MLA Global:
CONSUMER TRACKER

JAPAN 2021

Presentation Deck

MEAT & LIVESTOCK AUSTRALIA

KANTAR

Agenda…

Intros, Background & Methodology

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

Protein Landscape

A look at the awareness, claimed usage and associations with the different main proteins

Beef COO Brand Health & Perceptions

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

Topic 1: COO Trust perceptions

Level of Trust in different COO brands, and the key attributes for building Trust in AU product in the UAE market.

Topic 2: Purchase Channel online

Usage, barriers and facilitators of online red-meat purchase

Topic 3: True Aussie awareness & perceptions

True Aussie logo performance and key associations tied to the TA brand.

Japan: A recap of some of your specific areas of focus from the brief

Deeper look at brand image perceptions

- Brand image comparison between Aussie beef and American beef. Can emotional statements also be added into the attribute list e.g Stylish/Old, Innovative, Natural/Artificial, beauty/unhealthy, and others.

We get to some of this in the 'Trust' section and our core COO section

Purchase Decision journey

- When does consumer decide to buy meat including beef, chicken, pork, fish? Before shopping, when checking retail flyer, on the spot at meat section of supermarket, etc. and reasons for.
- What is the possibility to cook beef or put beef in the freezer immediately after purchasing?

Less of this covered in this quant study, but a little in our recent qual

Online purchase environment

- A deeper understanding of the online environment, including TA logo penetration.
- Where buying beef before and after COVID-19?
  Supermarket, butcher, online butcher.

We will cover this in topics 2 and 3

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

7,800 consumer interviews in 2021

*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, purchase channel*
- *Trust & recommendation of COO brands*

10 markets in 2021

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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** UAE/KSA conducted with face to face interviewer*

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DEMOGRAPHICS

Sample is made up of 800 consumers

		COUNTRY INCIDENCE	SAMPLE STRUCTURE
Gender	Male	50%	-
	Female	50%	100%
Age	18-34	16%	27%
	35-49	21%	45%
	50-64	19%	27%
Cities	Nagoya	2%	12%
	Tokyo	7%	19%
	Chiba	0.7%	7%
	Saitama	0.9%	7%
	Kanagawa	7.2%	7%
	Fukuoka	1%	13%
	Sapporo	2%	12%
	Kyoto	1%	5%
	Osaka	2%	11%
	Hyogo	4%	7%
Consumption	Buy Fresh Meat at Least Occasionally	96%	100%
MGBs	Main Grocery Buyers	97%	93%
Children	Households with Children	23%	29%
Income	Under ,000,000 yen	51%	27%
	4,000,000 yen – 6,000,000 yen		29%
	6,000,001 yen+	49%	43%

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PROTEIN LANDSCAPE

Beef, Pork and Chicken remain top of mind, as per previous years. Last month usage stable over time.

SPONTANEOUS AWARENESS

	Top of Mind	Total Awareness	‘20	‘19	‘18
Beef	42%	87% ▲	83 ▼	87	83
Pork	31%	85% ▲	78	83	82
Chicken	18%	74% ▲	69 ▼	74	68
Lamb/ mutton	1%	27%	26 ▼	36	38
Goat	0%	1%			

Top of Mind

Total Awareness

BOUGHT IN LAST MONTH

		‘20	’19	’18
Beef	77%	80	79	80
Pork	91%	91 ▼	96	94
Chicken	90%	91	93	92
Lamb/ mutton	10%	11 ▲	7	15
Goat	1%	1	1	0
Horse	3%	2	3	2

AVERAGE SERVES LAST 7 DAYS

		‘20	’19	‘18
Beef	0.9	1.0	1.0	1.1
Pork	2	2.2	2.2	2.1
Chicken	1.8	1.9	2.0	1.9
Lamb/ mutton	0.2	0.1	0.1	0.2
Goat	0.1	0.0	0.1	0.1
Horse	0.1	0.1	0.1	0.1

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CH1 Spontaneous Awareness – When thinking about meat, which types come to mind?
CH2 Bought in the last month – Which types of meat have you bought in the last month to prepare for a meal at home?
CH10 How many meals that included the following meats have been prepared and eaten in your home in the last 7 days?
Base: ‘21 (n=804), ‘20 (n=800), 19’(n=800)

▲▼ *Sig. different at 95%*

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IMAGE PROFILE: Understanding relative strengths and weaknesses

Image Profiling is a unique tool used by Kantar to analyse the ***relative* strengths and weaknesses** of each brand across a number of attributes/associations

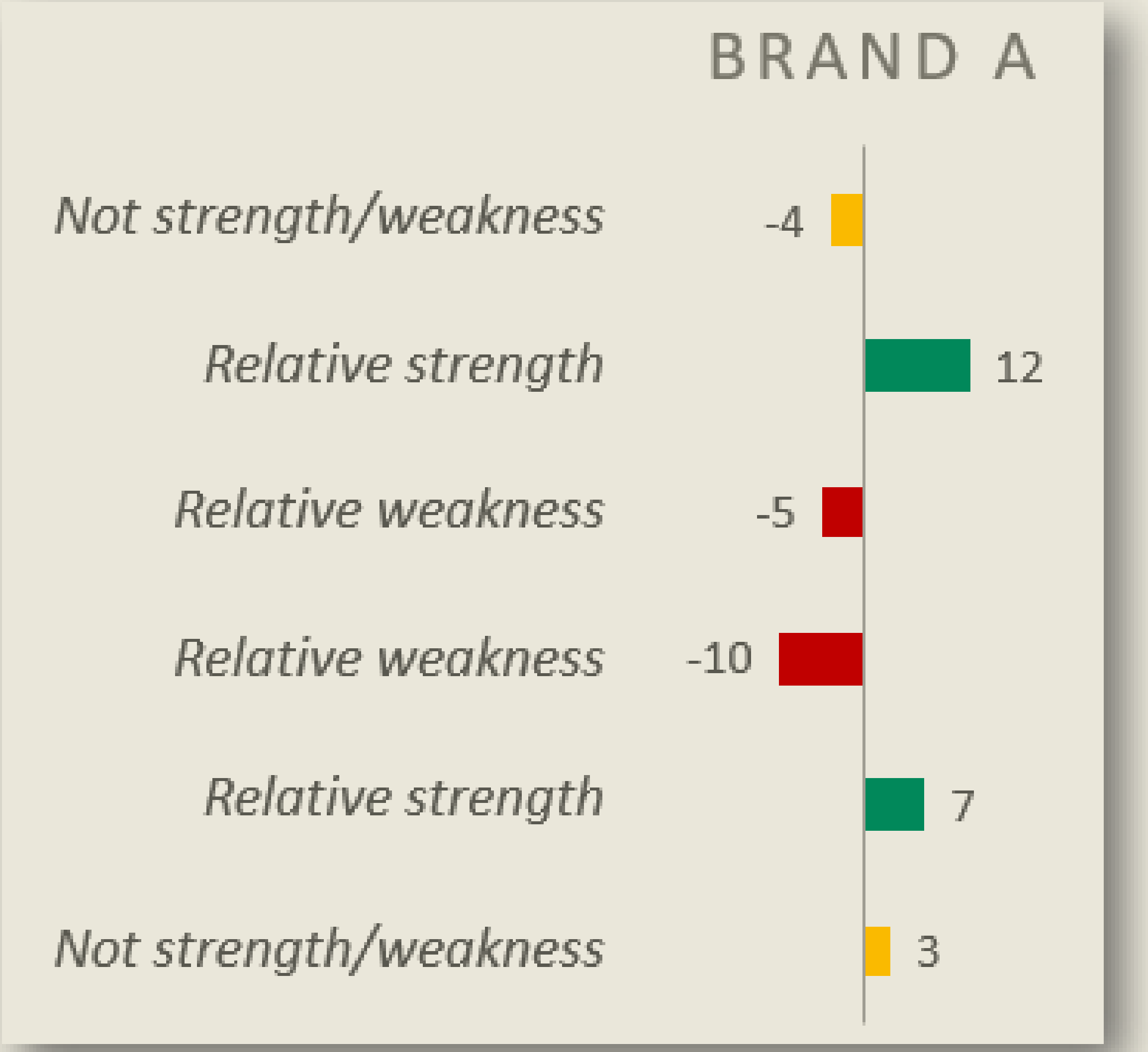
Image Profiling removes two effects from the data:

01 **Brand size / familiarity effect**

Some brands (or in this instance meat types) are more easily endorsed across all statements. This is often the case where larger, more well-known brands are more endorsed across all of the statements.

02 **Statement effect**

Certain image statements are more commonly used to evaluate brands than others, and therefore will be associated with more brands. For example, category hygiene statements may be endorsed for many brands – while other statements that are more discriminating.



Calculation

The number indicated on the chart is the **difference** between the score that brand is *expected* to receive (for that statement) and its *actual* score (for that statement).
The *expected* score is calculated based on the **average endorsement of that brand across all statements**, as well as the **average endorsement of that statement across all brands.**

If the brand scores a difference of **+5 or more** (from its expected score), this statement is considered a **relative strength** for that brand within the brands tested. Likewise, if that brand scores a differences of **-5 or more** (from its expected score), this statement is considered as a **relative weakness**.

As a result, all scores are relative as the calculation takes into account all the brands tested. Any changes to which or how many brands are tested impacts the *expected* scores and thus the final difference score for each brand.

