

Real or Fake?

Insights into consumer and retailer attitudes towards the authenticity and certification of the Indigenous art and craft market.



Prepared for the Aboriginal Art Centre
Hub of Western Australia (AACHWA)

FINAL REPORT

March 2021



PEOPLE. COUNTRY. OPPORTUNITY.





Artist : Sally Butler

Work: Wangurnu, 2020

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KPMG acknowledges Aboriginal and Torres Strait Islander peoples as the First Peoples of Australia. We pay our respects to Elders past, present and emerging.

We imagine a future where all Australians are united by our shared past, present, future and humanity.

This is our vision for reconciliation.

The artwork used throughout the body of this plan has been commissioned by KPMG from Supply Nation certified Indigenous Design Agency, Gilimbaa. This artwork reflects the diversity of Aboriginal and Torres Strait Islander cultures and KPMG's commitment to reconciliation.

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Disclaimer

Inherent Limitations

This report has been prepared as outlined in the Approach Section. The services provided in connection with this engagement comprise an advisory engagement, which is not subject to assurance or other standards issued by the Australian Auditing and Assurance Standards Board and, consequently no opinions or conclusions intended to convey assurance have been expressed.

The findings in this report are based on a quantitative study and the reported results reflect a perception of Aboriginal Art Centre Hub of Western Australia (AACHWA) but only to the extent of the sample surveyed, being approved representative sample of the Australia population. Any projection to the wider population is subject to the level of bias in the method of sample selection (95% confidence rating, 5% sample error).

No warranty of completeness, accuracy or reliability is given in relation to the statements and representations made by, and the information and documentation provided by, AACHWA personnel consulted as part of the process.

KPMG has indicated within this report the sources of the information provided. We have not sought to independently verify those sources unless otherwise noted within the report.

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Executive Summary

The purpose of this research was to understand:

- consumer, retailer and community attitudes towards fake Indigenous art and craft products;
- consumer acceptance of a certification of authenticity and ethically sourced Indigenous tourist products and understanding of the benefits this may bring; and
- the impact this may have on purchasing behaviours if they are available at a higher price point.

Consumer's interest in Indigenous art and craft is growing, however awareness of the scale of fake art remains low

It is clear the Indigenous art and craft industry has a diverse and complex supply chain which incorporates a wide array of products sold at numerous and varied stores. Speaking with Australian retailers of Indigenous art and craft products, as well as domestic and international consumers, the study revealed there appears to be a growing interest in Indigenous art and culture, however awareness of the scale and prevalence of fake art products on the market remains low. At present, consumers lack an understanding of what constitutes an authentic product and retailer definitions differ based on where and how they source their product.

There is an appetite to pay extra for product information and authentic certification

Promisingly however, there is appetite for product information and authentic certification, with consumers willing to pay a little extra. This finding is consistent across Australian consumers and other key tourist markets, specifically, the USA, UK and China. In terms of the information consumers would like to have, they are eager to learn about the products provenance and the artists' language and culture. This background information on the product would add significant value to most types of products for consumers and as a result, appear to benefit retailers in terms of sales and promotions. It is important to note that retailers would oppose any product information that acts as an 'advertisement' for the supplier.

A multifaceted authentication scheme supported by a campaign to increase consumer awareness is required to combat fake art

Consumers buy Indigenous art and craft products to celebrate 'Australianness', show support for, or as a way to raise awareness of Indigenous Affairs and cultural experiences, or to celebrate their own personal style. In this way, different products serve different purposes: some are bought as gifts, a personal memento or simply because the consumer finds the product appealing. Because of this diversity of needs, coupled with the array of suppliers, retailers and product types, it is clear a one size fits all approach to certification would be problematic. For any scheme to work, it must be flexible, in that it captures as many different types of suppliers and products, is easy to implement and easy for consumers to understand. Further, the scheme needs to be multifaceted with interventions at all points within the supply chain supported by a public campaign to increase consumer awareness.

Six key insights from the market and desktop research

The market research uncovered the below six key insights into consumer and supplier sentiment towards Indigenous art and craft products for consideration in the development of an appropriate ethical art certification scheme.

- **Cultural assets** – In Australia and overseas, Indigenous art and culture are viewed as a significant asset. People are open and eager to learn more.
- **Consistent definitions and classifications** - With such a complex and diverse supply chain, to avoid exclusion of products from the scheme, it would be beneficial to develop a classification scheme whereby different products are awarded different ratings of authenticity. This provides uniformity across the broad range of products on sale but also highlights the complexities of the supply chain to consumers allowing them to make more informed purchase decisions.
- **The need and appeal for education and increased awareness** – The authenticity of Indigenous art is not something many Australian and international consumers have considered before, particularly at the point of purchase. Through point of sale information and a public awareness campaign there is an opportunity to significantly increase awareness of the issue and potentially drive demand for ethically sourced goods.
- **Adding value, not complications with the intervention** – There is no reason why an authenticity certification scheme couldn't add value to the industry however there is the potential for it to add a layer of complication particularly for suppliers, producers and retailers. At every juncture it needs to be clear how the scheme benefits all those in the supply chain.
- **Prioritising interventions with suppliers** – It all starts with suppliers. For any scheme to work it needs to address the complex and diverse range of suppliers by making it easy for them to understand, adopt and implement certification.
- **Consumers want a scheme like this and are happy to pay a little extra** – The concept of fairness is an important one to all Australians. Any scheme that creates a fairer system whereby Indigenous artists and producers are appropriately remunerated for their work will be supported by the vast majority of consumers.

Focus areas for shaping ethical purchasing behaviours

This research found that the actions required to shape and inform consumers' ethical purchasing habits vary according to the distribution channel and 'pathway to purchase' by the consumer. The below focus areas articulate the different considerations for shaping ethical purchasing habits for key distribution channels.

Those who purchase from Indigenous art centres, including online

- Australians who most recently purchased from this channel are more interested in all the ethical provenance / authenticity attributes.
- In particular, the *meaning of the visual design* and *the personal history of the artist* resonated and should be seen as areas art centres can target even further for product designs they sell, point of sale displays implemented, the long and short term marketing strategies used and the immersive experiences they provide to customers.
- International tourists from key markets, particularly the UK, look to this purchasing channel for *originality / authenticity* and *additional products from the artist to view / purchase*.

Those who purchased from souvenir stores / airport stores / tourism information centres

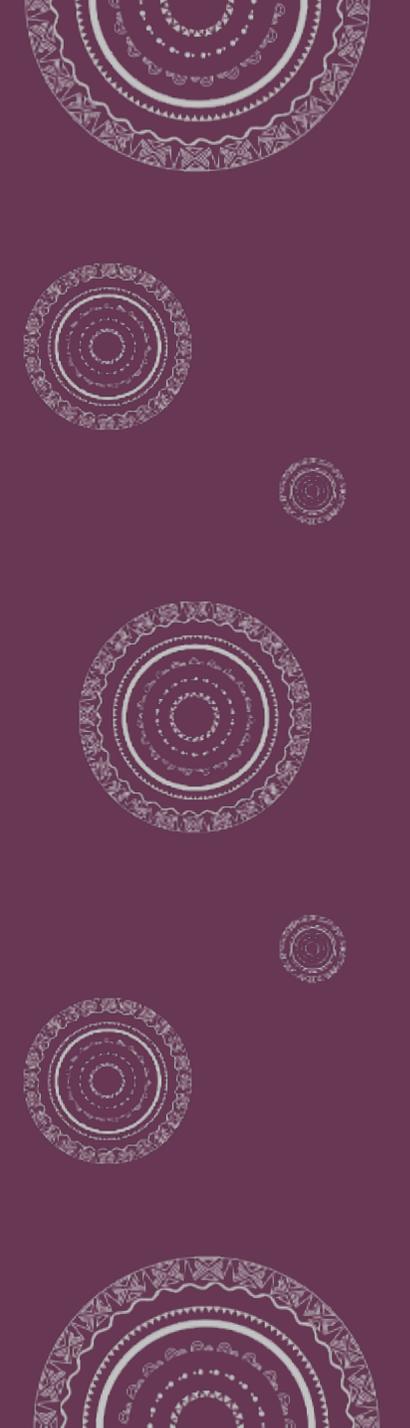
- Australians who most recently purchased from this channel are less interested in ethical provenance / authenticity attributes than other channels (but more than those who haven't purchased in the last year) – this is seen at both price points tested.
- *The personal history of the artist and the meaning of the visual design* resonated the most and should be seen as areas souvenir / airport and tourism information stores can target even further for product designs they sell, point of sale displays implemented and the long and short term marketing strategies used to drive sales.
- International tourists from key markets also look to this purchasing channel for *the history of the product (UK)*: for USA and China the focus is on *authenticity and quality of product*.

Those who purchased from local market stalls / art fairs / art galleries

- Australians who most recently purchased from this channel are more interested in all the ethical provenance / authenticity attributes – this is seen at both price points tested.
- *The personal history of the artist, the meaning of the visual design and the product's originality / proof of authenticity and provenance* resonated the most and should be seen as areas local markets / stalls / Art fairs / Art galleries can target further for product designs they sell, point of sale displays implemented and the long and short term marketing strategies used to drive sales.
- International tourists from key markets (particularly UK and China) also look to this purchasing channel for *the history of the product*.

Those who purchased direct from the artist / marketplace online

- Australians who most recently purchased from this channel are the most interested in ethical provenance / authenticity attributes – this is particularly seen at the \$30-\$100 range tested.
- *The personal history of the artist, product's quality and a breakdown of who the money is going to* resonated the most and should be seen as areas online channels can target even further both domestically and in the key international tourism markets of USA and UK for product designs they sell, point of sale displays implemented and the long and short term marketing strategies used to drive sales.
- The Chinese tourism market using this channel for their most recent purchase were comparatively less interested than the other international markets for ethical provenance / authenticity.

A vertical decorative bar on the left side of the slide, featuring a dark purple background with several circular, intricate white patterns of varying sizes, resembling traditional or geometric designs.

Introduction and research approach

Introduction

The deep connection between Indigenous art and crafts and Culture

Indigenous art and crafts are intrinsically linked to Aboriginal and Torres Strait Islander peoples' relationship to Country, language, culture and identity. Aboriginal and Torres Strait Islander peoples are culturally distinct and self-determining peoples, who have unique rights when it comes to ownership and responsibility for their art and craft that draws upon cultural knowledge that has been passed on through generations for more than 60,000 years. Traditional law and cultural protocol provides the authority for what can be produced and how this can be shared with others.¹

The uniqueness of Indigenous art and crafts has led to a significant rise in local, national and international demand from consumers. Indigenous art and craft products are available across a broad spectrum of price points, from high-end well known artists through to souvenir level objects. It provides an opportunity for domestic and international consumers to connect with unique Indigenous culture and the inherent meaning embedded in Indigenous art and craft products. Indigenous culture contributes significantly to Australia's broader economy, and in particular, tourism.² Indigenous tourism in Australia has an estimated value of \$5.8 billion annually, with over 900,000 international visitors and 680,000 domestic trips attributed to being driven by wanting to experience Indigenous culture.³ The Wilkins report⁴ identified that almost a third of total tourist spend can be attributed to shopping, particularly on Indigenous art and craft products as souvenirs.

Proliferation of fake Indigenous art

Alongside the increase in consumer demand has been the rise of the Indigenous fake art market. Fake Indigenous art is exploitation and theft of Indigenous people's culture, community and their identity.⁵ It is the appropriation of traditional objects, symbols, motifs and elements of Aboriginal culture, without the knowledge or blessing of the Indigenous rights holders.⁶ This 'art' is created to provide mass-produced, lower cost items to appeal to consumers, particularly tourists. Some common examples of readily available 'fake art' are bamboo boomerangs or mugs, displaying Indigenous motifs/artwork. Without permission from the artists or cultural authority within the community, fake art erodes Indigenous peoples' economic opportunities, through diminished returns on their intellectual property, as well as loss of ownership, responsibility and control of their cultural material and expressions.⁷ In accordance with International law, Indigenous peoples also have the right, to 'practice and revitalise their cultural traditions and customs'.⁸ This includes the right to maintain, protect and develop manifestations of culture including artefacts, designs, visual arts, performing arts and literature.⁹

Further, the fake art market misleads consumers who often purchase these objects under the belief that they are genuine items of Indigenous artistic expression of culture and knowledge.¹⁰ Ultimately this tarnishes the uniqueness and deep significance attached to these items.

⁵ Aboriginal Art Centre Hub of Western Australia (2018), Submission to the Parliamentary Enquiry into the Growing Presence of inauthentic Aboriginal and Torres Strait Islander style art and craft.

⁶ Ibid

⁷ Prime Minister & Cabinet & Department of Communications and the Arts (2018) Joint Submission to the Parliamentary Enquiry into the Growing Presence of inauthentic Aboriginal and Torres Strait Islander style art and craft.

⁸ UN Declaration on the Rights of Indigenous People (2007).

⁹ Ibid.

¹⁰ Ninti One Limited (2013), Submission to the Review of Indigenous Training and Employment.

¹ KPMG and GCNA (2020), The Australian Business Guide to Implementing the UN Declaration on the Rights of Indigenous Peoples.

² Prime Minister & Cabinet & Department of Communications and the Arts (2018), Joint Submission to the Parliamentary Enquiry into the Growing Presence of inauthentic Aboriginal and Torres Strait Islander style art and craft.

³ Ibid.

⁴ Ibid.

Introduction

'Fake art harms culture' campaign and Parliamentary enquiry

In 2016, the 'fake art harms culture' campaign, led by the Copyright Agency, Indigenous Art Code and Arts Law Centre of Australia, was created to address widespread concerns about the sale of artworks that 'look and feel' like Indigenous art and craft but have no connection to Aboriginal and Torres Strait Islander culture or communities. This campaign included lobbying the government to introduce legislation to stop the production and sale of artworks and artefacts appropriating Aboriginal and Torres Strait Islander culture and designs.

Ultimately, the campaign's efforts led to a Federal parliamentary enquiry report released in 2018 that found an estimated 80 per cent of souvenirs and merchandise sold to tourists as Aboriginal and Torres Strait Islander product is fake or imitation. The pilot project, of which this market research is part of, aligns with a series of recommendations put forward in the parliamentary enquiry.

Authentic Indigenous merchandise pilot project

This market research is part of the first stage of a three year pilot project led by the Aboriginal Art Centre Hub of WA partnership with the Pilbara, Kimberley and Goldfields-Esperance Development Commissions that seeks to disrupt the market for fake Aboriginal and Torres Strait Islander merchandise and replace it with a new industry that ensures profits from authentic products flow directly to Indigenous communities. The aim of this pilot project is to reset the market and end cultural and economic misappropriation that occurs through the production and sale of fake and imitation Indigenous products.

This market research conducted by KPMG seeks to understand consumer and retailer purchasing priorities and the potential appetite for ethically-provenanced products in the tourist Indigenous art and craft segment of the consumer market.

Purpose, approach and structure of this report

Report purpose

The purpose of this report is to provide an in-depth analysis on consumer purchasing priorities in relation to Indigenous art and craft products and whether there is an appetite for ethical provenance at the mass produced market segment of Indigenous 'tourist' objects. To this end, the methodology designed focuses on consumer goods with a retail value limited to \$100 with a potential new mark-up of 10% for on costs associated with certification of authenticity within an ethical supply chain framework. The methodology applied has been designed to better understand the attitudes, perceived barriers and appetite for ethical provenance at this price point of both consumers and retailers.

Research approach

The approach undertaken to conduct this market research consisted of three interconnected steps, designed to understand consumers' attitudes and behaviours when purchasing Indigenous art products to determine if there is an appetite for ethical provenance of art at on cost to the consumer. These steps included building a high level understanding of the current evidence about fake Indigenous art in Australia and adjacent frameworks across Indigenous art, craft and tourism goods.

Phase one – Desktop research

Desktop research was undertaken to understand the market context and inform the hypotheses to be tested with consumers and retailers. This included a review of the current evidence about fake Indigenous art in Australia and adjacent frameworks across Indigenous art, craft and tourism goods. Current frameworks that have been developed around the world to support the verification of authenticity and provenance of Indigenous art and craft have been identified and analysed in addition to other authenticity frameworks for different products across market segments to provide insights into the research

parameters for the qualitative and quantitative phases of this research. How the background desktop research informed the next two stages of the research are outlined.

Phase two – Qualitative research

Informed by the insights from the background research and market scan, this phase of the research was designed to develop an understanding of core attitudes and attitudinal drivers among Australian consumers/community members and retailer decision makers for key issues such as: interest and demand for indigenous tourist products; awareness and understanding of the fake art market; appetite for certification of authenticity and an ethical supply chain framework at a higher (10% mark-up) price point.

KPMG approached consumer groups and key retailers of Indigenous art products to investigate purchasing behaviours, the importance of provenance for Indigenous goods and how different ways of promoting certification would be received.

Consumers were invited to participate in three focus group discussions with questions guided by the Consumer Discussion Guide located in Appendix 1. A Number of retailers were also approached to engage in in-depth discussions driven by the Retailer Discussion Guide located in Appendix 1. These discussion guides were informed by the background research and market scan findings and specifically tailored for each cohort group.

The research was conducted through the following key steps:

- Four consumer focus groups conducted virtually through an online platform. These participants included relevant consumers in the target market (e.g. have bought relevant products or have an interest in the issue). Consumer groups were held in Sydney, Melbourne, Brisbane and Perth.

Purpose, approach and structure of this report continued

- Four in-depth interviews with retailer decision makers via telephone selected and invited to participate by AACHWA. These retailers were a mix of those already engaged in the issues of certification of authenticity, and those who are not yet engaged.

These discussions lasted around one and a half hours each and provided insights into purchasing behaviours, current knowledge in the consumer market over the prevalence of 'fake art' and their willingness and preference for different certification methods. The key findings and insights are contained in section 4 of this report.

Phase three – Quantitative research

KPMG designed and developed an online survey to quantify and robustly understand the consumer/community attitudes towards:

- fake Indigenous art and craft products;
- their acceptance of a certification of authenticity and ethically sourced Indigenous tourist products and understanding of the benefits this may bring, and;
- its impact on their purchasing if its available at a higher price point.

The survey was designed to be completed within 15 minutes, ensuring that a high proportion of participants provided full responses to all of the questions, strengthening the quantitative data and insights. A commercial sample provider was utilised for the recruitment of survey participants. KPMG targeted the survey towards four audiences: Australia, USA, UK and China. The international markets were selected due to their significant representation in annual tourism numbers and their significance in the volume of tourist goods procured. A sample size of 1000 was selected for Australian participants and 500 each for the international markets of USA, UK and China. These participants have either been to Australia within the last five years or have a strong interest in visiting Australia in the future. A full sample breakdown is

available in Appendix 2 of this report.

The survey was divided into five sections, these included: Screening of respondents to ascertain if they should be excluded from responding; Awareness of Indigenous culture and level of interest; Attitudes towards fake Indigenous art products; Provenance methods and price increases to drive ethically sourced Indigenous art products in the market; Profiling of respondents. Questions were designed to be tailored accordingly to the participant and their previous responses, this ensured that the survey remained at a manageable length and only suitable questions were asked of participants, according to their demographics and responses.

The key insights and findings of the quantitative research are contained in section 4 of this report.

This three phased research methodology has been developed to ensure the findings and insights gathered are robust and informative for AACHWA to make a determination on the viability and usefulness of a certification scheme for the mass-produced market segment of Indigenous tourist objects.

The team of KPMG research specialists who designed and conducted the three phases of research are all members of The Research Society, Australia's leading research association.

Limitations

This research was limited to the documents provided by AACHWA, publicly available evidence and the responses received through consultations and online surveys. Survey responses were only collected from those who have been or are planning to visit Australia and are from the USA, UK or China. This could result in other large target audiences and their purchasing behaviours being overlooked.

Purpose, scope and structure of this report

Report Structure

The remainder of this report is structured as follows:

- **Section 1: Desktop research findings**, visually maps out the features of selected adjacent frameworks, provides detailed analysis of the findings from government submissions analysed and distils the key insights found that informed the quantitative and qualitative research enquiry parameters.
- **Section 2: Retailer insights**, describes retailers views on the popularity of Indigenous Australian art and craft products, the inconsistencies of authenticity and complexities in the supply chain.
- **Section 3: Consumer Insights – Australia and key international tourism markets**, summarises attitudes towards Indigenous Australian culture; the purchasing of Indigenous Australian art product and the level of perceived authenticity; the willingness to pay extra to cover the costs associated of authenticity / ethical provenance; and the customer journey for purchasing Indigenous Australian art products.
- **Section 4: Key findings and next steps**, identified across the multi-faceted research undertaken.
- **Appendix 1: Qualitative research overview**, includes the discussion guides for retailer interviews and consumer focus groups.
- **Appendix 2: Quantitative research overview** details the sample profile across a nationally representative Australian group and across the three key international tourism markets of visitors to Australia (including past five years and intended over the next three years).



