MLA GLOBAL

CONSUMER TRACKER TAIWAN

2020

MEAT & LIVESTOCK AUSTRALIA

Agenda…

1

Intros, Background & Methodology

An overview of the sample structure, geographic spread, survey inclusions and approach

2

Protein Landscape & Beef Deep Dive

A look at the awareness, claimed usage and associations with the different main proteins and a deep dive into perceptions of specific beef types

3

Beef Country of origin

Digging down the country of origin level for Beef to understand their 'brand' associations, any strengths and weaknesses

4

Topic 1: Channel, On pack Claims

Covering off key channels of beef purchase – and the most impactful on pack claims Taiwan consumers look out for

5

Topic 2: COVID 19 + True Aussie

Covering off level of concern, key concerns and some behaviour change as a result of COVID19 and an evaluation of the True Aussie logo

Before we kick off today's session…

1. What are the key focus areas for AU Beef & Lamb in USA at the moment, and the key activities?

2. Any key outcomes that you are seeking from the session today?

INTRODUCING MLA'S GLOBAL CONSUMER TRACKER
Diverse markets, with some universal truths.

7,300 interviews

*Annual quantitative consumer survey conducted via a 20-minute online interview**

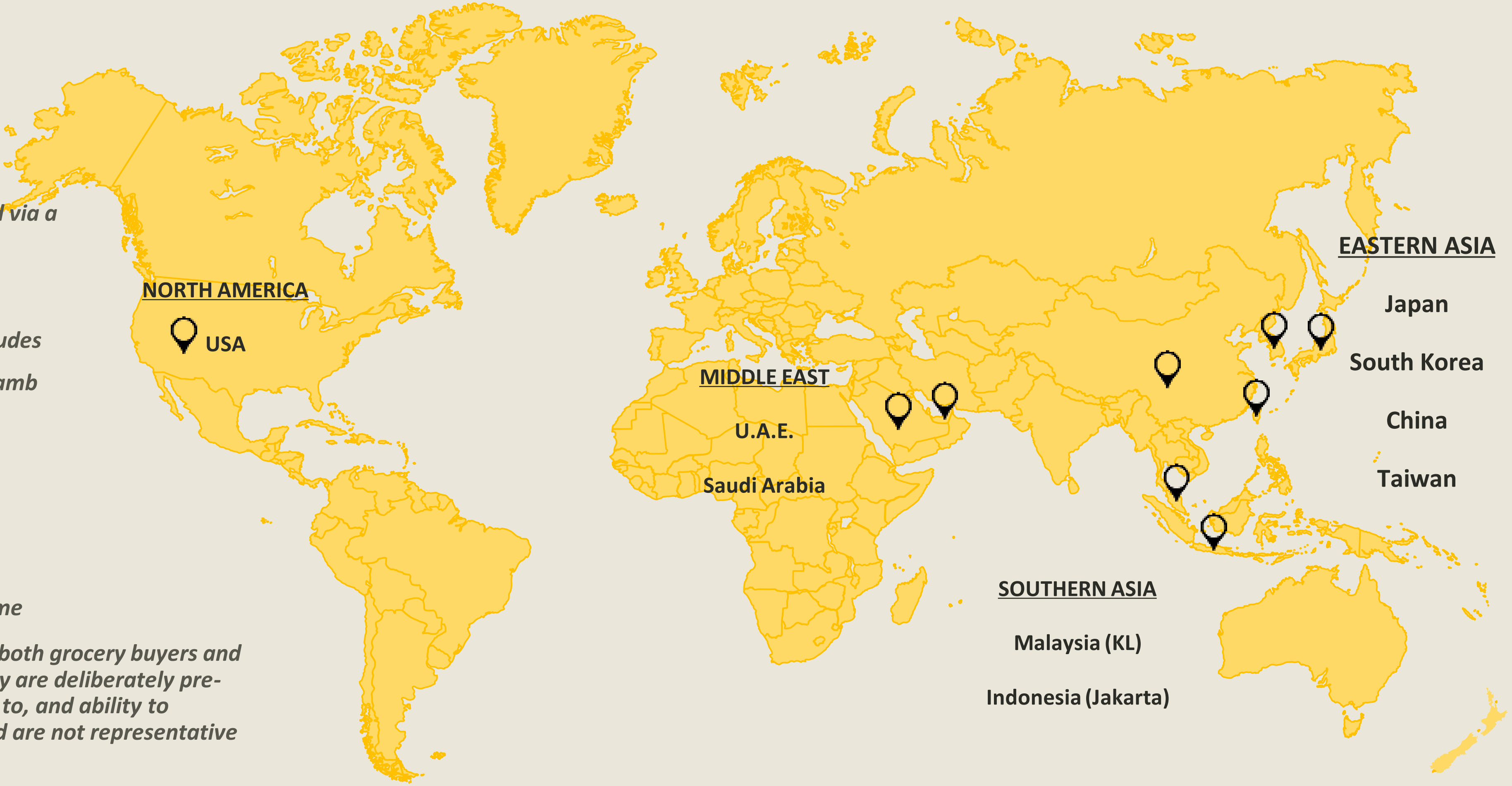
Surveying consumers about

- *their meat consumption habits and attitudes*
- *their perception of Australian beef and lamb versus competitors*
- *Drivers of purchase*
- *Path to purchase in retail*

10 markets in 2019

Historical data allows tracking of trends over time

- *Respondents selected are aged 18-64, and both grocery buyers and meal planners for affluent households. They are deliberately pre-selected based on their potential openness to, and ability to purchase, Australian beef and/or lamb, and are not representative of the overall market in each country.*



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Fieldwork: JULY 2020

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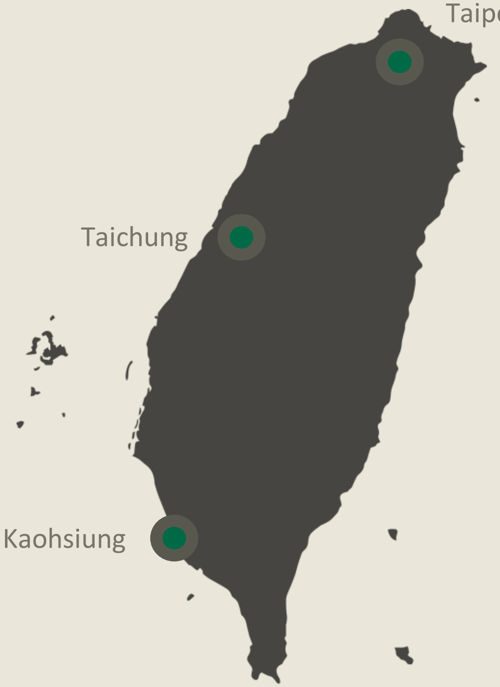
DEMOGRAPHICS

DEMOGRAPHICS



		COUNTRY INCIDENCE	SAMPLE STRUCTURE
Gender	Male	50%	32%
	Female	50%	68%
Age	18-34	32%	32%
	35-49	35%	44%
	50-64	33%	25%
Cities	Taipei	30%	59%
	Taichung	6%	19%
	Kaohsiung	6%	21%
Consumption	Buy Fresh Meat at Least Occasionally	-	100%
MGBs	Main Grocery Buyers	-	88%
Children	Households with Children	-	39%
Income	Below $720,000	24%	26%
	$720,000 – $1,200,000	29%	41%
	$1,200,000+	49%	33%

Sample is made up of 500 consumers

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S1: Gender
S2A: Age Group
S8: Where do you live?
S6: How often do you generally buy any fresh meat for meals for yourself or for people in your household?
S4:How often do you do the household grocery shopping?
C3:Do you have any dependent children 17 years or under living with you?
S7:What is your total annual household income before tax?
C9: Which one, if any of these religions do you best relate to? Base: 20' (n=501)

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PROTEIN LANDSCAPE

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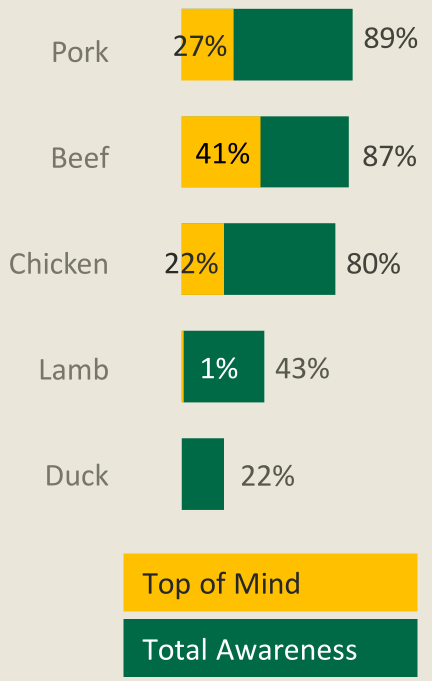
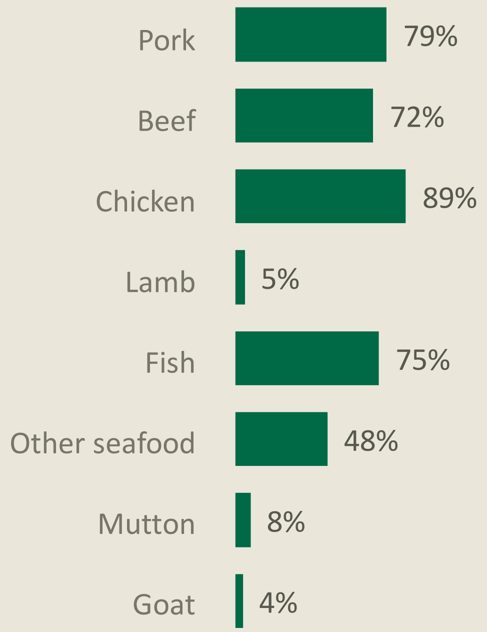
Beef and Pork are the most salient proteins for Taiwan consumers – followed by chicken (with Beef coming to mind most readily). Competitor proteins Pork, Chicken, Fish see higher serves in P7D and purchases in past month.

PROTEINS KEY METRICS:

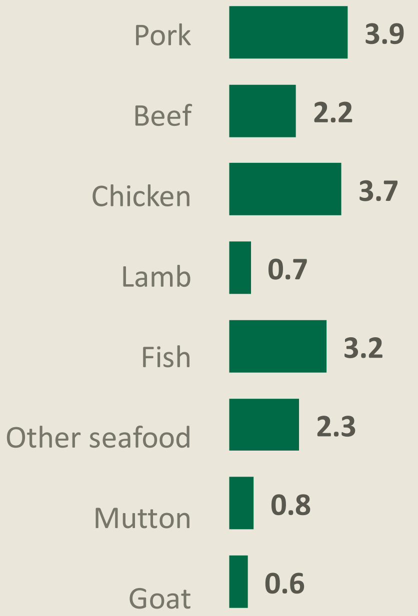
SPONTANEOUS AWARENESS



BOUGHT IN LAST MONTH



AVERAGE SERVES LAST 7 DAYS



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CH1 Spontaneous Awareness – When thinking about meat, which types come to mind?
CH10 How many meals that included the following meats have been prepared and eaten in your home in the last 7 days?
CH2 Bought in the last month – Which types of meat have you bought in the last month to prepare for a meal at home?
Base: 20'(n=501)

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The factors linked to protein volume remain in Taiwan include family's favourite, ease (preparation and purchase), willingness to pay more and animal is well cared for.

