

July 2022

# Global Tracker: SINGAPORE – *Presentation Deck*

*Brought to you by your Kantar Team:*  
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& Carolina Ferrando



We have conducted the global tracker in 22 markets over the last 8 years, with Singapore fieldwork back in 2022 after a break since 2017.

MARKETS	 Japan	 Korea	 China	 Indonesia	 Singapore	 Malaysia	 Philippines	 Taiwan	 Thailand	 Vietnam	 USA	 Canada	 KSA	 UAE	 Oman	 Jordan	 Kuwait	 Qatar	 UK	 Hong Kong	 Mexico	 Chile	Total # of markets
2015	Green	Green	Green	Green	Grey	Green	Green	Green	Grey	Grey	Green	Green	Green	Green	Grey	Grey	Grey	Grey	Grey	Grey	Grey	Grey	11
2016	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Grey	Grey	Grey	Grey	Grey	Grey	Grey	15
2017	Green	Green	Green	Green	Green	Green	Grey	Grey	Grey	Grey	Green	Green	Green	Green	Grey	Green	Grey	Grey	Grey	Grey	Grey	Grey	11
2018	Green	Green	Green	Green	Grey	Green	Grey	Grey	Green	Grey	Green	Grey	Green	Green	Grey	Grey	Grey	Grey	Green	Green	Green	Green	13
2019	Green	Green	Green	Green	Grey	Green	Grey	Grey	Grey	Grey	Green	Grey	Green	Green	Grey	Grey	Green	Green	Grey	Grey	Grey	Grey	10
2020	Green	Green	Green	Green	Grey	Green	Grey	Green	Grey	Grey	Green	Grey	Green	Green	Grey	Grey	Grey	Grey	Grey	Grey	Grey	Grey	9
2021	Green	Green	Green	Green	Grey	Green	Grey	Grey	Green	Green	Green	Grey	Green	Green	Grey	Grey	Grey	Grey	Green	Grey	Grey	Grey	11
2022	Green	Green	Green	Grey	Green	Grey	Green	Grey	Grey	Green	Green	Green	Green	Green	Grey	Grey	Grey	Green	Grey	Grey	Grey	Grey	11





# INTRODUCING MLA'S GLOBAL CONSUMER TRACKER

*Diverse markets, with some universal truths.*

## 2022 Study Details:



8,300 interviews



11 Markets *(See right)*



20-minute online survey  
(supported by interviewer in MENA)



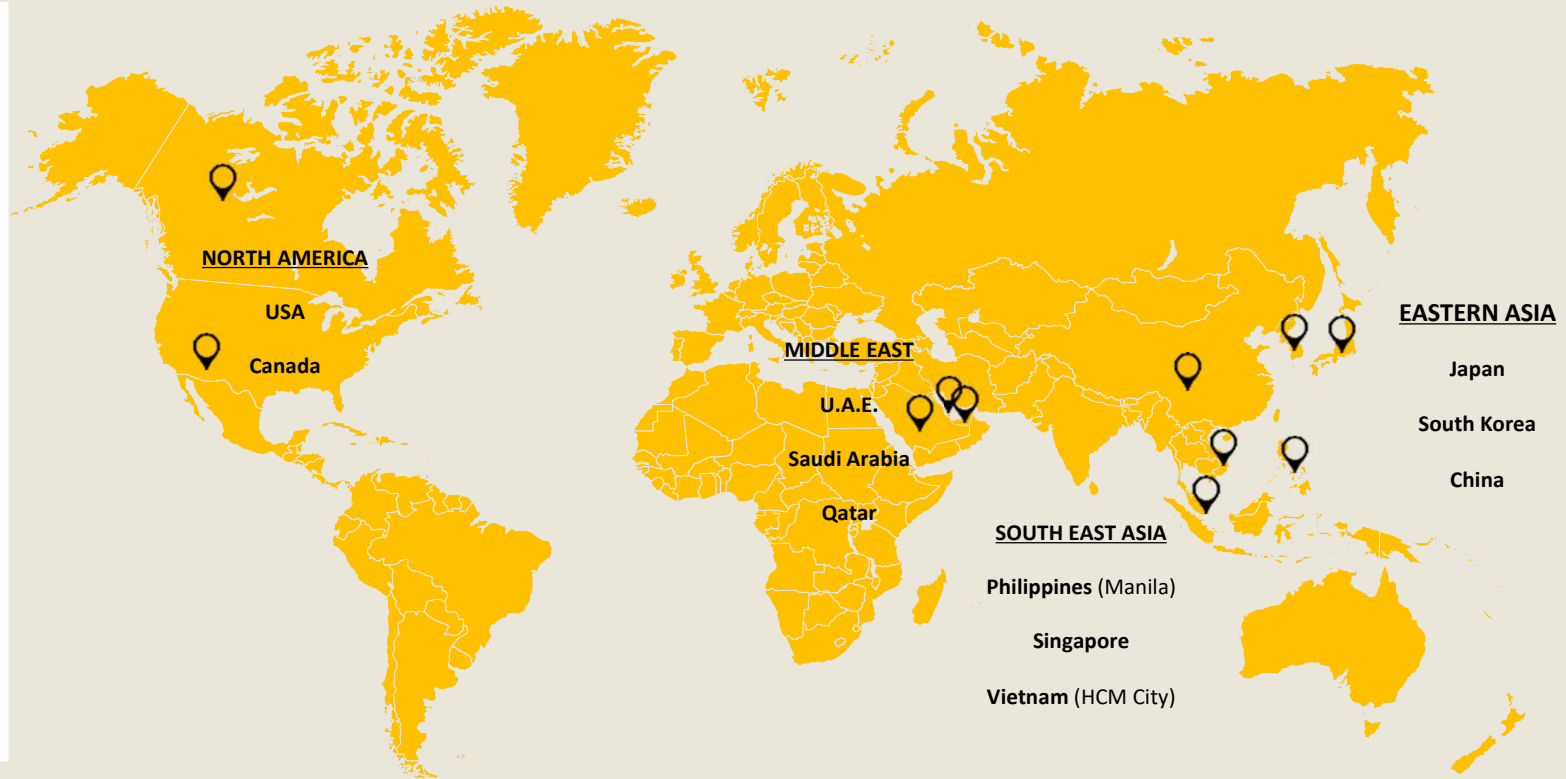
Consumers aged 18-64  
Grocery buyers, meal planners  
Affluent households (skew)  
Selected based on potential  
openness and ability to buy AU  
Beef and/or Lamb  
*(Not representative of total market)*



Captures meat consumption habits,  
attitudes, perceptions of COO Beef  
& Lamb, purchase drivers,  
channels, trust and True Aussie



Conducted annually, this study  
collects historical data allowing the  
tracking of trends overtime





## Singapore Sample – a consistent view to compare to 2017



Sample is made up of 500 consumers

		COUNTRY INCIDENCE	SAMPLE STRUCTURE
Gender	Male	52%	35%
	Female	48%	65%
Age	18-34	-	37%
	35-49	-	38%
	50-64	-	24%
Consumption	Buy Fresh Meat at Least Occasionally	-	100%
MGBs	Main Grocery Buyers	-	86%
Children	Households with Children	-	43%
Annual HH Income	<100,000 Singapore Dollar	44%	45%
	100,000 – 149,999 Singapore Dollars	25%	37%
	>150,000 Singapore Dollars	31%	18%



Age: 0-14 (13%), 15-24 (15%), 25-54 (51%), 55-64 (11%), 65+ (11%) – World factbook  
The Average Singaporean Household Income: Where Do You Stand? <https://blog.seedly.sg/average-singaporean-household-income-stand/>



## The Central Question

How can Australian Beef and Lamb build perceptions that will grow relevance of AU product for consumers in Singapore?

# Flow of the presentation today



## MACRO-MARKET CONTEXT [HIDDEN]

Some important global trends which are relevant context for changing consumer behaviours



## PROTEIN LANDSCAPE

Setting the scene by looking at the awareness, claimed consumption and perceptions of the key proteins in market. This also includes general beef/lamb channel behaviours.



## IMPORTED BEEF/LAMB CONSUMPTION & COUNTRY OF ORIGIN

Looking at the key associations with COO brands and trust in those brands.

How does this flow through to brand equity and Power.



## COMMUNICATING TO GROW BEEF & LAMB

Looking at what associations drive brand choice and premium perceptions to understand what we can leverage.



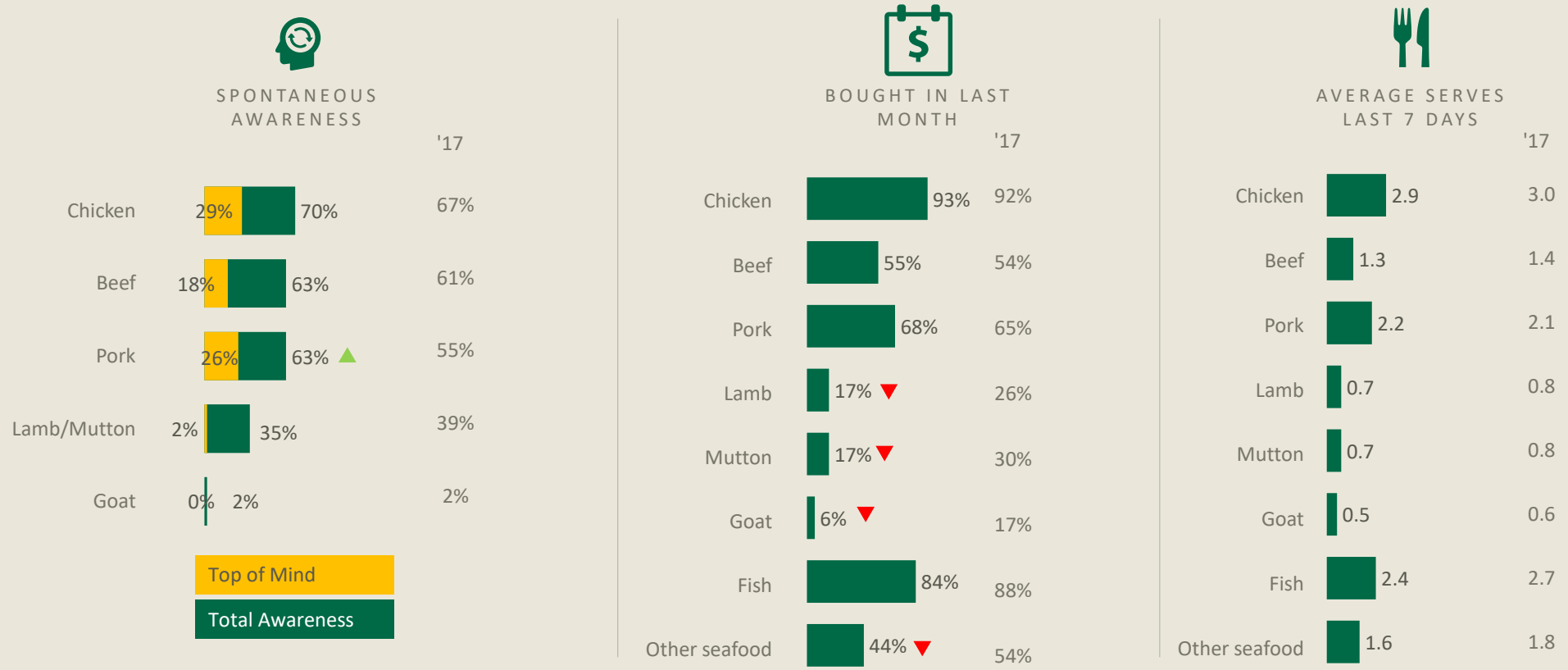
## Final Thoughts & Discussion

What levers can we pull and what should we continue to communicate to build likely AU product choice.