Section 1

Desktop research summary

Desktop research - Australian market context

To understand the current Australian market challenges and current projects focused on a solution to enable ethically produced and sourced Indigenous art and craft products, a detailed review of government submissions and organisational review of Desart and the Copyright Agency has been conducted.

Parliamentary submissions

22 key submission documents were reviewed from the parliamentary inquiry into the growing presence of inauthentic Aboriginal and Torres Strait Islander 'style' art and craft products and merchandise for sale across Australia. These Government submissions included those from Peak body organisations, Aboriginal Community Controlled Organisations; and broader interest groups.

Key insights from government submissions

The key insights gained from the analysis of the submissions which were used to inform the quantitative and qualitative research enquiry and parameters are as follows:

- **Complex licensing and supply chains makes consistency of voluntary labelling a challenge**

The myriad of business arrangements in the production and supply of both authentic and inauthentic products, confusing product presentation and inconsistent or insufficient information on labels make it difficult for consumers to determine what is authentic and what isn't. For example, a product labelled 'made in Taiwan' can be considered authentic if it is made under an appropriate licensing agreement with an Aboriginal or Torres Strait Islander artist or designer who has the cultural right or permission to use the stories or imagery depicted

- **Strong desire for a mandatory system for authenticity/in-truth labelling to ensure it captures tourism/souvenir markets and those perpetuating inauthentic art, but that does not put the onus of provenance responsibility on the Aboriginal and Torres Strait Islander artists**

A mandatory approach was taken when a Label of Authenticity was established in 2000 by the National Indigenous Arts Advocacy Association (NIAAA). That label only existed for two years.

The main failing with this approach is that it placed the responsibility to solve the problem with those least equipped to do so - artists typically on minimal incomes, often with low English language literacy, and who did not cause the problem.

The voluntary nature of the Indigenous Art Code was also seen as an unsuitable solution for the mass produced segment of the Indigenous art and craft market as it means that its operation does not extend to the majority of stakeholders who currently perpetuate the sale of inauthentic Indigenous artwork. For example, a souvenir store selling only inauthentic products would not be a member, and would therefore not be captured.

Case Study : *Desart*

Organisational overview

Desart is the peak body for Central Australian Aboriginal Art and Craft centres and represents over 30 members. Their member art centres are community-based enterprises and are owned and governed by local Aboriginal people, ensuring that autonomy, economic, social and cultural benefits are maintained and held by local Aboriginal communities and their artists.

Solution

Desart received Australian Government funding to test the feasibility of using digital labels on Aboriginal and Torres Strait Islander products to assist consumers in making informed choices by supporting ethically produced and sourced Indigenous art and craft. This aims to increase the economic and cultural opportunities for Aboriginal and Torres Strait Islander artists and designers and allow for them to more easily track and market their products.

Desart worked with three pilot art centres to implement the digital labels, these centres use the SAM database which is an artwork and sales management system developed specifically for Aboriginal and Torres Strait Islander art centres.

The digital label format chosen was a QR code due to the prevalence of its use in the Asian market. These QR codes were linked to the SAM database to allow for information about the product including artist biography and artwork information to be presented to the consumer. This ensures that consumers can check quickly the authenticity of the product for sale and find out more about the artist and its development, thereby providing a quick and simple way of providing provenance information to consumers.

Limitations

Due to COVID-19 restrictions, trials at retailers were halted and testing of products has been limited at this stage. Desart is seeking to find further information around consumer habits e.g. their willingness to use QR codes in a retail setting, and what information consumers would be looking for and therefore to be included in the QR code. This will then inform the roll out of these digital labels to more Indigenous art centres.

Case Study : *Copyright Agency*

Organisational overview

The Copyright Agency is an Australian not-for-profit organisation that enables the reuse of copyright-protected words and images in return for the fair payment to its creators or rights holders. They are responsible to the Commonwealth Minister for Communications and the Arts under their appointments to manage the artists' resale royalty scheme.

Solution

Copyright Agency worked in conjunction with Desart in their research and piloting of the digital label system of Indigenous products. Copyright agency investigated the use of Blockchain technology to more accurately identify and track eligible resales of art and get royalty payments to artists faster.

Blockchain is a digitised, public ledger that is linked and secured through cryptography. The transaction or provenance history of an item is continuously tracked through blockchain and enables consumers or others through a digital portal to access this information such as through a QR code. Securitisation of the blockchain through cryptography means that the transaction record of an item is accurate and cannot be altered, ensuring that the authenticity and provenance of an item can be known and tracked long after its initial sale. This technology would enable the Copyright Agency to more efficiently and effectively manage the Resale Royalty Right for visual arts.

Copyright Agency constructed a test visual arts blockchain application and discussed its implementation with multiple parties.

Limitations

Copyright Agency's proof of concept blockchain solution highlighted that the use of the technology for the visual arts is some way off being ready for widespread implementation. Additional work is required to understand how to ensure that the data integrity for physical works of art can be maintained in the blockchain solution.

Desktop research - Adjacent frameworks summary

The following table maps out the key components of three frameworks developed for authenticity and provenance of Indigenous art, craft and tourists goods from the USA, Alaska, USA, and New Zealand. Detailed analysis of these framework components through the lenses of enforcement and mechanics and consumer facing instruments and relevant insights that informed the quantitative and qualitative phases of this research is included in the following section.

		Framework components								
		Enforcement & mechanics				Consumer facing instrument				
Framework	Country	Government	Industry / peak body	Regulation	Voluntary	Logo/Mark	Certificate	Packaging seal	QR code/ app	Blockchain
Silver Hand seal	USA - Alaska	•		•	•	•		•		
Indian Arts and Crafts act	USA	•				•	•			
Toi Iho Māori made mark	New Zealand			•	•	•				

Desktop research - Adjacent frameworks detailed overview

Silver Hand Program

Helping Alaska Native artists promote their work in the marketplace and enable consumers to identify and purchase authentic Alaska Native art

Enforcement & mechanics

The Silver Hand image is protected under Alaska trademark statute and regulation and may only be used by individuals or organizations with Alaska State Council on the Arts' explicit written permission.

To be eligible for a two year Silver Hand permit an Alaska Native artist must be a full time resident of Alaska, at least 18 years old, and provide documentation of membership in a federally recognized Alaska Native tribe. The Silver Hand seal may only be attached to original work that is produced in the state of Alaska.

Consumer facing instrument

The seal indicates that the artwork on which it appears is created by hand in Alaska by an individual Alaska Native artist.

Only original contemporary and traditional Alaska Native artwork, not reproductions or manufactured work, may be identified and marketed with the Silver Hand seal.



The Indian Arts and Crafts Act of 1990

IACA has been instrumental in helping to promote, protect and preserve authentic handmade American Indian art and craft.

Enforcement & mechanics

It is illegal to offer or display for sale, or sell any art or craft product in a manner that falsely suggests it is Indian produced, an Indian product, or the product of a particular Indian or Indian tribe or Indian art and craft organization, resident within the United States.

The law covers all Indian and Indian-style traditional and contemporary art and craft produced after 1934. The Act broadly applies to the marketing of art and craft by any person in the United States.

All products being required to be marketed truthfully regarding the tribal enrolment of the producers so as not to mislead the consumer.

Consumer facing instrument

The legislation requires individuals to obtain written verification from the individual vendors that their Indian art or craftwork was produced by tribal members or by certified Indian artisans.



Toi Iho Māori Made Mark

The unique registered trademark distinguishes the work of Maori from others in the market place for quality and authenticity of Maori creative work and artists

Enforcement & mechanics

The Toi Iho Charitable Trust is firmly established and is committed to maintaining a register of Toi Iho artists, supporting their high-quality creative work and advancing the cultural future of Maori as indigenous people.

The trust's website accepts artist registration and lists established, experienced Maori artists who have high quality work on their website

Consumer facing instrument

The trust requests registered artists to display the trademark logo on their publications, exhibitions, performances and creative activities.



Source: <https://arts.alaska.gov/alaska-native-arts-program>

Source: <https://www.doi.gov/iacb/act>

Source: <http://www.toiio.co.nz/about-toi-iho/>

Desktop research - Summary of other industry frameworks

The following table maps out eleven framework examples across other industries in Australia and globally. These purpose of these frameworks is to provide authenticity in respect to Country of Origin, Authenticity or Sustainability. The frameworks analysed are summarised across three key areas of focus: enforcement and mechanics, framework purpose and customer facing instruments. The insights of this analysis informed the research parameters for the quantitative and qualitative research conducted for this report.

				Framework components									
				Enforcement & mechanics		Purpose				Consumer facing instrument			
Framework	Country	Industry	Company	Industry / peak body	Company run	Supply chain tracing	Product quality/ originality	Stories from the source	Anti-counterfeit	Package seal/logo/ certificate	Scientific tracing	QR code / NFC	Digital certificate/ badge
Country of origin	Australia	Seafood	-	•		•	•	•		•			
Country of origin	Italy	All	-	•			•			•			
Country of origin	France	Wine	-	•									
Authenticity	Australia	Sport	IP Australia / NRL	•					•				•
Authenticity	Australia	Fruit	NAAKPA	•		•	•				•		
Authenticity	Global	E-commerce	GTPA	•			•		•				•
Authenticity	EU	Organic food	-	•		•	•			•			
Authenticity	Global	Consumer goods	Philips		•		•		•	•			
Sustainability	Sweden	Coffee	Nestle		•	•		•				•	
Sustainability	NZ	Meat	Provenance meat		•		•				•		
Sustainability	UK	Fashion	Sheep Inc		•		•	•				•	

Desktop research - How it informed next stages in the research

Part A:

Review of key submission documents from the Australian parliamentary review

KPMG reviewed twenty two key submission documents from the parliamentary inquiry into the growing presence of inauthentic Aboriginal and Torres Strait Islander 'style' art and craft products and merchandise for sale across Australia. The review of these submissions resulted in qualitative discussion guides and survey content shaped around some of the key areas of focus those submissions touched on – such as complex supply chains making voluntary labelling a challenge (discussed with retailers); and labelling preferences (tested among consumers).

**Refer to Appendix for discussion guide and questionnaire.*

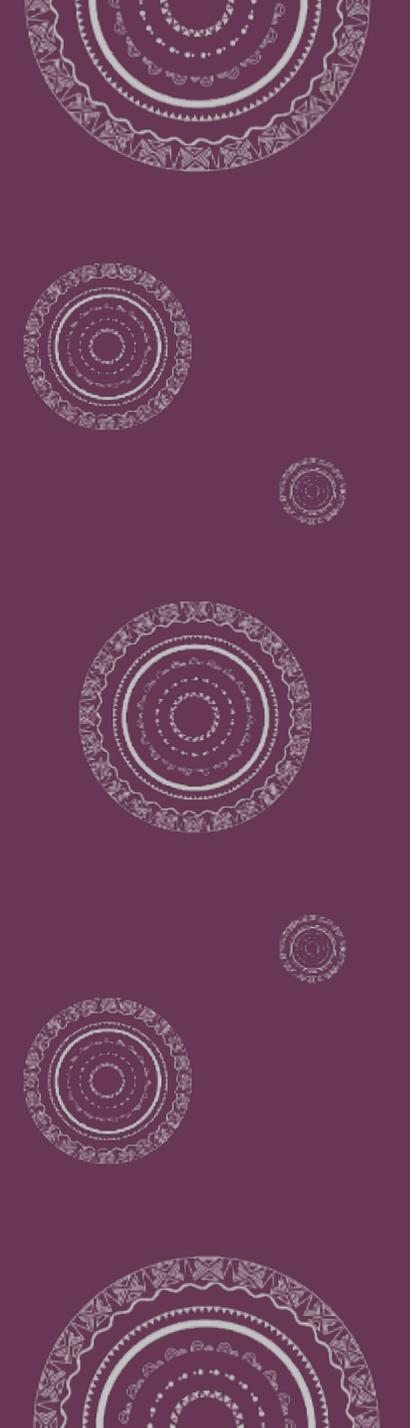
Part B:

Review of adjacent frameworks

KPMG scanned online available material of adjacent frameworks across indigenous art, craft and tourism goods; and more widely across other industries to inform the following market research stages of this research project; specifically, the qualitative interviews with retailers, focus groups with Australian consumers; and the quantitative market studies across Australia and key international tourism markets. This desktop research explored the ways government, industry bodies and companies are shaping authenticity / ethical provenance frameworks. From the enforcement and mechanics, to the purpose of frameworks and to what customer facing instruments are being used – much of which was included in discussion guides and questionnaire content.

**Refer to Appendix for discussion guide and questionnaire.*





Section 2

Retailer Insights - Australia

Retailers claim Indigenous products are increasing in popularity

Retailers see growing interest overall but particularly with younger audiences

Retailers think cultural movements like Black Lives Matter have had an impact on the social consciousness of the country. This movement has put a focus on Indigenous issues and as such has increased interest in Indigenous rights, arts and culture.

This heightened interest in Indigenous culture means that it is becoming increasingly secular. As a result, the application of Indigenous style art or designs are now applied to an increasingly diverse range of products. This has led to wider distribution and therefore Indigenous art products are becoming more common or mainstream.

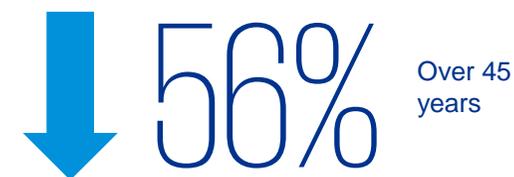
This growing interest appears to be driven largely by younger people who care about ethically sourced goods.

"I get people calling about all sorts of products. I think my customers are more informed than they used to be" – Retailer

"I think a lot of people are (only now) appreciating the value of Indigenous culture" – Retailer

"There's no one type of customer really. Lots of different people come in and buy these products but I'd say there has definitely been more and more younger people" – Retailer

Retailer perceptions are supported by consumer research



Survey Question: Q2.2 - How personally interested are you with the following aspects of Indigenous Australian culture
Analysis notes: 'Overall' charted; Interested = very/quite familiar; Statistical significance to overall shown

Authenticity / ethical provenance are important to retailers & consumers

All retailers claim that their products are ethically sourced and/or are authentic.

Authenticity and ethical provenance are two very distinct concepts. Ethical provenance encompasses all elements of the supply chain, incorporating environmental and social issues. While authenticity is less defined, it is seen as one component of ethical provenance but a crucial one when it comes to selling Indigenous art products.

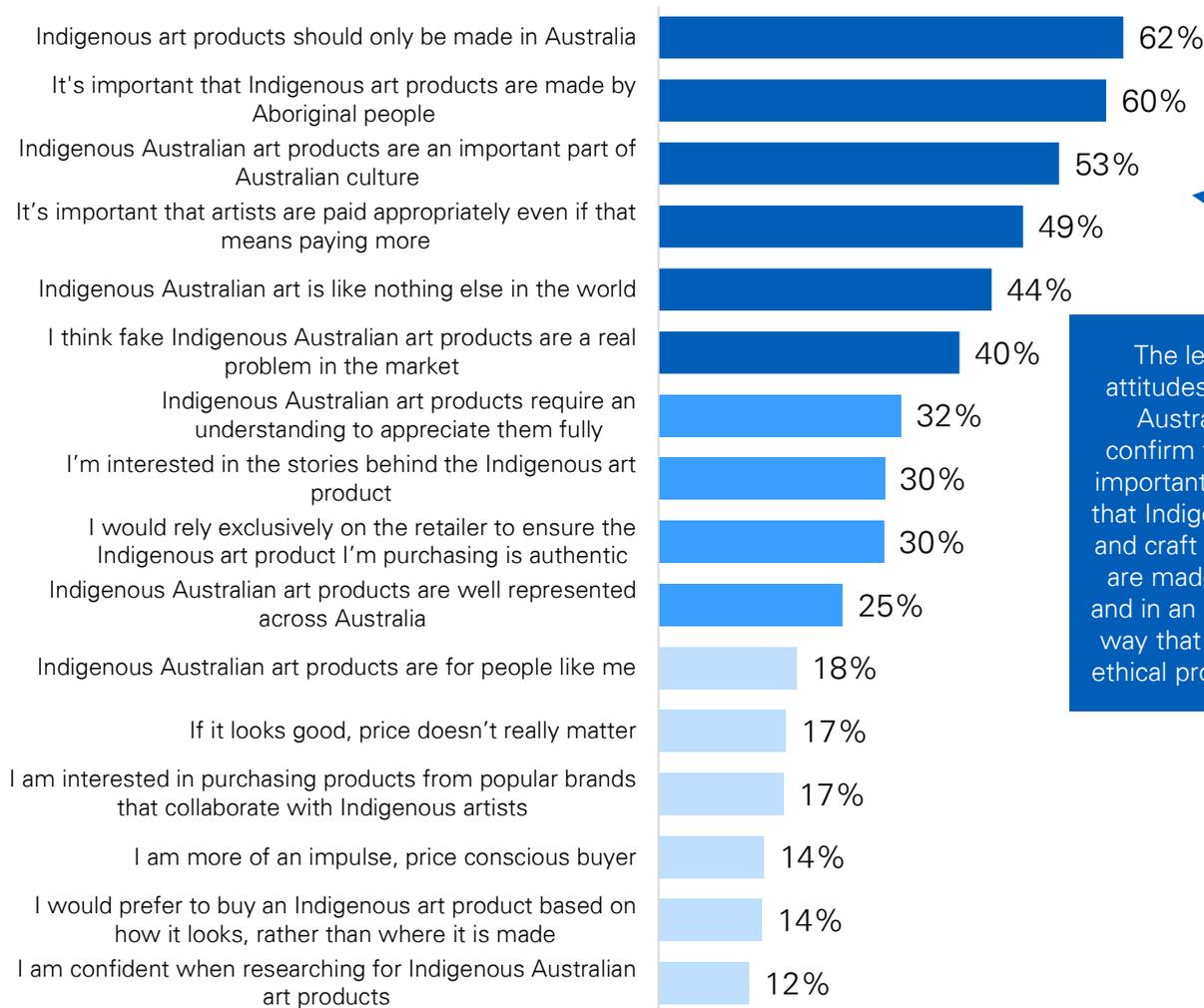
Many retailers see it as their responsibility to not only source authentic products but to help promote the authenticity of their products.

In terms of reasons to buy a product, retailers believe consumers expect authenticity whereas ethical provenance is less important.

“Authenticity is a large part of the appeal of these products. Its what makes them unique and what gives them their value” –

Retailer

Consumer attitudes – % agree a lot (Australia)



The leading attitudes among Australians confirm that it is important to them that Indigenous art and craft products are made locally and in an authentic way that ensures ethical provenance

But authenticity means different things to retailers depending on the product

Where the product is sourced the supplier and the retailer dictates whether a product is deemed authentic or not

While all retailers we spoke to believe that their products are authentic, it is clear that this term is broad and can be interpreted in different ways.

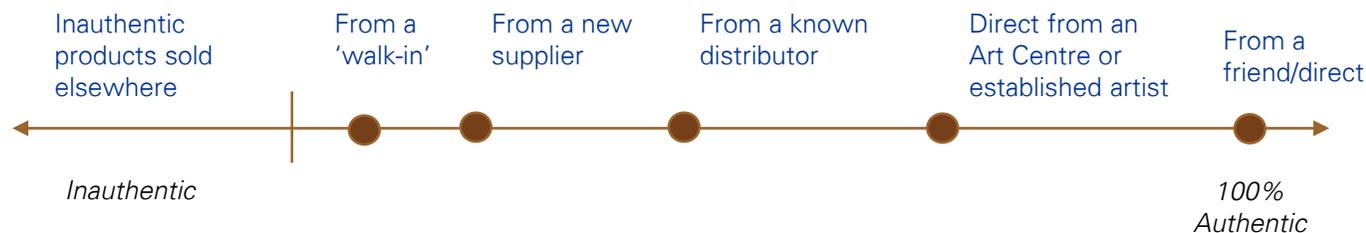
Authentic products seem to sit along a spectrum ordered by supplier type. The type of supplier and their relationship to the retailer defines where they are positioned.

"I sometimes purchase products from a man who has been coming to me for years. He says he's a local Indigenous man and that he makes the products but I don't really know for certain" – **Retailer**

"Authenticity? But what does that mean exactly? I know where I get my products from" – **Retailer**

"The idea of an authentic key chain seems strange, doesn't it? It could well be (authentic) but for a few dollars I don't think anyone cares" – **Retailer**

"I think it's a really broad term, does it depend on what a producer paid the artist or just who made it or where it was made? You could make arguments for all.." – **Retailer**



IMPLICATIONS:

There is a clear need for a single source of truth / a comprehensive definition of authenticity that all know and use.

These inconsistencies are a result of a varied supply chain

Every product has a story...

From the few retailers we spoke to, combined with our discussions with consumers, it is clear there are a diverse range of products supplied by an array of different suppliers. These suppliers range from local suppliers door-knocking or locally sourced goods, to Art Centres, to the retailer themselves.