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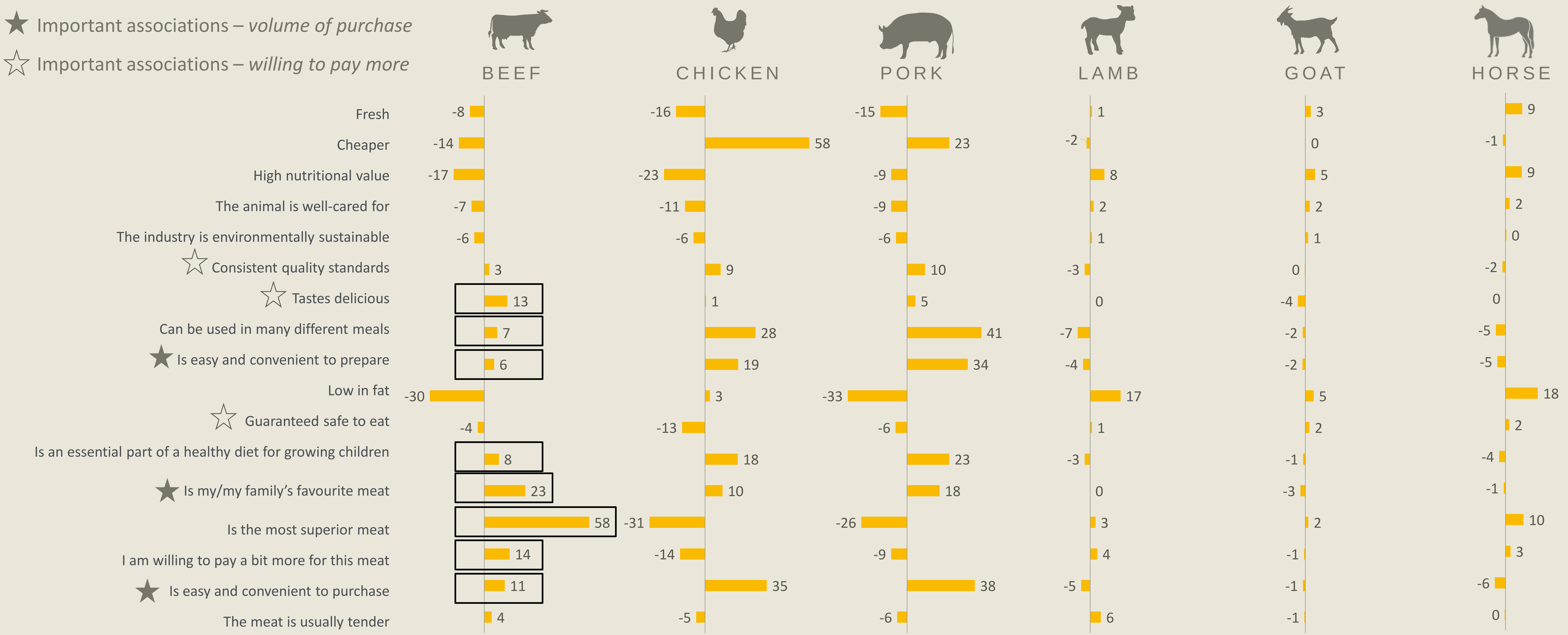
Beef has a distinctive profile in Japan – which combines superiority and a willingness to pay more vs other meats.



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CH12. Which of the following things do you associate with each type of protein? Base: (n=804)

+5 or more = relative category strength

-5 or less = relative category weakness.

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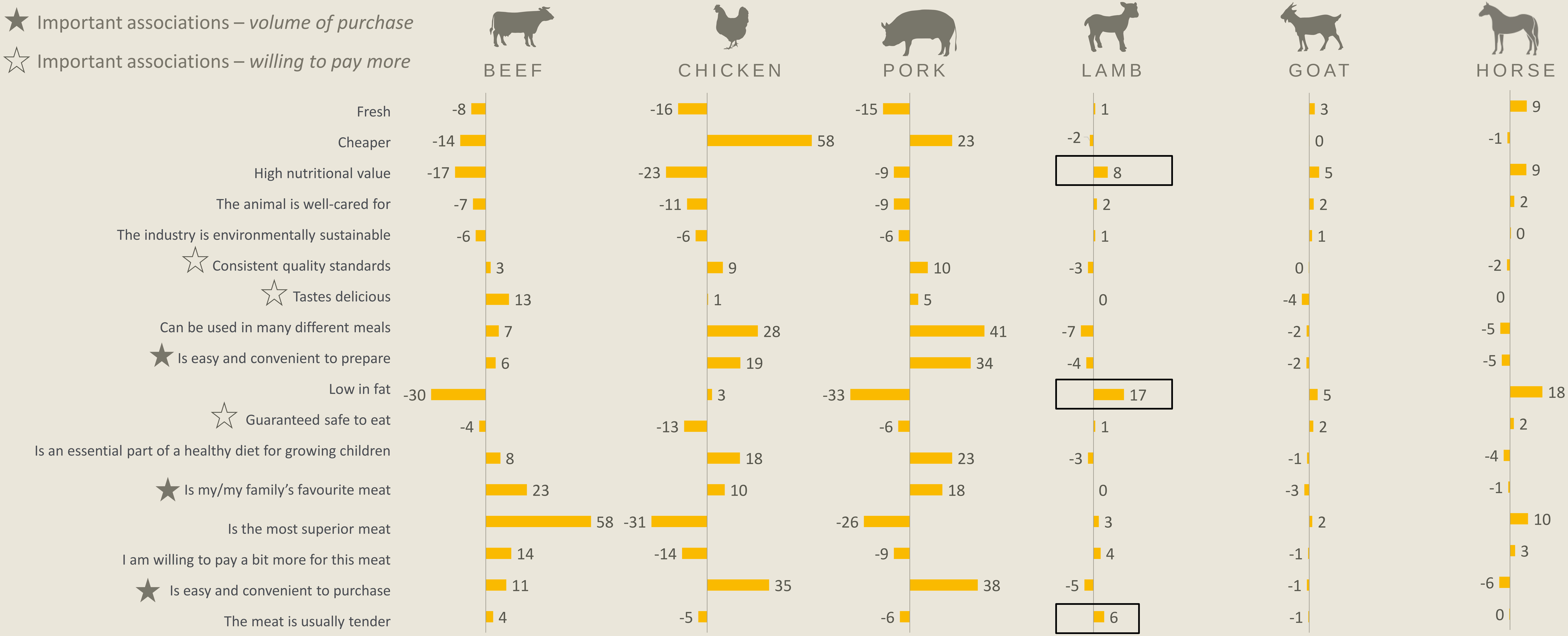
Chicken/Pork play similar roles for Japanese consumers: seen as cheap, versatile, healthy for growing children, consistent quality and easy/convenient to prepare/ purchase.

CH12. Which of the following things do you associate with each type of protein? Base: (n=804)

+5 or more = relative category strength

-5 or less = relative category weakness.

As seen in previous years, lamb's much smaller foothold in the Japanese market means it only has a few strengths – seen as tender (shared with beef), low in fat and of high nutritional value.



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CH12. Which of the following things do you associate with each type of protein? Base: (n=804)

+5 or more = relative category strength
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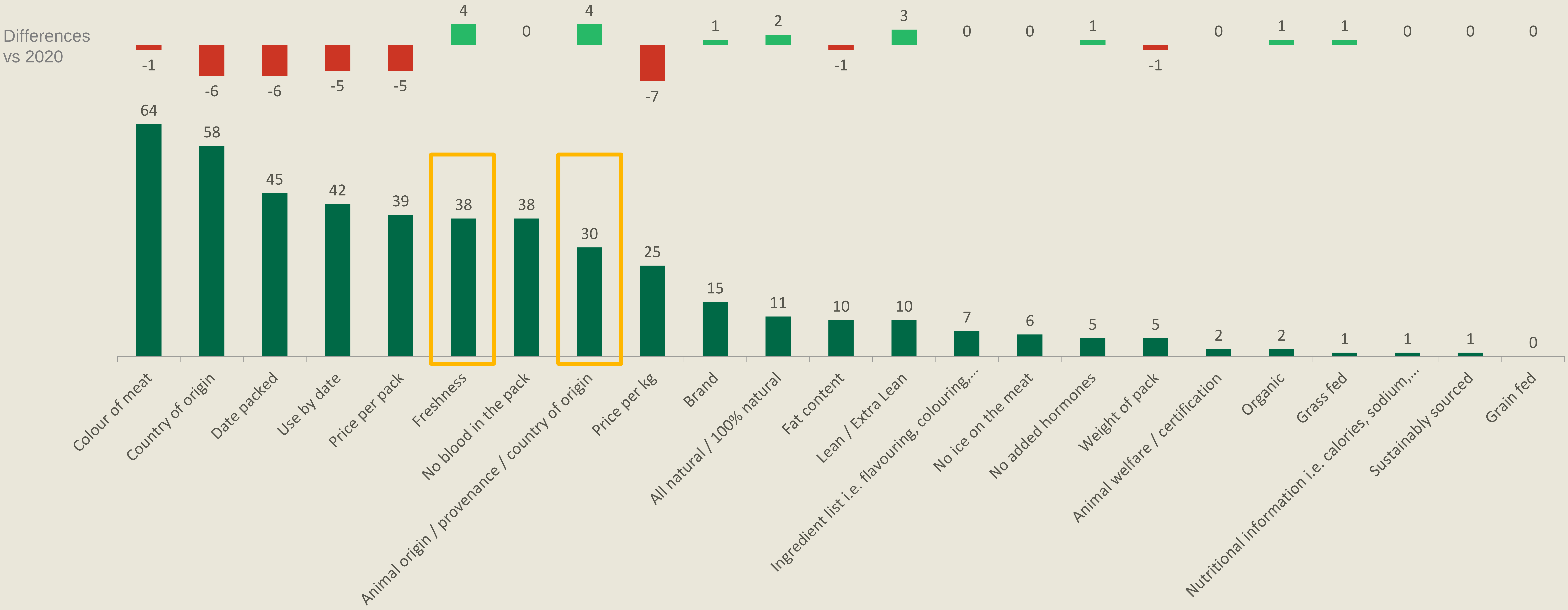
People are still looking, for the most part, at the same things on pack vs last year. However freshness and the animal's origin have increased slightly in importance.