# PROTEIN LANDSCAPE

# The 2022 protein landscape is consistent vs 2017; lead by Chicken, Fish, Pork and Beef. Pork increases perceptions and is slightly more salient. Seafood & sheepmeat soften per/serves.



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: '22 (n=500), '17 (n=648)

▲ ▼ Sig. different at 95%



A reminder, we know that there are some consistent themes of what the proteins stand for across all of our markets. Beef is the Superior protein.



### THE STAPLE



- Cheap and easily available
- Versatile and easy to prepare
- Doesn't play to taste
- Not very nutritious
- Animals treated poorly
- Questionable safety
- *Pork: Consistent quality, favourite and taste in key markets like China, Taiwan, US, Jp, SK)*



### THE SUPERIOR



- Good quality, good taste, superior meat
- Worth paying more for
- Nutritious
- *In MENA, beef is a Staple*

### THE CURIOSITY

- Unfamiliar, occasional purchase
- Premium option
- Not sure what to do with it
- Fatty
- Taste is a barrier for some
- *In MENA lamb is a Prime*



### THE SPECIALTY



- Few strengths or weaknesses
- Weakly positive on animal welfare and sustainability
- Taste is a barrier
- Lean/tough
- Unfamiliar and uncommon except amongst certain groups



### THE HEALTHY ALTERNATIVE

- Fresh
- Nutritious – especially for children
- Low in fat
- Tricky to use
- Welfare is not great
- *In SEA, fish is a cheap, low value protein - elsewhere it is premium*



**Proteins play a similar role in Singapore: Beef combines taste with care to be the superior choice in the protein repertoire. Chicken/Pork provide easy everyday variety. Fish is healthy but inconsistent.**

**Tasty, premium**



**Superior, less versatile**



**Easy, affordable, versatile**



**Fresh, nutritious, low fat**



**Beef**

**Strengths** *vs others*

- Well-cared for
- Delicious
- Superior
- Willing to pay more for

**Weaknesses** *vs others*

- Easy/convenient to purchase and prepare
- Low fat
- Cheap
- Fresh

**Lamb**

**Strengths**

- Well-cared for
- Superior
- Willing to pay more for

**Weaknesses**

- Not easy/convenient to purchase and prepare
- Not versatile

**Chicken**

**Strengths**

- Cheap
- Versatile
- Easy/convenient to purchase and prepare
- Family's favourite

**Weaknesses**

- Not fresh
- Not nutritious
- Not well-cared for
- Not sustainable
- Not safe
- Not superior
- Not willing to pay more

**Pork**

**Strengths**

- Cheap
- Versatile
- Easy/convenient to purchase and prepare
- Family's favourite
- Consistent quality

**Weaknesses**

- Not nutritious
- Not low fat
- Not superior
- Not willing to pay more

**Fish**

**Strengths**

- Fresh
- Nutritious
- Low fat
- Essential for healthy diet of growing kids

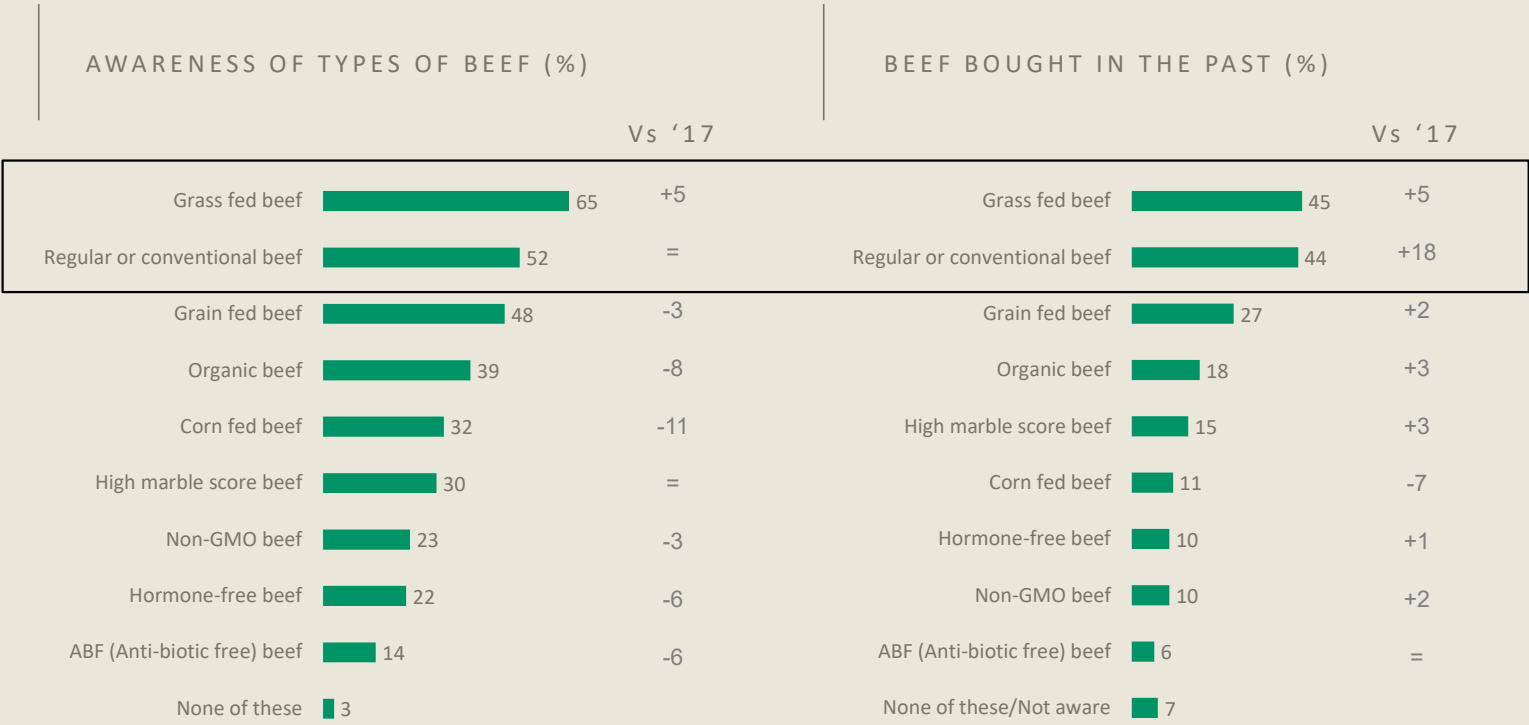
**Weaknesses**

- Not cheap
- Not well-cared for
- Not Consistent quality
- Not safe
- Not versatile
- Not superior
- Not willing to pay more

*Seafood fresh, low fat not cheap (weakening on some superiority)*

**Improved 'consistent quality' vs 2017**

Singapore consumers are most familiar with GF Beef, which they see as natural, better for health/ animals/environment; followed by 'regular' which is natural/min. processed and visually appealing.



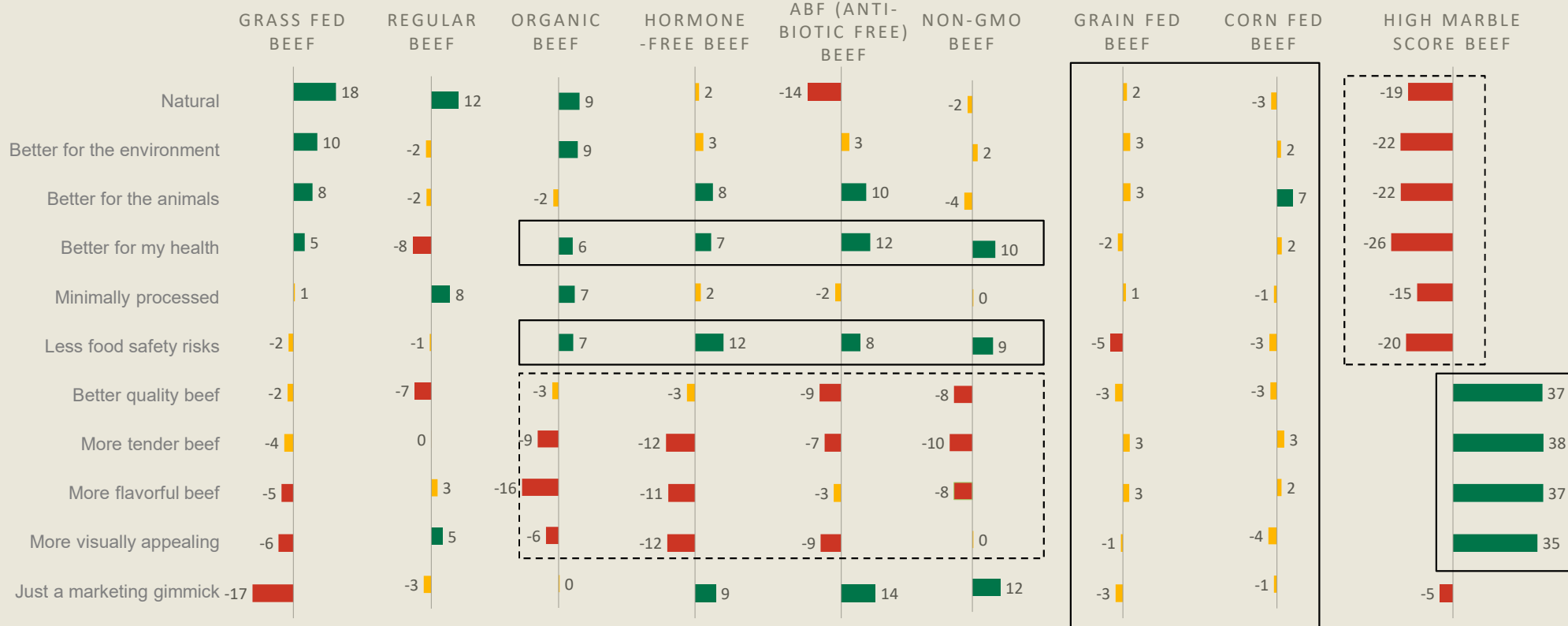
**Grass**  
**Regular**



**NATURAL**  
**BETTER FOR HEALTH,**  
**ANIMAL &**  
**ENVIRONMENT**

**NATURAL**  
**MIN. PROCESSED**  
**VISUAL APPEAL**

# Corn/Grain fed have less distinct associations – indicating benefit uncertainty. Other claims are seen as better for health by reducing food safety risks, but trade-off experience (high marble owns).



GF5. Which of the following things do you associate with each type of beef below? Base: Grass fed beef (n=302), Grain fed beef (n=221), Organic beef (n=181), Hormone-free beef (n=101), ABF beef (n=64), Non-GMO beef (n=107), Cornfed beef (n=148), Regular or conventional beef (n=241), High marble beef (n=139)


**KANTAR**

+5 or more = relative category strength  
-5 or less = relative category weakness.