"I'm not sure I have much control over the ethical provenance of the product. I mean I expect it has been but I can't be certain where or how the supplier sourced the wood for instance." – **Retailer**



IMPLICATIONS:

Suppliers are a critical component in affecting change – not just retailers and consumers.

Retailers are sceptical about fixing the problem of fake art products

Retailers appear to be tired of 'all the talk' around the issue. As such they are sceptical about any real action being done.

Retailers are quite pragmatic when it comes to addressing fakes in the market. They recognise there are a number of tourist/souvenir stores with significant distribution channels and don't believe a lot can (or perhaps) should be done about the sale of those products, particularly those priced less than \$20.

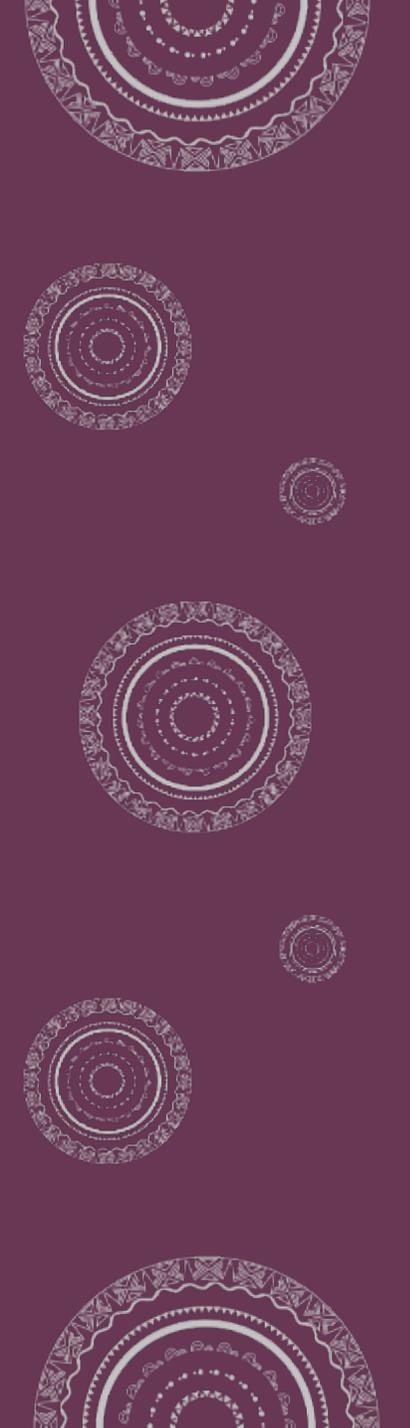
For any scheme to be successful, retailers believe it needs the following:

- Be a collaborative process
- Have retailer and supplier input
- Add value to all those in the supply chain (artist/producer → consumer)
- Be easy to use
- Be comprehensive yet not restrictive
- It shouldn't take potential sales away from retailers



Section 3

Consumer Insights - Australia and key international tourism markets

A vertical decorative bar on the left side of the slide, featuring a dark purple background with several circular patterns in a lighter purple color. These patterns consist of concentric circles with intricate, repeating geometric and organic designs, resembling traditional Indigenous Australian art.

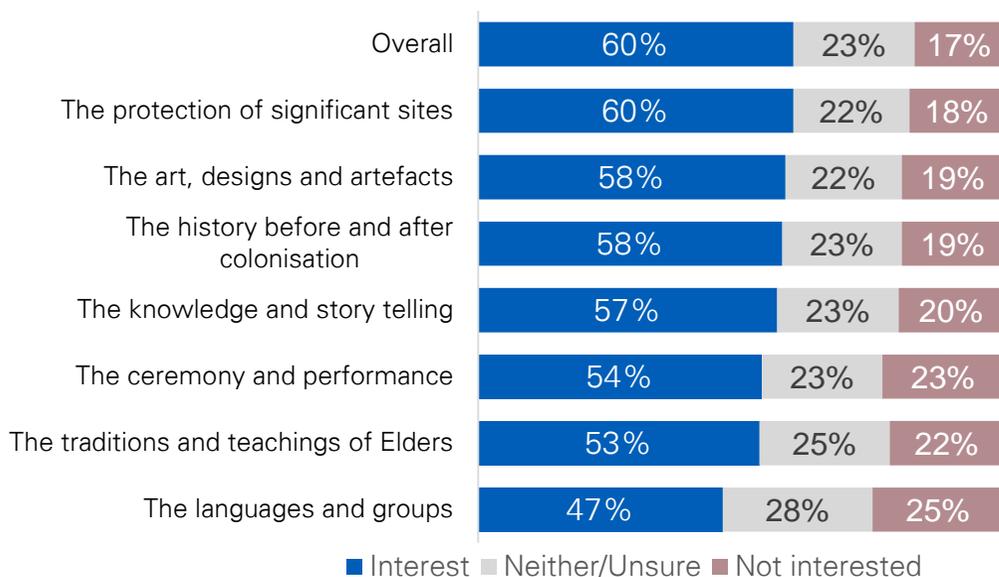
Attitudes towards Indigenous Australian culture

Australian consumers are interested in Indigenous culture

Interest and demand in Indigenous culture

When talking to consumers it is clear that there is an interest in the history and culture of First Nations people. When purchasing Indigenous art products consumers tend to enjoy learning the stories and cultural significance of the pieces they buy, or they simply find the artwork or object appealing aesthetically.

Interest among Australians



Examples of why Australian consumers are interested

"The artwork is unique and intricate, showing great detail despite a simplicity about it. There is nothing like it anywhere else in the world."

"I've just always liked their designs, you know the dot paintings. I think they're really interesting to look at."

"I enjoy listening to the meanings behind the style of painting and the creation of the artwork."

"I'd love to know more. I think all Australians should learn more about Indigenous culture."

Sample size: n=1,004 Australian's 18+

Survey Question: Q2.2 - How personally interested are you with the following aspects of Indigenous Australian culture; Q2.3 – You mentioned that you are interested in <insert statement>. Can you provide some detail around why you feel this way?

Analysis notes: n/a



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Why I'm interested in Indigenous culture - Australian consumers

"I think it's a massive part of the Australian heritage and story. I think we should all have an understanding of the First Peoples of this country and understand this country better than anyone. Plus, I just think the stories are amazing and I'd love to learn more."

The knowledge and story telling

"I enjoy listening to the meanings behind the style of painting and the creation of the artwork."

The art, designs and artefacts

"I think it's important that this part of history is taught accurately. I'm interested in knowing more about it, but it's difficult to find or access."

The history before and after colonisation

"I think it is a very rich culture and history and is essential to know. Additionally having lived in Australia for thousands of years, the Aboriginal people have a lot of knowledge to pass to us how to take care of land and survive in harmony."

The traditions and teachings of Elders

"Over the years we have seen a number of ceremonies and performances which we have really enjoyed and would like to see more."

The ceremony and performance

"I am interested more in the protection of artefacts and ensuring that art, sold as Indigenous is genuine and not a knock-off and that money received from selling art is returned to the artists."

The art, designs and artefacts

"The artwork is unique and intricate, showing great detail despite a simplicity about it. There is nothing like it anywhere else in the world."

The art, designs and artefacts

"These sites can date back hundreds or thousands of years, but more importantly they are significant to Indigenous people."

The protection of significant sites

"It is all part of keeping culture alive which is significant in passing the knowledge down to our children and future generations."

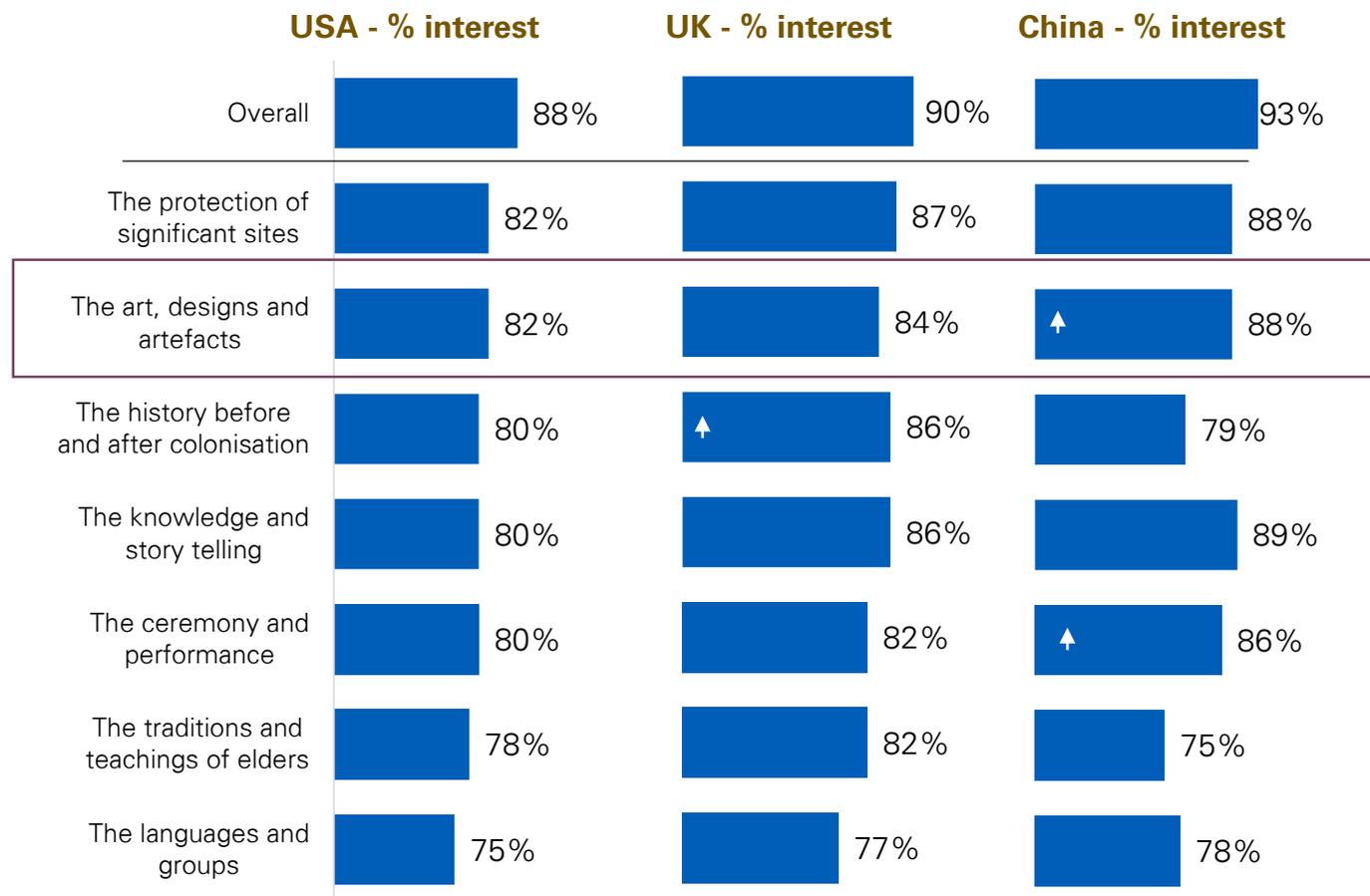
The language and groups

Survey Question: Q2.3 – You mentioned that you are interested in <insert statement>. Can you provide some detail around why you feel this way?

International tourists are interested in Indigenous art and design

Interest across each facet of Indigenous Australian culture is very strong across each key tourism market.

The levels of interest within these key international tourist markets is even stronger than the Australian market.*



*Refer to page 31 for a detailed breakdown of the Australian market.

Sample size: USA n=514; UK n=507; China n=503

Survey Question: Q2.2 - How personally interested are you with the following aspects of Indigenous Australian culture

Analysis notes: Statistical significance between countries shown ▲▼ ; ranked in AU order of familiarity.

Why I'm interested in Indigenous culture - USA tourists

"The best way to find out about a culture is to learn about its history and traditions. Story telling does that quite well – I really want to know about Indigenous culture and legends."

The knowledge and story telling

"I am very interested in art because I feel a connection when artists use their expressions and paint it onto a canvas."

The art, designs and artefacts

"I love learning about history and I would like to be able to see for myself how things were before colonisation and what has changed."

The history before and after colonisation

"I've always wanted to visit there, and get to know the customs, traditions and culture , especially from Elders. I'm interested in knowing about different areas of the world."

The traditions and teachings of Elders

"I would love to see the Aboriginal tribal ceremonies and performances like smoke ceremonies and dance performances."

The ceremony and performance

"I feel like art tells a lot about people. I enjoy history so I am interested in the artefacts."

The art, designs and artefacts

"It is beautiful and I would like to learn more about it."

The art, designs and artefacts

"I wish to respect and learn about the sacred sites of Indigenous Australians. Their traditions of story telling fascinate me, and I would love to learn more."

The protection of significant sites

"Would like to learn first hand the diversity of the languages and clan groups of the First Peoples of Australia."

The language and groups

Survey Question: Q2.3 – You mentioned that you are interested in <insert statement>. Can you provide some detail around why you feel this way?

Why I'm interested in Indigenous culture - UK tourists

"It would definitely be interesting to understand the history of Indigenous Australians and how they have survived all of these years. Also to understand their knowledge of the fauna and flora of Australia."

The knowledge and story telling

"I like the artistic style. I have an interest in crafts which includes design. The historical artefacts are a fascinating view into the culture."

The art, designs and artefacts

"It's always interesting to see how First Nation People have been treated in all countries around the world."

The history before and after colonisation

"I like learning about different cultures and traditions. I found Elders teachings and traditions very interesting when I visited Australia last year."

The traditions and teachings of Elders

"I think that ceremony and performance give insight into Indigenous peoples story and is an excellent way of conveying this to people who are not aware."

The ceremony and performance

"Aboriginal design & art is distinctive & interesting".

The art, designs and artefacts

"The patterns the artists create and the way they make them is something unique."

The art, designs and artefacts

"It is right to protect sites and the history that means so much to the Indigenous people of Australia."

The protection of significant sites

"I was unaware of the variety before I visited and found it interesting. Always good to learn something when travelling."

The language and groups

Survey Question: Q2.3 – You mentioned that you are interested in <insert statement>. Can you provide some detail around why you feel this way?

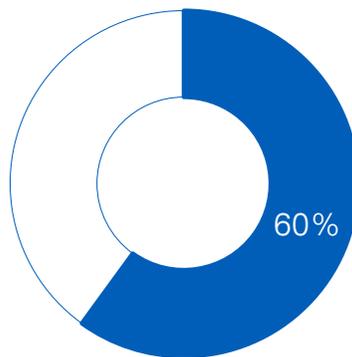
There is an opportunity to increase consumer understanding

There is a significant gap between interest and familiarity

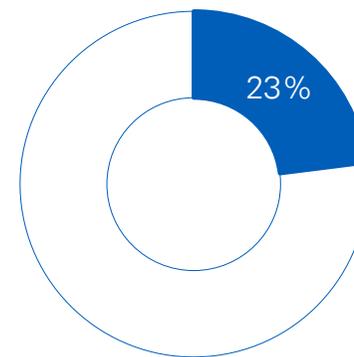
Overall **familiarity** in Australia with Indigenous Australian culture is low (23% are extremely/ moderately familiar). Close to one in five indicate they are not at all familiar. Nonetheless, **interest** in Indigenous Australian culture is strong – 60% indicate they are very or quite interested in learning more about it.

There does appear to be an interest in learning more about Indigenous art and craft, communities and culture and this appears to be greater with first generation Australians.

Interest
(% very/quite interested)



Familiarity
(% extremely/moderately familiar)



"I'd love to know more. I think all Australians should learn more about Indigenous culture."

Melbourne – consumer focus group

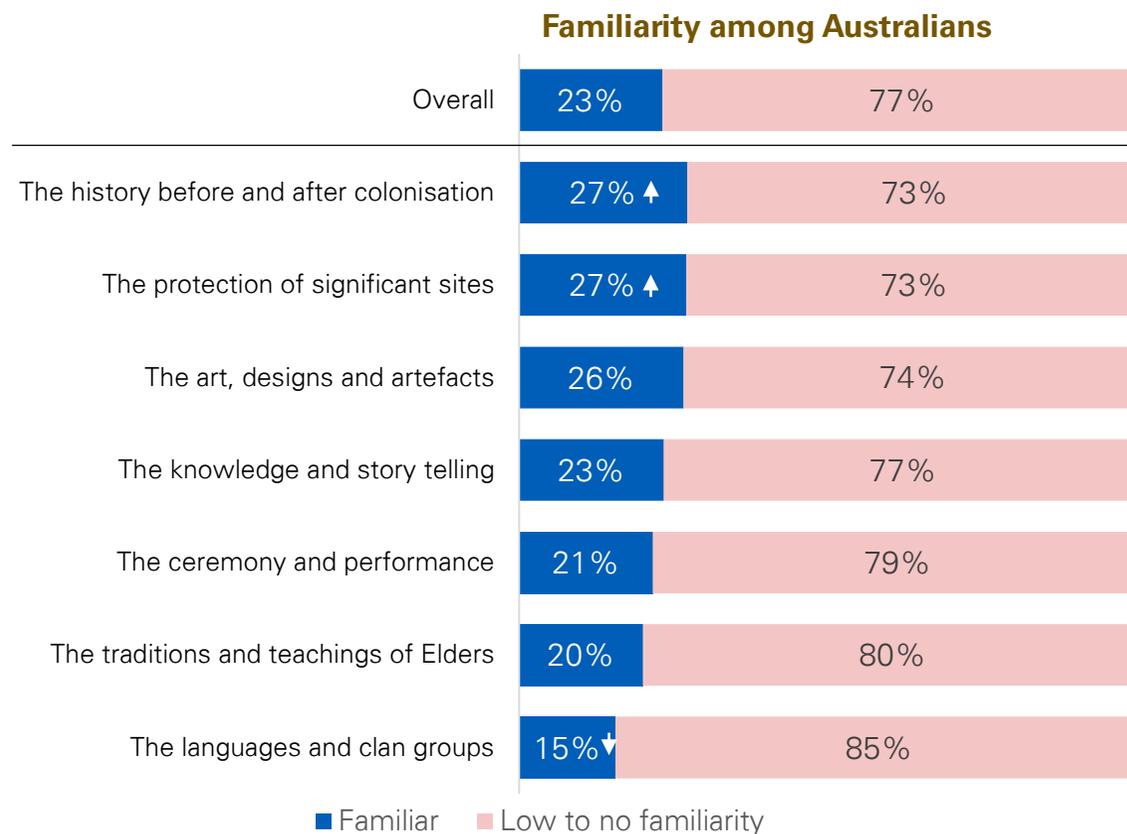
The opportunity to increase understanding is across a number of different key areas

The low level of familiarity is seen across the different facets of Indigenous Australian culture – particularly *the languages and clan groups*.

Familiarity is relatively strongest with *the history before and after colonisation* and *the protection of significant sites*, but even here is at just over the 1 in 4 minority level.

International markets

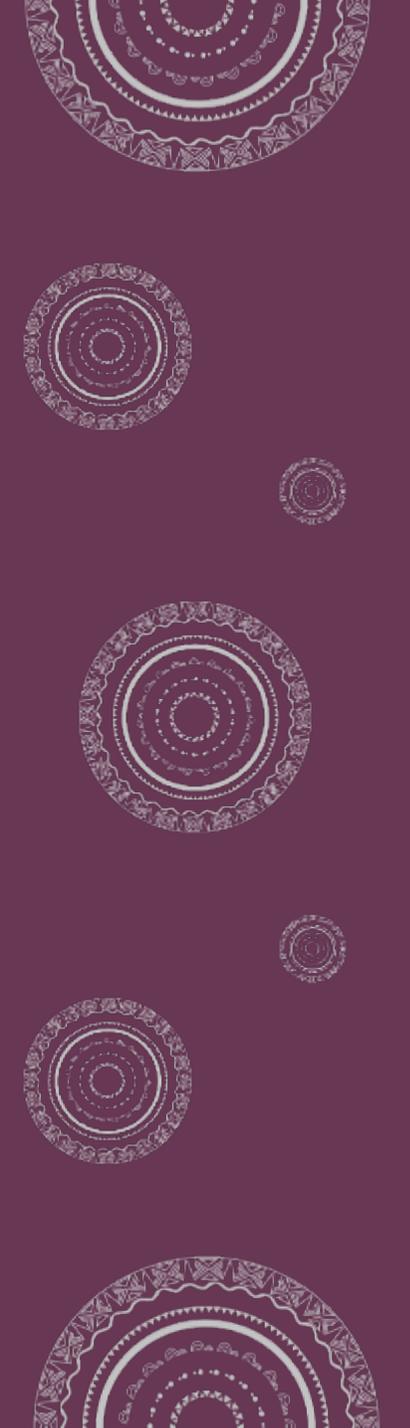
Interestingly the USA, UK and China all claim to be more familiar than Australians overall and on every measure. The Chinese claim to be the most familiar.



