

## Is 'Made In' still important nowadays ?

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In February 2010, SémioConsult launched a global survey among professionals of all sectors of activity on their vision of the 'Made In' concept. The question was on purpose very open, leaving space for personal developments and thoughts. Two years later, we present the first results of the study, based on the answers of a 1063-large sample.

Far from being a closed question, *Is Made In still important nowadays?* had been designed to stimulate a maximum level of thoughts and personal feelings expression. It did not precise for who 'Made In' would still be important or not, and thus let interviewees choose among various possible actors: firms, consumers, governments, the society in general (social welfare), etc... After transcribing the answers, we were left with more than 80 pages of verbatims (Times New Roman, font 10, single-spaced), and thus with rich material to analyse. **82% of the people who were interviewed answered positively or rather positively to the question, but sometimes for quite opposite reasons !**

With the aim of analyzing it as a whole, the corpus of verbatims was submitted to semantic analysis, relying upon the Wmatrix<sup>1</sup> software. Two documents have been produced: one presenting the most used words in the verbatims (the size of which being proportional to their relative frequency), the other focusing on the lexical fields the most pregnant in the data

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<sup>1</sup> <http://ucrel.lancs.ac.uk/wmatrix/> On both figures, the closer the words, the most often they come associated in professionals' discourses.



**Quality**, as perceived by the consumer and not as stated by the manufacturer, is then quoted. The ‘Made In’ mention on a product is seen as a way of assessing ex-ante its quality. This relationship between quality and Made In is particularly true for shoes.

The product is quoted in third position. ‘Made In’ characterizes its **production**, meaning its very physical manufacturing, and not its design or conception. Thus, ‘Made In USA’ brings real added value to many products, as the country bears strong connections with the industrial tradition of manufacturing goods.

The importance of Made In will thus be fluctuating depending on the type of product and then of the brands behind the product. Some brands are perceived as more or less legitimate to manufacture in such or such country, depending on how much authentic they appear. This legitimacy is assessed by consumers, and related to the brand-image and corporate-image that they hold.

Luxury is the most quoted sector of activity. In this sector, Made In appears not only as an important issue, but as a vital one. Lastly, Made In refers to the COO (Country Of Origin) concept, directly related to craftsmanship and know-how. Italy tops the list of key countries for Made In, far before France and Europe in general.

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✓ Main takeaways :

- What is more important is 'Made In China' vs. 'Not Made In China', more than Made In on its own.
- Labelling Made In enables consumers to assess before purchase the quality of a product.
- Some products are more legitimate than others to be manufactured in given countries.
- Brands should remain authentic. Some are more legitimate than others to change of 'Made In'. Such authenticity-level is defined by consumers, and related to the brand equity.
- Made In is a vital issue in Luxury.
- Made In is synonymous with craftsmanship and know-how. It is a competitive advantage for Italy and to a slightly lesser extent for France.