HIGHEST CORRELATION WITH VOLUME OF PURCHASE - GLOBAL

			2018	2017		2016, 2018				2017	2019	2019		2018		2018
Japan	Korea	China	Hong Kong	Singapore	Malaysia	Thailand	Indonesia	Saudi	UAE	Jordan	Qatar	Kuwait	USA	Mexico	Taiwan	UK
Is my/my family's favourite meat	Is my/my family's favourite meat	Is my/my family's favourite meat	Is my/my family's favourite meat	Is my/my family's favourite meat	Fresh	Is easy and convenient to prepare	Is my/my family's favourite meat	Is my/my family's favourite meat	Is my/my family's favourite meat	Is my/my family's favourite meat	Is my/my family's favourite meat	Is my/my family's favourite meat	Is my/my family's favourite meat	Is my/my family's favourite meat	Is my/my family's favourite meat	Is my/my family's favourite meat
Consistent quality standards	Is easy and convenient to prepare	Is easy and convenient to prepare	The industry is environmentally sustainable	Is easy and convenient to prepare	Is my/my family's favourite meat	Is my/my family's favourite meat	Is easy and convenient to prepare	Tastes delicious	Tastes delicious	Tastes delicious	Fresh	Is easy and convenient to prepare	Is easy and convenient to prepare	Can be used in many different meals	Is easy and convenient to prepare	The meat is usually tender
Is easy and convenient to purchase	I am willing to pay a bit more for this meat	Consistent quality standards	The meat is usually tender	Consistent quality standards	Tastes delicious	Consistent quality standards	Is easy and convenient to purchase	Can be used in many different meals	Is easy and convenient to prepare	Fresh	High nutritional value	Is easy and convenient to purchase	Is easy and convenient to purchase	Is easy and convenient to prepare	Is easy and convenient to purchase	Is an essential part of a healthy diet for growing children
Is easy and convenient to prepare	Is easy and convenient to purchase	Can be used in many different meals	Consistent quality standards	Is an essential part of a healthy diet for growing children	Is easy and convenient to prepare	The meat is usually tender	Can be used in many different meals	Is an essential part of a healthy diet for growing children	Is easy and convenient to purchase	Is easy and convenient to purchase	The industry is environmentally sustainable	Tastes delicious	I am willing to pay a bit more for this meat	Is an essential part of a healthy diet for growing children	I am willing to pay a bit more for this meat	I am willing to pay a bit more for this meat
Is an essential part of a healthy diet for growing children	Is the most superior meat	Is easy and convenient to purchase	Guaranteed safe to eat	Tastes delicious	I am willing to pay a bit more for this meat	Fresh	Consistent quality standards	Is easy and convenient to prepare	Guaranteed safe to eat	Is easy and convenient to prepare	Is the most superior meat	Is an essential part of a healthy diet for growing children	Tastes delicious	The industry is environmentally sustainable	The animal is well-cared for	Tastes delicious

Family’s favourite also links to a willingness to pay more along with perceived superiority, delicious taste, high nutritional value and tenderness (common themes across the globe)

HIGHEST CORRELATION WITH WILLINGNESS TO PAY MORE - GLOBAL

			2018	2017		2016, 2018				2017	2019	2019		2018		2018
Japan	Korea	China	Hong Kong	Singapore	Malaysia	Thailand	Indonesia	Saudi	UAE	Jordan	Qatar	Kuwait	USA	Mexico	Taiwan	UK
Consistent quality standards	Is my/my family’s favourite meat	Tastes delicious	Is the most superior meat	Is the most superior meat	Is the most superior meat	Is the most superior meat	Is the most superior meat	Is my/my family’s favourite meat	Is the most superior meat	Tastes delicious	Tastes delicious	Is the most superior meat	Is the most superior meat	Tastes delicious	Is my/my family’s favourite meat	Is my/my family’s favourite meat
Is my/my family’s favourite meat	Tastes delicious	High nutritional value	Is my/my family’s favourite meat	Is my/my family’s favourite meat	Consistent quality standards	Tastes delicious	Is my/my family’s favourite meat	Tastes delicious	Tastes delicious	Is my/my family’s favourite meat	The industry is environmentally sustainable	High nutritional value	Is my/my family’s favourite meat	The animal is well-cared for	Is the most superior meat	Is the most superior meat
The industry is environmentally sustainable	Is the most superior meat	Is the most superior meat	Guaranteed safe to eat	Tastes delicious	Tastes delicious	Consistent quality standards	Consistent quality standards	Fresh	Is my/my family’s favourite meat	Is the most superior meat	High nutritional value	Is my/my family’s favourite meat	Tastes delicious	Is the most superior meat	Tastes delicious	Tastes delicious
Fresh	High nutritional value	Consistent quality standards	High nutritional value	Consistent quality standards	Is my/my family’s favourite meat	High nutritional value	The animal is well-cared for	Is the most superior meat	Consistent quality standards	High nutritional value	Is the most superior meat	Tastes delicious	The meat is usually tender	High nutritional value	High nutritional value	The meat is usually tender
Guaranteed safe to eat	Is an essential part of a healthy diet for growing children	Is an essential part of a healthy diet for growing children	Tastes delicious	High nutritional value	The animal is well-cared for	Is my/my family’s favourite meat	High nutritional value	Is easy and convenient to purchase	Guaranteed safe to eat	Guaranteed safe to eat	The animal is well-cared for	Consistent quality standards	Consistent quality standards	Consistent quality standards	The meat is usually tender	The animal is well-cared for

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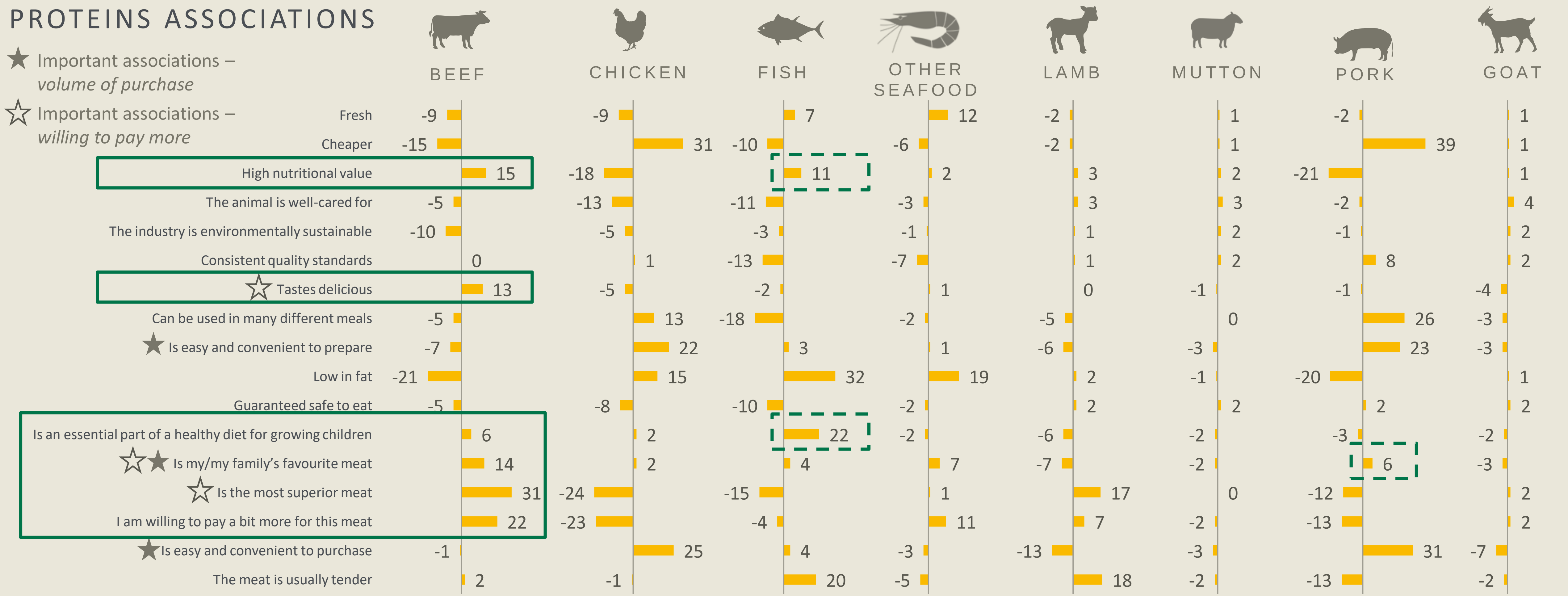
Beef is seen as the most superior meat, that consumers are willing to pay more for (vs others). It's a strong family favourite (a shared strength with Pork) that is delicious yet highly nutritious.



CH12. Which of the following things do you associate with each type of protein? Base: (501)

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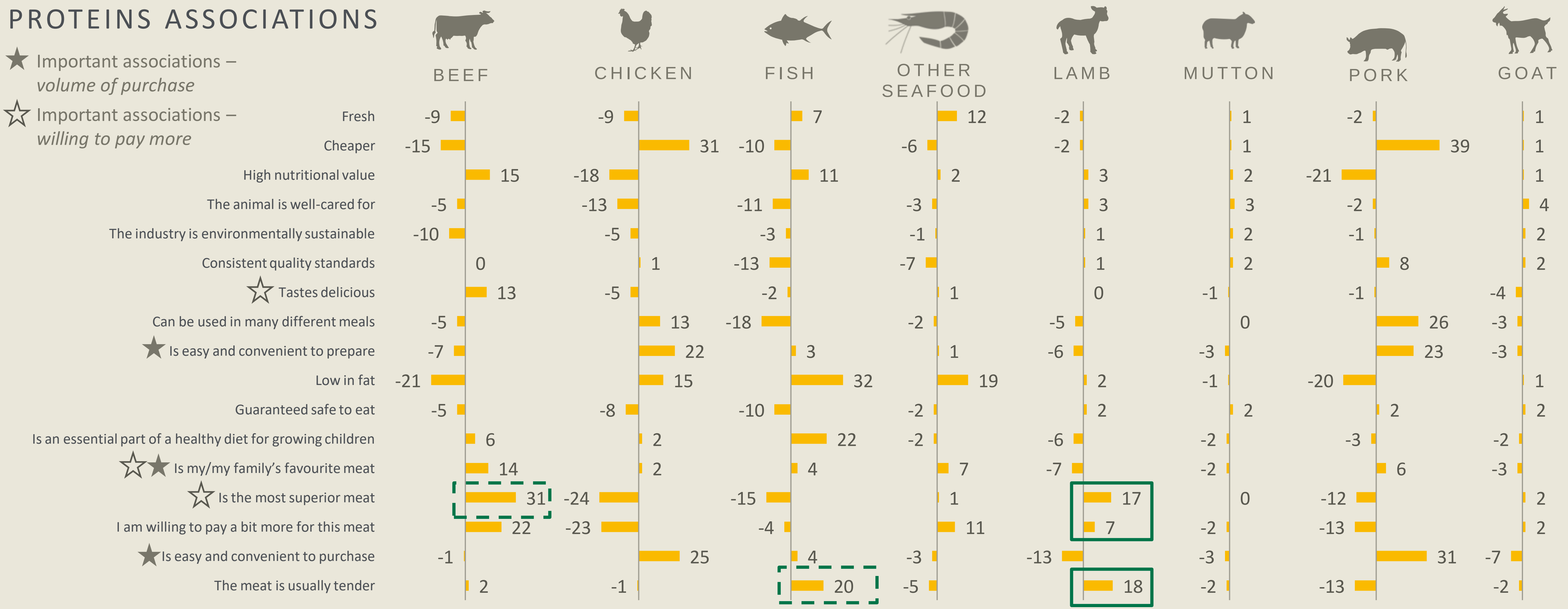
Lamb is less defined in consumers' minds but like Beef it also stands out for it's superiority, instead supported by tenderness. This drives premium perceptions and greater willingness to pay vs other proteins.