Sample size: n=1,004 Australian's 18+

Survey Question: Q2.1 - How personally familiar are you with the following aspects of Indigenous Australian culture

Analysis notes: Familiar = moderate/extremely familiar, Low to no familiarity = Not at all/slightly/Somewhat; Statistical significance between statement shown ▲▼

A vertical decorative bar on the left side of the slide, featuring a dark purple background with several circular, concentric patterns in a lighter purple color. These patterns resemble traditional Indigenous Australian art motifs, such as dot paintings or rangitj patterns, with varying levels of complexity and size.

Purchase of Indigenous Australian art product and level of perceived authenticity

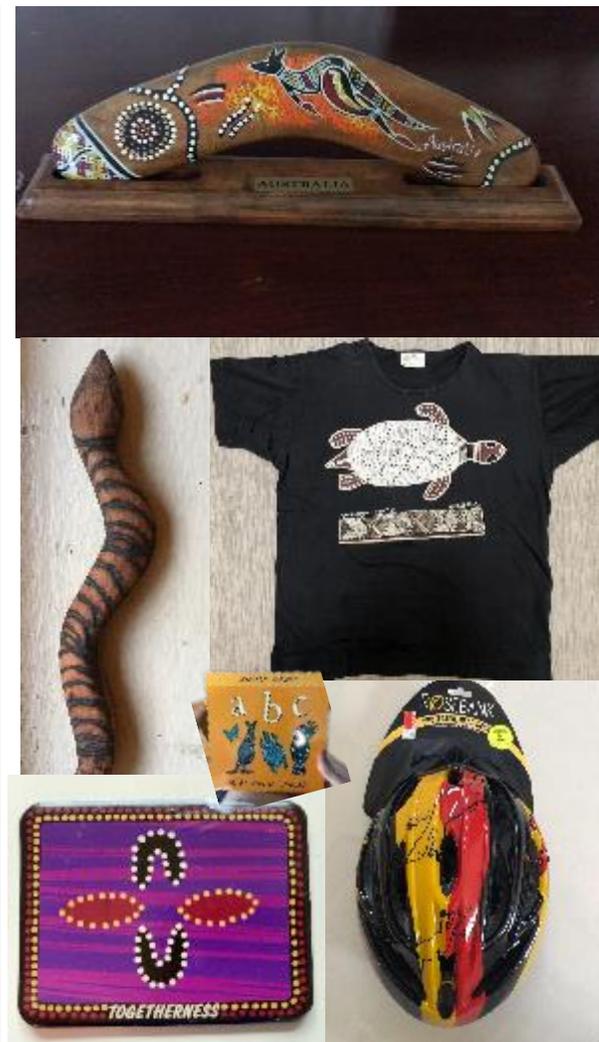
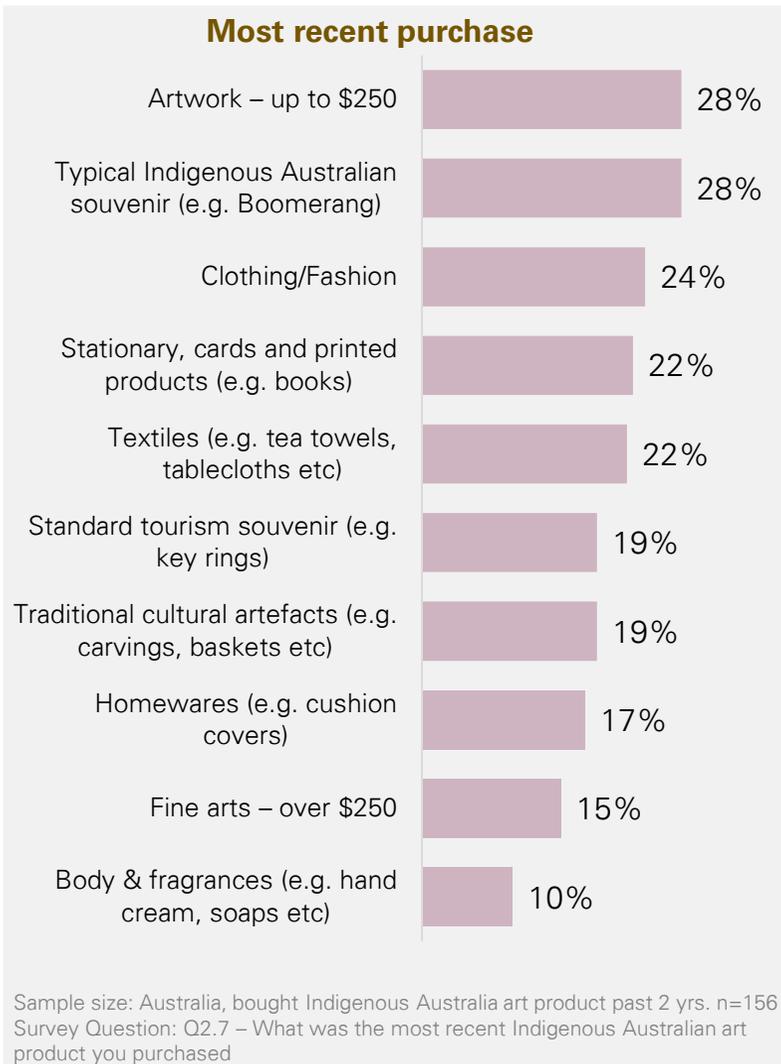
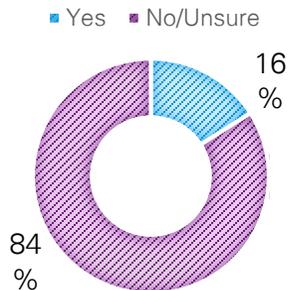
Indigenous style products are a broad category at lower price point

Research participants were asked to send a photo of the product they had purchased in the past six months

In the online survey close to one in five Australians (16%) indicated that they had purchased an Indigenous Australian art product in the past two years.

A broad mix of products have been purchased most recently – leading with artwork (up to \$250) and typical souvenirs (e.g. Boomerang); followed by clothing/fashion, stationary, cards and printed products and textiles.

Purchased Indigenous Australia art Product in the past 2 years



Australian consumers buy Indigenous products for three key reasons

Australians are proud. As people begin to appreciate Indigenous culture and history they are beginning to celebrate that it makes Australia truly distinct.

Why buy Indigenous products?

Celebrate 'Australianness'

- **Unique culture** – Aboriginal and Torres Strait Islander culture is viewed as unique to Australia.
- **A shared history** – Many believe we have a lot to learn from the oldest living culture on the planet.
- **Culturally significant** - Aboriginal and Torres Strait Islander culture brings a richness and colour.

Teach and show support

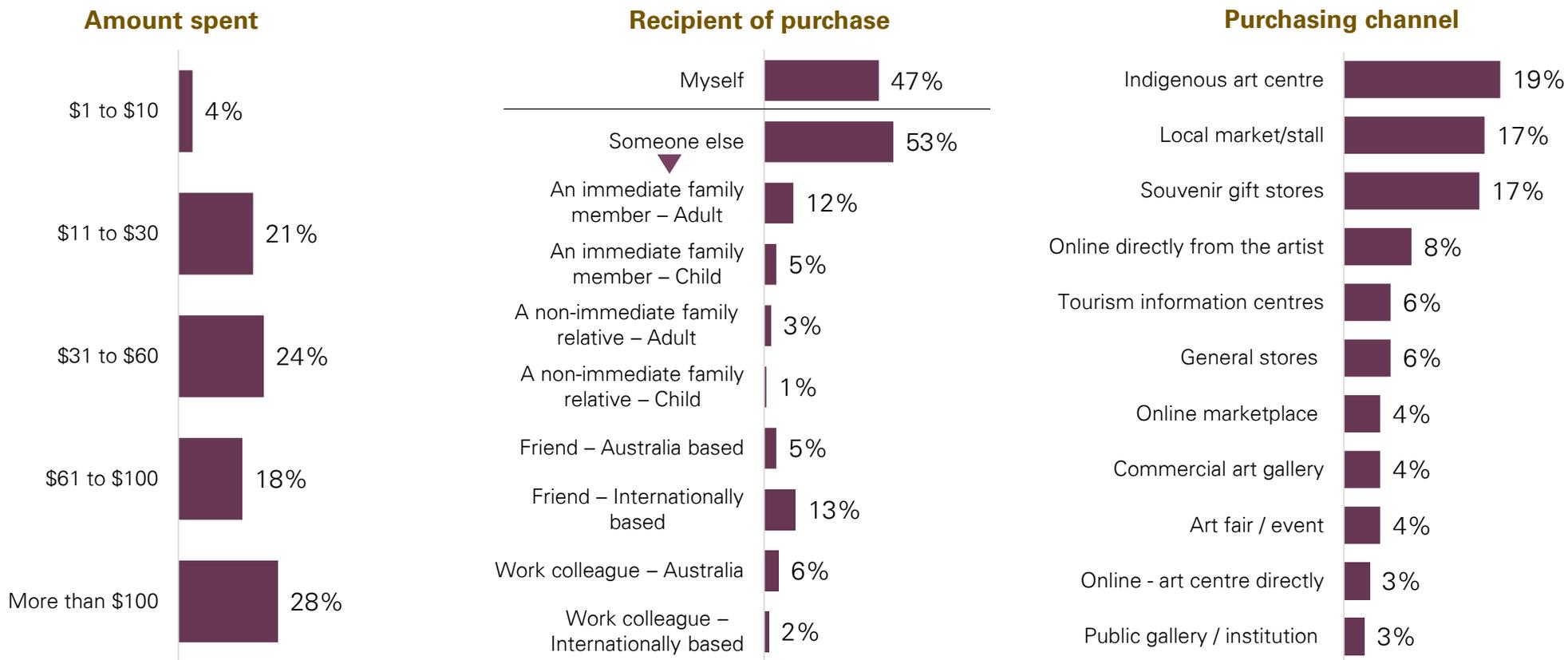
- **Share knowledge** – Many are eager to share what they have learnt from their experiences.
- **Tell a story** – For many having an artefact is a great way to tell their story.
- **Show support** - For those who want to show support for Aboriginal rights

Celebrate style

- **Colour** – Many report they love the vibrant colour of Indigenous art and designs
- **Design** – Others like the abstract shapes and dots that tell a story.
- **Natural** – Indigenous art products are synonymous with earth and natural concepts.

Path to purchase – Most recent purchase journey: Australia

A profile of Australians most recent purchase of Indigenous art and craft products – how much they spent, who received the purchase and which channel they bought from



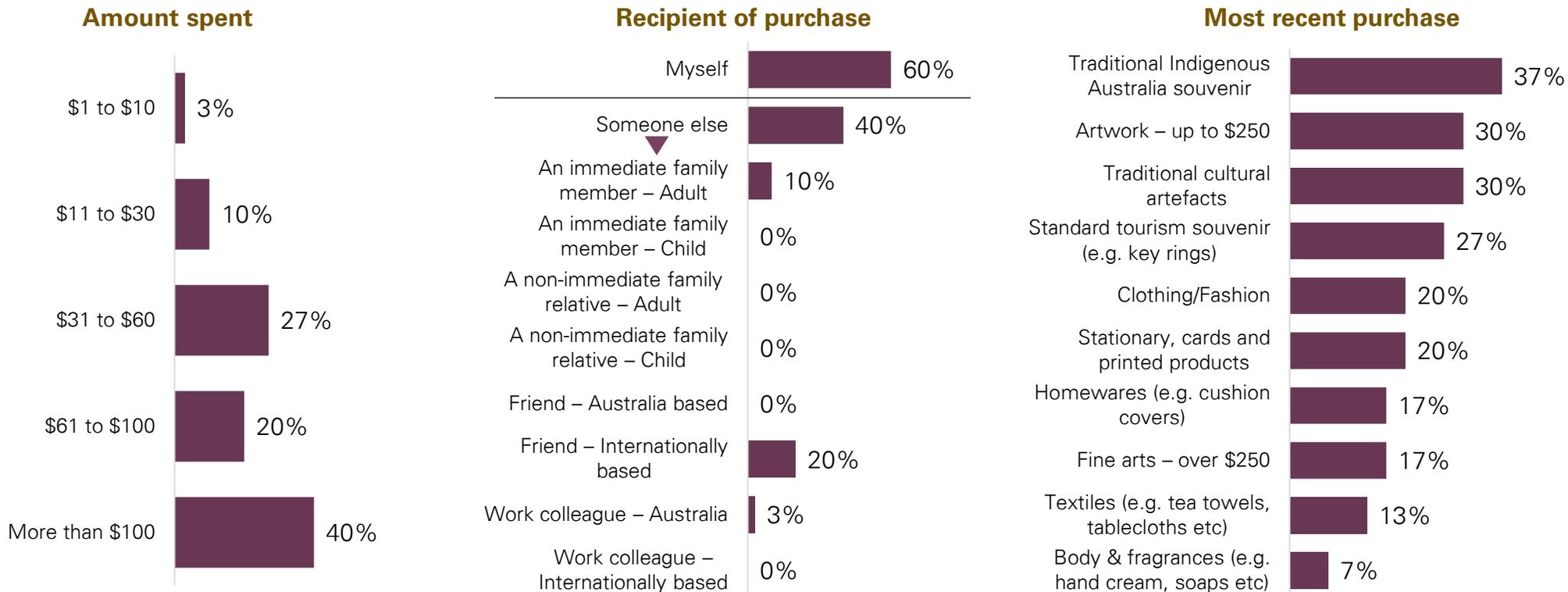
Sample size: Australia, purchased Indigenous Australia art product past 2 years n=156

Survey Question: Q2.8 – How much did you spend on your most recent purchase? Q2.9 – Who did you purchase it for? Q2.10 – And where did you purchase it from?

Analysis notes: Don't know/Unsure not shown in charts

Australians visiting Indigenous art centres are more likely to spend more and purchase for themselves, compared to other purchase channels

A profile of Australians who most recently purchased from Indigenous art centres only – how much they spent, who received the purchase and what was purchased.



Sample size: Australia, purchased Indigenous Australia art product past 2 years at an Indigenous art centre n=30

Survey Question: Q2.8 – How much did you spend on your most recent purchase? Q2.9 – Who did you purchase it for? Q2.7 – What was the most recent Indigenous Australian art product you purchased

Analysis notes: Don't know/Unsure not shown in charts

Consumers say they don't consider authenticity when purchasing a product

Particularly at the lower price range, consumers admit to not thinking about where the product has come from or who produced it.

When asked about the products they had purchased almost none had considered the authenticity of the product and whether it was fake or not.

Almost all however believed they had bought an authentic product.

Consumers were also asked if they could determine the difference between a fake or an authentic product. Most believe they could tell the difference without having to ask.

However there was some confusion around what would be considered as a fake product. Ideas of what would be considered fake include:

- Imported
- Made (or designed) by an Non-Indigenous person
- A copy of something authentic
- Mass-produced

"I wouldn't even think to ask the shop keeper (about the authenticity of the product)" – **Brisbane consumer**

"I think I could tell if it was a fake. It would feel cheap" – **Melbourne consumer**

"I genuinely don't know. Do Aboriginal people have like a copy right on a style? I guess they should" – **Perth consumer**

"I bought this at the Fremantle markets because I really liked the design. It looks hand-painted so I just assumed it was from up north or somewhere like that" – **Perth consumer who bought a painting**



Sample size: Purchased Indigenous Australia art product past 2 years, AU n=156

Survey Question: Q3.4 – Thinking about the most recent product you purchased, how confident are you that it was authentic?

Analysis notes: n/a

Australians think 40% of products may be fake

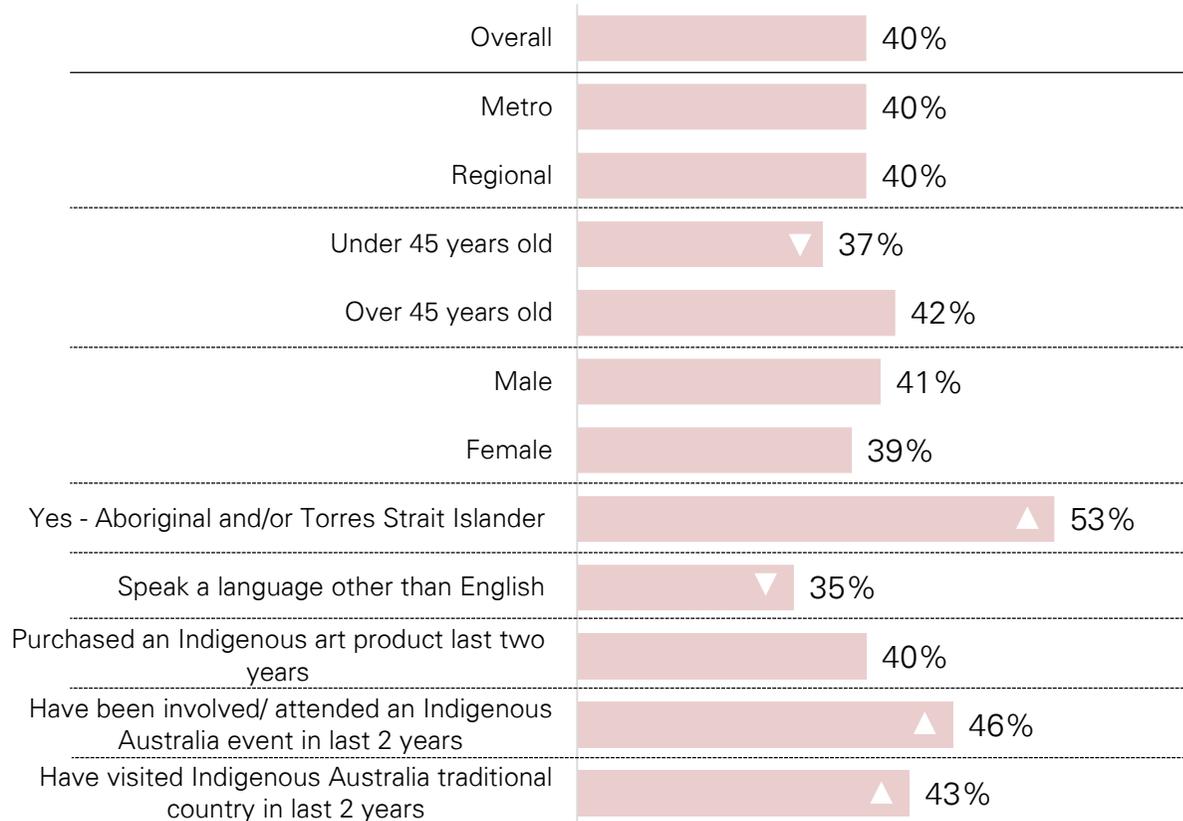
The perception in Australia is that 4 in 10 Indigenous Australian art products in the market are fake.

Those who are Aboriginal and/or Torres Strait Islander and are seen to be recent participants in Indigenous Australian culture via an event or visit to traditional country perceive it to be higher.

Those under the age of 45 years old and who speak a language other than English at home perceive the level to be slightly lower.

This is in contrast to findings by the Arts Law Centre of Australia that indicates around 80% are fakes.

% perceived amount of fake art in the market



Sample size: n=1,004 Australian's 18+

Survey Question: Q3.2 – Thinking about Indigenous Australia art products and where they are sold, what percentage do you feel are fakes?

Analysis notes: Statistical significance to overall shown Δ

Once Australian consumers learn about fake Indigenous art products, they react strongly

"This makes me quite angry, as those who pay for these products are quite likely scammed (unless they knew beforehand what they were buying was fake). Moreover it is very disrespectful towards Indigenous Australians."

"Amazed and disgusted to think that authentic artists are not being treated properly by the people who sell fake artworks."

"It's much higher than I thought it's appalling. Fakes should be identified and dealt with."

"I think that's really terrible. I think that it should only be made by Indigenous Australian's. I have no issues with it being imported as long as the original artist has an Aboriginal heritage, otherwise it should be stopped."

"It's disgusting that people are taking advantage."

"Surprised. Never thought that it would be that high."

"Makes me feel sad, annoyed and angry."