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PACK 1- Can you please select up to 6 things you look for (on the pack, on the shelf etc.) when buying beef?
Base: (n=586)

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PROTEIN LANDSCAPE IMPLICATIONS:
Beef's plays a clear and distinct role vs. Chicken and Pork, with strengths that can be leveraged by AU producers

What do we see?

1 — Top 3 proteins maintain their salience

Beef, Chicken and Pork all remain as the key top of mind proteins in the Japanese market. After a dip across the board in 2020, they are back up at 2019 levels.
BUT…

2 — A clear positioning for Beef to leverage

Beef maintains the clearest positioning in consumers minds, vs the other two. Seen as superior, having the best taste and family's favourite which reinforce both its potential volume and Premium perceptions. Chicken and Pork more similar, and those competing with one another.

3 — Lack of understanding holding lamb back

As previously seen, lamb is not well known, and shares associations with other niche proteins which largely reflect what the larger proteins are not know for.

Now what?

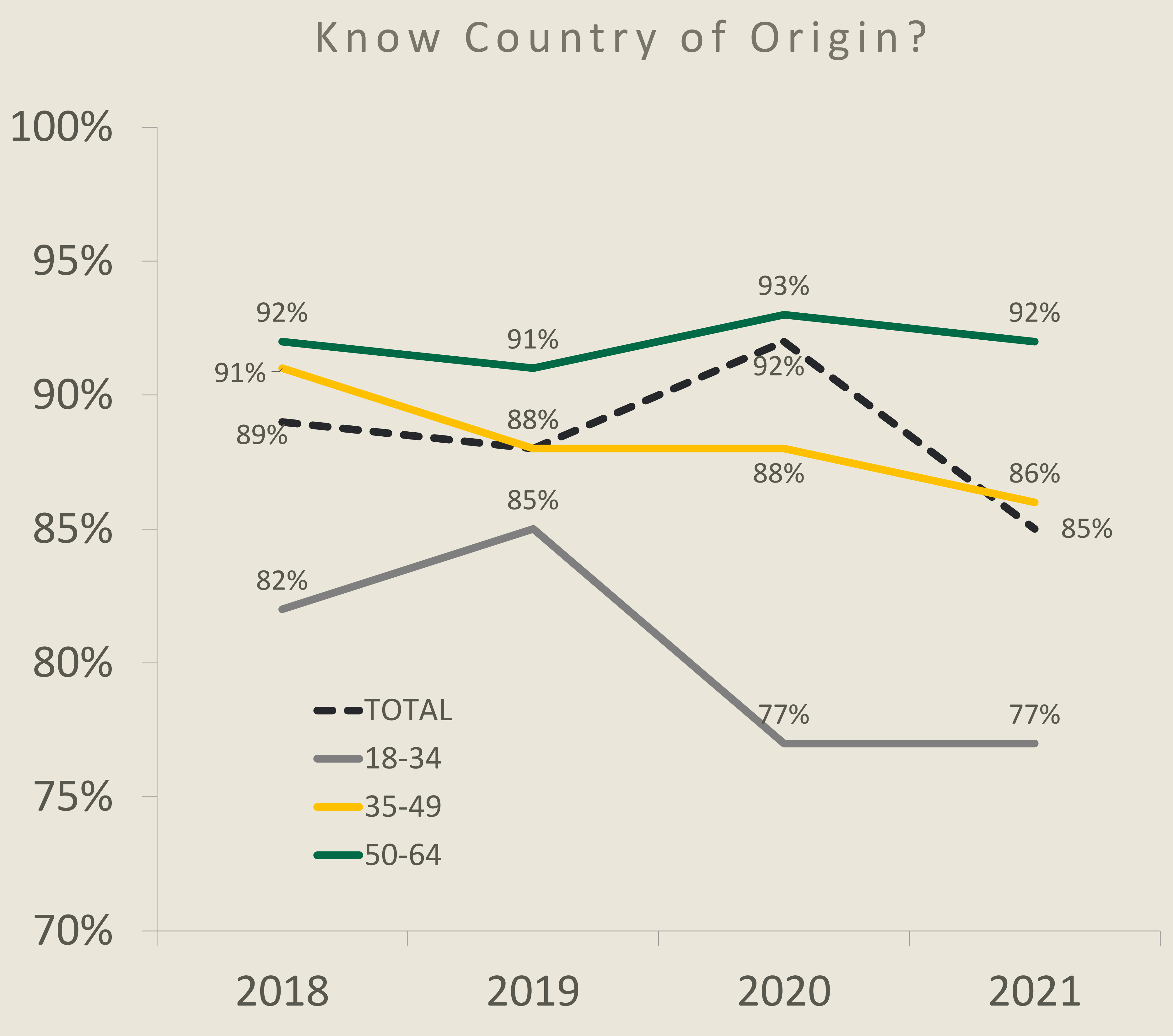
Beef's strong platform of salience, and very clear set of distinctive strengths can be leveraged to communicate and reinforce AU Beef's own distinct strengths and role in the repertoire of Japanese consumers.

Is there an opportunity to lead the way in educating Japanese consumers on the more nuanced benefits of lamb

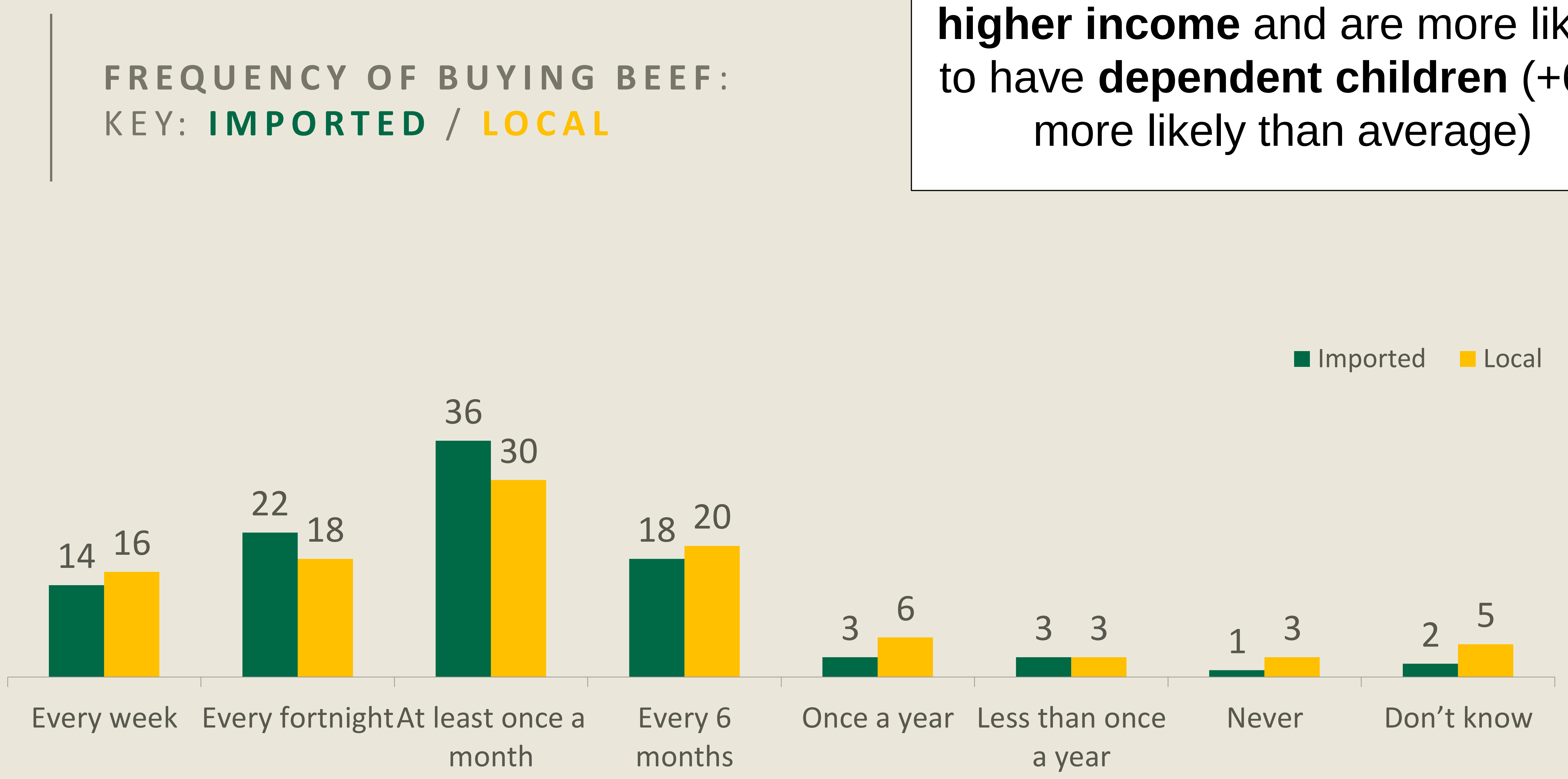
BEEF BRAND HEALTH & PERCEPTIONS

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.