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CH12. Which of the following things do you associate with each type of protein? Base: (501)

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Chicken and Pork are cheap, easy to prepare and purchase, that can be used in a variety of meals. Chicken, fish and seafood also share low fat perceptions.

PROTEINS ASSOCIATIONS

★ Important associations – *volume of purchase*

☆ Important associations – *willing to pay more*

	BEEF	CHICKEN	FISH	OTHER SEAFOOD	LAMB	MUTTON	PORK	GOAT
Fresh	-9	-9	7	12	-2	1	-2	1
Cheaper	-15	31	-10	-6	-2	1	39	1
High nutritional value	15	-18	11	2	3	2	-21	1
The animal is well-cared for	-5	-13	-11	-3	3	3	-2	4
The industry is environmentally sustainable	-10	-5	-3	-1	1	2	-1	2
Consistent quality standards	0	1	-13	-7	1	2	8	2
☆ Tastes delicious	13	-5	-2	1	0	-1	-1	-4
Can be used in many different meals	-5	13	-18	-2	-5	0	26	-3
★ Is easy and convenient to prepare	-7	22	3	1	-6	-3	23	-3
Low in fat	-21	15	32	19	2	-1	-20	1
Guaranteed safe to eat	-5	-8	-10	-2	2	2	2	2
Is an essential part of a healthy diet for growing children	6	2	22	-2	-6	-2	-3	-2
☆★ Is my/my family's favourite meat	14	2	4	7	-7	-2	6	-3
☆ Is the most superior meat	31	-24	-15	1	17	0	-12	2
I am willing to pay a bit more for this meat	22	-23	-4	11	7	-2	-13	2
★ Is easy and convenient to purchase	-1	25	4	-3	-13	-3	31	-7
The meat is usually tender	2	-1	20	-5	18	-2	-13	-2

CH12. Which of the following things do you associate with each type of protein? Base: (501)

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BEEF DEEP DIVE - SO WHAT?

What do we see?

1

Proteins stable YOY

Protein awareness and consumption has bounced back vs. 2019 with beef remaining most salient and positions stable over the last 3 years

2

For proteins, it's all about ease

At the protein level, ease of purchase and preparation are both in the top 3 drivers of volume of protein choice for USA consumers.

3

Beef marrying superiority with convenience & ease

Beef perceptions reflect a marriage of superiority and versatility, with convenience of purchase and preparation, explaining it's strength in market.

Now what?

1. How can AU beef leverage this current consolidated position as the most salient protein in the market?

2. Consider the role of information and accessibility in partnerships and communications to reinforce the ease of preparing and finding our product.

3. Ensure that AU beef is leveraging these general perceptions and expectations of beef to maximise purchase and consumption

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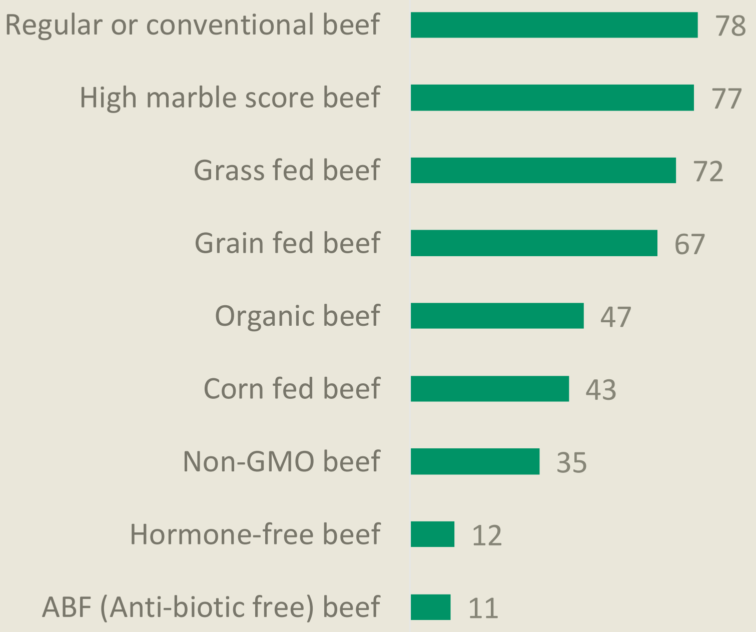
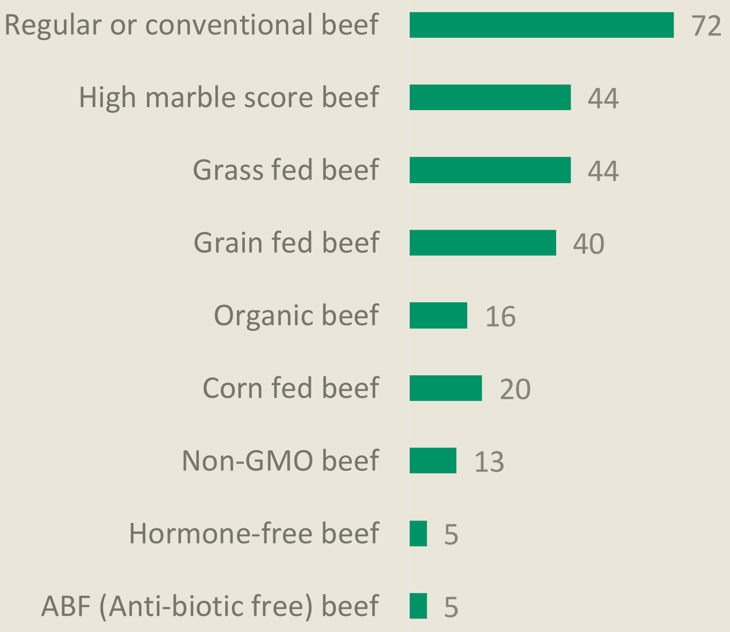
Regular/conventional beef sees the strongest awareness/purchase levels – followed by high marble score, grass fed and grain fed. Hormone-free and Anti-biotic free beef showing very little traction with low awareness or purchase in Taiwan.

AWARENESS OF TYPES OF BEEF (%)



BEEF BOUGHT IN THE PAST (%)



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QGF1. Which of the following types of beef are you aware of? Base : ‘20 (n=501)
QGF2.And which types of beef have you bought in the past? Base : ‘20 (n=501)
* High marble score beef was added to the scope in 2019

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Grass Fed beef is seen as most natural, better for animals/environment, grain fed has less clear profile. Regular beef is by a considerable degree, more flavourful than other beef types.

IMAGE PROFILES TYPES OF BEEF	GRASS FED BEEF	GRAIN FED BEEF	ORGANIC BEEF	HORMONE-FREE BEEF	NON-GMO BEEF	ABF (ANTI-BIOTIC FREE) BEEF	CORN FED BEEF	REGULAR BEEF	HIGH MARBLE SCORE BEEF
Better quality beef	-11	-2	-6	-8	-5	-6	-1	-6	53
More tender beef	-12	0	-12	-5	-8	-12	11	0	54
More flavorful beef	-4	4	-14	-7	-9	-8	5	45	0
Natural	25	6	10	1	0	3	-3	-5	-29
Better for the animals	17	4	5	13	5	10	2	-10	-25
Better for my health	-1	-7	14	19	14	17	-10	-10	-24
Less food safety risks	-4	-8	10	13	15	22	-12	-6	-18
Better for the environment	20	6	14	7	8	4	0	-6	-27
Minimally processed	-1	-4	5	1	4	-3	-3	12	-10
More visually appealing	-15	0	-8	-13	-3	-11	7	-1	61

GF5. Which of the following things do you associate with each type of beef below? Base: Grass fed (n=359), Grain fed (n=338), Organic (n=235), Hormone-free (n=60), ABF (n=55), Non-GMO (n=174), Cornfed (n=213), Regular or conventional (n=392), High marble (n=388)
Negative statement 'just a marketing gimmick' removed for image profile analysis
High marble score beef was added to the scope in 2019

There is little difference in the profiles of beef with specific claims with all seen as safe, better for animals, environment and health. Only Organic doing something a little difference with its lack of process. High Marble score beef has some very clear associations with quality, tenderness and visual appeal.

IMAGE PROFILES TYPES OF BEEF	GRASS FED BEEF	GRAIN FED BEEF	ORGANIC BEEF	HORMONE -FREE BEEF	NON-GMO BEEF	ABF (ANTI-BIOTIC FREE) BEEF	CORN FED BEEF	REGULAR BEEF	HIGH MARBLE SCORE BEEF
Better quality beef	-11	-2	-6	-8	-5	-6	-1	-6	53
More tender beef	-12	0	-12	-5	-8	-12	11	0	54
More flavorful beef	-4	4	-14	-7	-9	-8	5	45	0
Natural	25	6	10	1	0	3	-3	-5	-29
Better for the animals	17	4	5	13	5	10	2	-10	-25
Better for my health	-1	-7	14	19	14	17	-10	-10	-24
Less food safety risks	-4	-8	10	13	15	22	-12	-6	-18
Better for the environment	20	6	14	7	8	4	0	-6	-27
Minimally processed	-1	-4	5	1	4	-3	-3	12	-10
More visually appealing	-15	0	-8	-13	-3	-11	7	-1	61

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GF5. Which of the following things do you associate with each type of beef below? Base: Grass fed (n=359), Grain fed (n=338), Organic (n=235), Hormone-free (n=60), ABF (n=55), Non-GMO (n=174), Cornfed (n=213), Regular or conventional (n=392), High marble (n=388)
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High marble score beef was added to the scope in 2019