**Vs 2017 more consumers use online to purchase beef/lamb; overtaking convenience stores. While high, less consumers are using Hypermarkets. Butchers increase for Lamb (specialty).**

*Amongst Beef Buyers...*

	NET: Use monthly or more		Don't use this channel	
	'17 %	'22 %	'17 %	'22 %
 Supermarket	77	71	5	9
<b>Hypermarket</b>	<b>54</b>	<b>40 ▼</b>	25	38 ▲
Butcher	34	38	46	39
Wet Market	41	33	43	47
<b>Online retailer</b>	<b>16</b>	<b>24</b>	<b>72</b>	<b>61 ▼</b>
Convenience store	21	16	71	76
Direct from farm/farmer's market	13	14	77	81
Somewhere else	12	11	73	81

*Amongst Lamb Buyers...*

	NET: Use monthly or more		Don't use this channel	
	'17 %	'22 %	'17 %	'22 %
 Supermarket	77	83	11	2 ▼
<b>Butcher</b>	<b>51</b>	<b>73 ▲</b>	30	8 ▼
Wet market	69	70	21	11 ▼
Hypermarket	69	66	16	16
<b>Online retailer</b>	<b>31</b>	<b>54 ▲</b>	54	29 ▼
Convenience store	42	48	53	38 ▼
Direct from farm/farmer's market	34	42	56	42 ▼
<b>Somewhere else</b>	<b>24</b>	<b>38 ▲</b>	61	48 ▼

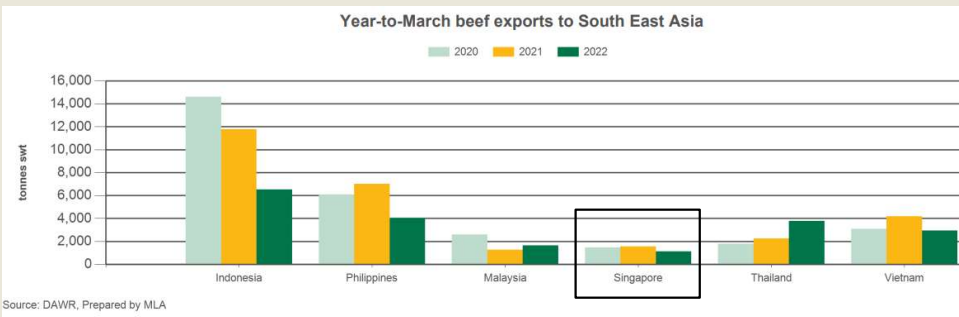
# BEEF COUNTRY OF ORIGIN



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.

**Like other SEA markets, Australian exports to Singapore in 2022 vs 2021 are smaller.  
Brazil remains #1 (increasing overtime), followed by AU, US and NZ who are relatively more stable.**

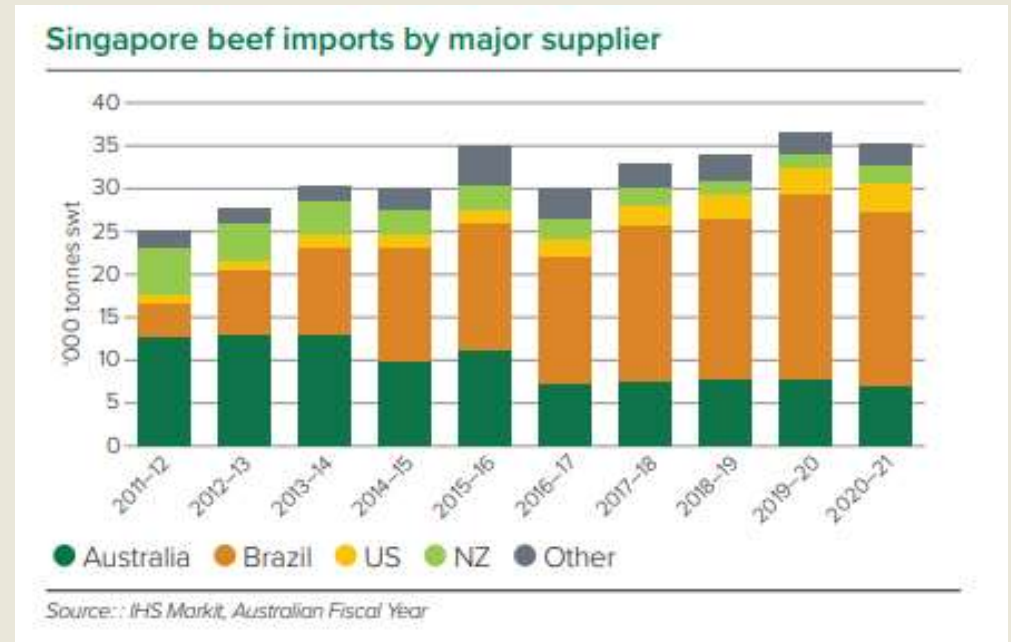
MLA S.E Asia Beef Imports (Share) –  
Monthly trade summary March 2022



Source: DAWR, Prepared by MLA

<https://www.mla.com.au/globalassets/mla-corporate/prices--markets/documents/os-markets/export-statistics/mar-2022/2023---australian-beef-exports---sea-summary.pdf>

MLA market snapshot – Singapore Beef Imports  
(2022)



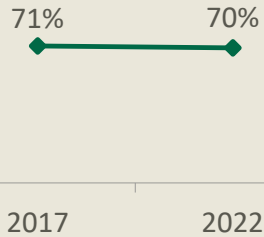
Source: IHS Markit, Australian Fiscal Year

[https://www.mla.com.au/globalassets/mla-corporate/prices--markets/documents/os-markets/export-statistics/november-2021/2021-singapore-market-snapshot-red-meat\\_171121\\_distribution.pdf](https://www.mla.com.au/globalassets/mla-corporate/prices--markets/documents/os-markets/export-statistics/november-2021/2021-singapore-market-snapshot-red-meat_171121_distribution.pdf)

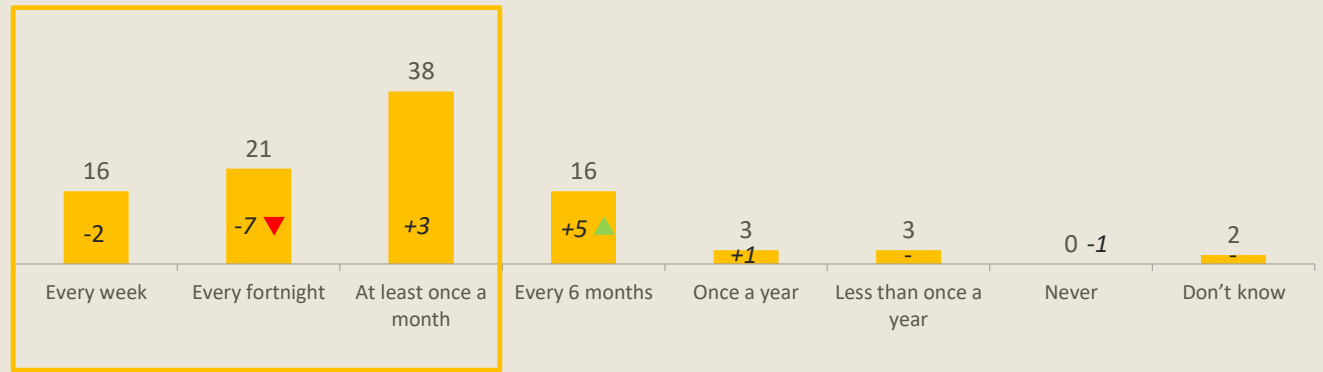


**Claimed awareness of COO remains very stable at 7 in 10.  
3 in 4 buy imported beef at least monthly – strongest for high income families.**

Know Country of Origin?



FREQUENCY OF BUYING  
**IMPORTED** BEEF  
(Differences vs 2017)

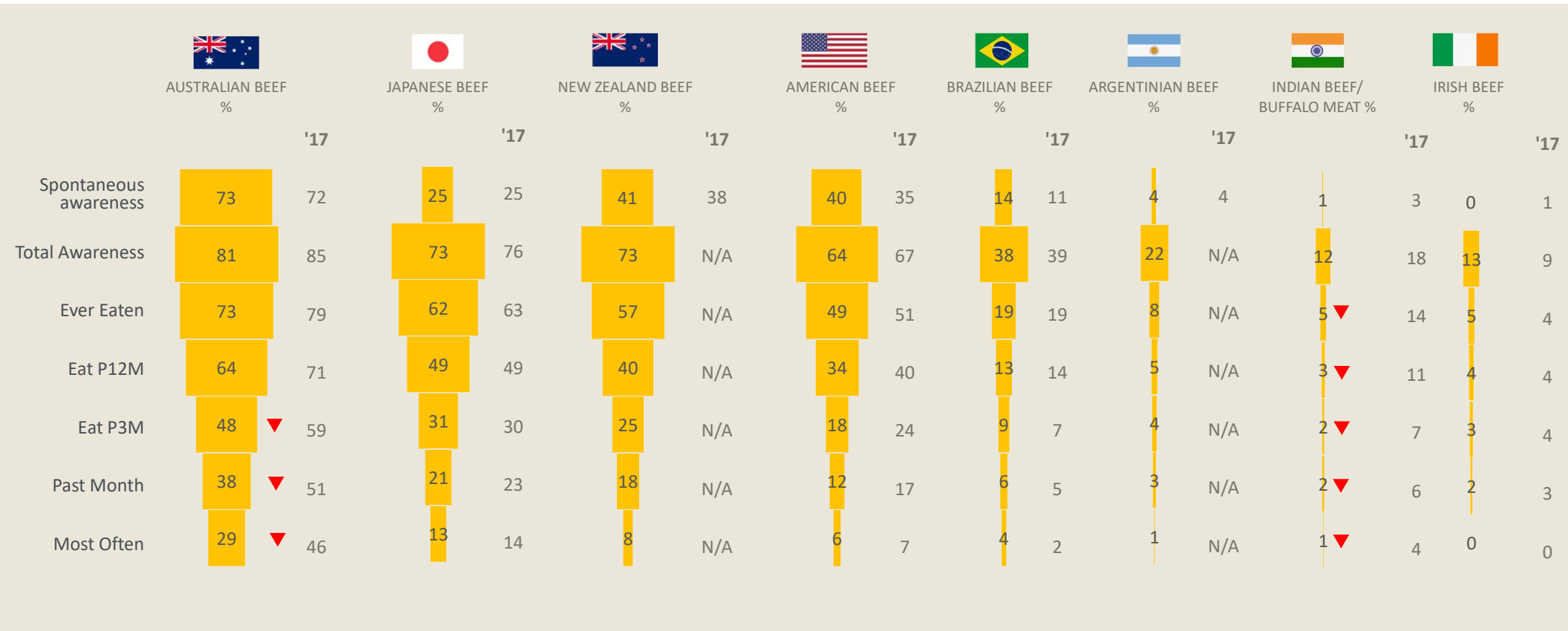


**IMPORTED BEEF MONTHLY 75% (-6% vs 2017)**

**Weekly buyers tend to be under 50, high income families**



## Despite strong volume, claimed Brazil consumption is relatively low. AU maintains its strong #1 position, however, recent consumption dips. What may be playing a role here beyond NZ?