Claimed Beef COO awareness remains high and relatively stable overtime in Japan. After rising 4% in 2020, levels have softened slightly in 2021 driven by 18-34s. Local/Imported beef see similar purchase frequency, however, at P1M imported is ahead (72% vs 64%).



Global Avg 2021: 87%



Frequent imported beef buyers (fortnightly or more) tend to be **aged 35+** (68%). On average, they have **higher income** and are more likely to have **dependent children** (+6% more likely than average)

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(GF3B) Do you know the country of origin of the beef you buy? Base: (n=804)
(CH4) How often do you buy imported beef? Base: (n=804)
(CH4LOC) How often do you buy local beef? Base: (n=804)

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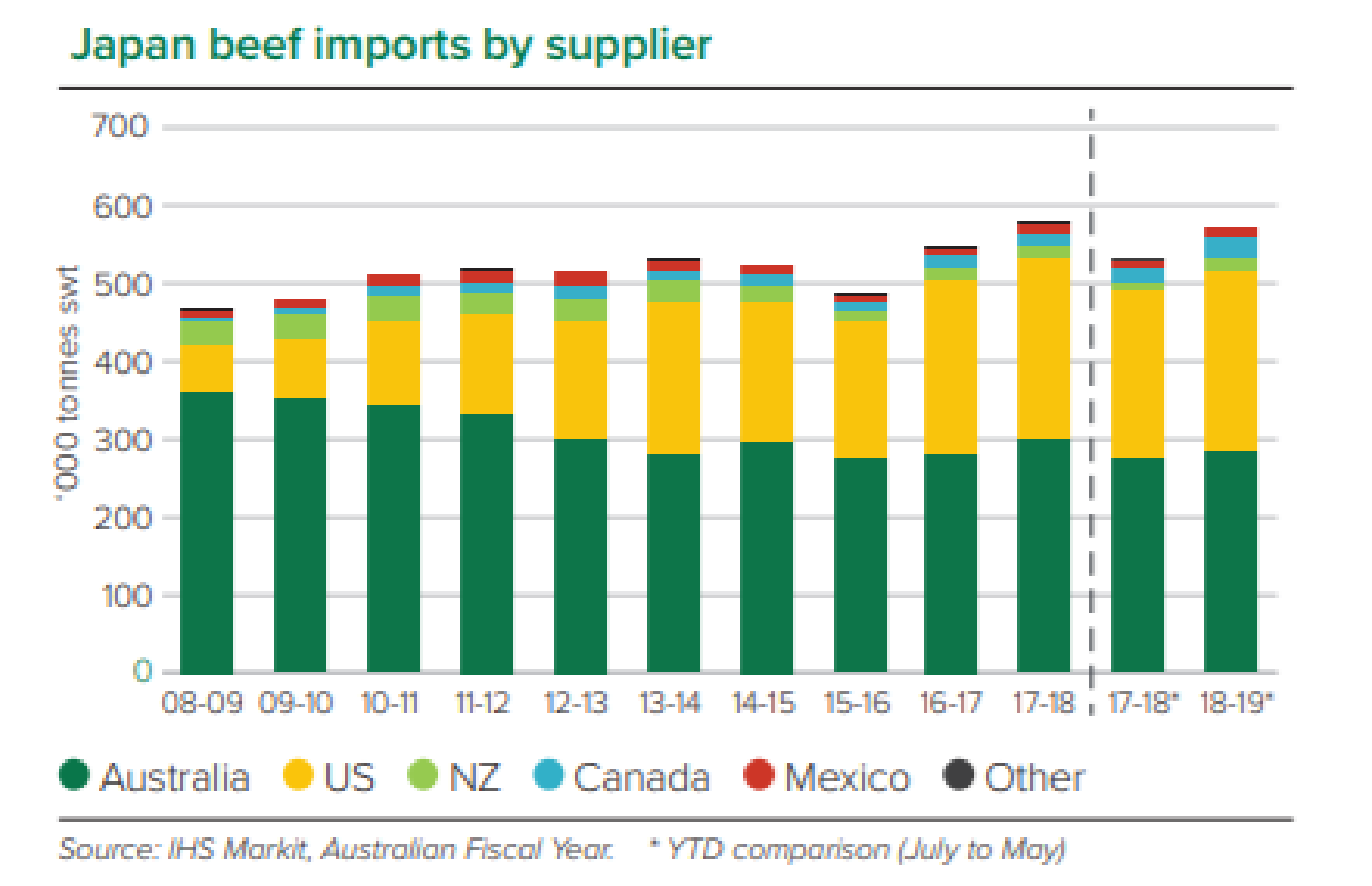
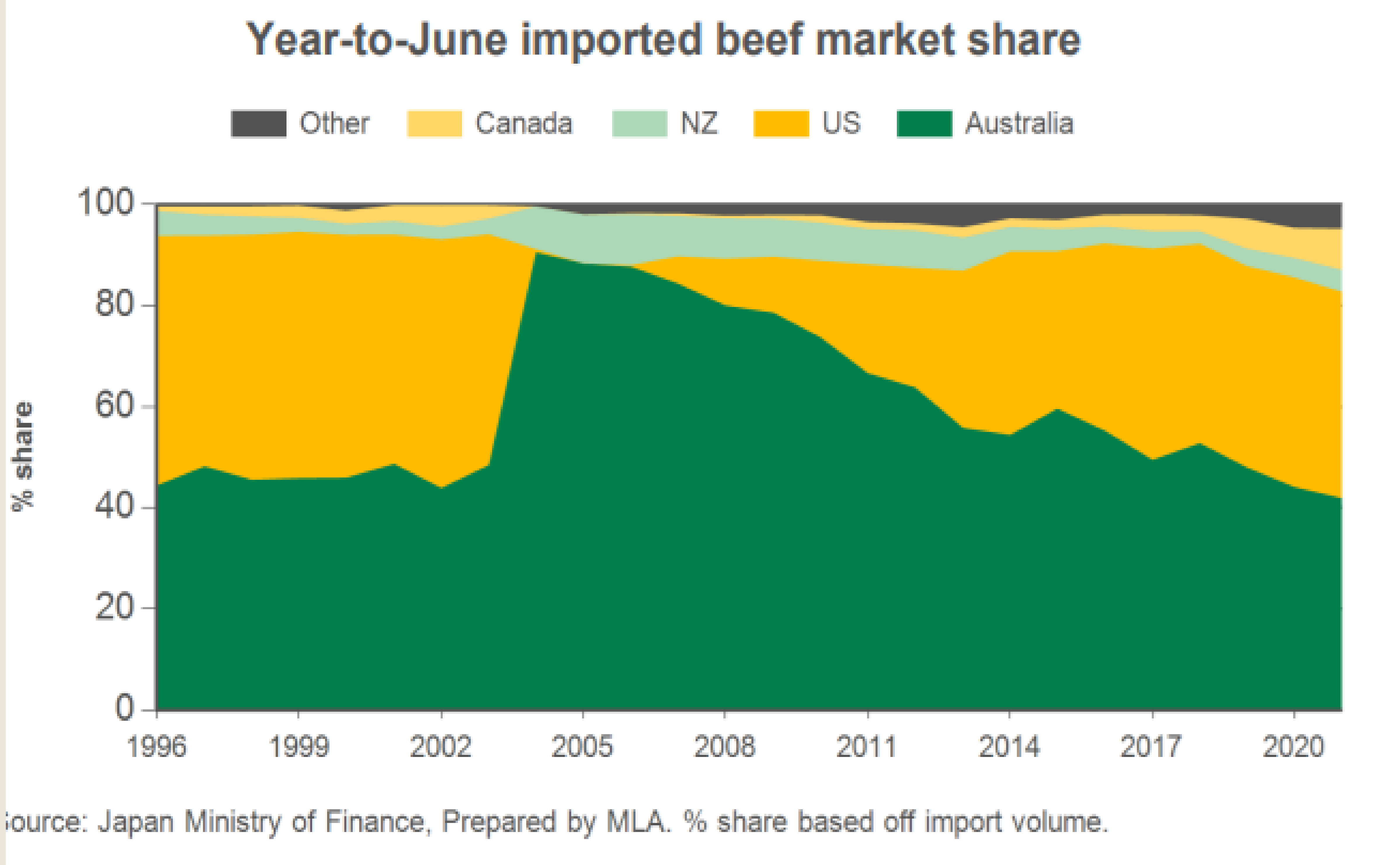
Some context to start us off, AU Beef remains the #1 importer to Japan by volume but has had share eroded in recent years by US Beef. They are now just about about on par.