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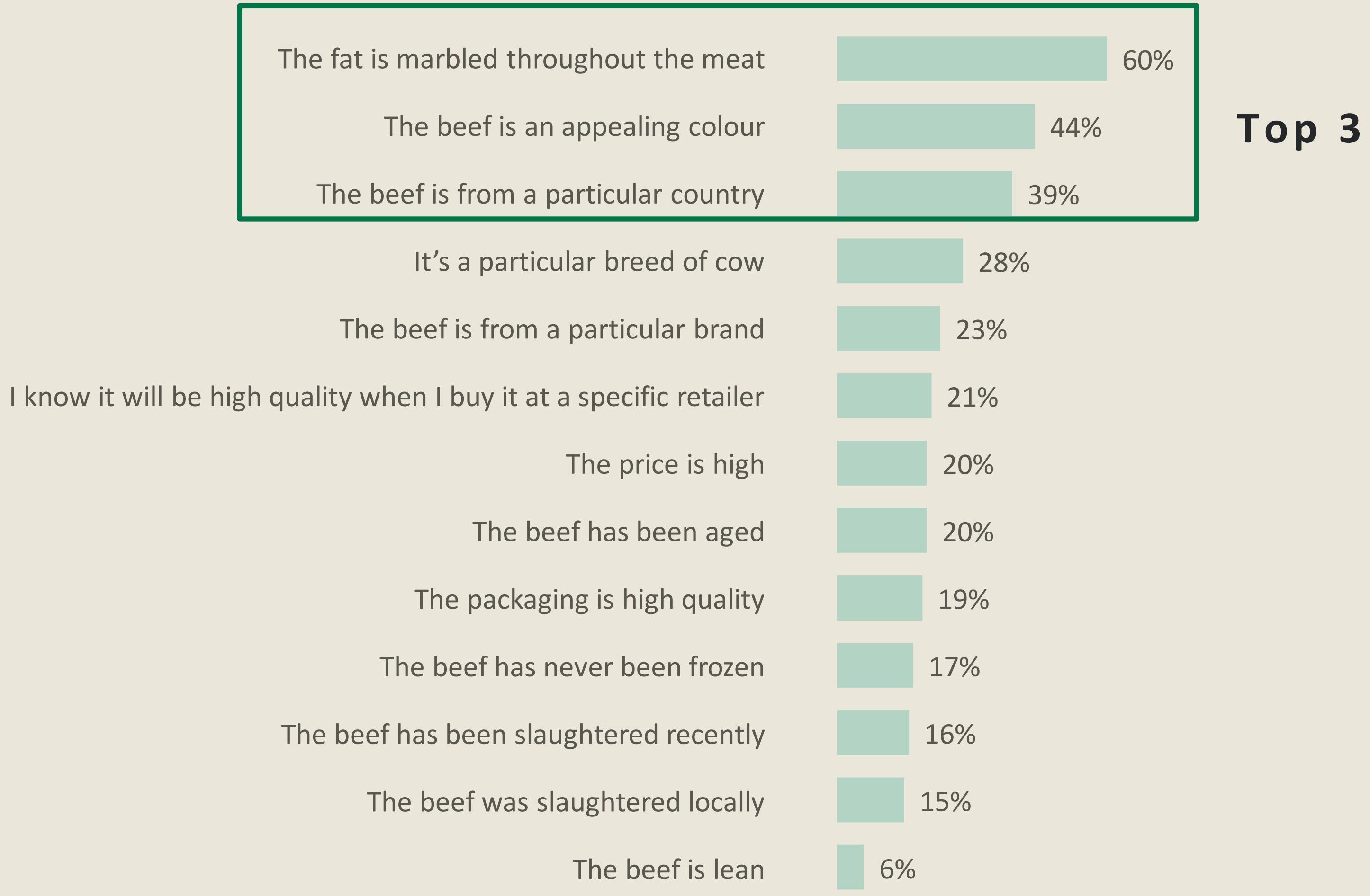
Taiwan consumers typically use fat marbling, colour and country of origin to help them identify beef is high quality.

PREMIUM BEEF – HOW CAN YOU TELL?



QPREM2. We'd now like you to think about occasions when you are buying the best quality kind of beef. How can you tell that the beef is high quality when you are purchasing it? Base (n=501)

BEEF DEEP DIVE - SO WHAT?

What do we see?

1

Grass fed = Natural, Regular = Flavour

Regular beef is considered the most flavourful by a considerable margin. Grass fed has strong associations with Natural and good for the animal/environment.

2

Marbled beef strong and with clear strengths and role

High awareness and consumption of marbled beef in Taiwan. Marbled beef has clear set of strengths that define what premium is

Now what?

Are we tapping into this idea of natural and better for the environment as a point of difference? At what cost to 'flavour' credentials?

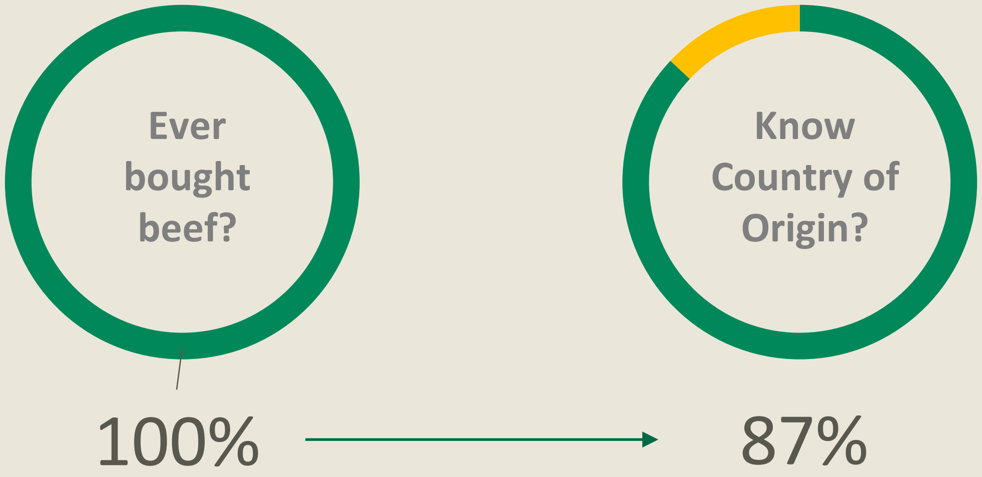
What opportunity is there for AU beef to leverage marbling to support premium credentials?

BEEF
COUNTRY OF ORIGIN

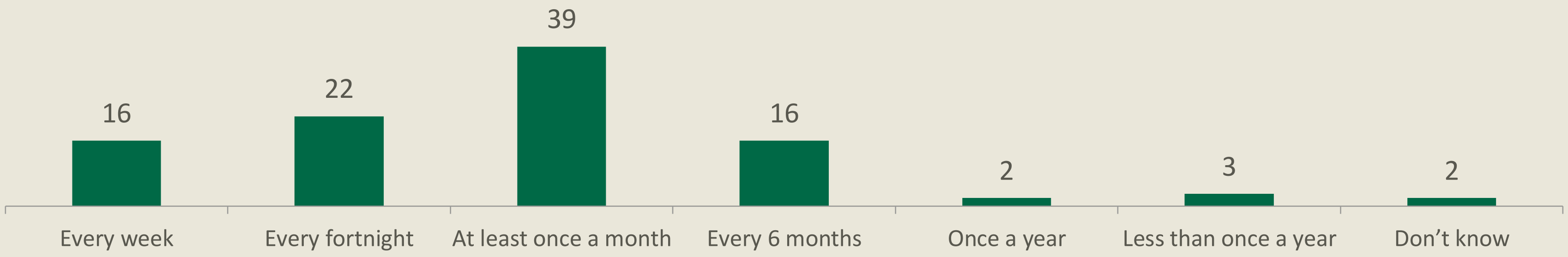
All questions in this section were asked of beef buyers only (must have ever bought beef). They also must have previously bought, or would consider buying, imported beef.

The majority of Taiwan consumers agree that they know the country of origin of the beef that they buy – with over ¾ purchasing imported beef at least every month.

BEEF BUYERS – KEY STATISTICS:



FREQUENCY OF BUYING IMPORTED BEEF



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(CH3) Do you ever buy beef? (Rebased to total – n=501) – QUOTA FOR TAIWAN
(GF3B) Do you know the country of origin of the beef you buy? n=501
(CH4) How often do you buy imported beef? n=501

*Caution low base

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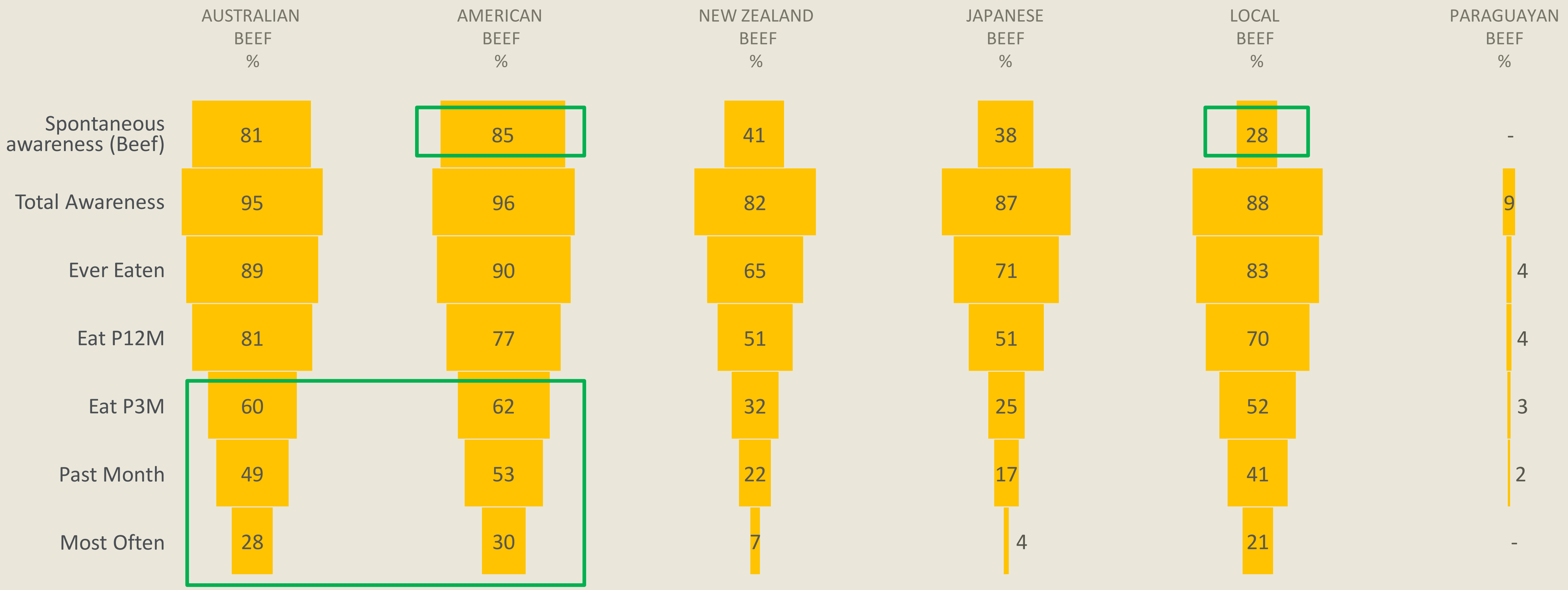
American and Australian lead the beef brands in Taiwan; followed by local. America is slightly ahead on top of mind awareness – but shares high levels of awareness and ever eaten with Australia.