**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  
 \*N/A –New Zealand and Argentinian Beef not included in 2017  
 Base: '22 (n=277), '17 (n=324) – Bought beef in past month or ever buy beef

▲ ▼ Sig. different at 95%





Consumption of AU/NZ Beef is strongest amongst families, aged 35+, while US and Japanese Beef consumption skews stronger for under 35s



AUSTRALIAN  
BEEF



NEW ZEALAND  
BEEF

35+ years old  
Households / families with children



AMERICAN  
BEEF



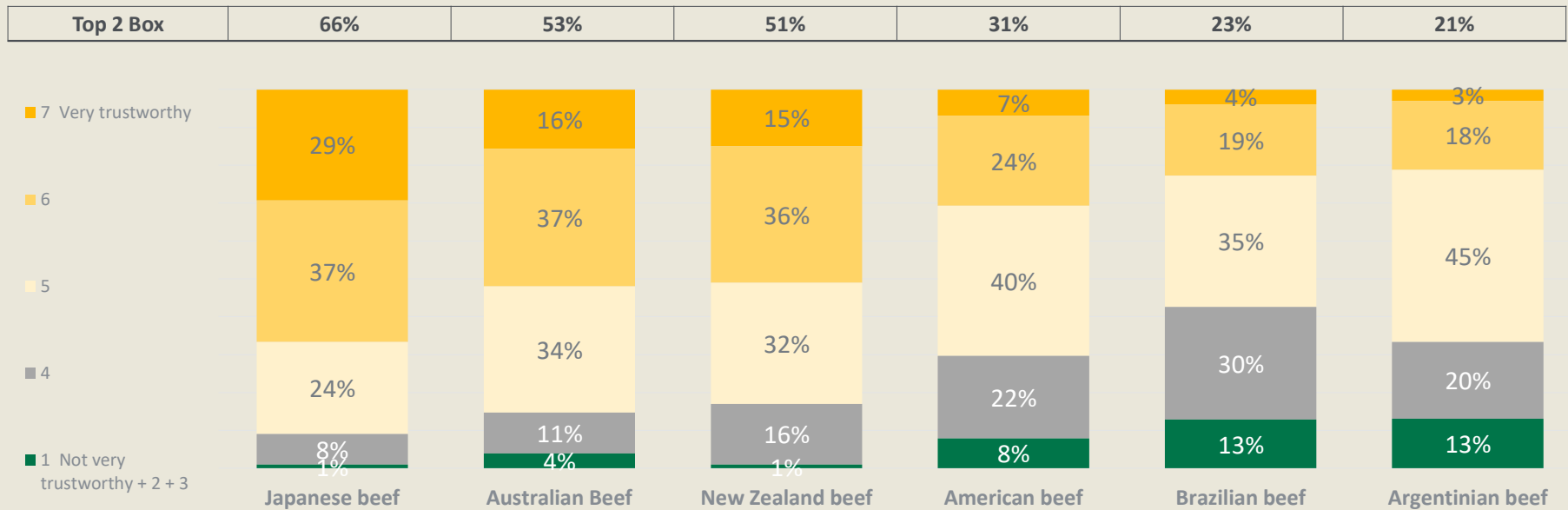
JAPANESE  
BEEF

Under 35 years old  
Households without children



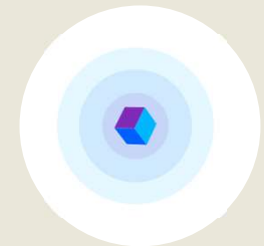
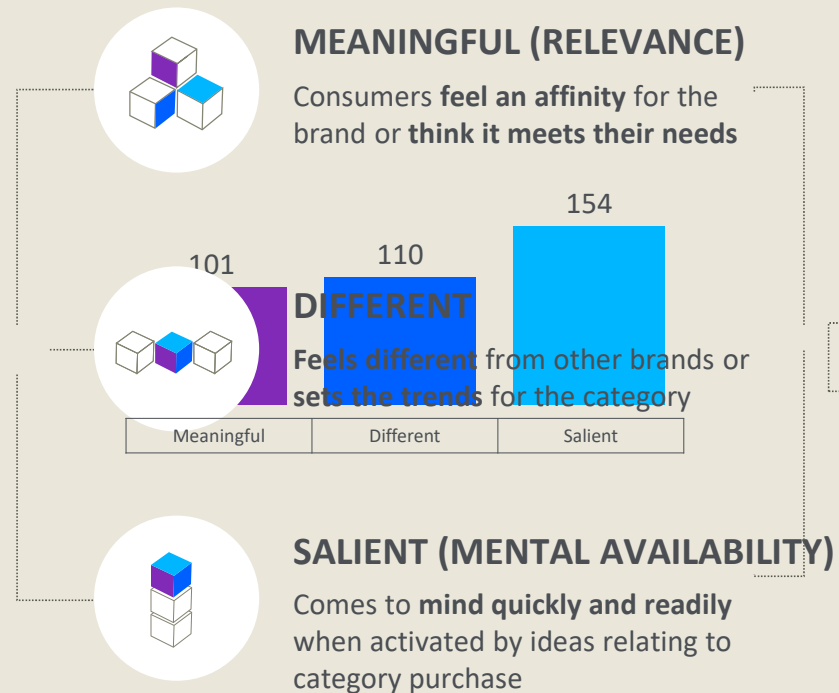
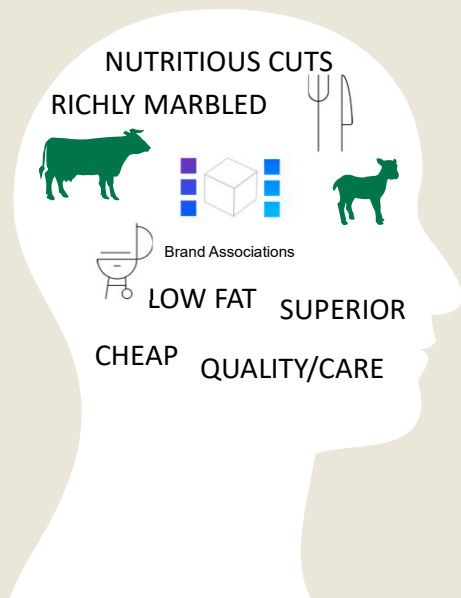
**Similar to other markets, Japanese Beef leads trust – followed by AU and NZ. US beef is significantly less trusted, as are smaller/less familiar imports.**

Trustworthy - COO BEEF



BTR2B. How trustworthy is the imported beef from these countries – 7 point scale  
 Base: Australian Beef (225) American beef (177), Indian beef/Bufalo meat (34), New Zealand beef (203), Japanese beef (203), Argentinian beef (60), Brazilian beef (105), Irish beef (36)

The elements of a successful brand associations that ensure you are relevant, build an emotional connection, are differentiated from the crowd and mentally available when it matters.

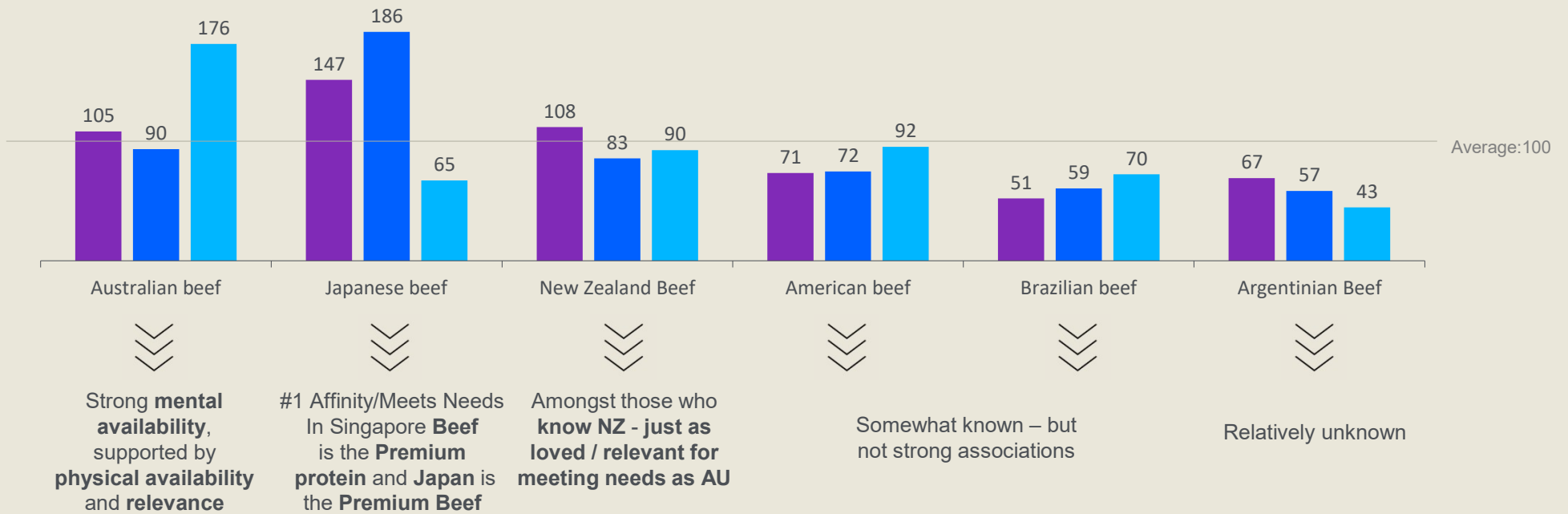


**POWER** is a prediction of the brand's volume share based purely on perception, absent of activation factors.



**PREMIUM**

**AU's powerful position is strong mental availability plus relevance. Amongst those who know NZ, NZ is just as strong. Unlike other markets, JP manages to pair difference with meeting needs/affinity.**



## The associations consumers hold in their minds for beef in Singapore group into intuitive themes



### SUPERIOR

*The fat is nicely **marbled***  
*Is the most **superior** beef*  
*The meat is usually **tender***  
***Consistent** quality standards*  
*Is my/my family's **favourite** beef*



### EASY EVERYDAY

*Is **easy and convenient** to purchase*  
*Offers a **variety of cuts** that suit the meals I make*  
***Fresh***  
*Guaranteed **safe** to eat*



### WELFARE

*The industry is **environmentally sustainable***  
*The animal is **well-cared for***