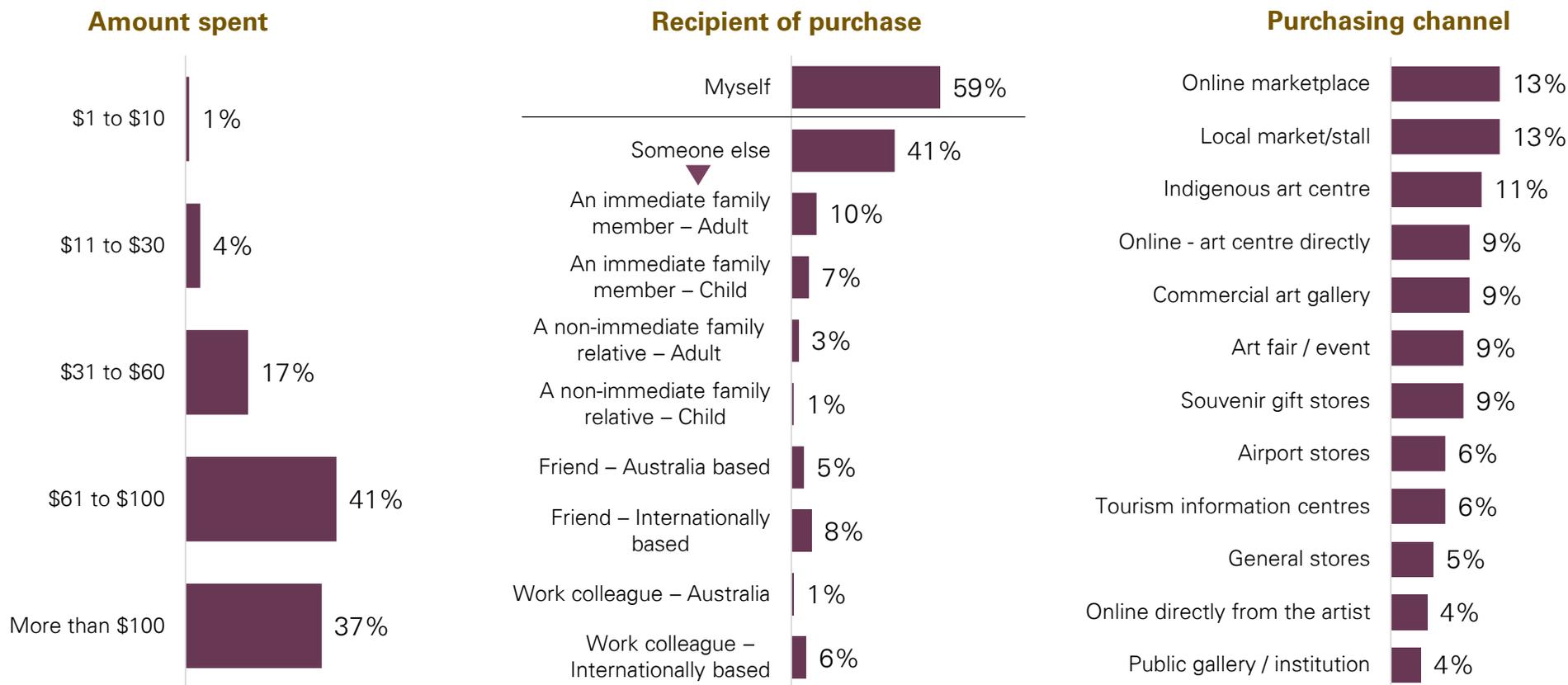
"Very disappointed, frustrated and angry."

"Annoyed – it should be labelled accordingly so people buying can make an informed decision."

Survey Question: Q3.3 – According to the Arts Law Centre of Australia "around 80% of 'aboriginal art' products marketed to tourists are thought to be fakes, made either by either non-Indigenous Australians or imported". Thinking about this statement, how does this make you feel:

Path to purchase – Most recent purchase journey: USA tourism market

A profile of USA tourists most recent purchase of Indigenous art and craft products show they are more likely to be using online marketplaces than UK and China tourists.



Sample size: USA tourism market, purchased Indigenous Australia art product past 2 years n=139.

Survey Question: Q2.8 – How much did you spend on your most recent purchase? Q2.9 – Who did you purchase it for? Q2.10 – And where did you purchase it from?

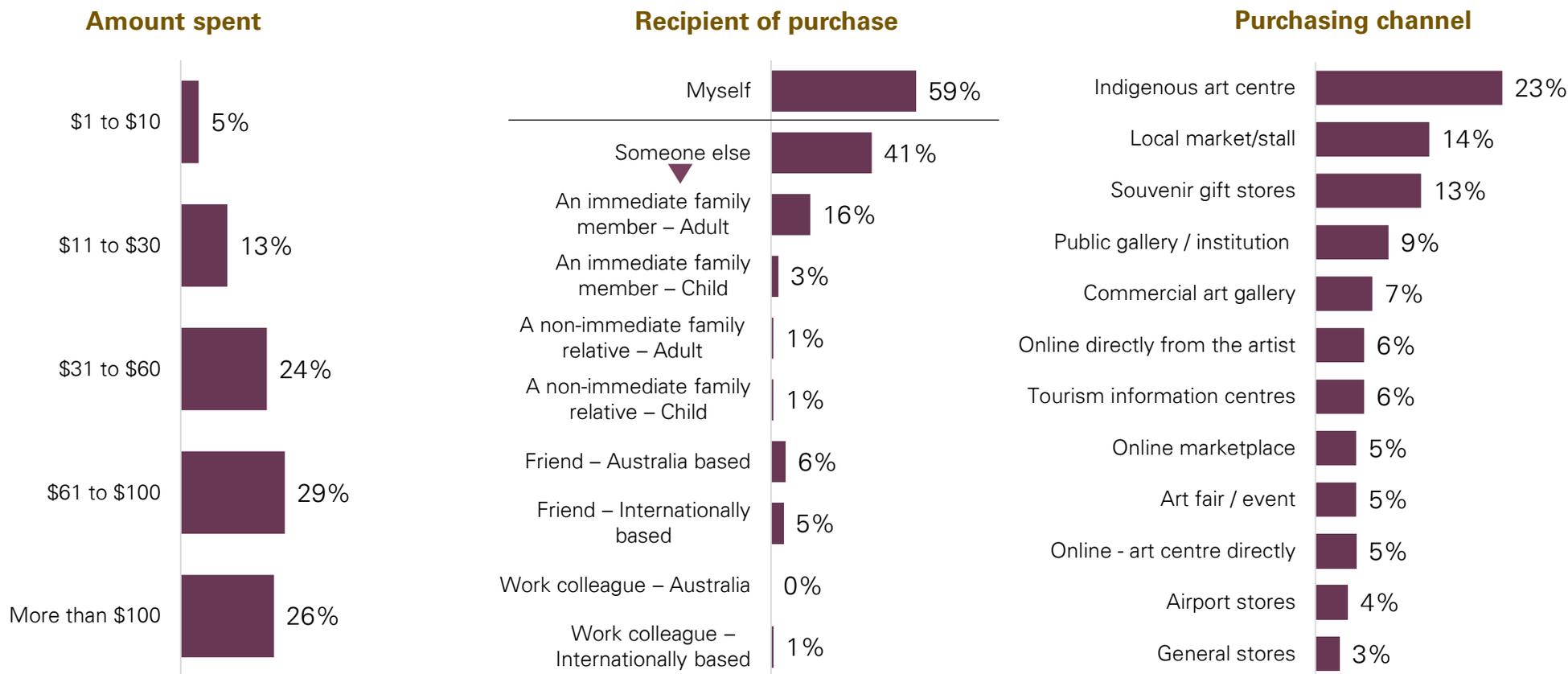
Analysis notes: Don't know/Unsure not shown in charts

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Path to purchase – Most recent purchase journey: UK tourism market

A profile of UK tourists most recent purchase of Indigenous art and craft products show they are more likely than the USA tourists to have used Indigenous art centres.



Sample size: UK tourism market, purchased Indigenous Australia art product past 2 years n=101.

Survey Question: Q2.8 – How much did you spend on your most recent purchase? Q2.9 – Who did you purchase it for? Q2.10 – And where did you purchase it from?

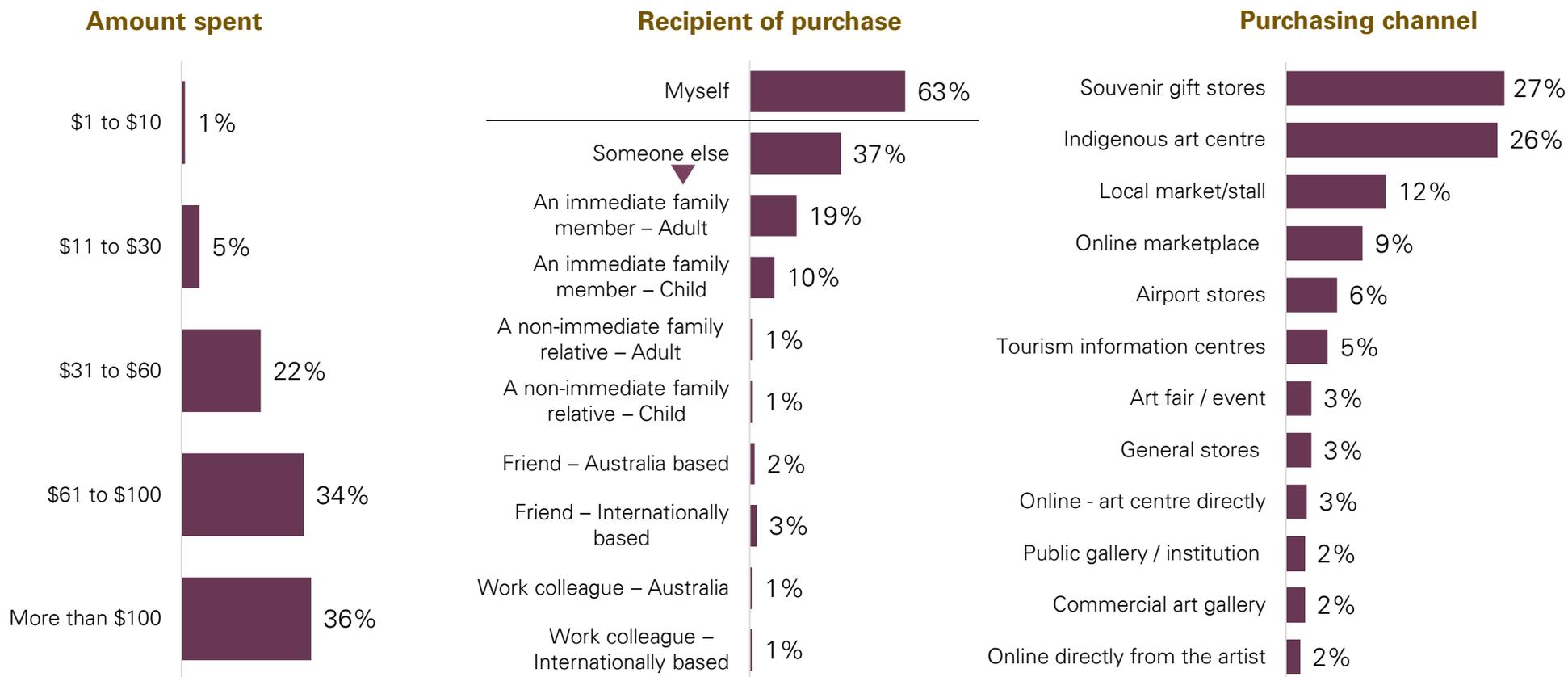
Analysis notes: Don't know/Unsure not shown in charts

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Path to purchase – Most recent purchase journey: China tourism market

A profile of Chinese tourists most recent purchase of Indigenous art and craft products show they are more likely to be buying from souvenir gift stores than USA and UK tourists.



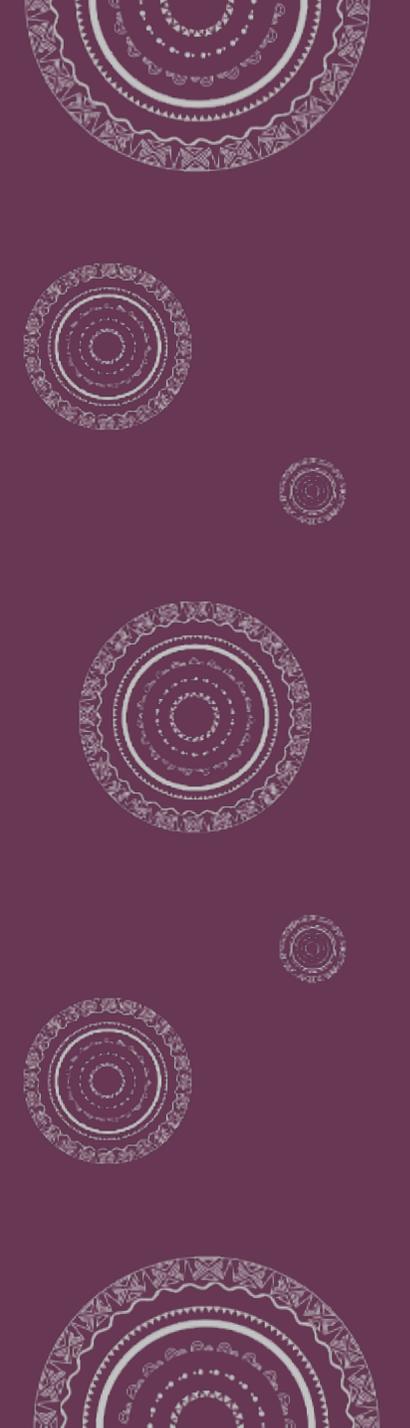
Sample size: China tourism market, purchased Indigenous Australia art product past 2 years n=354.

Survey Question: Q2.8 – How much did you spend on your most recent purchase? Q2.9 – Who did you purchase it for? Q2.10 – And where did you purchase it from?

Analysis notes: Don't know/Unsure not shown in charts

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A vertical decorative bar on the left side of the slide, featuring a dark purple background with several circular, intricate white patterns of varying sizes. The patterns consist of concentric circles with various geometric and floral motifs.

Willingness to pay extra for authenticity

Australian consumers are willing to pay up to 10% extra on purchases

This is consistent for both impulse and planned purchases

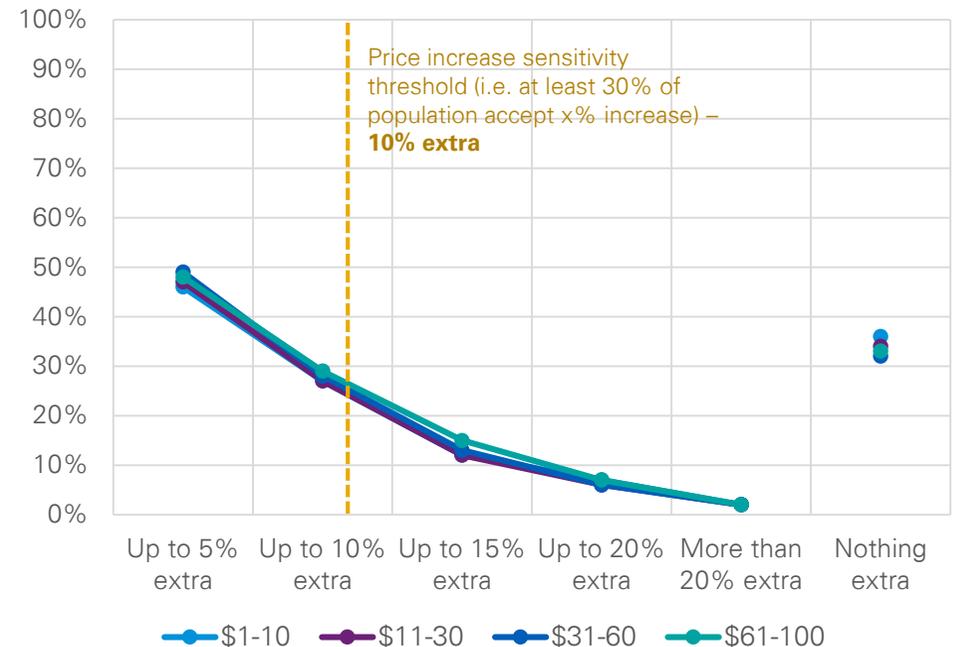
Impulse purchase

Sensitivity in Australia to price increases contributes to the costs associated with ensuring authenticity / ethical provenance of Indigenous Australian art style product



Planned purchase

Sensitivity in Australia to price increases contributes to the costs associated with ensuring authenticity / ethical provenance of Indigenous Australian art style product



Sample size: n=1,004 Australian's 18+

Survey Question: Q4.4/4.5 – How much extra, if any, would you be willing to pay at the following price points when you are next purchasing an Indigenous art style product as an impulse/ planned purchase?

Analysis notes: Don't know / unsure not charted

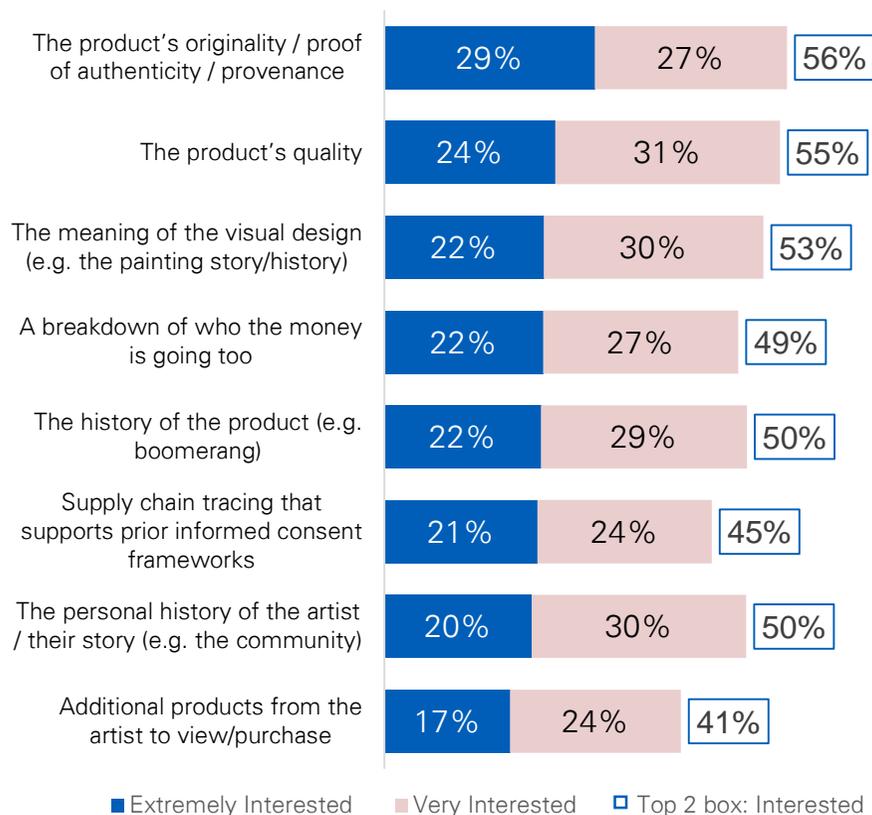


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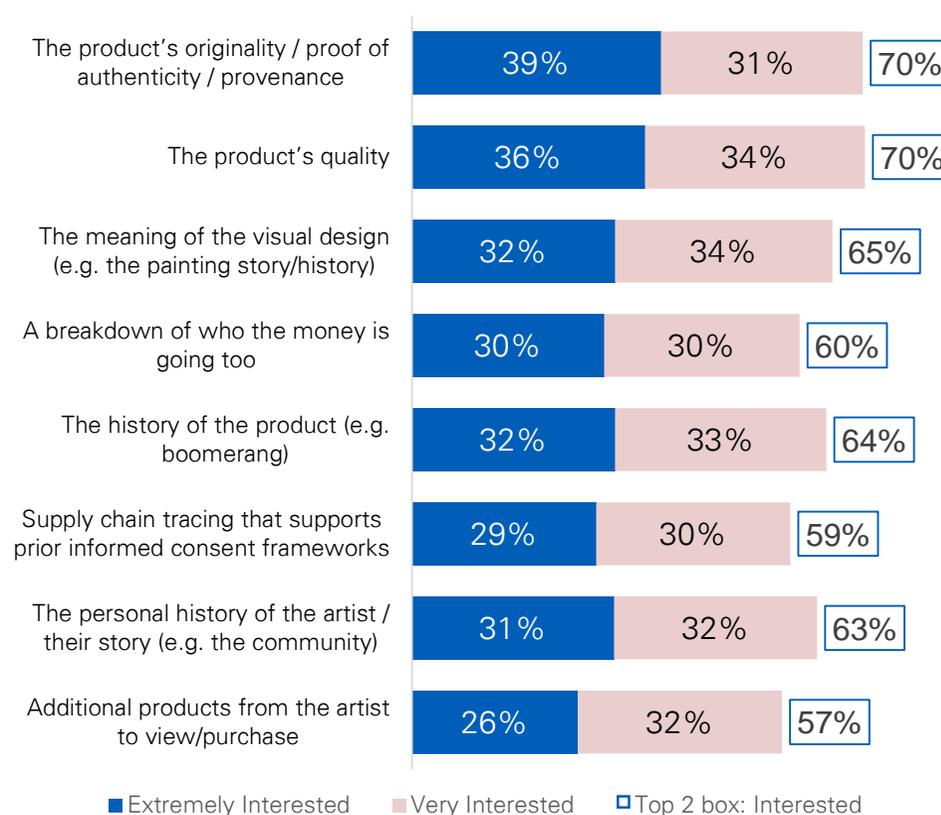
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Paying more means providing information about the products

