

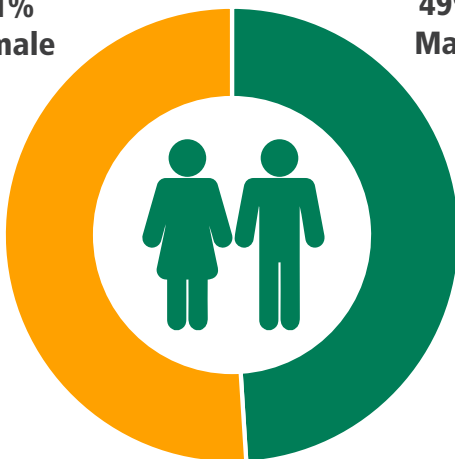
Roy Morgan Research 2020

In July 2020, the Australian Made Campaign partnered Roy Morgan to undertake consumer behaviour research. The research investigated:

- Recognition and trust of the Australian Made logo
- Which country of origin label provides the most confidence
- If Australians have a preference for Australian Made products
- If and what are the benefits of displaying the logo for businesses, retailers and industry bodies
- The impact of COVID-19 pandemic and consumer purchase behaviour

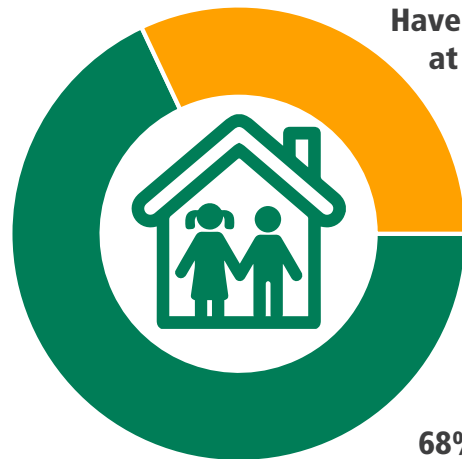
Sample profile by key demographics:

51%
Female



49%
Male

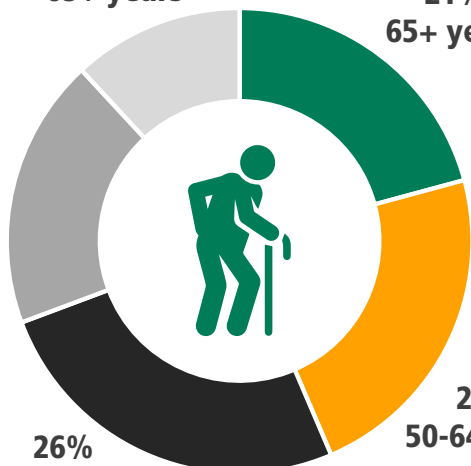
32%
Have children
at home



68%
Have no children at
home

12%
65+ years

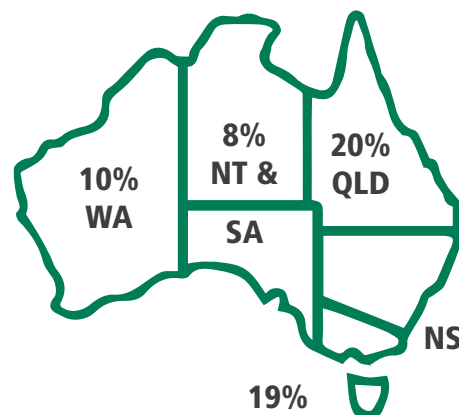
19%
25-34
years



21%
65+ years

26%
35-49 years

23%
50-64 years



10%
WA

8%
NT &
SA

20%
QLD

19%
VIC & TAS

34%
NSW & ACT



The Australian Advantage



99%

of Australians recognise the Australian Made logo



92%

of Australians trust the Australian Made logo



When asked which country of origin label on products provides the most confidence a product is genuinely of Australian origin



Australians associate the following attributes with the Australian Made logo



- 97%** Supports local jobs & employment
- 95%** High quality
- 95%** Safe
- 89%** Use of ethical labour
- 83%** Good value
- 78%** Sustainable
- 77%** Leading edge
- 74%** Clean and green