### NUTRITIOUS

*More **nutritious***



### LOW FAT

*Is **low fat***

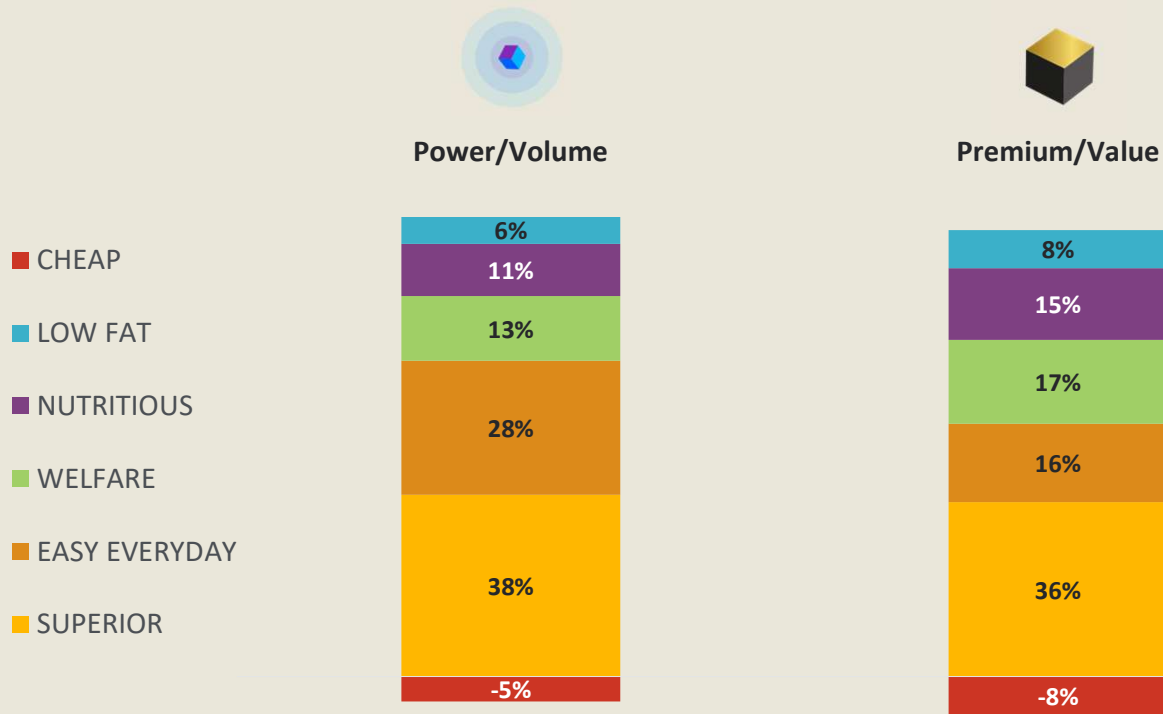


### CHEAP

***Cheaper***

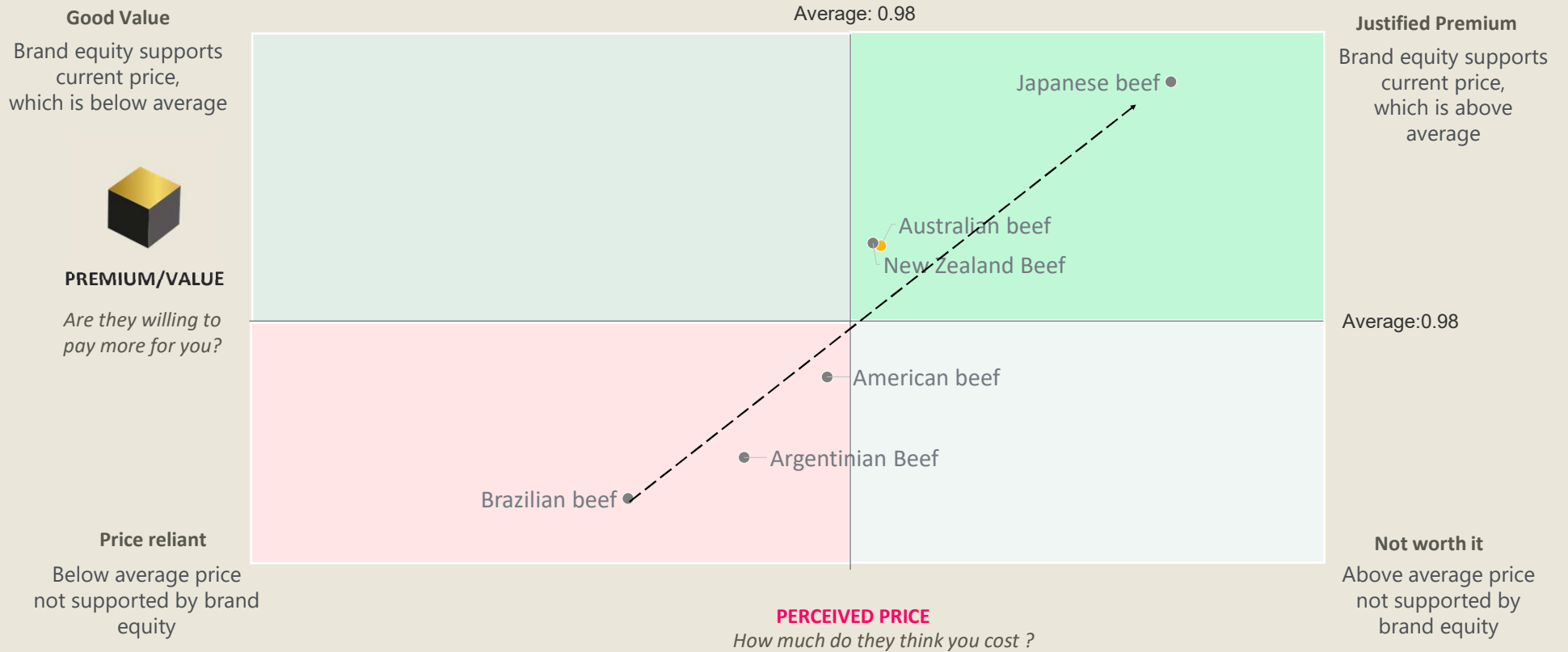


There is some difference in the impact that each of these themes has on driving likelihood to choose one product over the other (Power) or the likelihood to pay more (Premium).





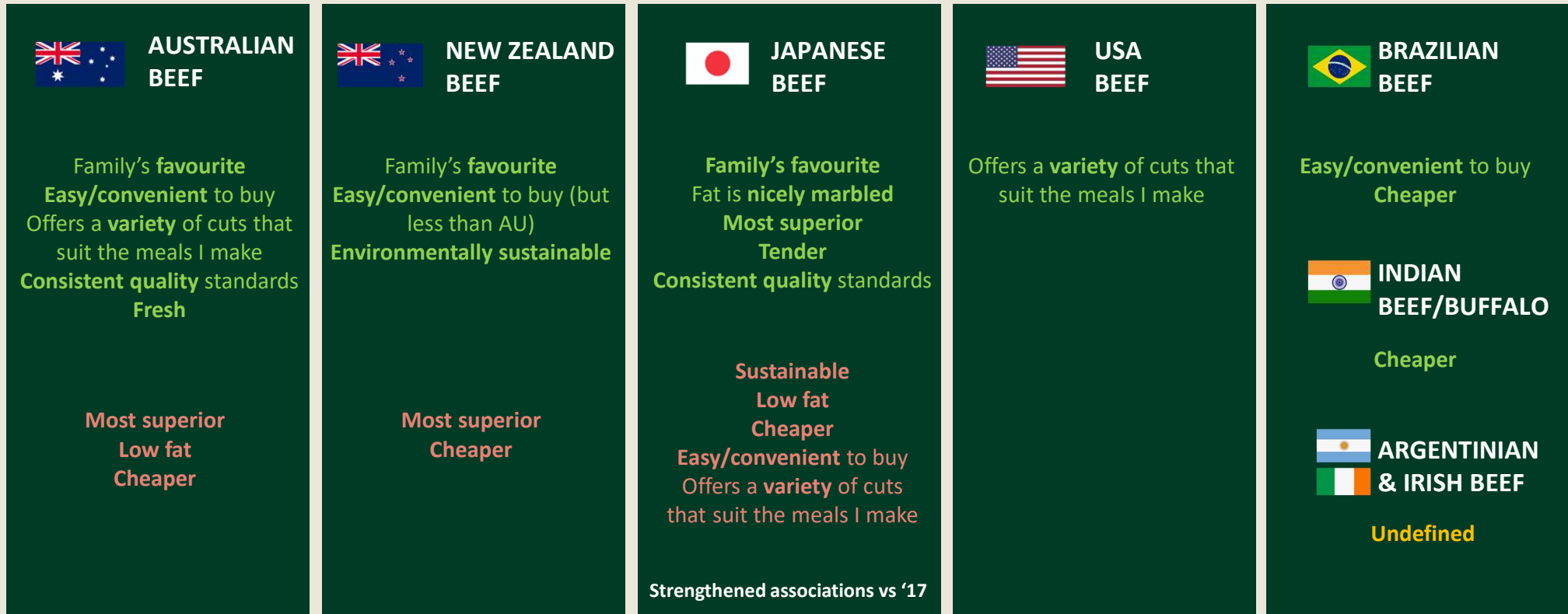
In Singapore, there is a linear relationship between price and premium perceptions. Brazil, Argentina and US are low price, while AU/NZ and Japan justify their higher price.



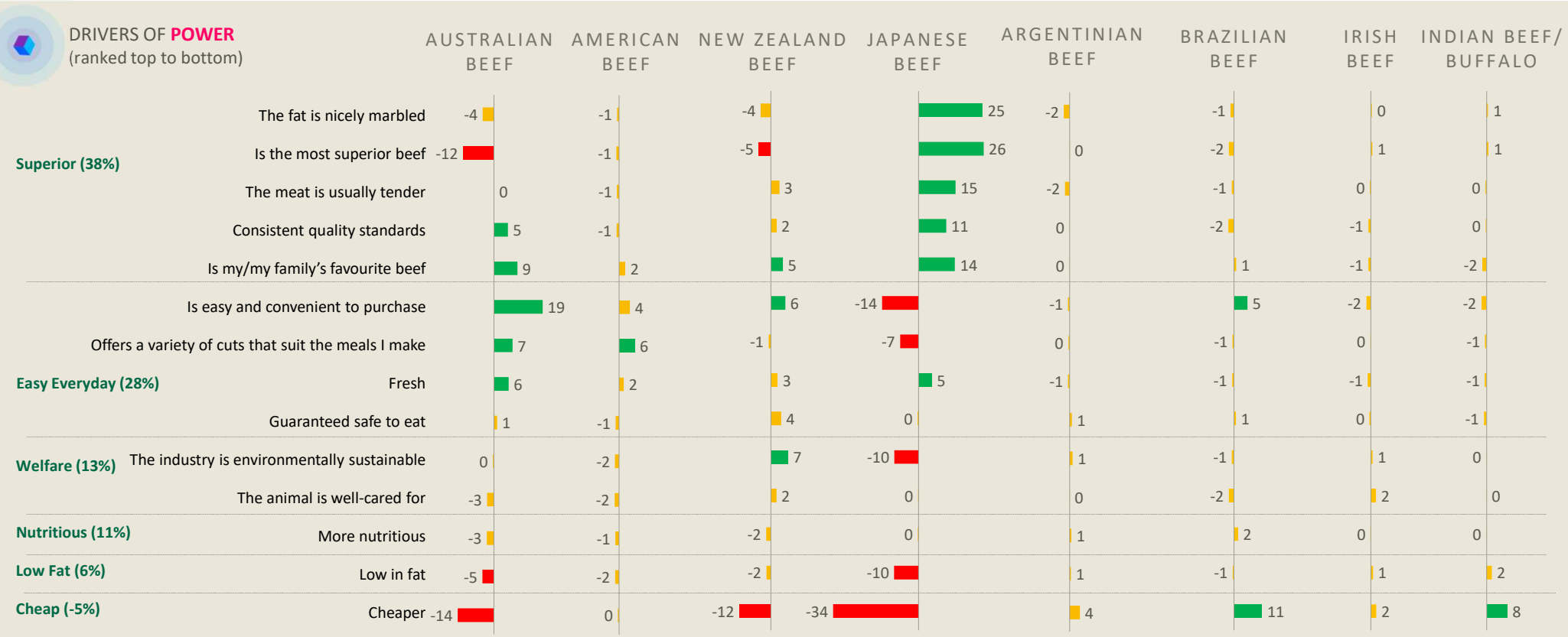
Unlike other markets, AU Beef plays like a local – seen as a readily available, fresh family favourite. NZ seen similar, but less and picks up environmental associations (seen elsewhere). Japan is seen as most Superior.

Relative Strengths:

Relative Weakness:



# AU Beef's relative strengths highlight its position as 'accessible premium' – fresh, easy and consistent quality to be a family favourite. NZ is similar, but lesser and picks up environmental associations. Japan is most Superior.



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: '22 (n=277). 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 an appropriate, summary name



We measure perceptions related to Beef trust and traceability – which gives us a window into the mental image consumers hold about COOs. It is anchored in taste, backed by different place and process perceptions.

A thought bubble containing the Australian and New Zealand flags, a landscape with cows, and text describing the origin and taste of the beef.

**AUSTRALIAN & NEW ZEALAND BEEF**

Comes from the perfect place to produce beef

Tastes great AU: Everyone eats

**PLACE**

A thought bubble containing an image of a cow with the USA flag on its body and text describing the origin and taste of the beef.

Clearly traced back to its origin

Tastes great

(Indicates clear branding) **USA BEEF**

A thought bubble containing images of Japanese beef steaks and text describing the standards and quality of the beef.