COUNTRY OF ORIGIN: BRAND HEALTH FUNNEL – BEEF



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BBH1. Spontaneous Awareness, BBH2. Prompted Awareness, BBH3. Ever Eaten, BBH4. Eaten last year, BBH5. Eaten in the last 3 months, BBH6. Eaten last month, BBH8. Most often Base: (n=501) Base – Bought beef in past month or ever buy beef

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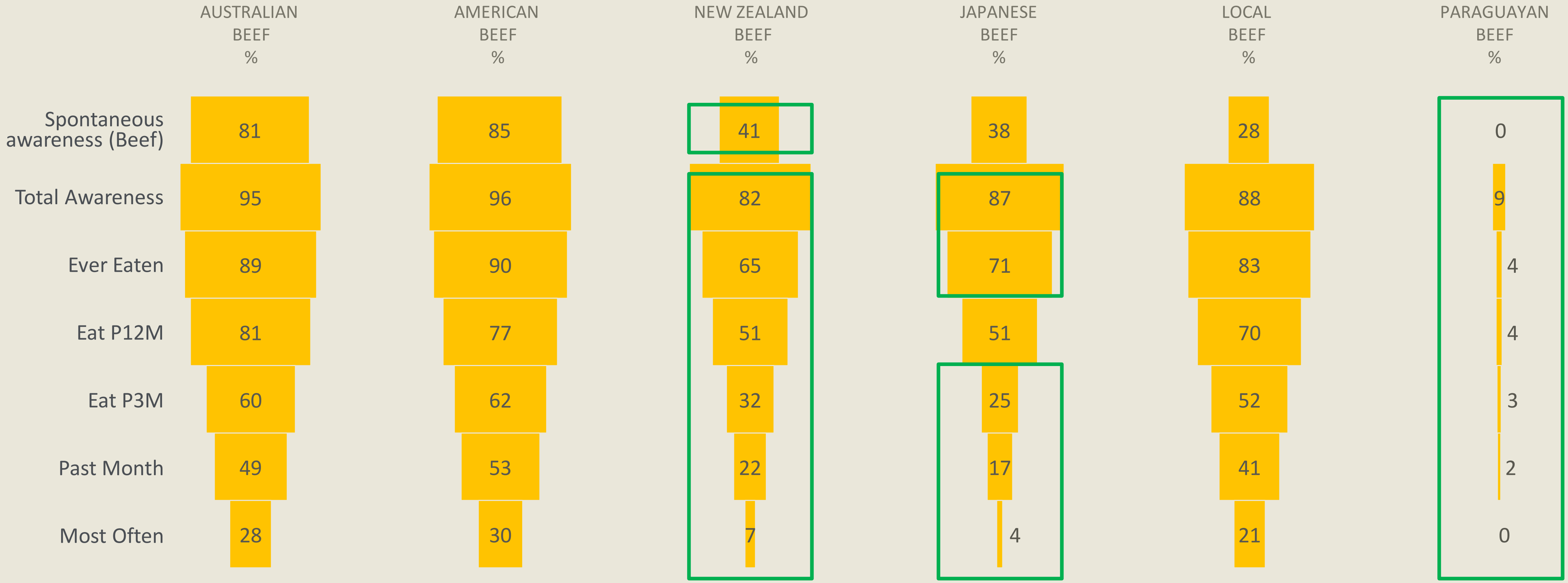
New Zealand Beef comes to mind less readily, seeing softer purchase levels – while premium positioned Japanese beef is well known but is a less frequent purchase. Paraguayan beef is a small player in the market – not coming to mind readily.

COUNTRY OF ORIGIN: BRAND HEALTH FUNNEL – BEEF



KANTAR

BBH1. Spontaneous Awareness, BBH2. Prompted Awareness, BBH3. Ever Eaten, BBH4. Eaten last year, BBH5. Eaten in the last 3 months, BBH6. Eaten last month, BBH8. Most often Base: (n=501) Base – Bought beef in past month or ever buy beef

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AU, US and Local beef are seen as easy to purchase - offering a variety of cuts to be their family's favourite and drive volume. Interestingly the US also has strengths in often competing attributes of tenderness and cheap.

DRIVERS OF POWER
(ranked top to bottom)

Group	%	Attribute	AUSTRALIAN BEEF	AMERICAN BEEF	NEW ZEALAND BEEF	JAPANESE BEEF	LOCAL BEEF	PARAGUAYAN BEEF
EASY EVERYDAY	47%	Offers a variety of cuts that suit the meals I make	8	16	1	-23	6	-1
		Is easy and convenient to purchase	21	26	0	-35	13	-2
		Is my/my family's favourite beef	4	5	-2	-3	6	-2
WELFARE	16%	The industry is environmentally sustainable	5	-6	12	-8	-2	0
		The animal is well-cared for	1	-9	8	-3	-4	2
		Guaranteed safe to eat	1	-11	7	-1	7	0
FRESH	16%	Fresh	-8	-5	-6	-8	26	0
HIGH QUALITY	16%	More nutritious	-5	-4	-4	41	-7	-1
		Is the most superior beef	-7	-6	-5	41	-8	0
		The fat is nicely marbled	-5	4	-5	33	-11	0
		The meat is usually tender	-8	6	-1	27	-6	-1
		Consistent quality standards	2	2	3	10	-7	-1
LOW FAT	0%	Low in fat	3	-6	2	-6	4	0
CHEAP	-5%	Cheaper	0	8	-4	-22	13	5

Attributes are grouped according to level of co-endorsement i.e. when respondents endorse one attribute for a brand, they are likely to endorse the others in the group. In this way the attributes are linked, then the groups are given the most appropriate name.

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BBH9. Here are some things which people have said about beef. We would like to know which of the following statements apply to beef from different countries of origin. You may choose as many or as few countries of origin as you wish. It doesn't matter if you don't buy any of them - it's your impressions we'd like. Base: (n=501)

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AU would benefit by supporting its easy everyday positioning with additional credentials to drive volume growth. AU beef also has some strength in sustainability of the industry, but not to the extent that NZ does with welfare perceptions owned by NZ.

DRIVERS OF POWER (ranked top to bottom)			AUSTRALIAN BEEF	AMERICAN BEEF	NEW ZEALAND BEEF	JAPANESE BEEF	LOCAL BEEF	PARAGUAYAN BEEF
EASY EVERYDAY	47%	Offers a variety of cuts that suit the meals I make	8	16	1	-23	6	-1
		Is easy and convenient to purchase	21	26	0	-35	13	-2
		Is my/my family's favourite beef	4	5	-2	-3	6	-2
WELFARE	16%	The industry is environmentally sustainable	5	-6	12	-8	-2	0
		The animal is well-cared for	1	-9	8	-3	-4	2
		Guaranteed safe to eat	1	-11	7	-1	7	0
FRESH	16%	Fresh	-8	-5	-6	-8	26	0
HIGH QUALITY	16%	More nutritious	-5	-4	-4	41	-7	-1
		Is the most superior beef	-7	-6	-5	41	-8	0
		The fat is nicely marbled	-5	4	-5	33	-11	0
		The meat is usually tender	-8	6	-1	27	-6	-1
		Consistent quality standards	2	2	3	10	-7	-1
LOW FAT	0%	Low in fat	3	-6	2	-6	4	0
CHEAP	-5%	Cheaper	0	8	-4	-22	13	5

Attributes are grouped according to level of co-endorsement i.e. when respondents endorse one attribute for a brand, they are likely to endorse the others in the group. In this way the attributes are linked, then the groups are given the most appropriate name.

KANTAR

BBH9. Here are some things which people have said about beef. We would like to know which of the following statements apply to beef from different countries of origin. You may choose as many or as few countries of origin as you wish. It doesn't matter if you don't buy any of them - it's your impressions we'd like. Base: (n=501)

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Simultaneously, consistent quality standards helps drive perceptions of premium (ability to command and justify a price premium on shelf) - where Japan is currently positioned…

DRIVERS OF PREMIUM
(ranked top to bottom)

			AUSTRALIAN BEEF	AMERICAN BEEF	NEW ZEALAND BEEF	JAPANESE BEEF	LOCAL BEEF	PARAGUAYAN BEEF
HIGH QUALITY	**34%**	More nutritious	-5	-4	-4	41	-7	-1
		Is the most superior beef	-7	-6	-5	41	-8	0
		The fat is nicely marbled	-5	4	-5	33	-11	0
		The meat is usually tender	-8	6	-1	27	-6	-1
		Consistent quality standards	2	2	3	10	-7	-1
EASY EVERYDAY	**16%**	Offers a variety of cuts that suit the meals I make	8	16	1	-23	6	-1
		Is easy and convenient to purchase	21	26	0	-35	13	-2
		Is my/my family's favourite beef	4	5	-2	-3	6	-2
WELFARE	**16%**	The industry is environmentally sustainable	5	-6	12	-8	-2	0
		The animal is well-cared for	1	-9	8	-3	-4	2
		Guaranteed safe to eat	1	-11	7	-1	7	0
FRESH	**14%**	Fresh	-8	-5	-6	-8	26	0
LOW FAT	**4%**	Low in fat	3	-6	2	-6	4	0
CHEAP	**-17%**	Cheaper	0	8	-4	-22	13	5

Attributes are grouped according to level of co-endorsement i.e. when respondents endorse one attribute for a brand, they are likely to endorse the others in the group. In this way the attributes are linked, then the groups are given the most appropriate name.

KANTAR

BBH9. Here are some things which people have said about beef. We would like to know which of the following statements apply to beef from different countries of origin. You may choose as many or as few countries of origin as you wish. It doesn't matter if you don't buy any of them - it's your impressions we'd like.
Base: 20' (n=501)

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TOP 5 ASSOCIATIONS TO DRIVE FOR AUSTRALIAN BEEF

Positively, consistent quality standards contributes to growing both volume and premium and differentiates AU beef differently to local and American

These associations are simulated in the Meaningfully Different model to ascertain which will drive the greatest growth in Power and Premium