MLA market snapshot – Japan (August 2019)



https://www.mla.com.au/globalassets/mla-corporate/prices--markets/documents/os-markets/red-meat-market-snapshots/2019/mla-ms-japan-beef-sheep-2019-1.pdf

MLA Japan Beef Imports (Share) – Monthly trade summary June 2021



https://www.mla.com.au/globalassets/mla-corporate/prices--markets/documents/os-markets/export-statistics/july-2021/2108-japan-beef-imports---global-summary.pdf

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AU and US beef remain the powerhouses of premium imported COO, matching each other through the funnel. AU consumption has softened slightly back to 2018 levels (driven by 50-64s), suggesting no real shifts over the long term. NZ sees gradual builds (P1M/P3M).

BRAND HEALTH – BEEF

	AUSTRALIAN BEEF %	’20	‘19	‘18	AMERICAN BEEF %	’20	‘19	‘18	NEW ZEALAND BEEF %	’20	‘19	‘18	CANADIAN BEEF %	’20	‘19	‘18
Spontaneous awareness	64	66	72	67	65	64	65	63	9	9	7	6	7	6	8	5
Total Awareness	97	97	97	97	95	97	96	96	71	67	66	67	57	55	54	43
Ever Eaten	89	91	93	92	89	90	89	89	43	44	37	38	34	35	32	23
Eat P12M	74	76	79	74	71	78	75	70	27	28	24	21	21	22	22	13
Eat P3M	53	58	56	53	55	57	55	49	16	16	13	10	12	12	11	7
Past Month	39	44	41	39	41	45	41	36	11	10	8	5	9	7	7	3
Most Often	28	32	33	30	28	30	26	25	2	3	2	1	3	2	2	0

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: ‘21(n=804), ’20 (n=800), ‘19 (n=800), 18’ (n=571) Base – Bought beef in past month or ever buy beef

Sig. different at 95% - Sig diffs removed

Beef is Japan’s favourite meat and AU Beef is Japan’s favourite COO, seen as delivering consistent quality while being easy and convenient to purchase. US beef leverages strengths in being ‘easy everyday’, seen as cheaper, easy, convenient and offering variety.

DRIVERS OF **POWER**
(ranked top to bottom)

		AUSTRALIAN BEEF	AMERICAN BEEF	NEW ZEALAND BEEF	CANADIAN BEEF
High Quality (38%)	Consistent quality standards	3	-1	-1	0
	Guaranteed safe to eat	1	-6	3	1
	Is my/my family’s favourite beef	6	1	-3	-2
Easy Everyday (35%)	Cheaper	-2	16	-6	-2
	Is easy and convenient to purchase	8	16	-12	-5
	Offers a variety of cuts that suit the meals I make	-2	5	-3	1
Superior (19%)	The meat is usually tender	1	-1	1	-1
	The fat is nicely marbled	-2	2	-1	1
	Helps make me and my family feel genki	1	1	-2	0
	Is the most superior beef	-1	-2	3	0
Healthy (6%)	Low in fat	0	-1	0	0
	More nutritious	-2	-3	2	1
Welfare (-1%)	The industry is environmentally sustainable	-1	-3	3	1
	The animal is well-cared for	-1	-1	3	0
	Fresh	-2	-4	1	2

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

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=804). *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.*

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AU's perceptions of favourite and fairly consistent quality play well to supporting premium/willingness to pay. NZ has carved out some differentiation in other drivers of premium relating to safety, sustainable practices and animal welfare.

DRIVERS OF **PREMIUM**
(ranked top to bottom)

		AUSTRALIAN BEEF	AMERICAN BEEF	NEW ZEALAND BEEF	CANADIAN BEEF
High Quality (28%)	Consistent quality standards	3	-1	-1	0
	Guaranteed safe to eat	1	-6	3	1
	Is my/my family's favourite beef	6	1	-3	-2
Superior (28%)	The meat is usually tender	1	-1	1	-1
	The fat is nicely marbled	-2	2	-1	1
	Helps make me and my family feel genki	1	1	-2	0
	Is the most superior beef	-1	-2	3	0
Welfare (22%)	The industry is environmentally sustainable	-1	-3	3	1
	The animal is well-cared for	-1	-1	3	0
	Fresh	-2	-4	1	2
Healthy (15%)	Low in fat	0	-1	0	0
	More nutritious	-2	-3	2	1
Easy Everyday (7%)	Cheaper	-2	16	-6	-2
	Is easy and convenient to purchase	8	16	-12	-5
	Offers a variety of cuts that suit the meals I make	-2	5	-3	1

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

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=804). *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.*

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There are three attributes that can deliver against both volume and premium targets – Consistent Quality, Safety and Genki. Building these into the AU brand will reinforce our difference and maintain our Power/Premium position

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/VALUE**
TOP 5 ASPECTS TO FOCUS ON WHEN DRIVING THESE OBJECTIVES IN THIS MARKET…	1. **Consistent quality standards**	1. **Guaranteed safe to eat**
	2. Offers a variety of cuts that suit the meals I make	2. **Consistent quality standards**
	3. **Guaranteed safe to eat**	3. Fresh
	4. **Helps me and my family feel genki**	4. Is the most superior beef
	5. Is my/my family's favourite beef	5. **Helps me and my family feel genki**

BEEF BRAND HEALTH & PERCEPTIONS - IMPLICATIONS:
AU Beef has strong equity which supports our premium that we should continue to leverage, but be mindful of USA beef which is salient and has strengths in easy everyday.

What do we see?

1 A two horse race – AU vs. USA

AU and USA are the dominant brands, are on par for all metrics through the funnel from awareness, to penetration, through to claimed consumption.

2 Leverage our premium associations, to contrast with USA

AU is the family's favourite, and has a slight strength in quality, although other associations largely remain shared across COO brands. USA product is known as Easy Everyday – being Cheap and Accessible

3 Safety and quality standards the two associations to drive dual goals

Three specific associations are drivers of both Power and Premium, providing the dual outcomes of growing volume as well as people's willingness to pay more for the COO product.

Now what?

1. With the long term growth of USA Beef in the market we need to continue to reinforce our meaningful difference.

2. Associations in general have remained very stable, with the one area of concern our perceptions of being cheaper having fallen significantly YoY, a potential watchout and reason to continue driving the associations that allow us to justify premium

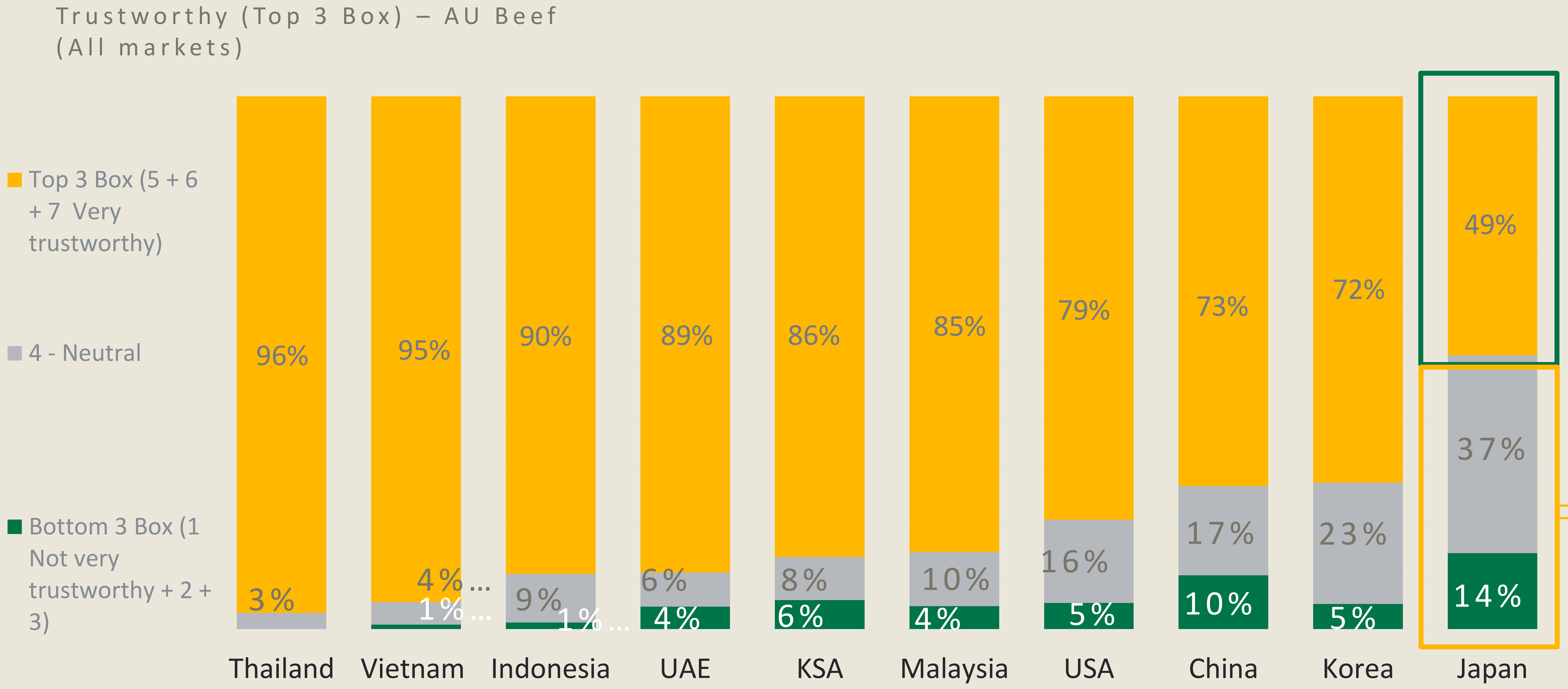
3. AU Beef should focus on communicating quality strengths we have to reinforce the safety and quality perceptions which build brand power and brand premium