**JAPANESE BEEF**

Highest standards at every step

Tastes great Consistent quality

High Quality

**PROCESS**

A thought bubble containing the Brazilian flag and text describing the origin and taste of the beef.

**BRAZILIAN BEEF**

Safety, consistent quality and freshness are the most relevant associations for Australian Beef to pursue and protect, underpinned by perfect place / grass-fed rearing practices.




Top 5 Associations to Grow - Volume & Value:  
(Ordered based on impact on building equity\*)

 <b>1. Most Superior</b>	 <b>2. Fat is nicely marbled</b>
--	--

Owned by Japan

Build

  
**3.  
Safe**

Protect

  
**4.  
Consistent  
Quality**

Protect

  
**5.  
Fresh  
/OR/  
Tender**

Relevant for Australian Beef to pursue and protect, underpinned by perfect place / grass-fed rearing practices

# LAMB

## COUNTRY OF ORIGIN

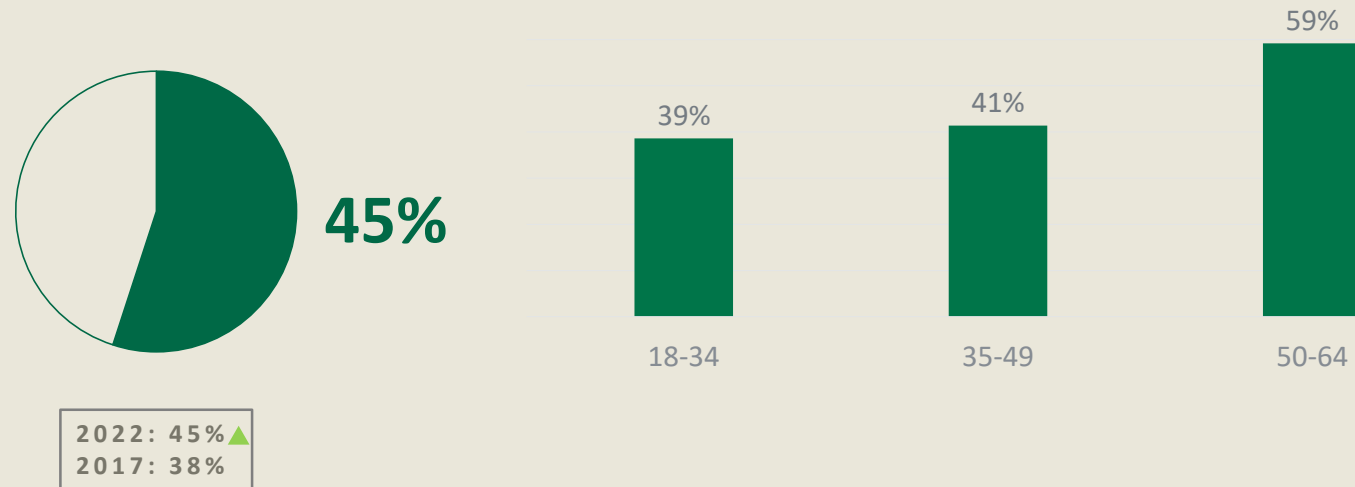


All questions in this section were asked of lamb buyers only (must have ever bought lamb). They also must have previously bought, or would consider buying, imported lamb.



Penetration of lamb purchase appears to have dipped since 2017, with just under half of those we spoke with saying they have never bought lamb. It is older consumers who claim to not be buying lamb. Under 50s penetration is stronger.

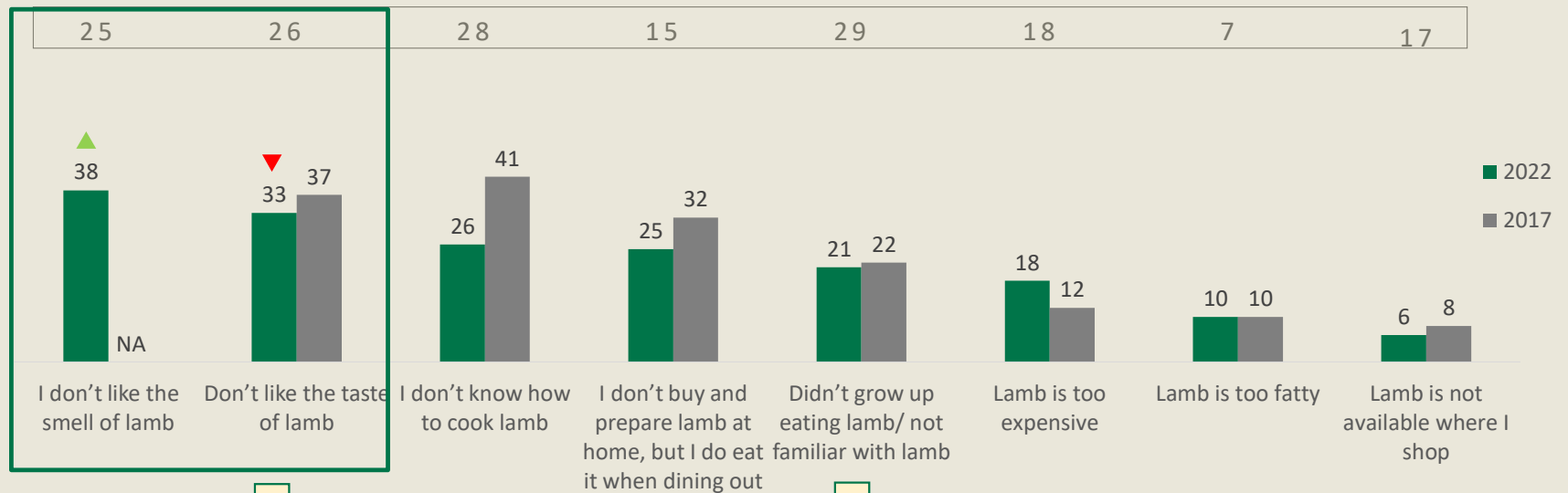
### Of the sample who have never bought lamb





And it is the functional barriers of taste and smell that are the biggest deterrents, exceeding the global averages.

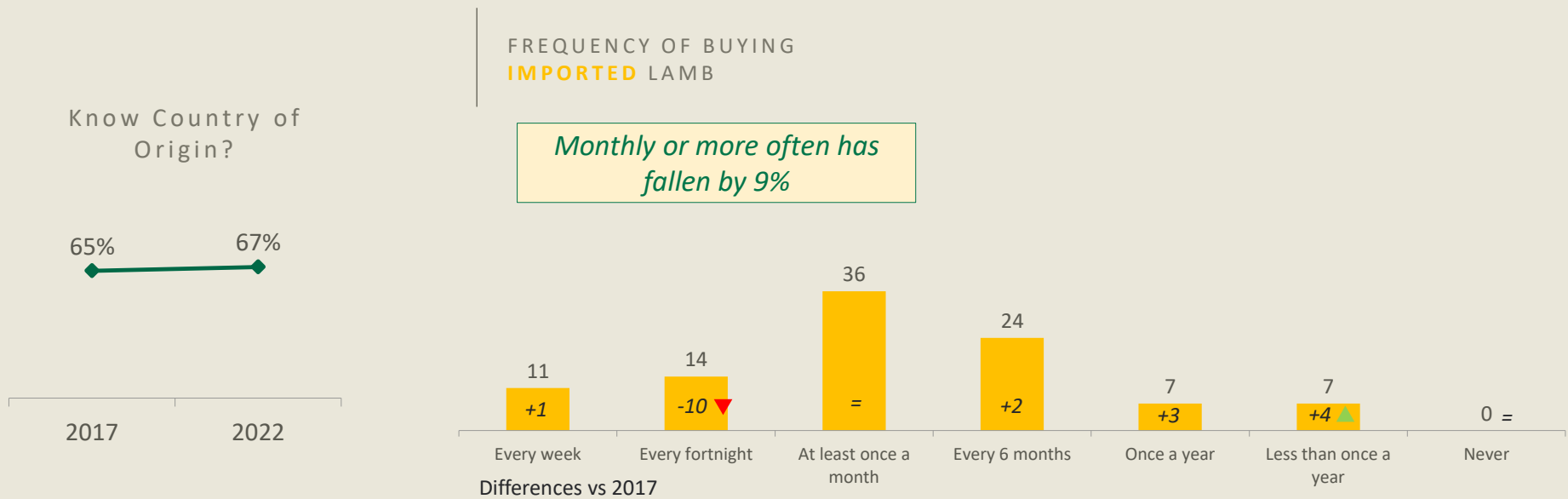
Global Average:



Taste and familiarity are bigger barriers for the younger consumers who are not buying lamb.



While claimed knowledge of COO remains stable, purchase frequency appears to have declined since 2017, but still around 2 in 3 buying at least monthly.



**KANTAR**

(LBH1A) Do you know the country of origin of the lamb you buy? Base: '22 (n=276), '17 (n=402)  
 (CH7) How often do you buy imported lamb/Halal compliant lamb? '22 (n=276), '17 (n=402)  
 (CH7LOC) How often do you buy local lamb/Halal compliant lamb? Base: '22 (n=276), '17 (n=402)

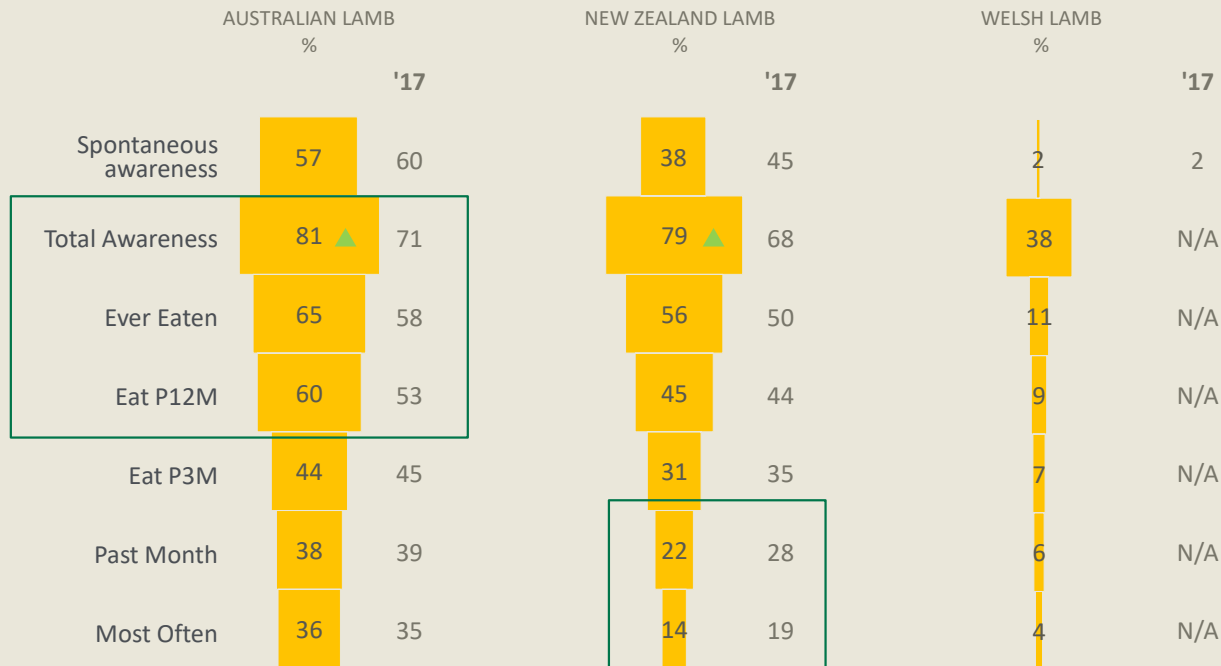
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While aided awareness of both AU and NZ lamb is up vs 2017 the rest of the funnel remains stable. Welsh lamb (new addition), is still very small in Singapore.