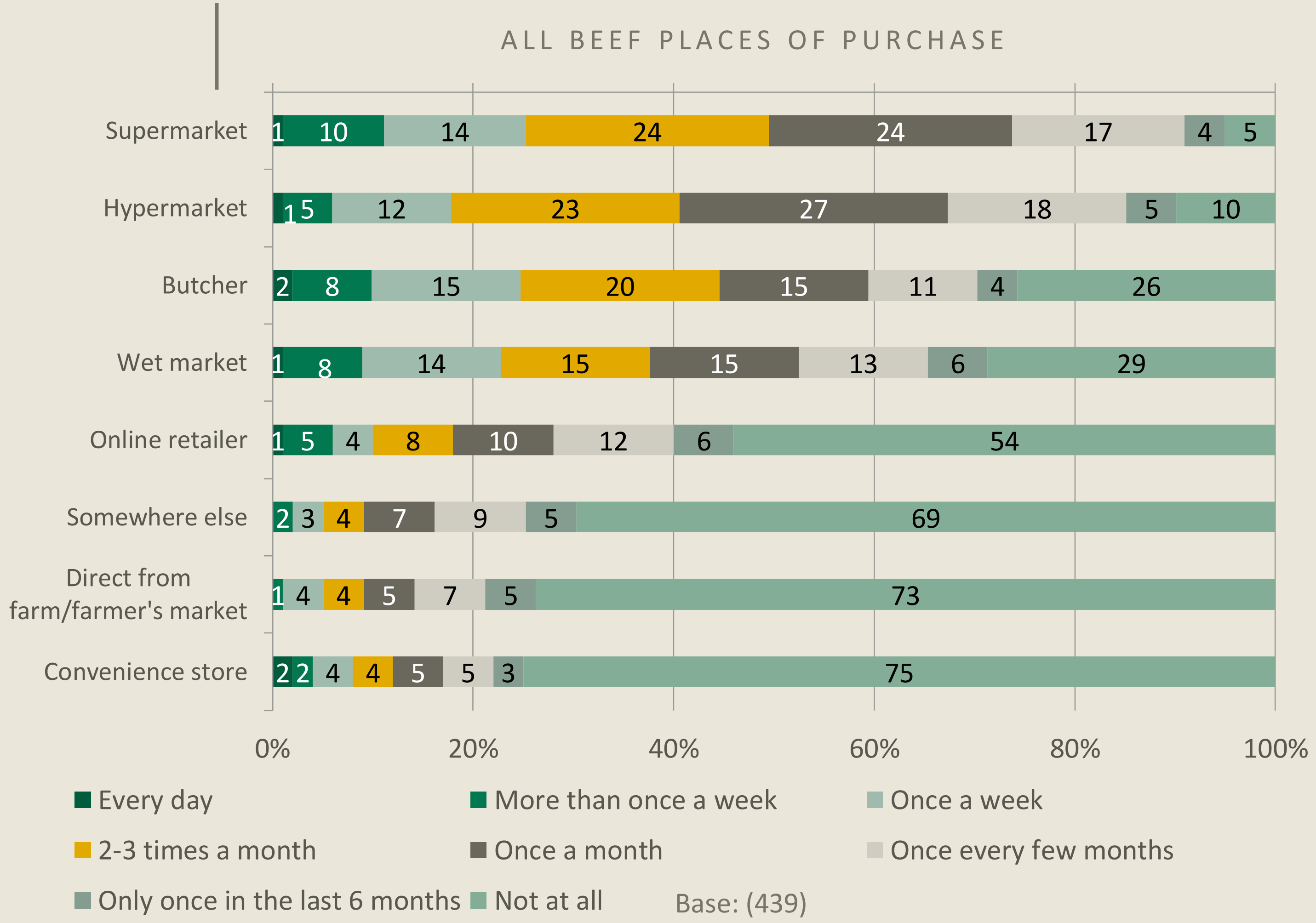
OBJECTIVE:	GROWING EQUITY/VOLUME		GROWING PREMIUM	
TOP 5 ASPECTS TO FOCUS ON WHEN DRIVING THESE OBJECTIVES IN THIS MARKET…	1. Offers a variety of cuts that suit the meals I make	AU/Local/US play here	1. More nutritious	Japan plays here
	2. Is my/my family's favourite beef	AU/Local/US play here	2. Is the most superior beef	Japan plays here
	3. Fresh	Local plays here	3. The meat is usually tender	US/Japan play here
	4. Consistent quality standards	Japan plays here (lower extent)	4. The fat is nicely marbled	Japan plays here
	5. The meat is usually tender	US/Japan play here	5. Consistent quality standards	Japan plays here (lower extent)

BEEF DEEP DIVE - SO WHAT?

	1	2	3
What do we see?	**Strong on Easy Everyday (but so is USA)** AU Beef has strong credentials in the attributes that drive volume, in particular our accessibility. Sustainable credentials also coming through.	**NZ leaning to welfare** A distinct feature of the Taiwan market is the difference for NZ beef vs. AU. Welfare is a clear factor that is owned by NZ beef.	**Japanese beef owning premium** By a considerable way Japanese beef is strongly associated with all the attributes that drive premium perceptions.
Now what?	Important to maintain the key associations with accessibility.	These associations align with Grass fed beef, we need to protect some of these credentials to maintain position.	Any opportunity to build some of these elements into parts of the AU beef offer?

POINT OF PURCHASE + CLAIMS

Taiwan consumers most commonly purchase beef from supermarkets and hypermarkets with 1 in 10 claiming to use an online retailer at least once a week.



KANTAR

QR3A. How often have you bought beef from each of these locations in the last six months?
Base: (439)

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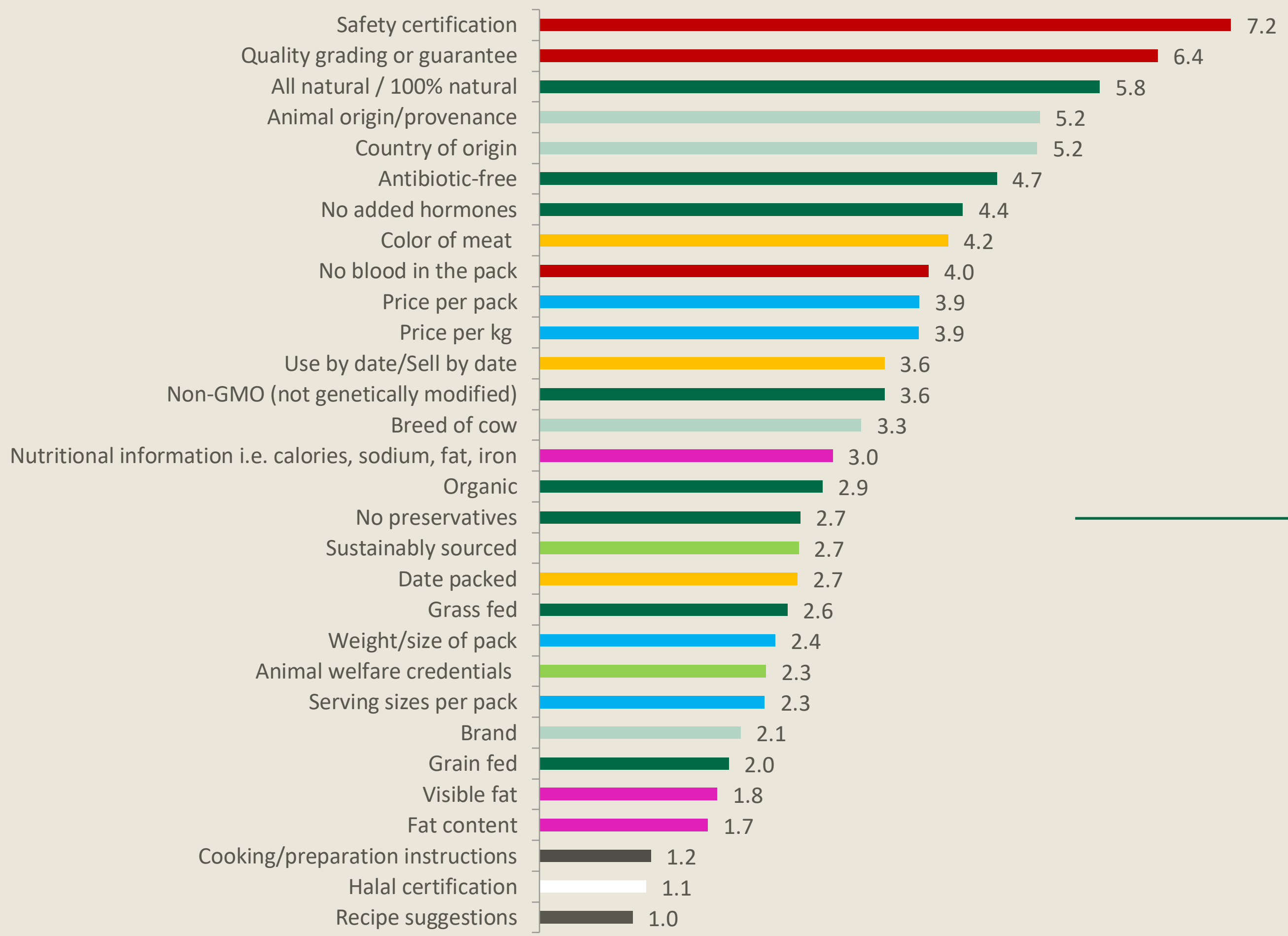
For Taiwan consumers, safety and quality are the key on pack motivators (likely influence of the C19 pandemic experienced in 2020 as Natural is typically #1 Globally)

BEEF CLAIMS AND THEMES IMPORTANCE – ON PACK OR AT SHELF – ranked by Relative Importance



The most important area to Taiwan BEEF buyers is being safe, followed by claims around the core themes of beef origin, natural and being fresh. Claims around these areas are most likely to motivate consumers to choose BEEF

Base: Total (n=439)
QMAX1 BEEF: Please indicate which one is the most likely, and which is the least likely to motivate you to choose / eat BEEF
SCr1. Are you personally responsible for the cooking in your household, either mainly or equally with some other person?
SCr2. How often do you generally buy any meat or seafood for meals for yourself or for people in your household?
R1a. Approximately how often do you buy beef?

BEEF DEEP DIVE - SO WHAT?

What do we see?

1

Safety & Quality should lead

On pack claims that drive beef consumption are about safety and quality assurance.

1

COO and provenance are key claims

Not only is COO important at a total level, versus the rest of the world the COO callout on pack is highly important with provenance #1 and COO #3

Now what?

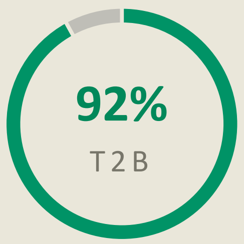
Do we have clear safety and quality credentials we can callout to in a simple direct way on pack?

A clear opportunity to be reassuring and driving choice with a clear COO callout on pack (as long as it is driving our desired associations)