BEEF

COO TRUST PERCEPTIONS

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

In Japan, while the majority do Trust Australian Beef, Trust is lower in comparison to other markets, with more than 1 in 3 saying they are neutral



3 reasons those who rated AU Beef 4 or less for Trust

1. Preference for local beef
2. It's imported/not domestic
3. Production method unclear

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BTR2B. How trustworthy is the imported beef from these countries – 7 Point scale
Base: Japan (n=776); Korea (774); Vietnam (447); USA (n=437); UAE (n=234); Indonesia (231); Thailand (227); Malaysia (227); KSA (n=199); China (197)

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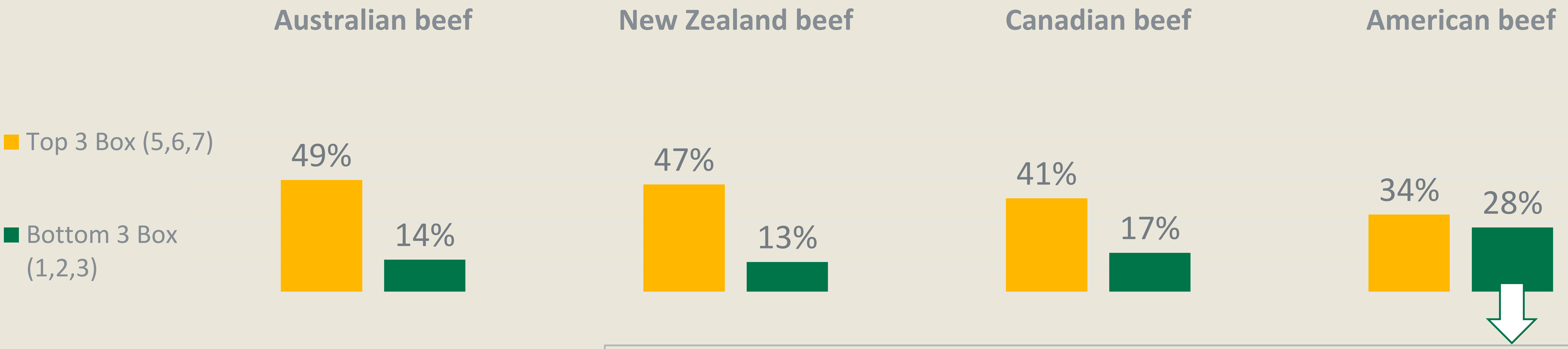
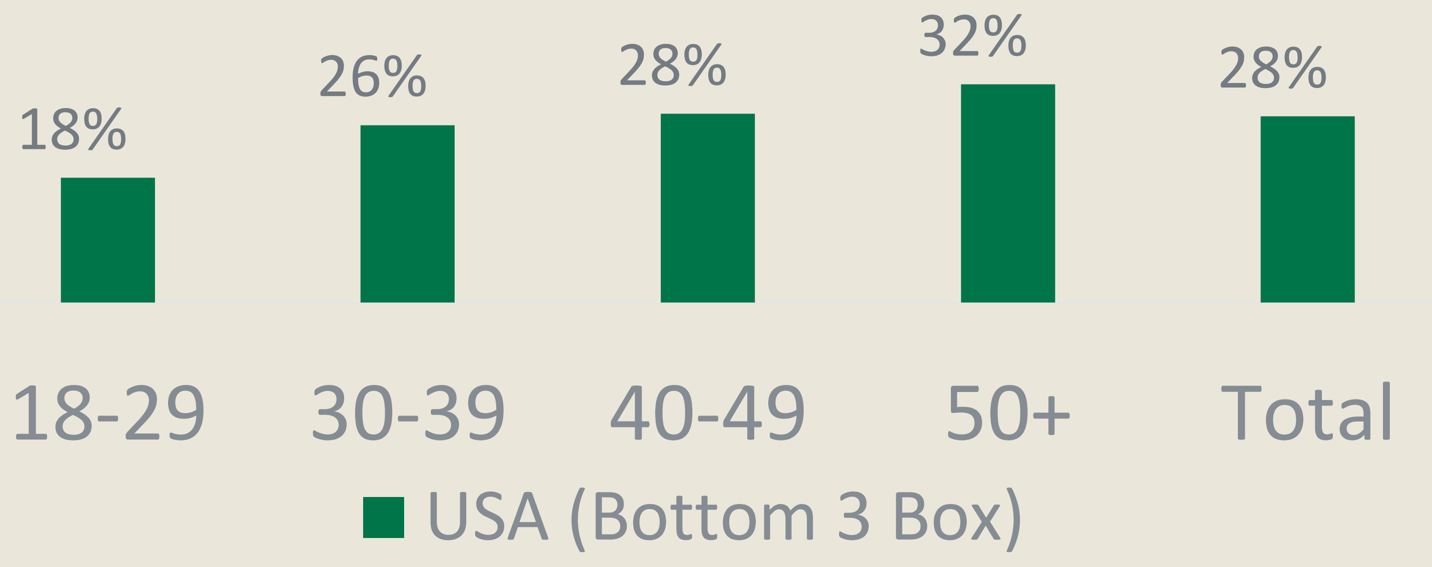
And we see that AU beef is the most trusted imported COO brand in the Japanese market, with New Zealand about on par. More than 1 in 4 saying they don't trust American Beef.

COO BEEF Trustworthy (Top 3 Box vs. Bottom 3 Box) (Japan)



USA BEEF (Bottom 3 Box) - By AGE

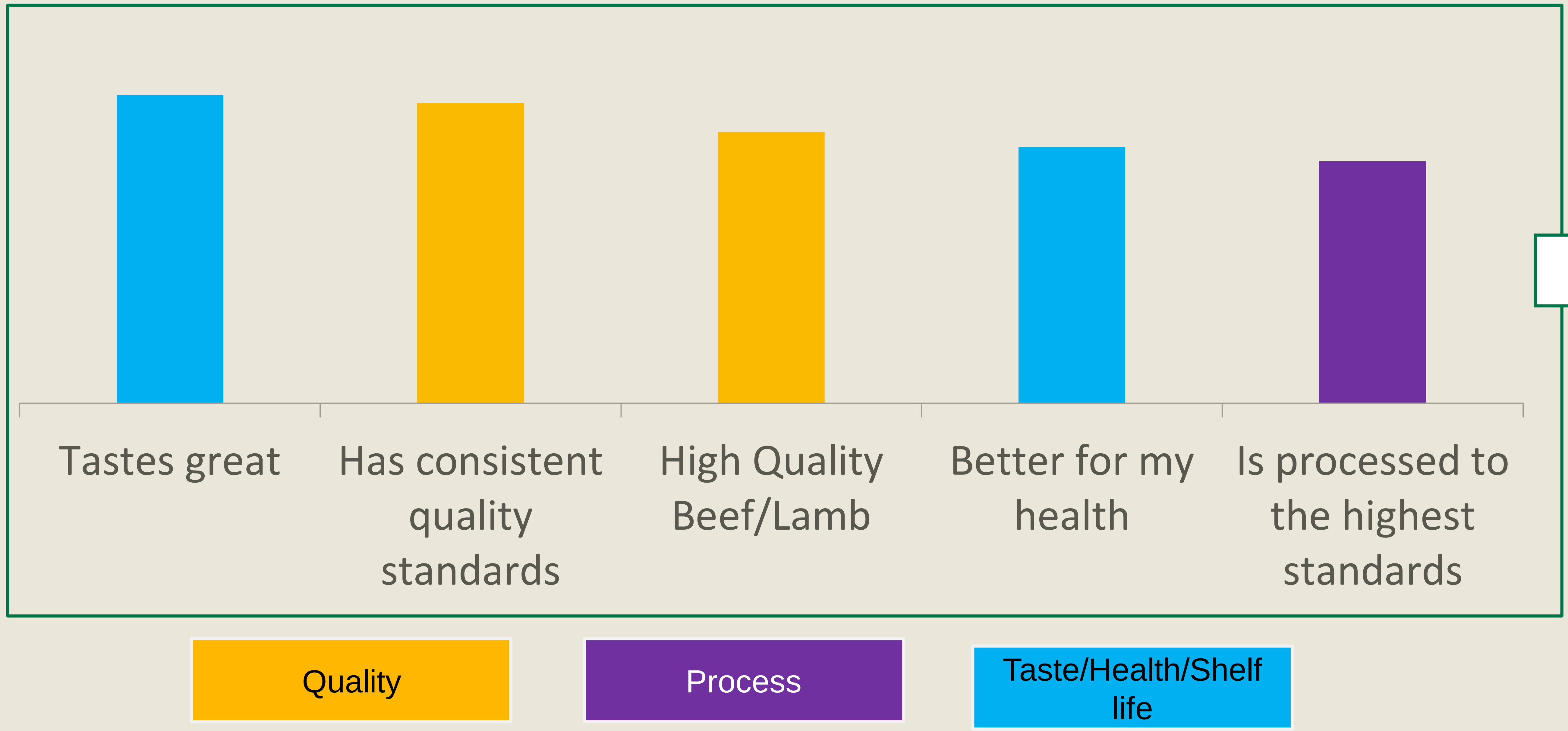
The manner in which lack of Trust increases for USA beef with age suggests the residual concerns from the BSE experience remain, but are fading over time. Take advantage now.