BRAND HEALTH – LAMB



LBH1. Spontaneous Awareness, LBH2. Prompted Awareness, LBH3. Ever Eaten, LBH4. Eaten last year, LBH5. Eaten in the last 3 months, LBH6. Eaten last month, LBH8. Most often  
Base: '22 (n=223), '17 (n=324) – Bought lamb in past month or ever buy lamb

▲ ▼ Sig. different at 95%



The associations consumers hold in their minds for lamb in Singapore reflect a focus on quality and versatility important for family favourite, and tenderness and superiority tying to nutrition. Availability is a defining attribute that stands apart from others.



### CONSISTENT CUTS

*Is my/my family's favourite lamb*  
*Offers a **variety of cuts** that suit the meals I make*  
*Consistent quality standards*



### SUPERIOR

*Is the **most superior** lamb*  
*More **nutritious***  
*The meat is usually **tender***



### CONVENIENT

*Is **easy and convenient** to purchase*



### SAFE TO EAT

*The animal is **well-cared for***  
*Guaranteed **safe to eat***  
***Low in fat***



### CHEAP

***Cheaper***

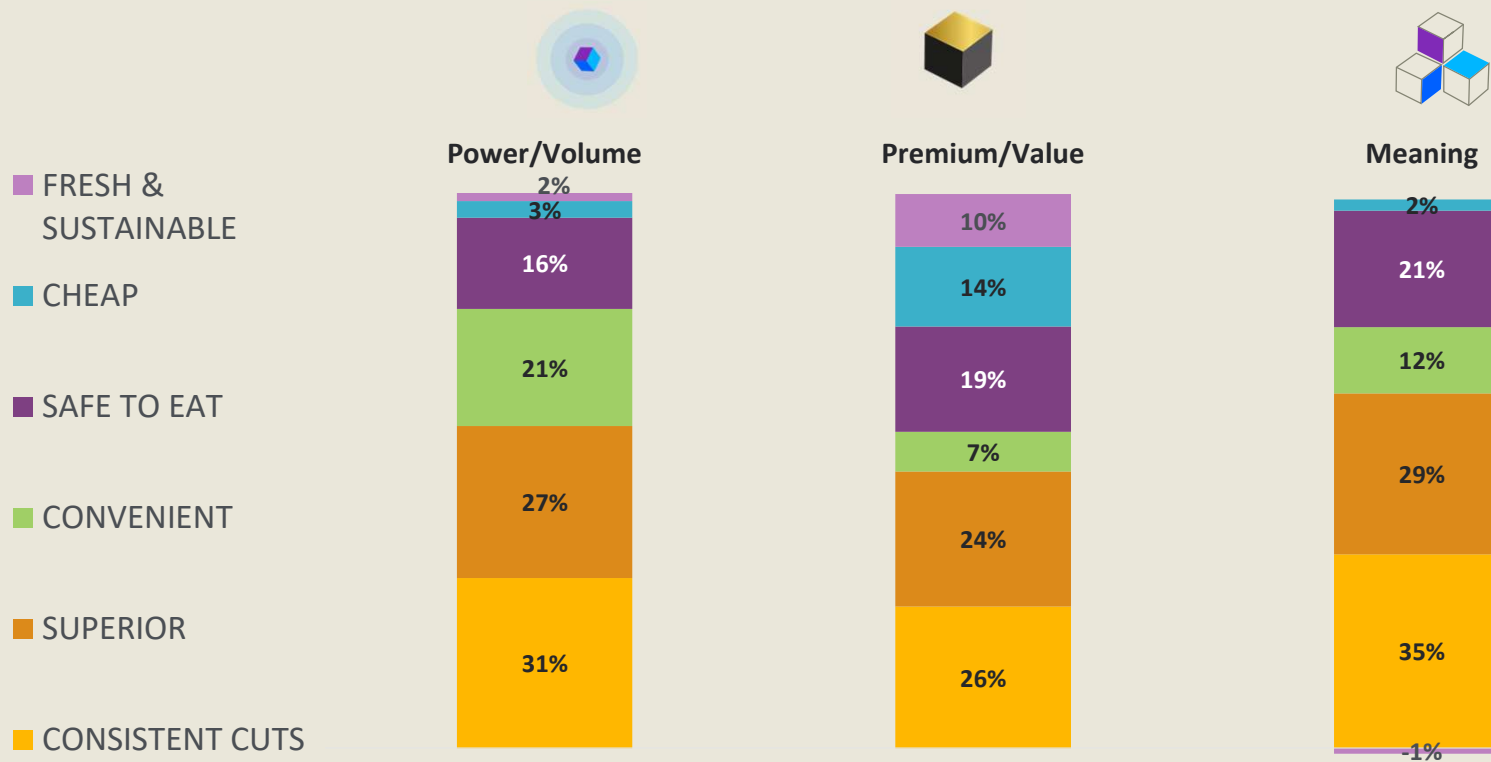


### SUSTAINABLE

*The industry is **environmentally sustainable***  
***Fresh***



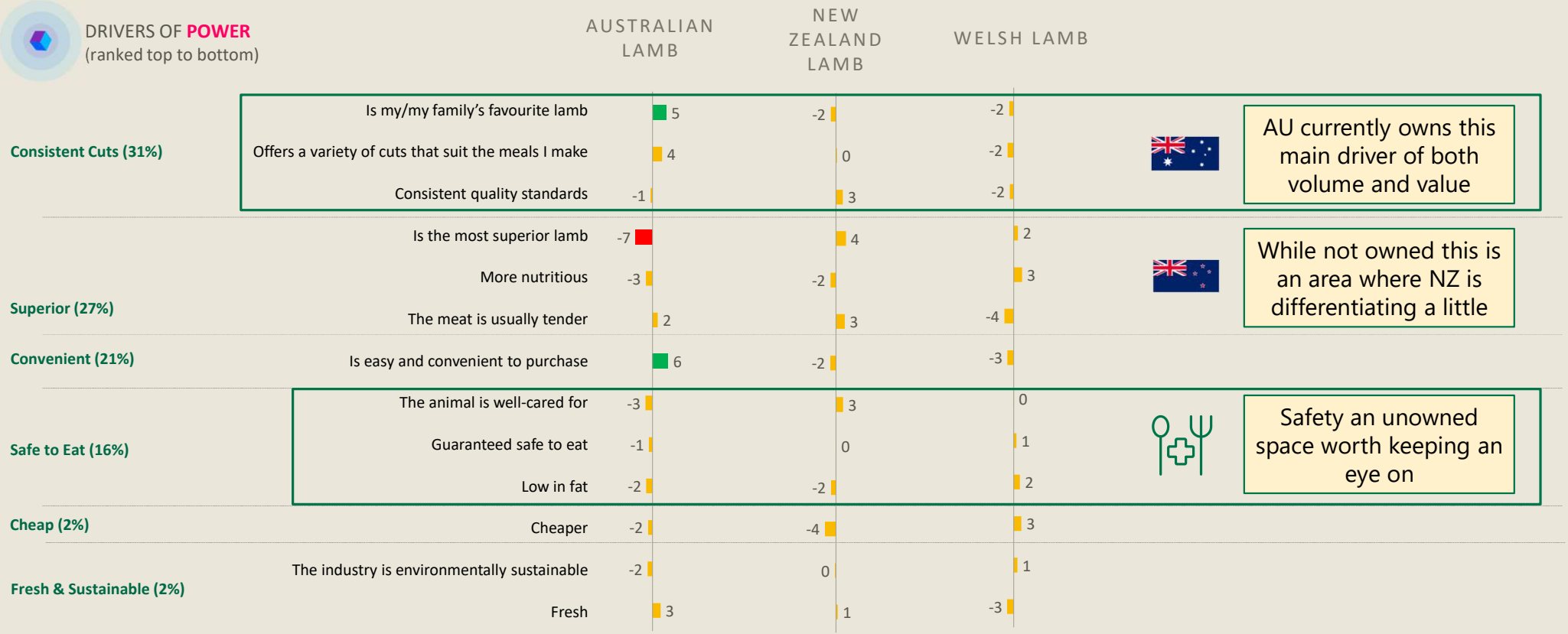
And these top three groupings explain about 80% of volume, and a similar level of relevance to the lives of Singaporeans. Perceptions of safe to eat remain important.



Compared with 2017 there have been some changes in the market dynamics.



# Australian lamb is the only COO with definition in Singapore consumers minds. We own the consistent cuts space, and also convenience, supporting volume.



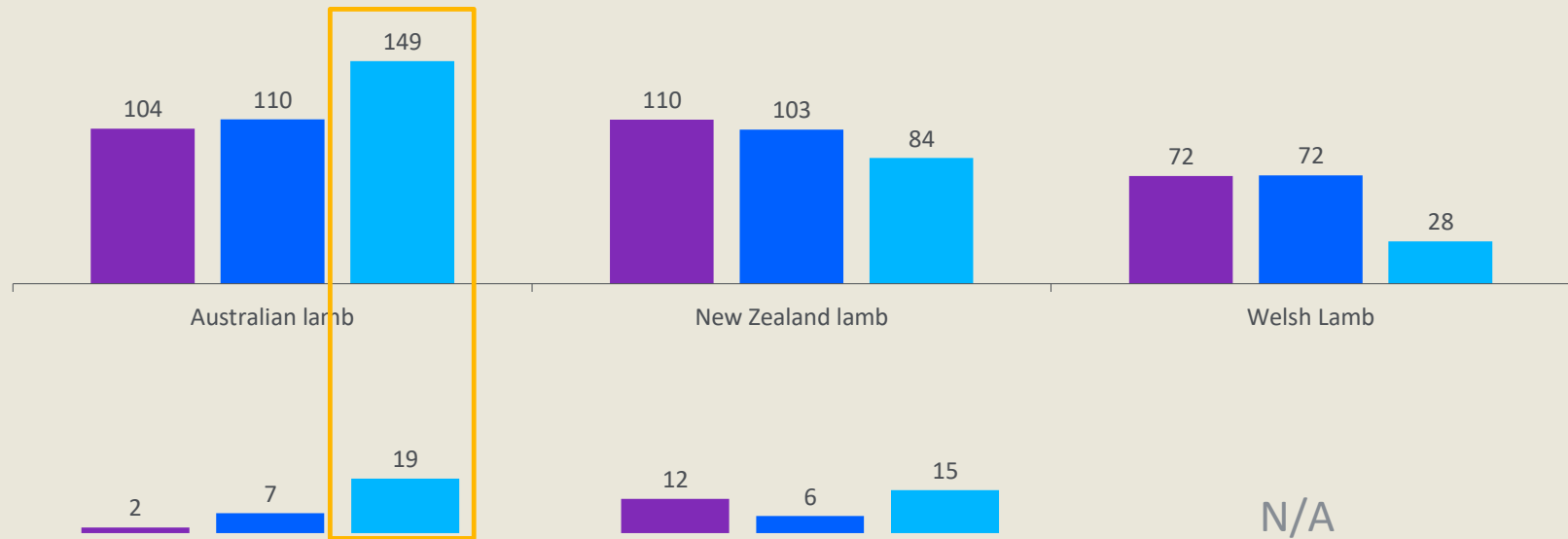
**KANTAR**  
+5 or more = relative category strength  
-5 or less = relative category weakness.