% interested on purchases up to \$30



% interested on purchases up to \$31-100



Sample size: n=1,004 Australian's 18+

Survey Question: Q4.1/Q4.2 – If you were shopping for an Indigenous Australian art style product for [up to \$30/\$31-100], how interested would you be in accessing the following information to ensure its authenticity and/or its ethical provenance:

Analysis notes: Statistical significance between 'Extremely interested' for statements $\uparrow\downarrow$



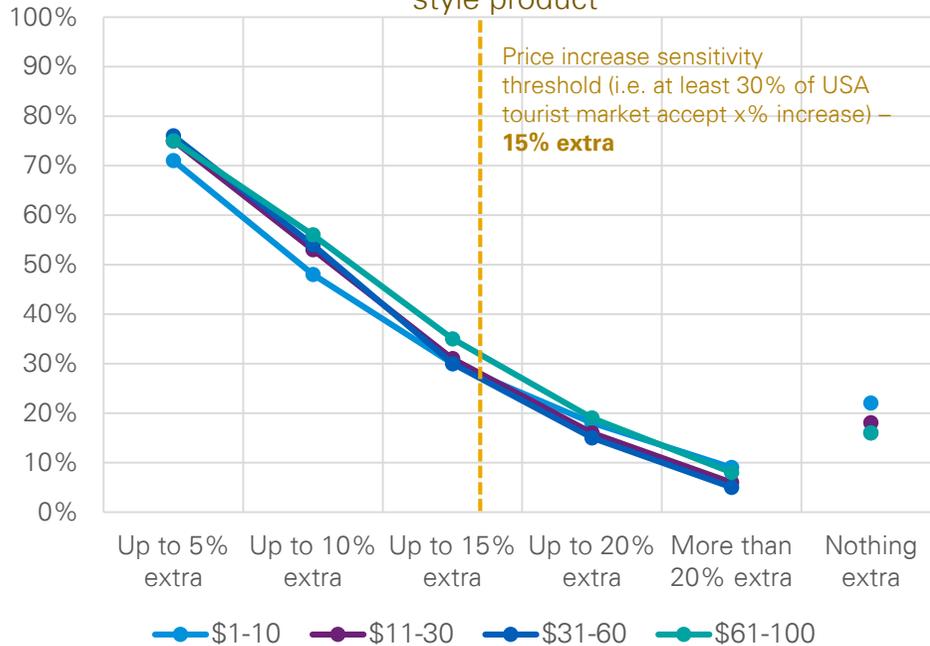
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The USA tourism market is willing to pay up to 15% extra on both impulse and planned Indigenous art product authentic purchases

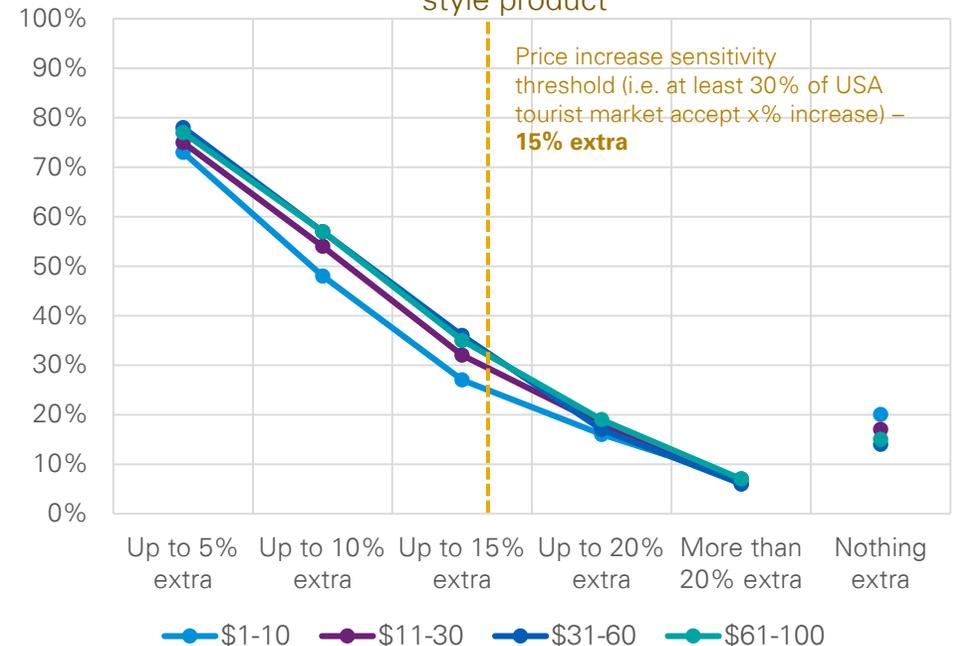
Impulse purchase

Sensitivity in the USA tourism market to price increases contributes to the costs associated with ensuring authenticity / ethical provenance of Indigenous Australian art style product



Planned purchase

Sensitivity in the USA tourism market to price increases contributes to the costs associated with ensuring authenticity / ethical provenance Indigenous Australian art style product



Sample size: USA n=514

Survey Question: Q4.4/4.5 – How much extra, if any, would you be willing to pay at the following price points when you are next purchasing an Indigenous art style product as an impulse/planned purchase?

Analysis notes: Don't know / unsure not charted



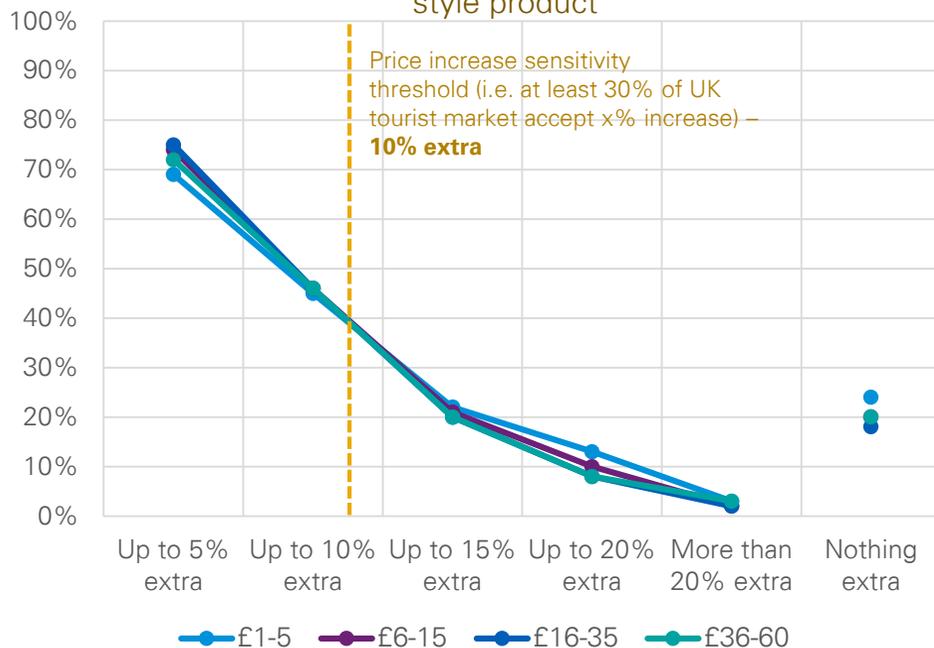
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The UK tourism market is willing to pay up to 10% extra on both impulse and planned Indigenous art product authentic purchases

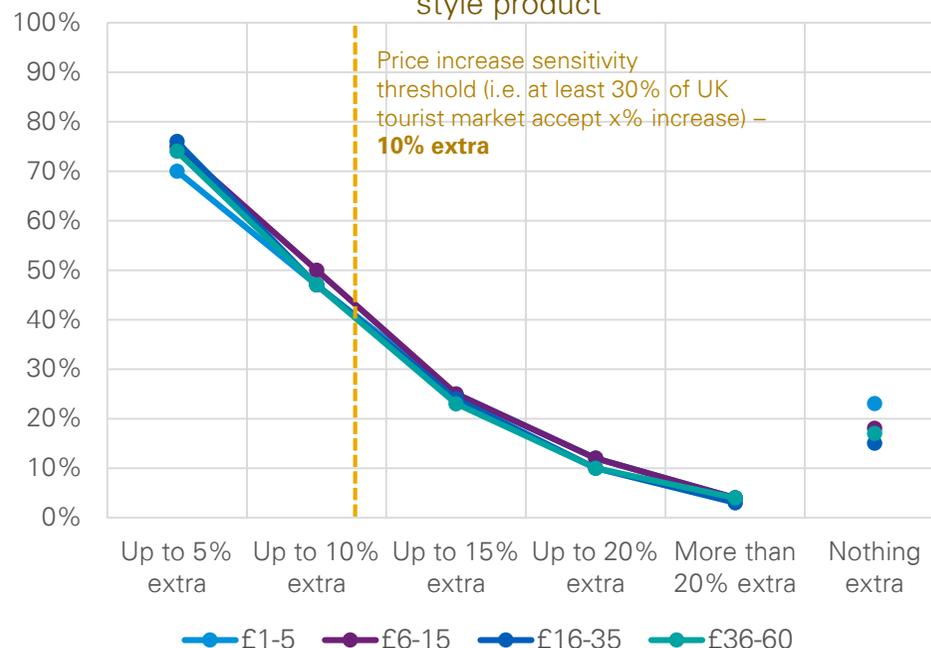
Impulse purchase

Sensitivity in the UK tourism market to price increases contributes to the costs associated with ensuring authenticity / ethical provenance of Indigenous Australian art style product



Planned purchase

Sensitivity in the UK tourism market to price increases contributes to the costs associated with ensuring authenticity / ethical provenance Indigenous Australian art style product



Sample size: UK n=507

Survey Question: Q4.4/4.5 – How much extra, if any, would you be willing to pay at the following price points when you are next purchasing an Indigenous art style product as an impulse/ planned purchase?

Analysis notes: Don't know / unsure not charted



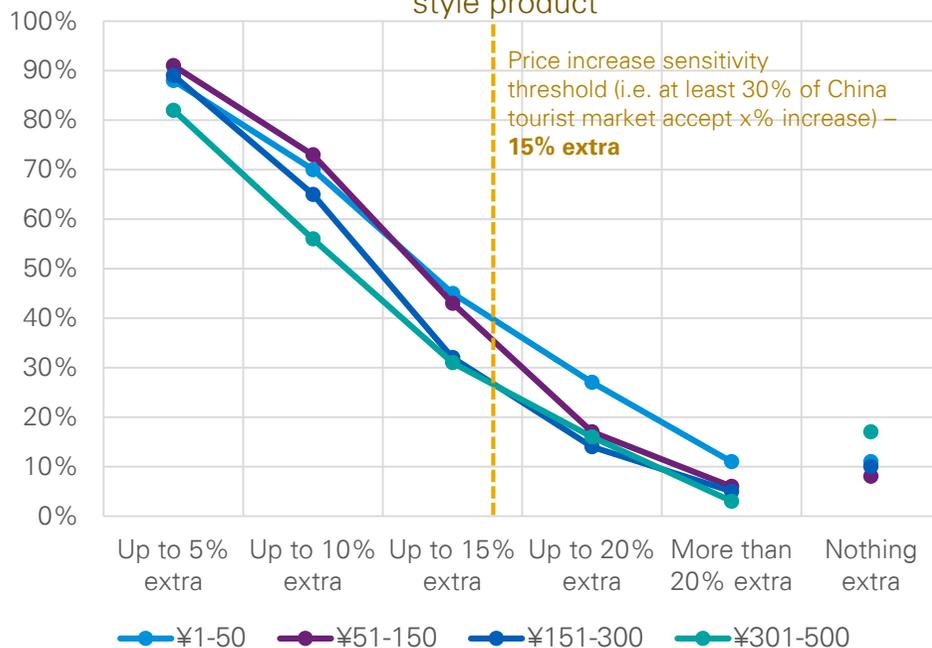
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The Chinese tourism market is willing to pay up to 15% extra on both impulse and planned Indigenous art product authentic purchases

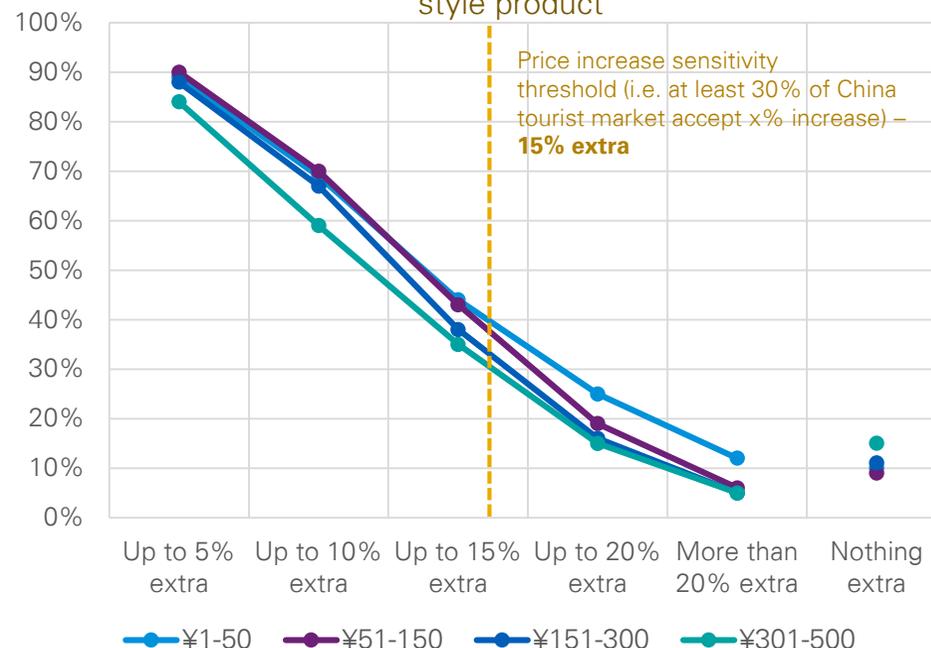
Impulse purchase

Sensitivity in the Chinese tourism market to price increases contributes to the costs associated with ensuring authenticity / ethical provenance of Indigenous Australian art style product



Planned purchase

Sensitivity in the Chinese tourism market to price increases contributes to the costs associated with ensuring authenticity / ethical provenance Indigenous Australian art style product



Sample size: China n=503

Survey Question: Q4.4/4.5 – How much extra, if any, would you be willing to pay at the following price points when you are next purchasing an Indigenous art style product as an impulse/ planned purchase?

Analysis notes: Don't know / unsure not charted



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International tourism markets: up to \$30

Interest in information to reduce level of fake Indigenous art products

% top 2 box interested: extremely/very



Sample size: USA n=514; UK n=507; China n=503

Survey Question: Q4.1 – If you were shopping for an Indigenous Australian art style product for up to \$30, how interested would you be in accessing the following information to ensure its authenticity and/or its ethical provenance:

Analysis notes: n/a



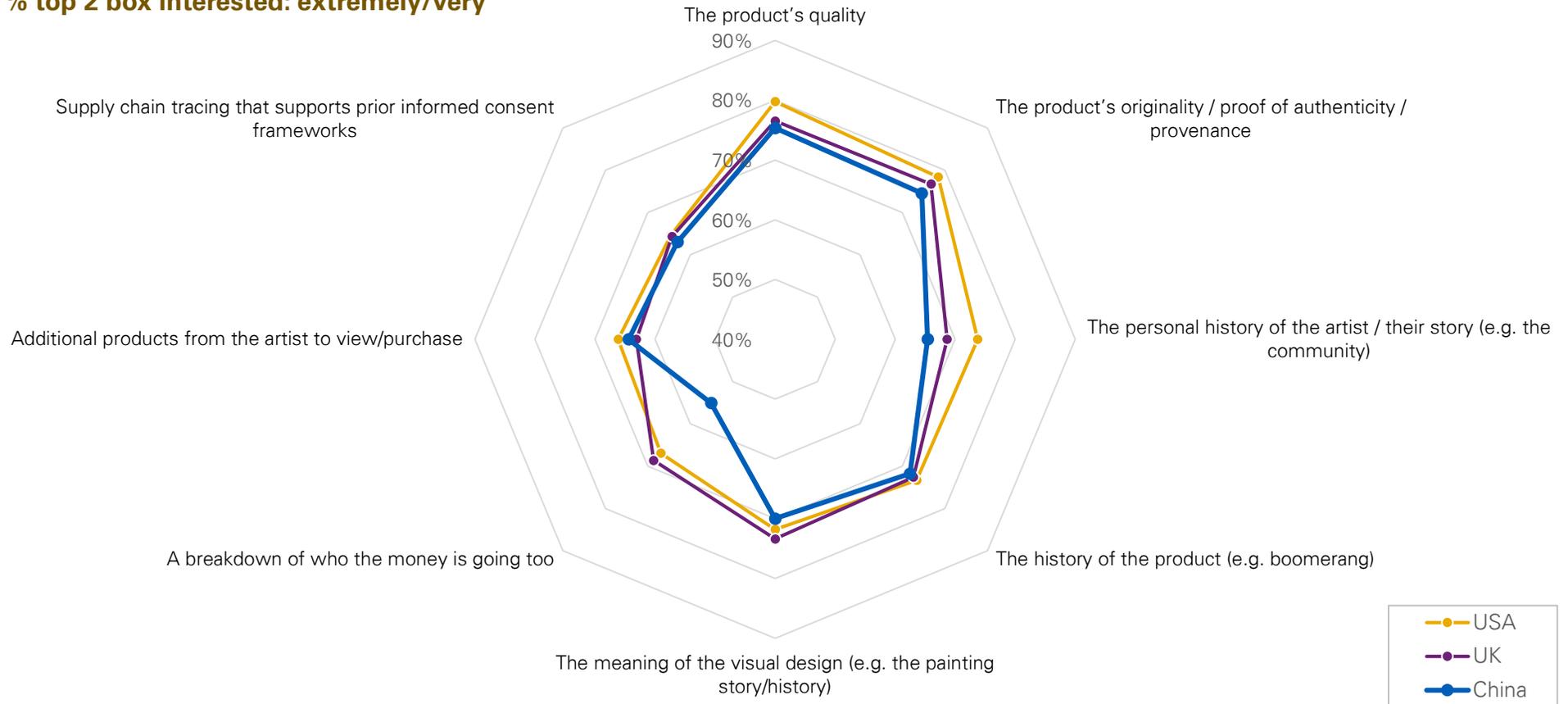
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International tourism markets: \$31-100

Interest in information to reduce level of fake Indigenous art products

% top 2 box interested: extremely/very



Sample size: USA n=514; UK n=507; China n=503

Survey Question: Q4.2 – And if you were shopping for an Indigenous Australian art style product for between \$30 to \$100, how interested would you be in accessing the following information to ensure its authenticity and/or its ethical provenance:

Analysis notes: n/a



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The customer journey

Product information is vital at the point of purchase

Different products carry different expectations about their authenticity.

At the point of sale is where consumers would be most likely to engage with information about the product. Without any consistent labelling information at present, the different types of retailers and the different types of products currently dictate perceptions about whether a product is authentic or not.

Consistent and clear labelling across all retailers and as many products as possible would address these perceptions and influence consumers more than the environment where they purchase the product.

"If it told me the origins and something about the artist, their land and story, it would make it so much more special" –

Brisbane consumer

"I'll be looking out for certification now, do you know when this happening? I wouldn't buy a product without it" – **Sydney**

consumer

"But I wouldn't expect a cheap \$2 ornament or souvenir to carry an authenticity certification...I think we all just assume these are mass produced in China"

– Melbourne consumer

IMPLICATIONS:

The retail point of sale is the single biggest influence and opportunity on consumers' perceptions of authenticity

Certificate / logo on the product is the most useful method to deliver information to Australian consumers

The most useful method to deliver each piece of ethical provenance / authenticity information to those in Australia indicating they are interested in the information is a certificate or logo that is placed on the product or packaging – this is seen across all community groups.

The other methods tested were at relatively similar levels for most pieces of information – though classifications were seen as more useful for *product quality* and *supply chain tracing*; and QR codes less for product authenticity and quality, which indicates a level of education is still required on the application and benefits of QR codes in this area to a wider Australian audience.

Australia <u>Most useful method to deliver information to those interested</u>	Certificate / logo on the product / packaging	Classification against a standard rating system	Product / packaging seals	QR code on the product / packaging
The product's originality / proof of authenticity / provenance	57%	15%	12%	8%
The product's quality	44%	24%	14%	7%
The meaning of the visual design (e.g. the painting story/history)	44%	14%	17%	14%
The history of the product (e.g. boomerang)	45%	15%	14%	15%
The personal history of the artist / their story (e.g. the community)	43%	13%	17%	14%
A breakdown of who the money is going too	37%	16%	16%	14%
Supply chain tracing that supports prior informed consent frameworks	44%	20%	11%	14%
Additional products from the artist to view/purchase	39%	14%	15%	17%

Sample size: n=1,004 Australian's 18+

Survey Question: Q4.3 – Which of the following methods do you feel would be most useful to you in delivering the authenticity and/or ethical provenance information when you are purchasing an Indigenous Australian art style product:

Analysis notes: n/a



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Certificate / logo on the product is also strongly favoured by the USA & UK tourism markets

The most useful method to deliver each piece of ethical provenance / authenticity information to those in the USA and UK is a certificate or logo that is placed on the product or packaging; in China this method leads but is not the only method supported.