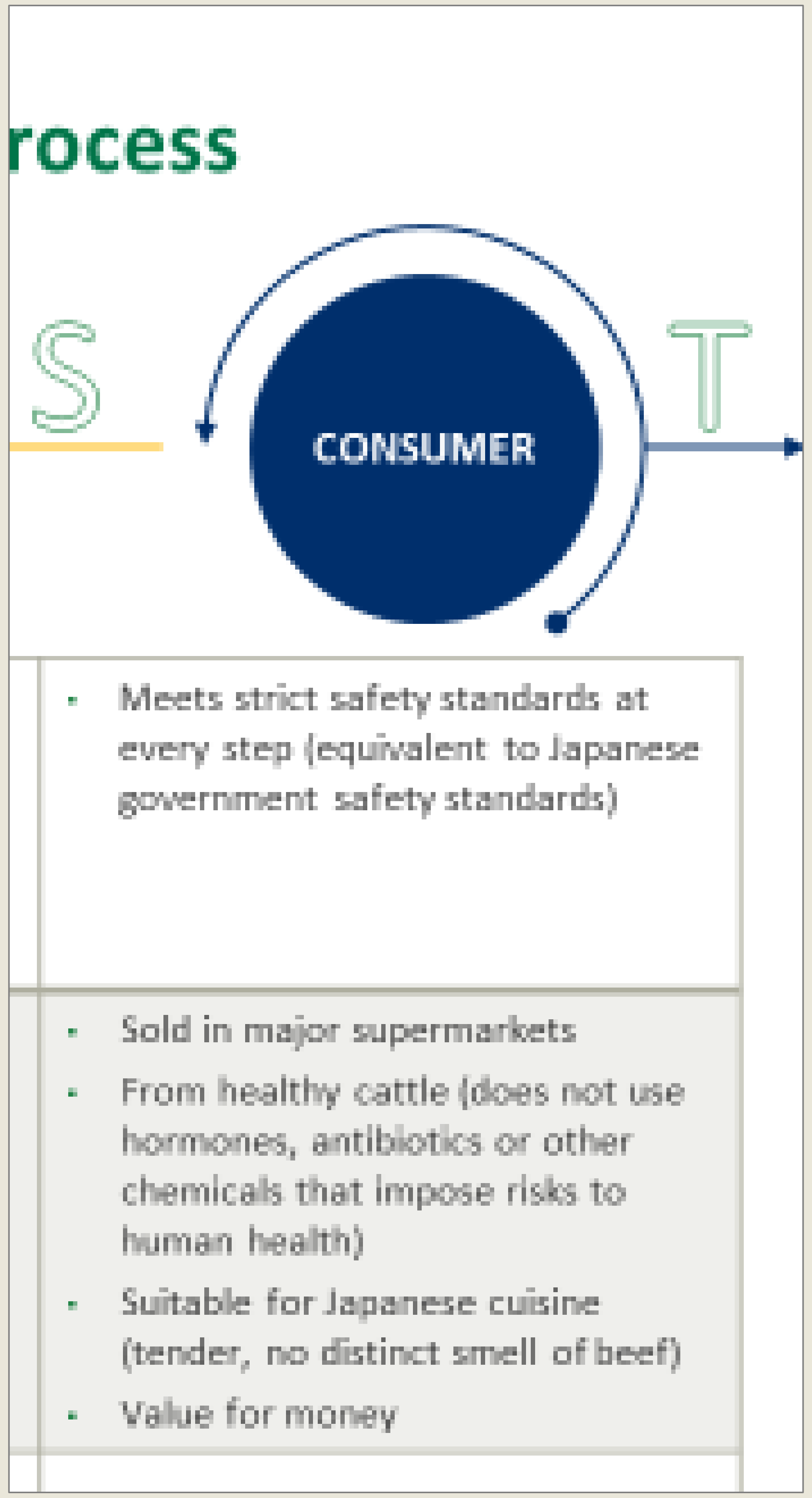
In Japan the associations for AU Beef most strongly aligned with Trust in AU product are quality, high process standards along with functional proof points of taste and healthiness, reflecting what we learned in our qual study.

Trust imagery – Trust Image statements
Ordered by strength of correlation with Trust of AU Beef (Japan)

Top 5 Trust image attributes most strongly positively correlated with Trust of AU Beef



This aligns with what we saw in our recent global qualitative study on Trust and Traceability, with quality markers, health and process standards explicitly mentioned as Trust drivers for consumers



Source: Project Cyclone, Global report September 2021

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IMGB. Associate with each of the different countries for imported beef (Australian Beef)
Base: Japan (n=776);
Correlations with Trustworthiness – positively correlated

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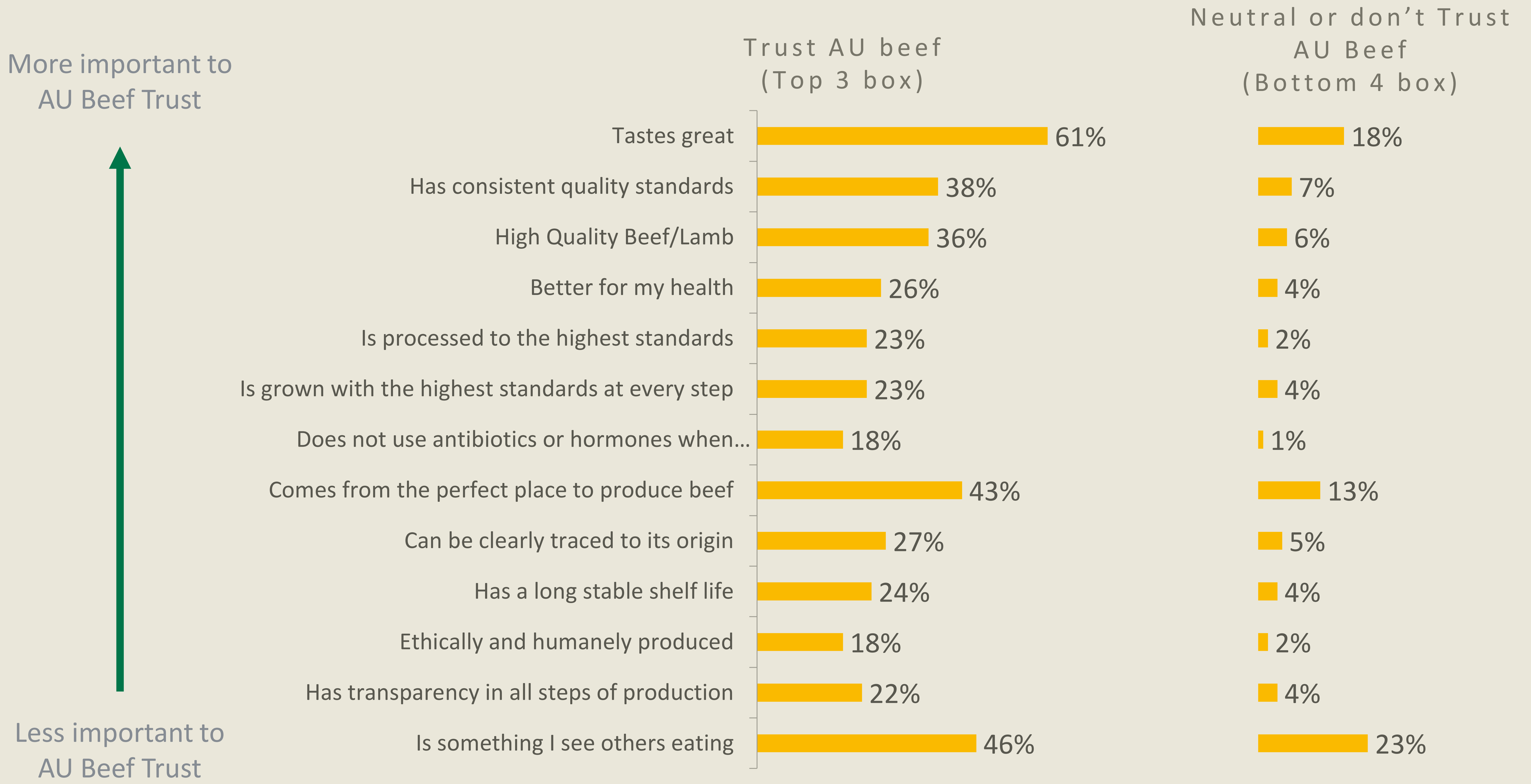
Upwards of 3 in 5 of those who Trust AU Beef say that it tastes great, there is still room to improve associations on key quality credentials. The gap between those who Trust and those who don't appears is a reflection of a gap in familiarity.

COO Trust Imagery – AU Beef endorsements
(Ordered by importance in driving Trust of AU product)

AUSTRALIAN BEEF



So what?

This is not about a lack of Trust per se, rather a lack of understanding, with the opportunity to communicate some clear benefits to a group of Japanese consumers who lack a clear picture of what AU Beef stands for.

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IMGB. Associate with each of the different countries for imported beef
Base: Australia (n=776); America (n=766) Newzealand (n=568), Canada (n=458)

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COO BRAND TRUST - IMPLICATIONS:
AU Beef has established the most Trust in the Japanese market, but there is still an opportunity to improve with a large group of neutrals. Showcasing our quality is key.

What do we see?