73% of Australians

have a positive opinion of businesses that partner with the Australian Made logo



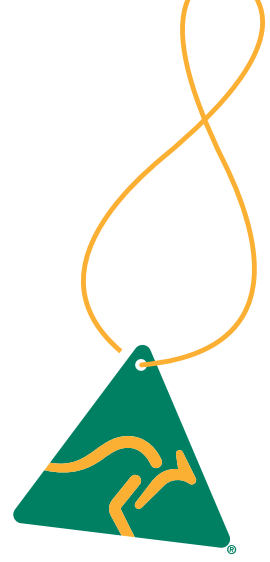
73% of Australians

are likely to engage with businesses that partner with the Australian Made logo

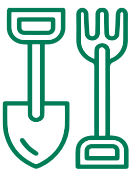


75% of Australians

are likely to purchase from retailers that partner with the Australian Made logo



Australians have a preference for Australian-made products in each category



80%

Agricultural and gardening equipment



74%

Children and baby care products



68%

Building and renovation materials



68%

Animal, pet and pet care products



64%

Household cleaning and laundry



62%

Caravan, camping and outdoor living



60%

Beauty, personal care and cosmetics



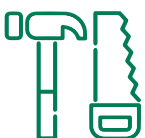
60%

Furniture and home furnishings



58%

Mattresses, pillows, quilts and bedding



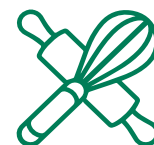
56%

Tools and hardware



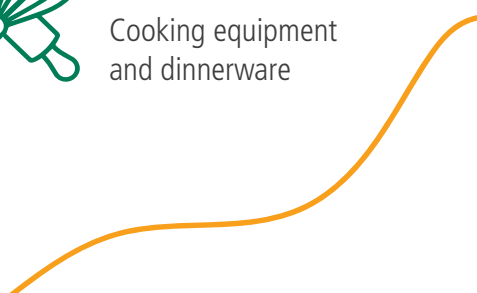
56%

Clothing, jewellery, bags and accessories

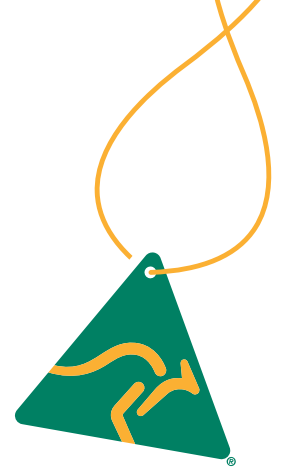


54%

Cooking equipment and dinnerware

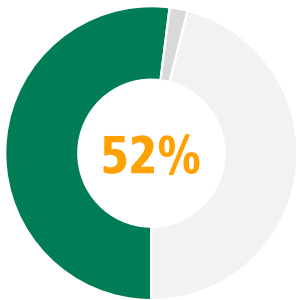


The Impact of COVID-19 on purchasing decisions

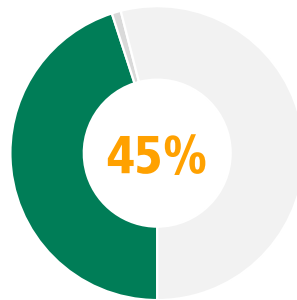


The preference for Australian-made products was already high before the pandemic with Roy Morgan research in January finding 88% of Australians were more likely to buy products made in Australia.

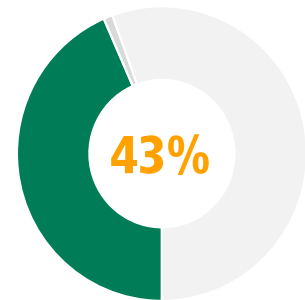
Since the start of the COVID-19 pandemic...



More than half of Australians have shown a higher preference for Australian made products

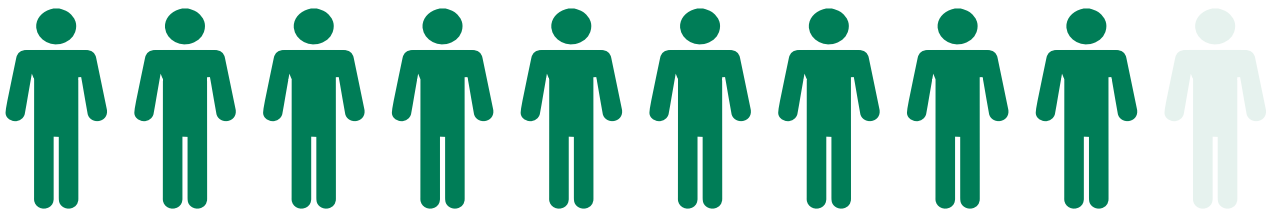


Almost half of all Australians more likely to buy more Australian made products



Nearly half Australians are more likely to look for the country of origin labels on products

Comparison between January and July 2020



9 in 10 Australians believe Australia should produce more products locally.

When asked why?

38% said "the pandemic has highlighted Australia's reliance on other countries"

26% said "to create new employment opportunities and keep jobs in Australia"

26% said "we need to support Australian businesses and industry"

20% said "the pandemic has highlighted vulnerable international supply chains"

16% said "to strengthen Australia's economy and survive the recession"