## Professionals' Made In network of concepts

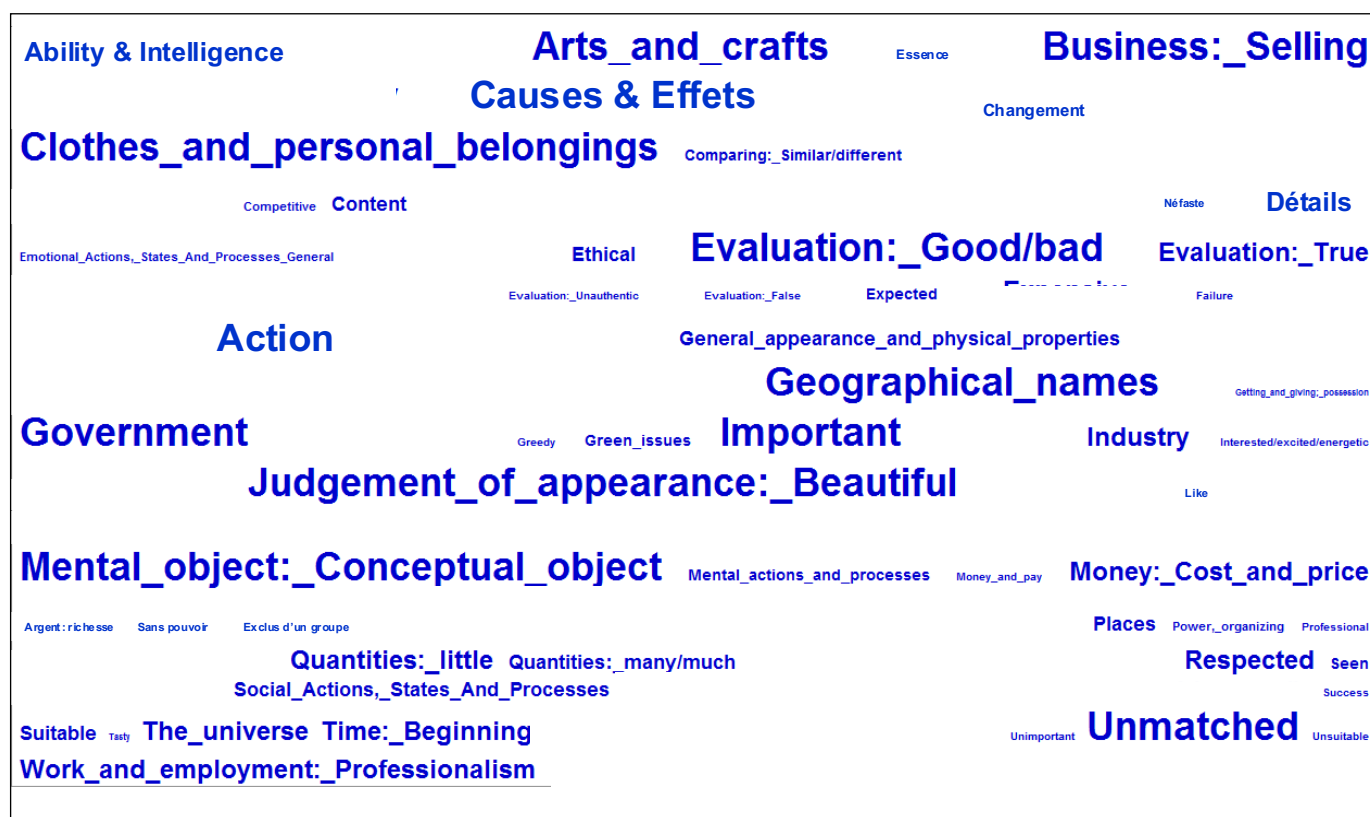


Fig.2 : The Made In Lexical Fields (1063 answers)

The most used lexical field is related to evaluation. The interviewees have chosen to take a positive or negative standpoint on the Made In concept, even before answering to its importance matter.

We then face the lexical field of clothes and personal belongings. This sector of activity has been quoted quite a number of times, especially when assessing the cause and effects of a 'Made In' change for its actors.

Not surprisingly, we find then the importance that professionals grant to the 'Made In' concept. It regularly appears in relation with green and industrial issues.

In fourth position come the governments, geographical names, or selling – in this case associated with a product identity, as offered to final consumers. Similarly, one can find the lexical fields of art and craftsmanship; related to notions of ability and know-how. Lastly, aesthetics is important, as a criterion to evaluate Made In products.

✓ Main takeaways :

- More than questioning the importance or non-importance of 'Made In', one should debate over its beneficial and damaging aspects.
- Made In is key for the business sector of clothes and personal belongings. It's part of its raison d'être.
- Aesthetics and CSR are associated with the 'Made In' concept.
- Governments have a role to play in the debate over 'Made In', and professionals hold expectations toward them in this regard.

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To conclude, professionals' expectations are high regarding the Made In concept, which according to them should be globally considered and be consistent with brand positioning and offered products. If 82% of them judge it as fundamentally useful, it's only after an extensive review of its advantages and drawbacks that each brand should go for such or such option, still remaining consistent with its brand DNA. Consumers won't be insensitive to such moves, be it consciously or not.

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