Key International tourism markets % certificate / logo on the product / packaging is the most useful method to deliver information to those interested	USA	UK	China
The product's originality / proof of authenticity / provenance	45%	51%	38%
The product's quality	34%	43%	34%
The meaning of the visual design (e.g. the painting story/history)	37%	40%	31%
The history of the product (e.g. boomerang)	40%	39%	35%
The personal history of the artist / their story (e.g. the community)	41%	41%	30%
A breakdown of who the money is going too	34%	40%	28%
Supply chain tracing that supports prior informed consent frameworks	36%	40%	34%
Additional products from the artist to view/purchase	35%	42%	31%

Sample size: USA n=514; UK n=507; China n=503

Survey Question: Q4.3 – Which of the following methods do you feel would be most useful to you in delivering the authenticity and/or ethical provenance information when you are purchasing an Indigenous Australian art style product:

Analysis notes: n/a

The Chinese tourism market has a moderate level of support across each method, but leans towards a certificate/logo as well

China tourism market Most useful method to deliver information to those interested	Certificate / logo on the product / packaging	Classification against a standard rating system	Product / packaging seals	QR code on the product / packaging
The product's originality / proof of authenticity / provenance	38%	17%	23%	20%
The product's quality	34%	29%	18%	17%
The meaning of the visual design (e.g. the painting story/history)	31%	20%	24%	23%
The history of the product (e.g. boomerang)	35%	15%	23%	26%
The personal history of the artist / their story (e.g. the community)	30%	16%	20%	31%
A breakdown of who the money is going too	28%	23%	24%	20%
Supply chain tracing that supports prior informed consent frameworks	34%	22%	20%	23%
Additional products from the artist to view/purchase	31%	20%	25%	21%

Sample size: China n=503

Survey Question: Q4.3 – Which of the following methods do you feel would be most useful to you in delivering the authenticity and/or ethical provenance information when you are purchasing an Indigenous Australian art style product:

Analysis notes: n/a



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There is clear opportunity and need for multiple interventions





Section 4

Key insights and focus areas

Six key insights from the market and desktop research

The market research uncovered the below six key insights into consumer and supplier sentiment towards Indigenous art and craft products for consideration in the development of an appropriate ethical art certification scheme.

- **Cultural assets** – In Australia and overseas, Indigenous art and culture are viewed as a significant asset. People are open and eager to learn more.
- **Consistent definitions and classifications** - With such a complex and diverse supply chain, to avoid exclusion of products from the scheme, it would be beneficial to develop a classification scheme whereby different products are awarded different ratings of authenticity. This provides uniformity across the broad range of products on sale but also highlights the complexities of the supply chain to consumers allowing them to make more informed purchase decisions.
- **The need and appeal for education and increased awareness** – The authenticity of Indigenous art is not something many Australian and international consumers have considered before, particularly at the point of purchase. Through point of sale information and a public awareness campaign there is an opportunity to significantly increase awareness of the issue and potentially drive demand for ethically sourced goods.
- **Adding value, not complications with the intervention** – There is no reason why an authenticity certification scheme couldn't add value to the industry however there is the potential for it to add a layer of complication particularly for suppliers, producers and retailers. At every juncture it needs to be clear how the scheme benefits all those in the supply chain.
- **Prioritising interventions with suppliers** – It all starts with suppliers. For any scheme to work it needs to address the complex and diverse range of suppliers by making it easy for them to understand, adopt and implement certification.
- **Consumers want a scheme like this and are happy to pay a little extra** – The concept of fairness is an important one to all Australians. Any scheme that creates a fairer system whereby Indigenous artists and producers are appropriately remunerated for their work will be supported by the vast majority of consumers.

Focus areas for shaping ethical purchasing behaviours

This research found that the actions required to shape and inform consumers' ethical purchasing habits vary according to the distribution channel and 'pathway to purchase' by the consumer. The below focus areas articulate the different considerations for shaping ethical purchasing habits for key distribution channels.

Those who purchase from Indigenous art centres, including online

- Australians who most recently purchased from this channel are more interested in all the ethical provenance / authenticity attributes.
- In particular, the *meaning of the visual design* and the *personal history of the artist* resonated and should be seen as areas art centres can target even further for product designs they sell, point of sale displays implemented, the long and short term marketing strategies used and the immersive experiences they provide to customers.
- International tourists from key markets, particularly the UK, look to this purchasing channel for *originality / authenticity* and *additional products from the artist to view / purchase*

Those who purchased from souvenir stores / airport stores / tourism information centres

- Australians who most recently purchased from this channel are less interested in ethical provenance / authenticity attributes than other channels (but more than those who haven't purchased in the last year) – this is seen at both price points tested.
- *The personal history of the artist and the meaning of the visual design* resonated the most and should be seen as areas souvenir / airport and tourism information stores can target even further for product designs they sell, point of sale displays implemented and the long and short term marketing strategies used to drive sales.
- International tourists from key markets also look to this purchasing channel for *the history of the product (UK)*: for USA and China the focus is on *authenticity and quality of product*.

Those who purchased from local market stalls / art fairs / art galleries

- Australians who most recently purchased from this channel are more interested in all the ethical provenance / authenticity attributes – this is seen at both price points tested.
- *The personal history of the artist, the meaning of the visual design and the product's originality / proof of authenticity and provenance* resonated the most and should be seen as areas local market / stalls / Art fairs / Art gallery can target even further for product designs they sell, point of sale displays implemented and the long and short term marketing strategies used to drive sales.
- International tourists from key markets (particularly UK and China) also look to this purchasing channel for *the history of the product*

Those who purchased direct from the artist / marketplace online

- Australians who most recently purchased from this channel are the most interested in ethical provenance / authenticity attributes – this is particularly seen at the \$30-\$100 range tested.
- *The personal history of the artist, product's quality and a breakdown of who the money is going to* resonated the most and should be seen as areas online channels can target even further both domestically and in the key international tourism markets of USA and UK for product designs they sell, point of sale displays implemented and the long and short term marketing strategies used to drive sales.
- The Chinese tourism market using this channel for their most recent purchase were comparatively less interested than the other international markets for ethical provenance / authenticity.



Appendix 1

Quantitative research overview: Sample profile and questionnaire

The sample of respondents in Australia was nationally representative of the general population aged 18+ (location, age and gender)

Location	N=	%
Total	1,004	100%
New South Wales	333	33%
Victoria	253	25%
Queensland	194	19%
Western Australia	92	9%
South Australia	87	9%
Tasmania	25	2%
ACT	15	1%
Northern Territory	5	0%
Metro	727	72%
Regional	277	28%

Age	N=	%
Total	1,004	100%
18 - 25	88	9%
26 - 34	150	15%
35 - 44	208	21%
45 - 54	194	19%
55 - 64	170	17%
65 - 75	194	19%

Gender	N=	%
Total	1,004	100%
Male	475	47%
Female	529	53%

Sample in key international tourism markets (USA, UK, and China) was focused on visitors to Australia, but aiming for a representative profile

USA	N=	%
Total	514	100%
AU visitor – Past 5 years	206	40%
AU visitor – Intend in next 3 years	308	60%
Region – Northeast	93	18%
Region – Midwest	111	22%
Region – South	132	26%
Region – West	177	35%
Age – Under 45 yrs. old	235	46%
Age – Over 45 yrs. old	279	54%
Gender – Male	237	46%
Gender – Female	277	54%

UK	N=	%
Total	507	100%
AU visitor – Past 5 years	219	43%
AU visitor – Intend in next 3 years	288	57%
England	421	83%
Scotland	47	9%
Wales	32	6%
Northern Island	7	1%
Age – Under 45 yrs. old	232	46%
Age – Over 45 yrs. old	275	54%
Gender – Male	251	50%
Gender – Female	256	50%

China	N=	%
Total	503	100%
AU visitor – Past 5 years	403	80%
AU visitor – Intend next 3 years	100	20%
Tier of City – Tier 1	268	53%
Tier of City – Tier 2	235	47%
Age – Under 45 yrs. old	443	88%
Age – Over 45 yrs. old	60	12%
Gender – Male	237	47%
Gender – Female	266	53%



Consumer questionnaire - Australia, USA, UK and China markets (1/11)



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AACHWA

Online Survey

Survey version: Final

Date: 24/11/2020

Average survey length: 15 minutes

Sample source: Commercial sample provider

Target audiences:

- n=1000 from Australia (age / gender / location representative)
- n=500 from USA who have visited Australia in past 5 years or plan to visit within the next 2 years
- n=500 from UK who have visited Australia in past 5 years or plan to visit within the next 2 years
- n=500 from China who have visited Australia in past 5 years or plan to visit within the next 2 years

Questionnaire Structure

Section	Content	Estimated time to complete	Page
1	Screening respondents	1-3 minutes	2
2	Awareness of Indigenous culture & level of interest	2-4 minutes	8
3	Attitudes towards fake Indigenous art products	4 minutes	13
4	Provenance methods and price increases to drive ethically sourced Indigenous art products in the market	5 minutes	15
5	Profiling respondents	1 minute	19

Legend

SR: Single response question

MR: Multiple response question

OE: Open-ended free text question

NR: Numerical response question

FR: Forced rank question

- - - - Page break: where respondent progresses to the next survey questions page

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Section 1: Screening respondents

INTRO: Before you start the survey, we would like to ask you a few questions to make sure that we are surveying a good cross section of the community.

----- Page break -----

S1. ASK ALL MARKETS. MR. Randomise list.

Do you, or does anyone in your household work in any of the following industries?

	CODE	Screening Outcome
Travel or Tourism	1	Continue
Advertising	2	Thank & end
Marketing and Market Research	3	Thank & end
Computing or IT	4	Continue
Journalism (TV, radio, newspapers, magazines, online media)	5	Thank & end
Banking or finance	6	Continue
Automotive manufacturing	7	Continue
Fashion manufacturing	8	Continue
Hospitality	9	Continue
None of these	99	Continue

S2. ASK ALL MARKETS. SR.

Do you live in:

	CODE	Screening Outcome
Australia	1	AU survey
USA	2	USA survey
UK	3	UK survey
China	4	China survey
None of these countries	99	Thank & end

S3a. ASK S2 CODE 1 (AU MARKET). SR.

Where in Australia do you live?

	CODE	Screening Outcome
ACT	1	Check hard quotas

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Consumer questionnaire - Australia, USA, UK and China markets (2/11)



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New South Wales - Sydney	2	Check hard quotas
New South Wales - Other	3	Check hard quotas
Northern Territory - Darwin	4	Check hard quotas
Northern Territory - Other	5	Check hard quotas
Queensland - Brisbane	6	Check hard quotas
Queensland - Other	7	Check hard quotas
South Australia - Adelaide	8	Check hard quotas
South Australia - Other	9	Check hard quotas
Tasmania - Hobart	10	Check hard quotas
Tasmania - Other	11	Check hard quotas
Victoria - Melbourne	12	Check hard quotas
Victoria - Other	13	Check hard quotas
Western Australia - Perth	14	Check hard quotas
Western Australia - Other	15	Check hard quotas
You don't live in Australia	99	Thank & end

S3b. ASK S2 CODE 2 (US MARKET). SR.

Where in the USA do you live?

	CODE	Screening Outcome
Alabama	1	Check soft quotas
Alaska	2	Check soft quotas
Arizona	3	Check soft quotas
Arkansas	4	Check soft quotas
California	5	Check soft quotas
Colorado	6	Check soft quotas
Connecticut	7	Check soft quotas
Delaware	8	Check soft quotas
District of Columbia	9	Check soft quotas
Florida	10	Check soft quotas
Georgia	11	Check soft quotas
Hawaii	12	Check soft quotas
Idaho	13	Check soft quotas
Illinois	14	Check soft quotas
Indiana	15	Check soft quotas
Iowa	16	Check soft quotas
Kansas	17	Check soft quotas
Kentucky	18	Check soft quotas
Louisiana	19	Check soft quotas

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Maine	20	Check soft quotas
Maryland	21	Check soft quotas
Massachusetts	22	Check soft quotas
Michigan	23	Check soft quotas
Minnesota	24	Check soft quotas
Mississippi	25	Check soft quotas
Missouri	26	Check soft quotas
Montana	27	Check soft quotas
Nebraska	28	Check soft quotas
Nevada	29	Check soft quotas
New Hampshire	30	Check soft quotas
New Jersey	31	Check soft quotas
New Mexico	32	Check soft quotas
New York	33	Check soft quotas
North Carolina	34	Check soft quotas
North Dakota	35	Check soft quotas
Ohio	36	Check soft quotas
Oklahoma	37	Check soft quotas
Oregon	38	Check soft quotas
Pennsylvania	39	Check soft quotas
Rhode Island	40	Check soft quotas
South Carolina	41	Check soft quotas
South Dakota	42	Check soft quotas
Tennessee	43	Check soft quotas
Texas	44	Check soft quotas
Utah	45	Check soft quotas
Vermont	46	Check soft quotas
Virginia	47	Check soft quotas
Washington	48	Check soft quotas
West Virginia	49	Check soft quotas
Wisconsin	50	Check soft quotas
Wyoming	51	Check soft quotas
You don't live in the USA	99	Thank & end

S3c. ASK S2 CODE 3 (UK MARKET). SR.

Where in the UK do you live?

	CODE	Screening Outcome
North East	1	Check soft quotas
North West	2	Check soft quotas
Yorkshire and the Humber	3	Check soft quotas
East Midlands	4	Check soft quotas

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Consumer questionnaire - Australia, USA, UK and China markets (3/11)



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West Midlands	5	Check soft quotes
East of England	6	Check soft quotes
London	7	Check soft quotes
South East	8	Check soft quotes
South West	9	Check soft quotes
Wales	10	Check soft quotes
Scotland	11	Check soft quotes
Northern Ireland	12	Check soft quotes
You don't live in the UK	99	Thank & end

S3d. ASK S2 CODE 4 (China MARKET). SR.

Where in China do you live?

	CODE	Screening Outcome
Anhui	1	Check soft quotes
Beijing	2	Check soft quotes
Chongqing	3	Check soft quotes
Fujian	4	Check soft quotes
Gansu	5	Check soft quotes
Guangdong	6	Check soft quotes
Guangxi	7	Check soft quotes
Guizhou	8	Check soft quotes
Hainan	9	Check soft quotes
Hebei	10	Check soft quotes
Heilongjiang	11	Check soft quotes
Henan	12	Check soft quotes
Hubei	13	Check soft quotes
Hunan	14	Check soft quotes
Inner Mongolia	15	Check soft quotes
Jiangsu	16	Check soft quotes
Jiangxi	17	Check soft quotes
Jilin	18	Check soft quotes
Liaoning	19	Check soft quotes
Ningxia	20	Check soft quotes
Qinghai	21	Check soft quotes
Shaanxi	22	Check soft quotes
Shandong	23	Check soft quotes
Shanghai	24	Check soft quotes
Shanxi	25	Check soft quotes
Sichuan	26	Check soft quotes
Tianjin	27	Check soft quotes
Tibet	28	Check soft quotes

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Xinjiang	29	Check soft quotes
Yunnan	30	Check soft quotes
Zhejiang	31	Check soft quotes
You don't live in China	99	Thank & end

----- Page break -----

S4. ASK ALL MARKETS. Numerical input box.

How old are you?

Please type your age in the box below

Hidden: Code into the following frame.

	CODE	Screening Outcome
Under 18 years	1	Thank & end
18-25 years	2	Check quotes
26-34 years	3	Check quotes
35-44 years	4	Check quotes
45-54 years	5	Check quotes
55-64 years	6	Check quotes
65 years and over	7	Check quotes

S5. ASK ALL MARKETS. SR.

And what gender do you most identify with?

	CODE	Screening Outcome
Male	1	Check quotes
Female	2	Check quotes
I prefer to self-describe	3	Continue

Note AU market sent to Q2.1

----- Page break -----

S6. ASK S2 CODE 2-4 (USA, UK, CHINA MARKETS). MR. Randomise list, Anchor code 98.

Have you personally travelled to any of the following destinations in the past 5 years?

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Consumer questionnaire - Australia, USA, UK and China markets (4/11)



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	CODE	Screening Outcome
Australia	1	Send to S8
Asia	2	Send to S7
Western Europe	3	Send to S7
Eastern Europe	4	Send to S7
UK	5	Send to S7
Africa	6	Send to S7
South Pacific (e.g. New Zealand, Fiji)	7	Send to S7
South America	8	Send to S7
North America	9	Send to S7
Other	10	Send to S7
None of these destinations	99	Send to S7

S7. ASK S6 CODE 2-10 & 99 (USA, UK, CHINA MARKETS VISITED OR PLAN TO VISIT). MR
And do you intend to travel to any of the following destinations in the next 2 to 3 years?

	CODE	Screening Outcome
Australia	1	Send to S9
Asia	2	Thank & end
Western Europe	3	Thank & end
Eastern Europe	4	Thank & end
UK	5	Thank & end
Africa	6	Thank & end
South Pacific (e.g. New Zealand, Fiji)	7	Thank & end
South America	8	Thank & end
North America	9	Thank & end
Other	10	Thank & end
None of these destinations	99	Thank & end

S8. ASK S6 CODE 1 (USA, UK, CHINA MARKETS VISITED AU LAST 5 YRS). SR per row.
When you visited Australia, how interested were you in the following:

	Not at all interested	Not very interested	Neither Interested nor Uninterested	Quite Interested	Very Interested	Unsure. Don't know.
Australia's natural landmarks	1	2	3	4	5	6
Australia's wildlife	1	2	3	4	5	6

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Australia's cities	1	2	3	4	5	6
Australia's Indigenous culture	1	2	3	4	5	6
Australia's sporting and arts events	1	2	3	4	5	6
Australia's beaches	1	2	3	4	5	6

S9. ASK S7 CODE 1 (USA, UK, CHINA MARKETS PLAN TO VISIT NEXT 2-3 YRS). SR per row.
How interested are you in visiting Australia for the following reasons?

	Not at all interested	Not very interested	Neither Interested nor Uninterested	Quite Interested	Very Interested	Unsure. Don't know.
To see Australia's natural landmarks	1	2	3	4	5	6
To experience Australia's wildlife	1	2	3	4	5	6
To visit Australian cities	1	2	3	4	5	6
To experience Indigenous Australian culture	1	2	3	4	5	6
For a specific event (i.e. sport, arts)	1	2	3	4	5	6
To experience Australian beaches	1	2	3	4	5	6

Page break

Section 2: Awareness of Indigenous culture & level of interest

INTRO WITH Q2.1: The following questions are about your awareness and interest in Indigenous Australian culture.

Q2.1 ASK ALL MARKETS. SR per row. Carousel format

How personally familiar are you with the following aspects of Indigenous Australian culture:

	Not at all familiar	Slightly familiar	Somewhat familiar	Moderately familiar	Extremely familiar	Don't know of this. Unsure
The knowledge and story telling	1	2	3	4	5	99

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The languages and groups	1	2	3	4	5	99
The history before and after colonisation	1	2	3	4	5	99
The traditions and teachings of elders	1	2	3	4	5	99
The ceremony and performance	1	2	3	4	5	99
The protection of significant sites	1	2	3	4	5	99
The art, designs and artefacts	1	2	3	4	5	99
Overall	1	2	3	4	5	99

----- Page break -----

Q2.2 ASK ALL MARKETS. SR per row. Carousel format

And how personally **interested** are you with the following aspects of Indigenous Australian culture:

		Not at all interested	Not very interested	Neither Interested nor Uninterested	Quite Interested	Very Interested	Don't know of this. Unsure
1	The knowledge and story telling	1	2	3	4	5	99
2	The languages and groups	1	2	3	4	5	99
3	The history before and after colonisation	1	2	3	4	5	99
4	The traditions and teachings of elders	1	2	3	4	5	99

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5	The ceremony and performance	1	2	3	4	5	99
6	The protection of significant sites	1	2	3	4	5	99
7	The art, designs and artefacts	1	2	3	4	5	99
8	Overall	1	2	3	4	5	99

----- Page break -----

Q2.3 ASK THOSE WHO INDICATED A STATEMENTS 1-7 WAS CODE 4 & 5 from Q2.2. Least fill. OE

You mentioned that you are **interested** in <insert statement from Q2.2>. Can you provide some detail around why you **feel** this way?

----- Page break -----

Q2.4 ASK S2 CODE 1 (AU MARKET) or S6 CODE 1 (International markets: Visited AU last 5 yrs.). SR

Have you been involved with or attended an Indigenous Australian cultural event in the past 2 years?