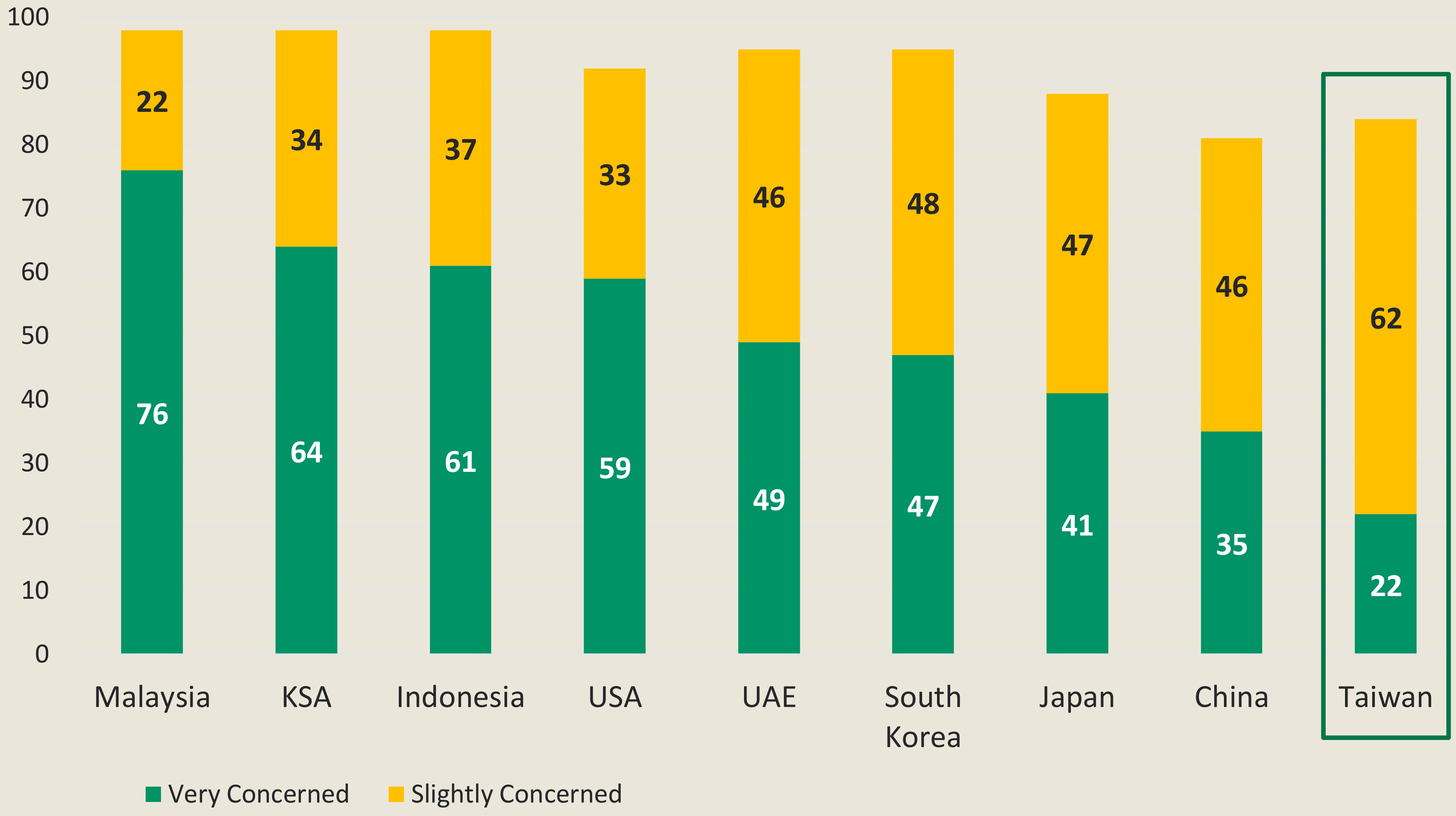
COVID-19 IMPACT

A majority of consumers are concerned about the C19 pandemic overall, but consumers are much less concerned in Asian countries, especially in Taiwan where only 2 out of 10 are very concerned about it.

COVID PANDEMIC CONCERN (%)



GLOBAL AVERAGE (T2B %)



KANTAR

COV1: How concerned do you currently feel about the coronavirus (Covid-19) pandemic? Base: USA n=2400, KSA n=499, UAE n=500, China n=801, Indonesia n=500, Malaysia n=503, South Korea n=800, Japan n=800, Taiwan n=501

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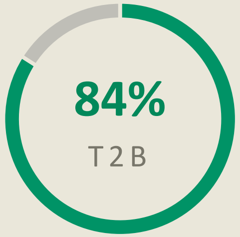
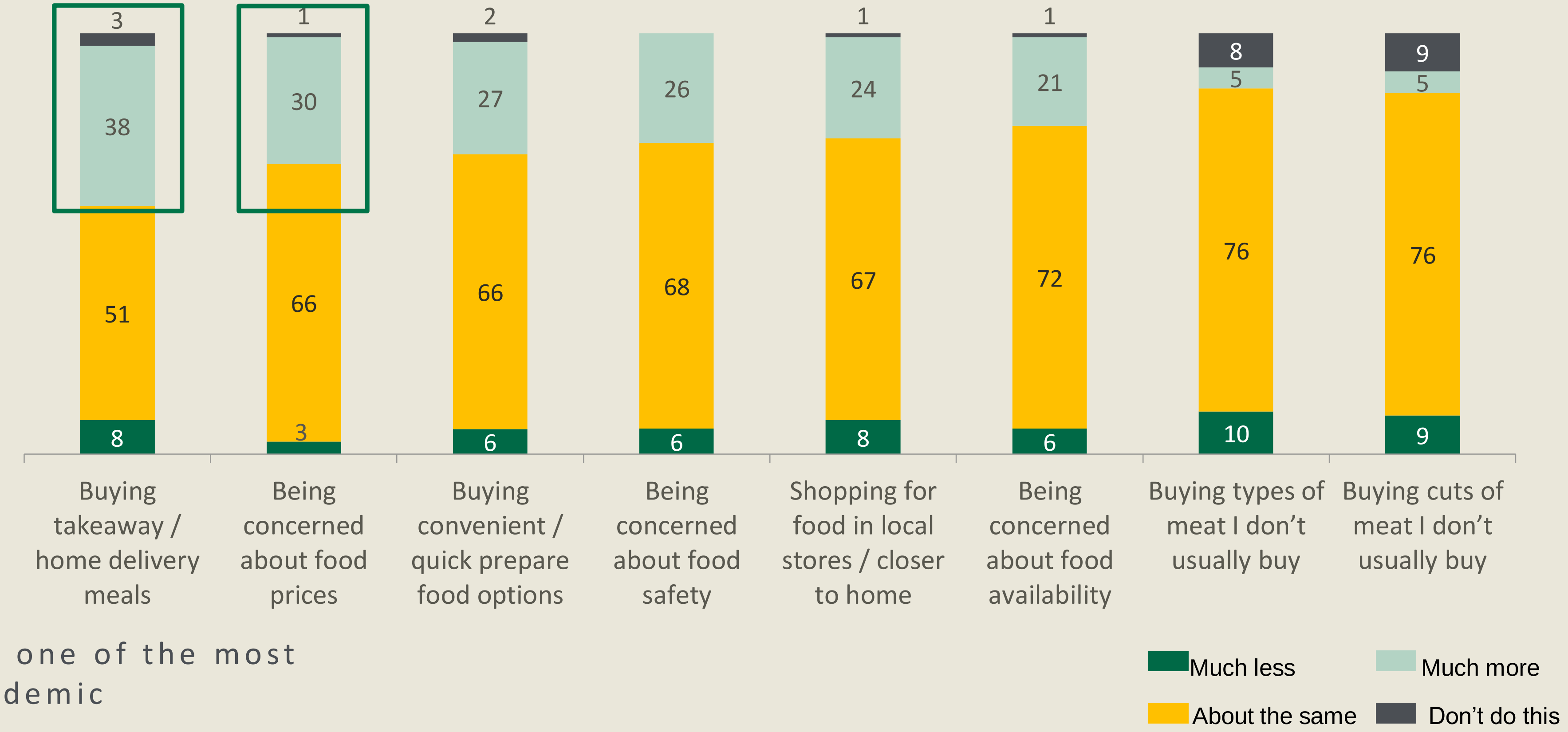
While slightly lower than we see around the world, the majority of Taiwan consumers are concerned about the C19 pandemic*. Just over 1 in 4 consumers are concerned about food prices/availability – with takeaway/home delivery and quick food options on the rise.



CONCERNED ABOUT THE COVID-19 PANDEMIC

GLOBAL AVERAGE: 92%

SHOPPING HABITS CHANGES VS BEFORE THE PANDEMIC (%)



*Taiwan is widely considered as one of the most effective responders to C19 pandemic

KANTAR

COV1: How concerned do you currently feel about the coronavirus (Covid-19) pandemic? Base: (n=501)
COV3: In light of the changing coronavirus situation, how have your shopping habits changed compared to before the pandemic? Base: (n=501)

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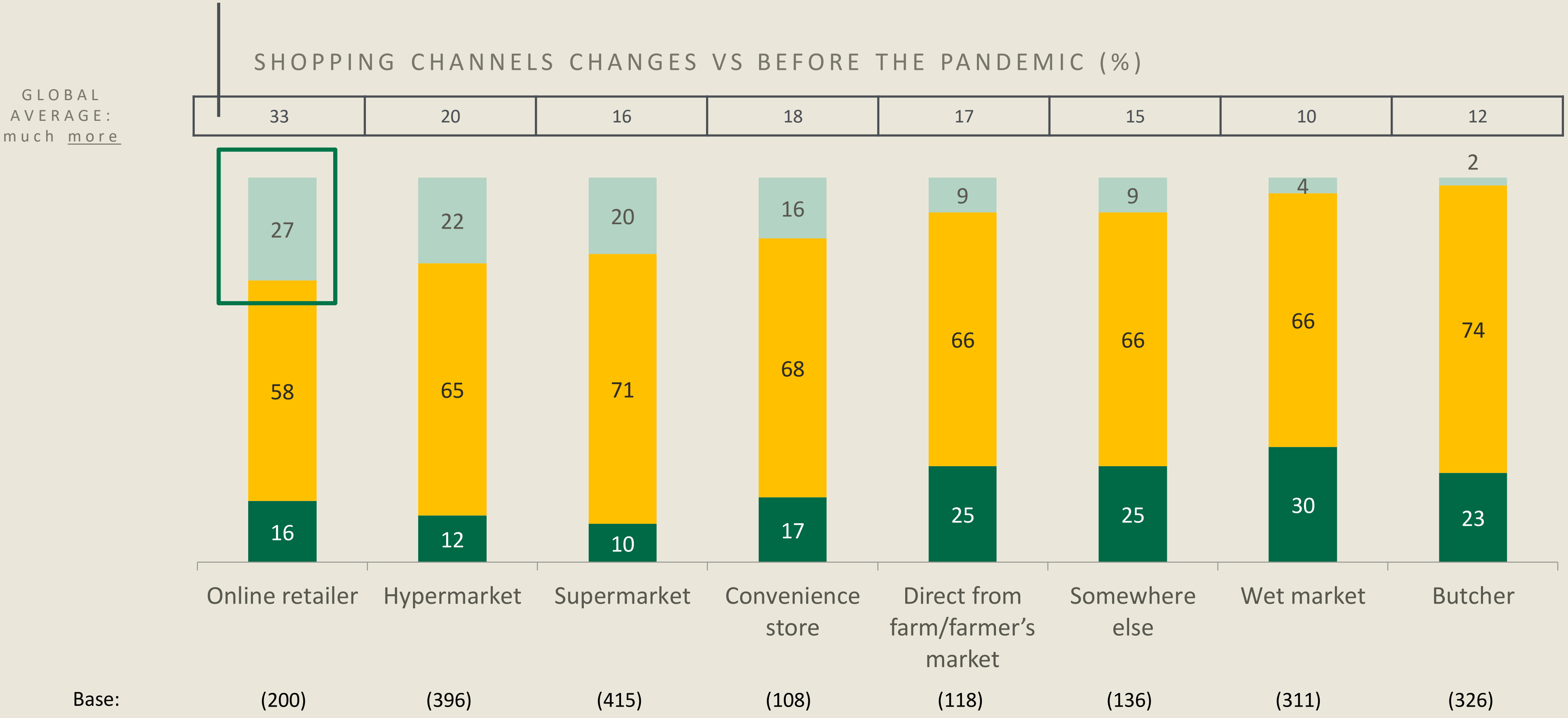
Online retailers are the channel to see the largest increase in usage. Markets and Butchers have seen almost no increase (with between 1 in 3 or 4 saying they are using them less).