LBH9. Here are some things which people have said about lamb. We would like to know which of the following statements apply to lamb 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=223). 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 an appropriate, summary name. Base: '22 (n=223)





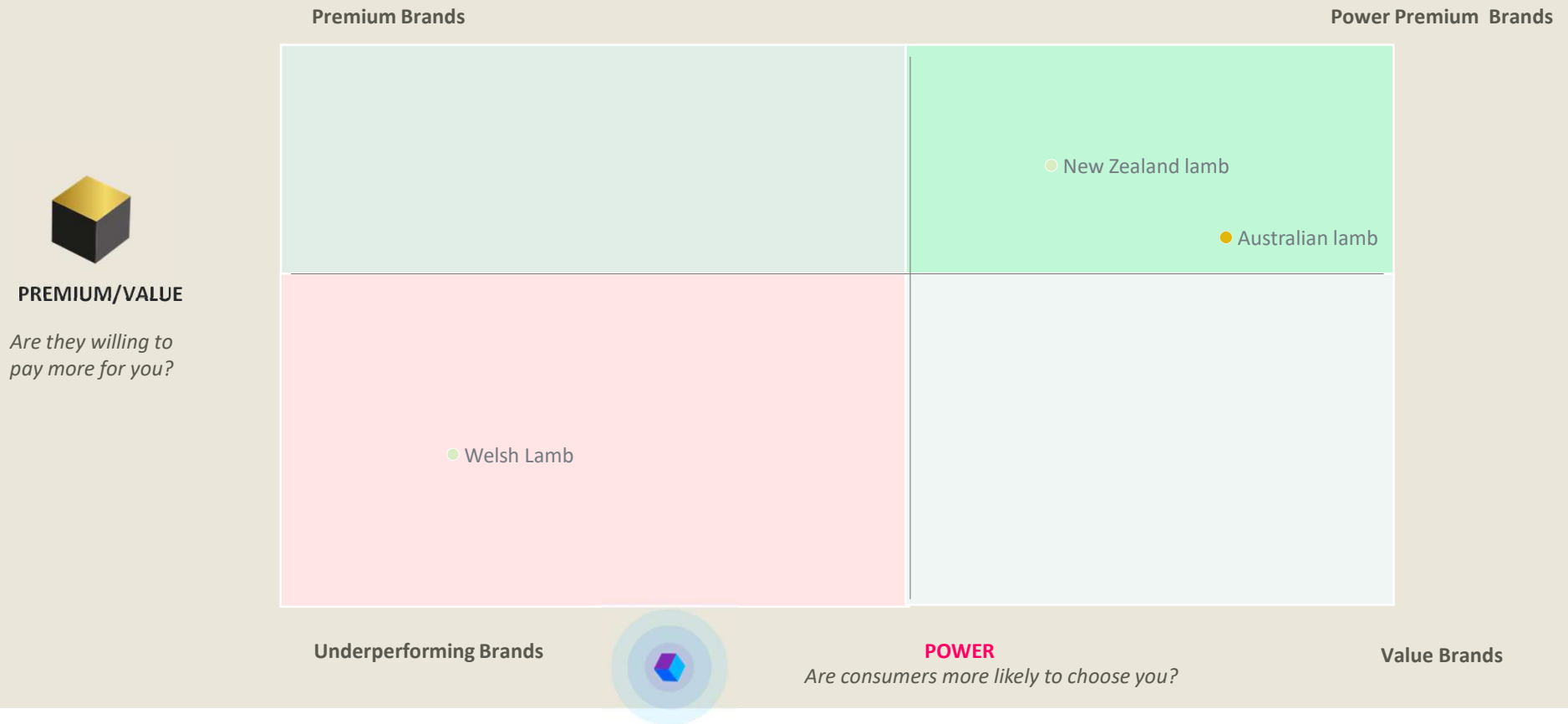
The result is that we have established a strong equity in consumers minds, being relevant but also supported by strong salience. NZ lamb is also a meaningfully different brand, having improved relevance since 2017.



Differences vs 2017

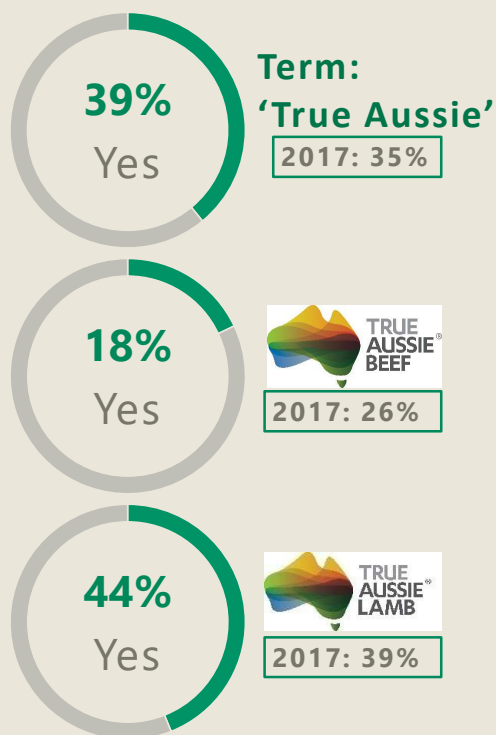


The result is that both NZ and AU lamb have similar Power and Premium perceptions in the Singapore market, with predisposition towards AU being higher and NZ seen as slightly more premium.





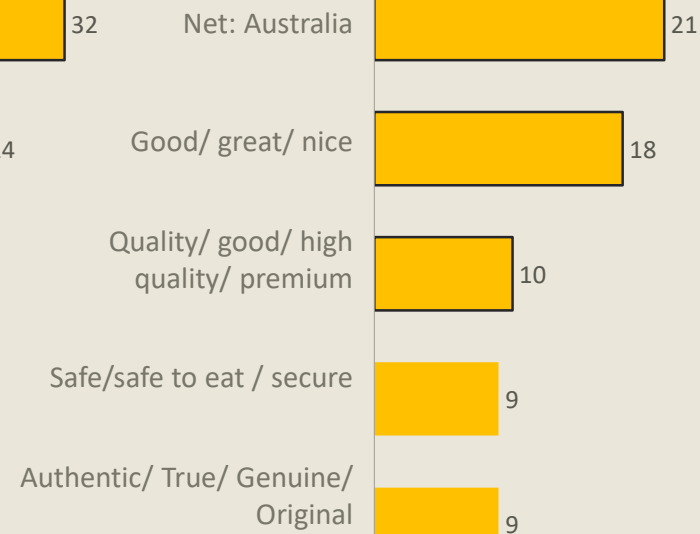
For lamb in particular, it appears that True Aussie Awareness is an asset we can leverage to underpin communications and perceptions of quality, reliability and safety.



% of respondents who spontaneously mention:



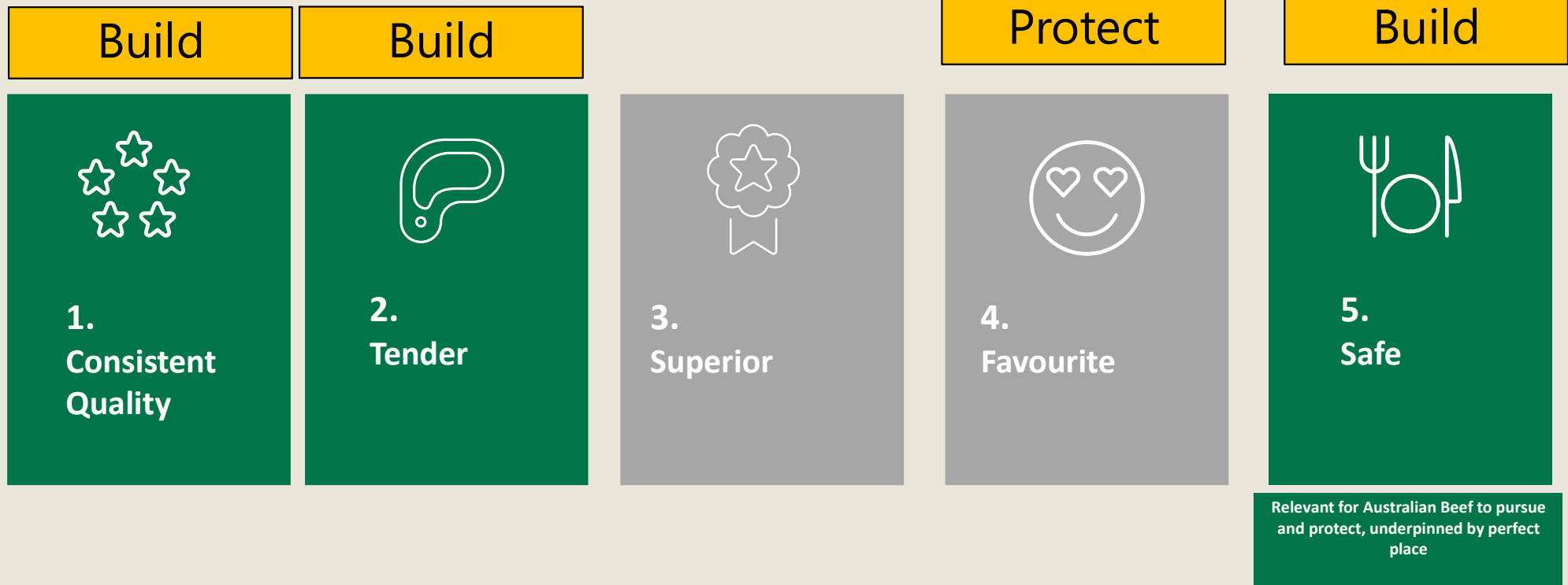
% of respondents who spontaneously mention:



Building out quality perceptions and tenderness while underpinning with the elements that can communicate safer product will allow us to reinforce our Power and Premium position in the market



Top 5 Associations to Grow - Volume & Value:  
(Ordered based on impact on building equity\*)



# FINAL THOUGHTS & DISCUSSION

## Recapping what we have seen today

Beef combines taste with care to be the superior choice in the protein repertoire. Chicken/Pork provide easy everyday variety. Fish is healthy option.

Grass-fed has established familiarity in the market which Singapore sees as natural, better for health. Grain/Corn have little clear meaning in this market. Marbled reflects a really clear role for consumers.

For beef, Channel usage remains stable (with exception of Hypermarket which declined) but Lamb has shifted more with greater general use and online and butchers up significantly.

Claimed awareness of COO remains very stable at 7 in 10. 3 in 4 buy imported beef at least monthly – strongest for high income families.



AU maintains its strong #1 position on brand health, with Japan a strong #2. Japanese Beef leads trust – followed by AU and NZ as clear second tier ahead of other imports.

AU's powerful position is strong mental availability plus relevance. Unlike other markets, JP manages to pair difference with meeting needs/affinity.



Penetration of a lamb purchase appears to have dipped since 2017. It is older Singaporeans who claim to not be buying lamb. Smell and taste are main barrier.

AU Lamb is the established leader. It has established a strong equity in consumers minds, being relevant but also supported by strong salience. NZ is developing elements of superior.

## Thoughts on what & where we should communicate.



**1. Safety, consistent quality and freshness are the most relevant associations for Australian Beef to pursue and protect, underpinned by perfect place / grass-fed rearing practices.**



**Building out quality perceptions and tenderness while underpinning with the elements that can communicate safer product will allow us to reinforce our Power and Premium position in the market**



**3. Our clean, safe rearing environment can be leveraged as reason to believe for safe, higher quality product, with True Aussie and other assets able to reinforce these perceptions.**

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