	CODE
Yes (please specify)	1
No	2
Unsure	99

Q2.5 ASK S2 CODE 1 (AU MARKET) or S6 CODE 1 (International markets: Visited AU last 5 yrs.). SR

And have you visited an Indigenous Australian homeland/traditional country in the past 2 years?

	CODE
Yes (please specify)	1
No	2
Unsure	99

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Q2.6 ASK ALL MARKETS. SR

Have you purchased an Indigenous Australian art product in the past 2 years?

Indigenous art products include art/designs licensed on standard souvenir items (e.g. key-rings and postcards), fabrics, home-wares and clothing/fashion; to traditional products such as Boomerangs and original artwork/paintings.

	CODE
Yes	1
No	2
Unsure	99

----- Page break -----

Q2.7 ASK Q2.6 CODE 1. MR. Randomise list. Anchor code 98

What was the most recent Indigenous Australian art product you purchased?

	CODE
Standard tourism souvenir (e.g. key rings)	1
Traditional Indigenous Australia souvenir (e.g. Boomerang)	2
Artwork – up to \$250	3
Fine arts – over \$250	4
Textiles (e.g. tea towels, tablecloths etc)	5
Clothing/Fashion	6
Home-wares (e.g. cushion covers)	7
Body & fragrances (e.g. hand cream, soaps etc)	8
Stationery, cards and printed products (e.g. books)	9
Traditional cultural artefacts (e.g. carvings, baskets etc)	10
Other (please specify)	98

Q2.8 ASK Q2.6 CODE 1. SR. Anchor code 99

How much did you spend on your most recent purchase?

	CODE
\$1 to \$10	1
\$11 to \$30	2

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\$31 to \$60	3
\$61 to \$100	4
More than \$100	5
Don't know. Unsure	99

Q2.9 ASK Q2.6 CODE 1. SR. Randomise list. Anchor code 98 & 99

Who did you purchase it for?

	CODE
Myself	1
An immediate family member – Adult	2
An immediate family member – Child	3
A non-immediate family relative – Adult (e.g. grandparents)	4
A non-immediate family relative – Child (e.g. nephew)	5
Friend – Australia based	6
Friend – Internationally based	7
Work colleague – Australia	8
Work colleague – Internationally based	9
Other (please specify)	98
Don't know. Unsure	99

Q2.10 ASK Q2.6 CODE 1. SR. Randomise list. Anchor code 98 & 99

And where did you purchase it from?

	CODE
Indigenous art centre	1
Online marketplace (e.g. eBay / Etsy)	2
Online directly from the artist	3
Online directly from the art centre	4
Local market/stall	5
Art fair / event	6
Commercial art gallery	7
Public gallery / institution (usually within a museum or gallery shop)	8
Tourism information centres	9
Souvenir gift stores	10
Airport stores	11
General stores (e.g. Convenience stores)	12

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Other (please specify)	99
Don't know. Unsure	99

----- Page break -----

Section 3: Attitudes towards fake Indigenous art products

INTRO WITH Q3.1: The following questions are about how you feel towards Indigenous Australian art products.

Q3.1 ASK ALL MARKETS. SR per row. Randomise statements. Carousel format

How much do you agree or disagree with the following statements about Indigenous Australian art products:

		Disagree a lot	Disagree a little	Neutral	Agree a little	Agree a lot	Don't know. Unsure
1	Are an important part of Australian culture	1	2	3	4	5	99
2	Are well represented across Australia	1	2	3	4	5	99
3	Are for people like me	1	2	3	4	5	99
4	Require an understanding to appreciate them fully	1	2	3	4	5	99
5	I'm interested in the stories behind the Indigenous art product	1	2	3	4	5	99
6	I think fake Indigenous Australian art products are a real problem in the market	1	2	3	4	5	99
7	I'm confident when researching for Indigenous Australian art products	1	2	3	4	5	99
8	Its important that Indigenous art products are made by Aboriginal people	1	2	3	4	5	99

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9	It's important that artists are paid appropriately even if that means paying more	1	2	3	4	5	99
10	Indigenous art products should only be made in Australia	1	2	3	4	5	99
11	Indigenous Australian art is like nothing else in the world	1	2	3	4	5	99
12	I would rely exclusively on the retailer to ensure the Indigenous art product I'm purchasing is authentic	1	2	3	4	5	99
13	If it looks good, price doesn't really matter	1	2	3	4	5	99
14	I'm more of an impulse, price conscious buyer	1	2	3	4	5	99
15	I would prefer to buy an Indigenous art product based on how it looks, rather than where it is made	1	2	3	4	5	99
16	I am interested in purchasing products from popular brands that collaborate with Indigenous artists	1	2	3	4	5	99

----- Page break -----

Q3.2 ASK ALL MARKETS. NR 1-100%

Thinking about Indigenous Australia art products and where they are sold, what percentage do you feel are fakes?

Examples of where Indigenous art products may be sold include Indigenous art centres, online marketplaces, the online artist directly, at a market/stall, event, art gallery, tourism centres or souvenir stores.

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----- Page break -----

Q3.3 ASK ALL MARKETS. OE

According to the Arts Law Centre of Australia "around 80% of 'aboriginal art' products marketed to tourists are thought to be fakes, made either by either non-Indigenous Australians or imported".

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Thinking about this statement, how does this make you feel:

Q3.4 ASK Q2.6 CODE 1, SR

Now that you have heard about the amount of fake Indigenous Australian art products in the market, thinking about the most recent product you purchased, how confident are you that it was authentic?

	CODE
Not at all confident	1
Not very confident	2
Neither	3
Fairly confident	4
Very confident	5
Don't know. Unsure	99

----- Page break -----

Section 4: Provenance methods and price increases to drive ethically sourced Indigenous art products in the market

INTRO WITH Q4.1: Thinking now about ways in which government, industry groups and businesses could ensure the authenticity and ethical provenance when consumers are purchasing Indigenous art products – from what information is provided, to how that information is made available.

Q4.1 ASK ALL MARKETS. SR per row. Rotate statements. Carousel format

If you were shopping for an Indigenous Australian art style product for up to \$30, how interested would you be in accessing the following information to ensure its authenticity and/or its ethical provenance.

	Not at all interested	Not very interested	Quite interested	Very interested	Extremely interested	Don't know. Unsure
The product's originality / proof of authenticity / provenance	1	2	3	4	5	99
The product's quality	1	2	3	4	5	99
A breakdown of who the money is going too	1	2	3	4	5	99
The personal history of the artist / their story (e.g. the community)	1	2	3	4	5	99

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The history of the product (e.g. boomerang)	1	2	3	4	5	99
The meaning of the visual design (e.g. the painting story/history)	1	2	3	4	5	99
Supply chain tracing that supports prior informed consent frameworks (e.g. confirmation that the retailer/dealer is a member of the Indigenous Art Code – which promotes fair and ethical trade in works of art by Indigenous Australia artists)	1	2	3	4	5	99
Additional products from the artist to view/purchase	1	2	3	4	5	99

----- Page break -----

Q4.2 ASK ALL MARKETS. SR per row. Rotate statements. Carousel format

And if you were shopping for an Indigenous Australian art style product for between \$30 to \$100, how interested would you be in accessing the following information to ensure its authenticity and/or its ethical provenance:

	Not at all interested	Not very interested	Quite interested	Very interested	Extremely interested	Don't know. Unsure
The product's originality / proof of authenticity / provenance	1	2	3	4	5	99
The product's quality	1	2	3	4	5	99
A breakdown of who the money is going too	1	2	3	4	5	99
The personal history of the artist / their story (e.g. the community)	1	2	3	4	5	99

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The history of the product (e.g. boomerang)	1	2	3	4	5	99
The meaning of the visual design (e.g. the painting story/history)	1	2	3	4	5	99
Supply chain tracing that supports prior informed consent frameworks (e.g. confirmation that the retailer/dealer is a member of the Indigenous Art Code – which promotes fair and ethical trade in works of art by Indigenous Australia artists)	1	2	3	4	5	99
Additional products from the artist to view/purchase	1	2	3	4	5	99

----- Page break -----

Q4.3 ASK ALL MARKETS. SR per row. Rotate statements. Grid format

Which of the following methods do you feel would be **most useful to you** in delivering the authenticity and/or ethical provenance information when you are purchasing an Indigenous Australian art style product:

	QR barcode on the product / packaging	Product / packaging seals	Certificate / logo on the product / packaging	Classification against a standard rating system	Don't know. Unsure
The product's originality / proof of authenticity / provenance	1	2	3	4	99
The product's quality	1	2	3	4	99
A breakdown of who the money is going too	1	2	3	4	99
The personal history of the artist / their story (e.g. the community)	1	2	3	4	99

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The history of the product (e.g. boomerang)	1	2	3	4	99
The meaning of the visual design (e.g. the painting story/history)	1	2	3	4	99
Supply chain tracing that supports prior informed consent frameworks (e.g. confirmation that the retailer/dealer is a member of the Indigenous Art Code – which promotes fair and ethical trade in works of art by Indigenous Australia artists)	1	2	3	4	99
Additional products from the artist to view/purchase	1	2	3	4	99

----- Page break -----

Q4.4 ASK ALL MARKETS. SR per row. Grid format

Thinking now about the costs associated with providing consumers with a certification of authenticity and / or ensuring ethical provenance for Indigenous art style products.

How much extra, if any, would you be willing to pay at the following price points when you are next purchasing an Indigenous art style product as an **impulse purchase**, or for a **child**?

	Nothing extra	Up to 5% extra	Up to 10% extra	Up to 15% extra	Up to 20% extra	More than 20% extra	Don't know. Unsure
\$0 to \$10	1	2	3	4	5	6	99
\$11 to \$30	1	2	3	4	5	6	99
\$31 to \$80	1	2	3	4	5	6	99
\$81 to \$100	1	2	3	4	5	6	99

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Q4.5 ASK ALL MARKETS. SR per row. Grid format

And how much extra, if any, would you be willing to pay at the following price points when you are next purchasing an Indigenous art style product that is planned purchase for yourself, or as a gift for someone else?

	Nothing extra	Up to 5% extra	Up to 10% extra	Up to 15% extra	Up to 20% extra	More than 20% extra	Don't know. Unsure
\$0 to \$10	1	2	3	4	5	6	99
\$11 to \$30	1	2	3	4	5	6	99
\$31 to \$60	1	2	3	4	5	6	99
\$61 to \$100	1	2	3	4	5	6	99

----- Page break -----

Section 5: Profiling respondents

INTRO WITH Q5.1: Finally, a few questions about you...

Q5.1 ASK S2 CODE 1 (AU MARKET). SR

Do you identify as Aboriginal and/or Torres Strait Islander?

	CODE
Yes, Aboriginal	1
Yes, Torres Strait Islander	2
Yes, Aboriginal AND Torres Strait Islander	3
No, neither Aboriginal or Torres Strait Islander	4
Don't wish to say	5

Q5.2 ASK ALL MARKETS. MR

Do you speak a language other than English at home?

	CODE
No, English only	1
Yes, Italian	2
Yes, Greek	3
Yes, Cantonese	4
Yes, Mandarin	5
Yes, Arabic	6

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Yes, Hindi	8
Yes, an Indigenous language	9

Q5.3 ASK ALL MARKETS. SR

And in which of the following broad groups does your total (pre-tax) household annual income fall?

Show S2 CODE 1 & 2 (AU & USA MARKETS).	CODE
Under \$20,000	1
\$20,000 – \$49,999	2
\$50,000 – \$79,999	3
\$80,000 – \$99,999	4
\$100,000 – \$149,999	5
\$150,000 - \$249,999	6
\$250,000 or more	7
Prefer not to say	99

Show S2 CODE 3 (UK MARKET).	CODE
Under £15,000	1
£15,000 to £29,999	2
£30,000 to £49,999	3
£50,000 to £74,999	4
£75,000 to £99,999	5
£100,000 to £199,999	6
£200,000 or more	7
Prefer not to say	99

Show S2 CODE 4 (CHINA MARKET).	CODE
Under 15,000 CNY	1
15,000 CNY to 44,999 CNY	2
45,000 CNY to 64,999 CNY	3
65,000 CNY to 99,999 CNY	4
100,000 CNY to 149,999 CNY	5
150,000 CNY to 249,999 CNY	6
250,000 CNY or more	7
Prefer not to say	99

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End of survey messaging & respondent re-direct

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Appendix 2

Qualitative research overview: Discussion guides for retailer interviews and consumer focus groups

Retailer interviews – Discussion guide (1/3)

The following are **question areas** that will be covered in the discussion. The question areas are designed to be open-ended and exploratory in nature; note, questions may not be asked precisely in this manner or order during the discussion. The moderator will adapt the questions to the natural discussion flow of the participant(s) and to their language and verbal style.

Moderator Introduction		5 minutes
	<ul style="list-style-type: none"> Set the context - Thanks for attending the session today. My name is Bart and I work for KPMG in their customer intelligence department. Today we are going to be undertaking research into Indigenous art / souvenirs / products. 	
	INTRODUCTIONS – Tell me your name, business, position and tenure	
Your customers		10 minutes
Objective	<p>Can you tell me about your customer? Who comes into your shop and who buys products and typically what do they buy? What are they typically looking for? What are some of your biggest selling items? How are your customers typically shopping in your store?</p> <p>How much interest do your customers have in Indigenous Art products? Do people ask about these types of products? If so, what do they generally ask?</p> <p>In your view, how much awareness & interest do your customers have in the makers/designers/ artists of Aboriginal style products and Indigenous products? Explain</p> <p>How would you define authenticity when it comes to Indigenous art and crafts/style products?</p>	

Retailer interviews - Discussion guide (2/3)

Your suppliers		10 minutes
Objective	<p>Can you tell me about your suppliers? Where do you source your products from? What kind of relationship do you have with your suppliers? How would you describe your suppliers?</p> <p>How much support do your suppliers give you in terms of merchandising/labelling? How much support do they give you in terms of product information? How do you know what you're buying is authentic?</p> <p>In your view, how important are the following to you and your suppliers when sourcing and buying products? And in particular for Aboriginal style products and Indigenous products? (How important are each below? Explain)</p> <ul style="list-style-type: none"> • Authenticity • Quality • Price 	
Introduction to ethical provenance		15 minutes
Objective	<p>Do shoppers ever ask about provenance (the origin of a product or who made it)? How much do customers care about the authenticity of an Indigenous product? How much information do you think they would want and what affect do you think that might have on sales?</p> <p>Do you think this is an important issue? (Ensuring ethical provenance of Indigenous objects). Explain</p> <p>How much of a difference would it make to your store/sales if the Indigenous objects you sold carried a stamp of authenticity? Explain. Would it be different for selling something in store opposed to online? Explain.</p> <p>Have you seen anything like this before? Where/how did it work? Have you ever asked suppliers about the authenticity of Indigenous objects that you sell?</p> <p>How much do you know about ethical provenance of Indigenous Art & Crafts?</p> <p>What are some product attributes that are important to you and your suppliers when sourcing/buying products? (Specifically, Indigenous objects). E.g. portability, size, availability, uniqueness).</p>	

Retailer interviews - Discussion guide (3/3)

Provenance ideas		15 minutes
Objective	<p>Okay finally I want to get your impression on a few different ways that might help ensure ethical provenance of Indigenous objects...</p> <ul style="list-style-type: none"> • A trademark/logo or stamp that certified the origin and authenticity of a product and/or is maker/designer. • Technology platform like blockchain/QR codes that detail the supply chain and story of the product • Merchandising the provenance story - artist, design cultural meaning etc • System – voluntary vs. legislative <p>For each option discuss the following:</p> <p>How interested would customers be in something like this? How interested are you? Would you be willing to pay more? Would your customers? If so, how much? Who would be best placed to manage this process? How might it be managed for your business? What type of products should this be applied to?</p> <p>Finally, how do you think this could best be managed? Do you think you should/could play a role in a system like this? (In summary - what they would want)</p>	
Close & summary		5 minutes
	Thank you and goodbye	

Consumer focus groups – Discussion guide (1/3)

The following are **question areas** that will be covered in the discussion. The question areas are designed to be open-ended and exploratory in nature; note, questions may not be asked precisely in this manner or order during the discussion. The moderator will adapt the questions to the natural discussion flow of the participant(s) and to their language and verbal style.

Moderator Introduction		5 minutes
	<ul style="list-style-type: none"> Set the context - Thanks for attending the session today. My name is Bart and I work for KPMG in their customer intelligence department. Today we are going to be undertaking research into Indigenous art / souvenirs / products. 	
	INTRODUCTIONS – Tell me your name, whereabouts you live, what you do for work etc.	
Path to purchase P2P (for Indigenous ‘tourist’ objects)		40 minutes
Objective	<p>Okay before attending this focus group the recruitment company would have asked you if you have bought an aboriginal style product (e.g. boomerang, clapping sticks etc), souvenir or product that carries an aboriginal design or art on it in the past 6 months up to the value of \$125.</p> <p>To start I want to understand how to came to purchase this product. So quickly let’s go around the room and tell me what you bought, when and where you bought it from.</p> <p>Ask each participant about their purchased product and draw their individual path to purchase (P2P).</p> <p>Awareness</p> <ul style="list-style-type: none"> Why did you purchase this particular product? How did you find out about? How much did the fact its Indigenous influence your purchase? Was it for you or did you buy it for someone else? If so, who and why? <p>Consideration</p> <ul style="list-style-type: none"> If you can remember, were you choosing between this product and others? Were these from the same store/website or different ones? Did you do much research about this product? Did you look into the provenance of the product at all? 	

Retailer interviews - Discussion guide (2/3)

Path to purchase P2P (for Indigenous 'tourist' objects)		40 minutes
Objective	<p>Purchase</p> <ul style="list-style-type: none"> • What can you tell me about this product? (Where was it made, by whom etc.) • Can you tell me how much the product was? • What can you tell me about the authenticity of the product? Was this something you considered? • Can you describe the store / website you purchased the product from? <p>Post-purchase</p> <ul style="list-style-type: none"> • How would you rate the quality of the product? • How do you feel about your purchase now? • Would you make this purchase again? Explain • Have you shared this experience with others? (Told them about the product)? <p>In your view, how important are the following to you when buying products?</p> <ul style="list-style-type: none"> • Authenticity • Quality • Price <p>And in particular for Aboriginal style products and Indigenous products? (How important are each of the above? Explain</p>	
Knowledge & Awareness (of fake Indigenous 'tourist' objects)		10 minutes
Objective	<p>Okay now I want to talk a bit about fake Indigenous tourist style objects. According to the "<i>Arts Law Centre of Australia around 80% of 'aboriginal art' products marketed to tourists are thought to be fakes, made either by either non-Indigenous Australians or imported.</i>"</p> <ul style="list-style-type: none"> • How does that statement make you feel? • Were you aware of this before this session? • Do you think the products we just discussed are fake or authentic? What makes you think that? Explain • Why do you think there are so many fakes? • Who do you think would sell these fake products? • Who wouldn't sell these fake products? Explain <p>Do you think this is an important issue? (Ensuring ethical provenance of Indigenous objects). Explain</p>	

Retailer interviews - Discussion guide (3/3)

Introduction to ethical provenance		10 minutes
Objective:	<p>Okay so we know now there's a lot of fake Indigenous tourist style products out there so there must also be authentic ones.</p> <ul style="list-style-type: none"> • How would you define authenticity when it comes to Indigenous art and crafts/style products? • What would be a fair definition of an authentic product? <p>Prompt for issues around the designer / artists / licences / distribution / suppliers / labelling etc.</p> <ul style="list-style-type: none"> • Have you ever asked about provenance (the origin of a product or who made it)? • How much do you care about the authenticity of an Indigenous product? • How and where would you like to find out whether or not you're buying a fake or something authentic? 	
Provenance ideas		15 minutes
Objective	<p>Okay finally I want to get your impression on a few different ways that might help ensure ethical provenance of Indigenous objects... (show illustrative examples on screen).</p> <ol style="list-style-type: none"> 1. A trademark/logo or stamp that certified the origin and authenticity of a product and/or is maker/designer. 2. Technology platform like blockchain/QR codes that detail the supply chain and story of the product 3. Merchandising the provenance story - artist, design cultural meaning etc 4. System – voluntary vs. legislative <p>For each option discuss the following:</p> <ul style="list-style-type: none"> • How interested would you be in something like this? • How interested would others be? • Would having one of these or more affect your purchase we spoke about earlier? How so? • How much of a difference would it make to you if the Indigenous objects you bought carried a stamp of authenticity? Explain. • Would it be different for selling something in store opposed to online? Explain. • Have you seen anything like this before? Where/how did it work? • Would you be willing to pay more? If so, how much? • What type of products should this be applied to? • Do you think, as the consumer you should/could play a role in a system like this? Explain. • How much information would you like? How much would be too much? And what affect do you think that might have on sales? 	
Close & summary		5 minutes
	Thank you and goodbye	





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