KANTAR

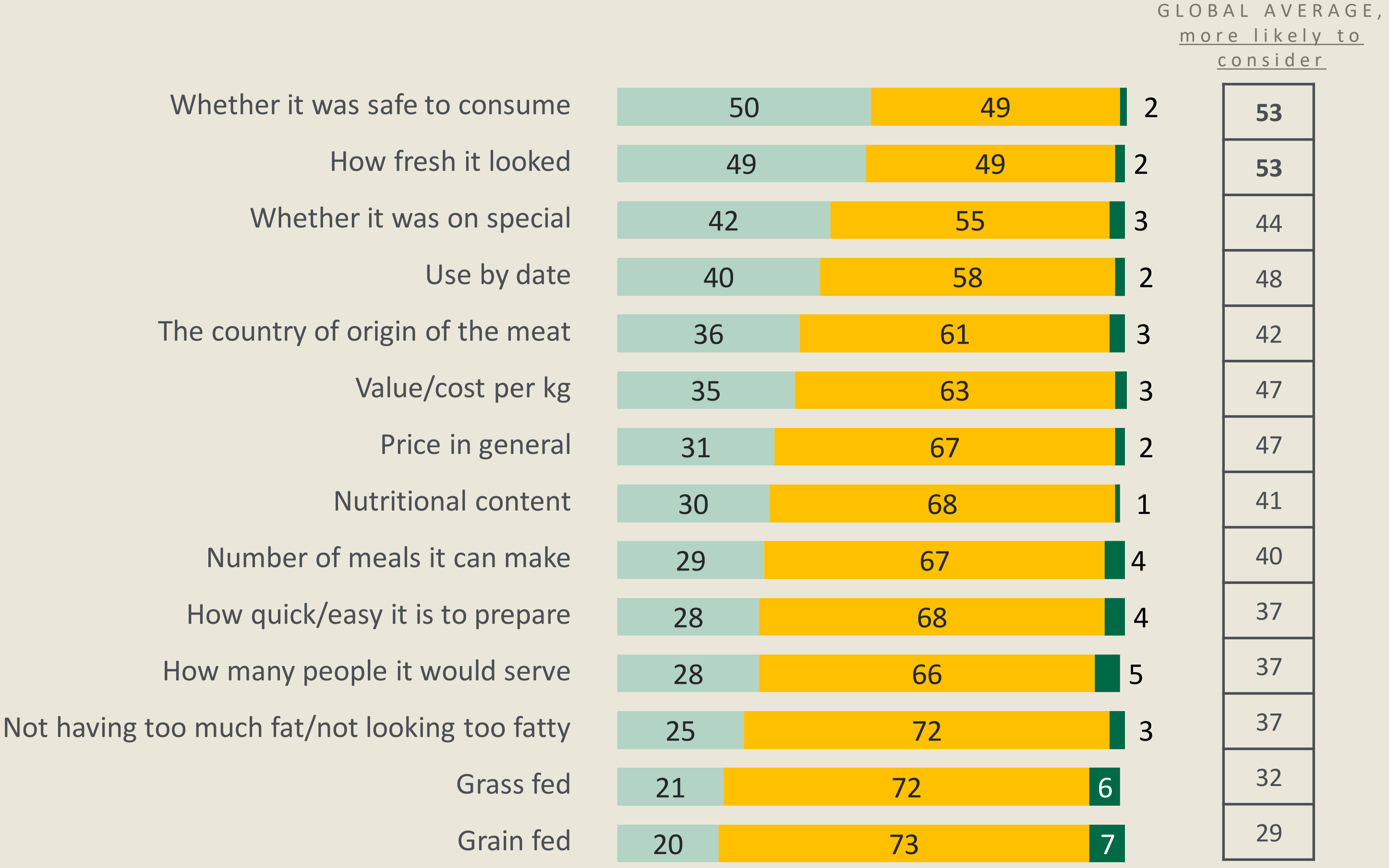
COV5A: During the coronavirus pandemic, how has your purchase of red meat through the following channels changed, compared to before the pandemic?

Much less
Much more
About the same

MEAT & LIVESTOCK AUSTRALIA

In the context of the pandemic and concerns of food prices/availability – Taiwan consumers take into account food safety, origin, freshness & value when buying red meat to a greater extent (links to on pack motivators like safety certifications seen earlier)

How has the importance of the following factors changed when buying red meat during Covid-19 outbreak, compared to before the outbreak?



More likely to consider
No change
Less likely to consider

KANTAR

COV5: How has the importance of the following factors changed when buying red meat during Covid-19 outbreak, compared to before the outbreak? Base: (n=501)

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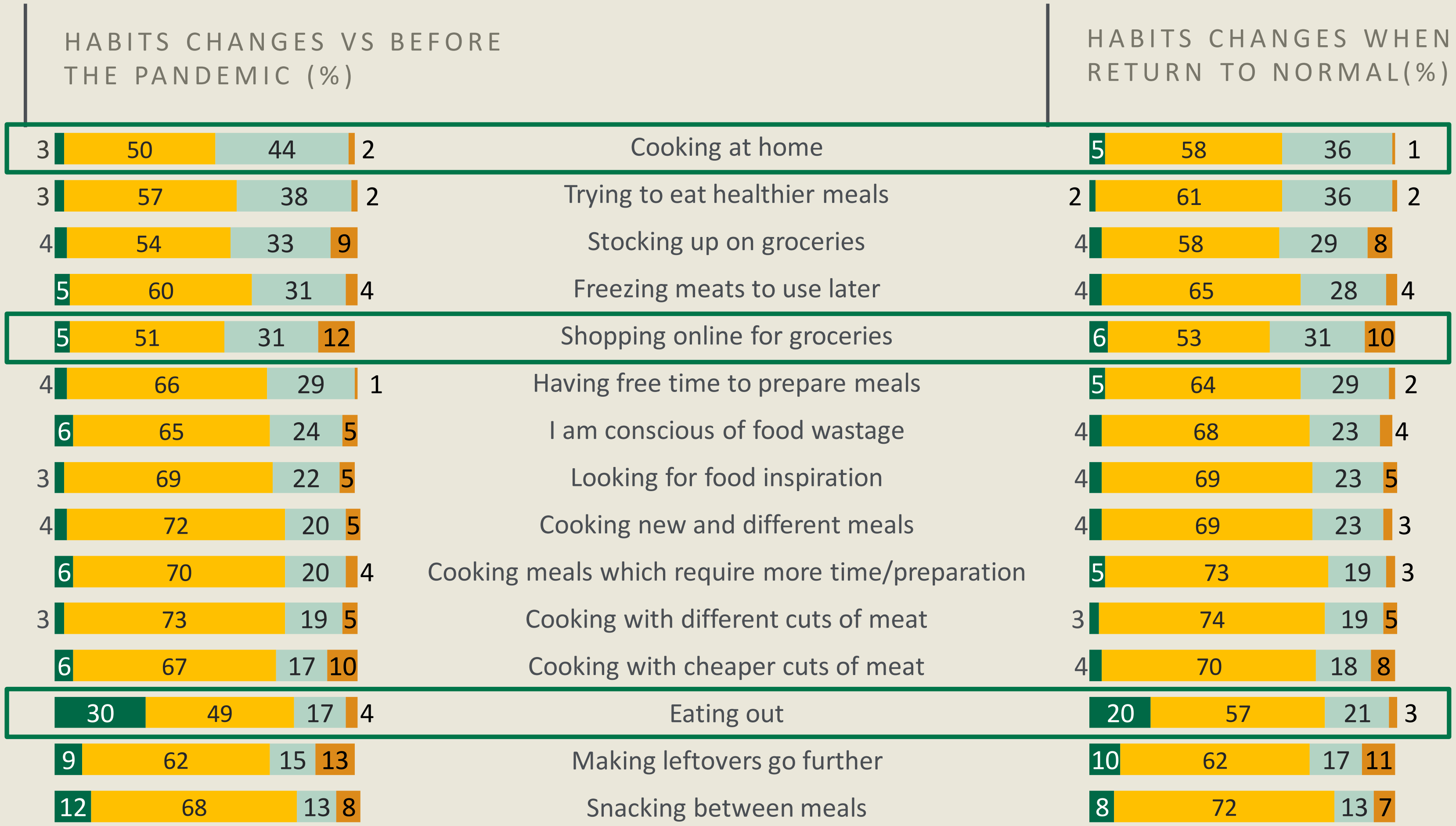
Taiwan consumers adapted to restrictions, cooking more at home and eating out less. Trends such as this are expected to reduce when the market returns to normal – however, those shopping online for groceries expect to maintain this behaviour moving forwards.

How has the importance of the following factors changed when buying red meat during Covid-19 outbreak, compared to before the outbreak?



Much less
Much more
About the same
Don't do this

KANTAR

COV6: How have your following habits changed during the Covid-19 outbreak, compared to before the outbreak? Base: (n=501)
COV10: And when life returns to normal, which of the following shopping and eating habits do you think will change compared to what they were before the pandemic? Base: (n=501)

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BEEF DEEP DIVE - SO WHAT?

What do we see?

1

Lower concern vs. the rest of the world

Taiwan has the lowest level of general concern in light of COVID19 with their effective response to and management of the crisis.

2

And different behaviours

With less general concern, the specific concerns are different. In other markets prices and food safety are much higher.

3

But safety (and freshness) still important

But Taiwanese are still focused on whether it is safe to eat and whether it looks fresh when they are thinking about what to buy.

Now what?

Traditional channels/routes to consumers remain, with some increases in use of food delivery services and shopping for meat online.

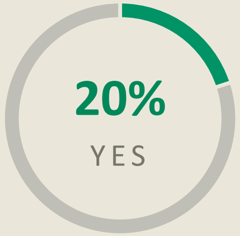
How can Australian beef build its presence in growing online channels while maintaining presence in larger, existing channels e.g. supermarket/hypermarket?

How can we showcase Australian beef to be the safe choice?

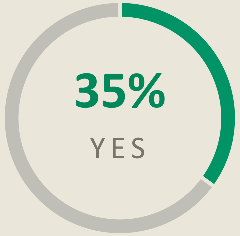
TRUE AUSSIE

20% Taiwan consumers claim awareness of the term True Aussie – however, this grows to 35% when prompted with the logo.

TRUE AUSSIE AWARENESS



AWARE OF TRUE AUSSIE?



AWARE OF LOGO

QTA1. Have you heard the term "True Aussie" before? Base: (n=501)
QTA3. Have you ever seen this logo before? Base: Beef (n=501)

BEEF DEEP DIVE - SO WHAT?

What do we see?

1

Logo awareness with some way to go,

Awareness of the logo at around 1 in 3, which is below the global average.

2

…but endorsement strong.

But for stronger levels of association vs. other COO brand logos.

Now what?

Platform to build on but some work to be done in growing awareness of the logo and understanding of what it represents.

The strong endorsement means we can focus brand associations, but need to keep an eye on NZ beef + Lamb which has a relative strength in ‘ideal home’ attributes.

MLA GLOBAL

CONSUMER TRACKER

TAIWAN

2020

MEAT & LIVESTOCK AUSTRALIA

APPENDIX

Detailed Appendix – what's in it?

2020

- Frequency of HH shopping, meal planning, fresh meat purchases
- Attribute importance when selecting between proteins and when justifying premium price
- Proteins associations to meat type
- COO propellers
- Drivers to meaning, difference, power & premium
- Power & Premium Brand image absolutes & profile by COO
- Profiling – beef consumers – repertoire
- True Aussie % Endorsements