1 Ahead on Trust, but a gap to fill

The most trusted COO brand, around half of JP consumers saying they Trust AU beef. The USA which is only 1 in 3, with almost as many saying they don't Trust USA beef. For AU a large group sitting on the fence in Japan (about a third of consumers).

2 Quality credentials, reinforced through functional proof points

In JP the associations most clearly positively correlated with Trust are quality credentials, and standards, as well as Taste and Health. So when Japanese consumers say they Trust AU beef, they associate it with quality and the functional attributes to prove it.

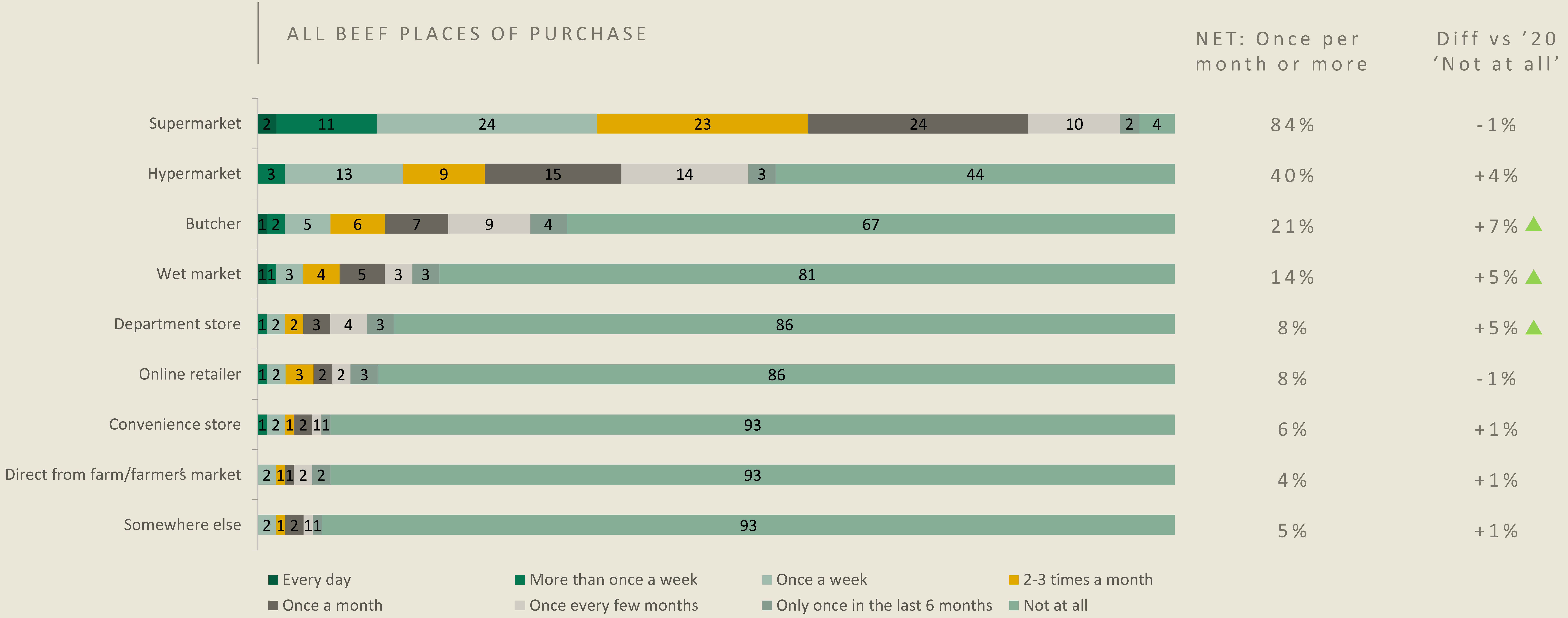
Now what?

Identify the choices of those who are currently ambivalent towards AU, communicate some key quality and health benefits to grow Trust with this particular audience.

AU beef also straddles other less common associations shared with NZ, such as from perfect place to produce beef, healthy and high standards in production. These offer some potential opportunities to communicate a differentiated proposition vs. other COO, and continue to drive Trust perceptions even further in the Japanese market.

SHOPPING BEHAVIOUR

Butchers, wet markets and department stores are declining – busier shopping locations



QR3A. How often have you bought beef from each of these locations in the last six months? Base: '21(n=586) '20(n= 597) Online Retailer: Online Supermarket 41%, Online-Only Retailer 41%, Other 23% (ONL5B. Where did you buy your beef online)

Sig. different at 95%

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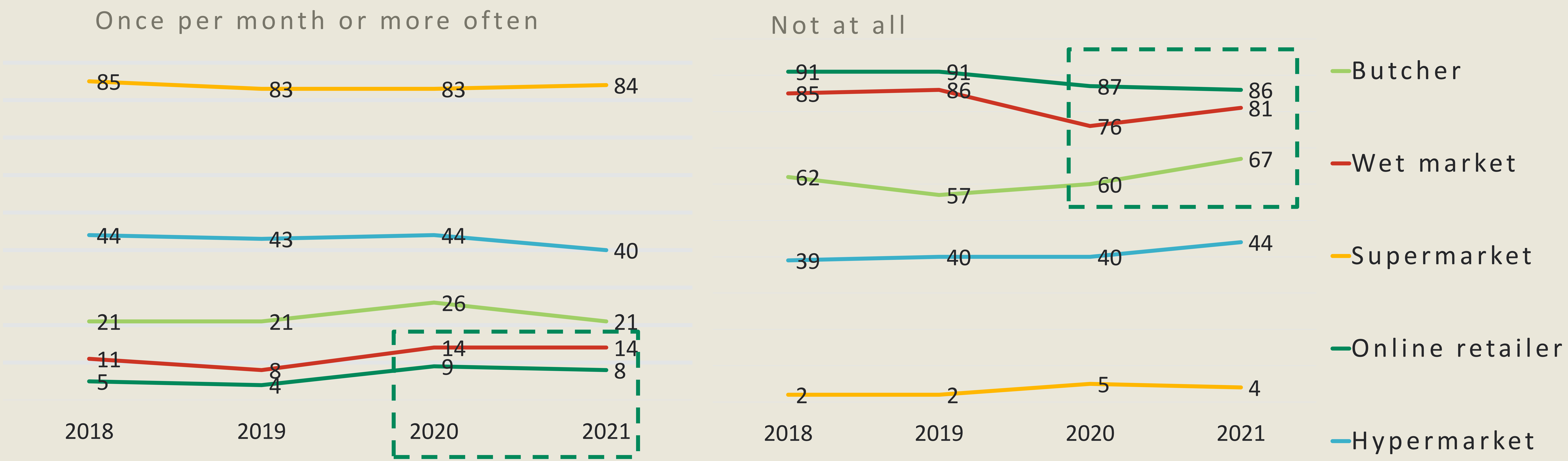
While relatively small, online monthly beef purchase doubled in 2020; maintaining in 2021, with a proportionate shift down in never using the channel. Those not using Butchers and Wet markets in the past 6ms has increased – new high for Butchers, Wet markets back to pre-2020 levels.

ALL BEEF PLACES OF PURCHASE



KANTAR

QR3A. How often have you bought beef from each of these locations in the last six months?
Base: '21(n=586) '20(n= 597) '19(n=629) '18(n=587)

Sig. different at 95%

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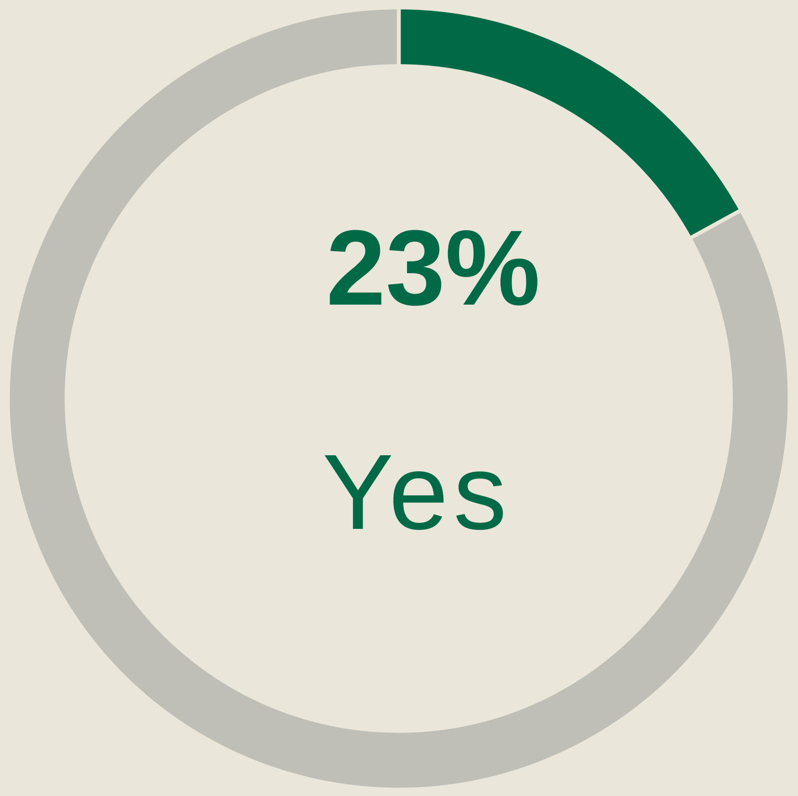
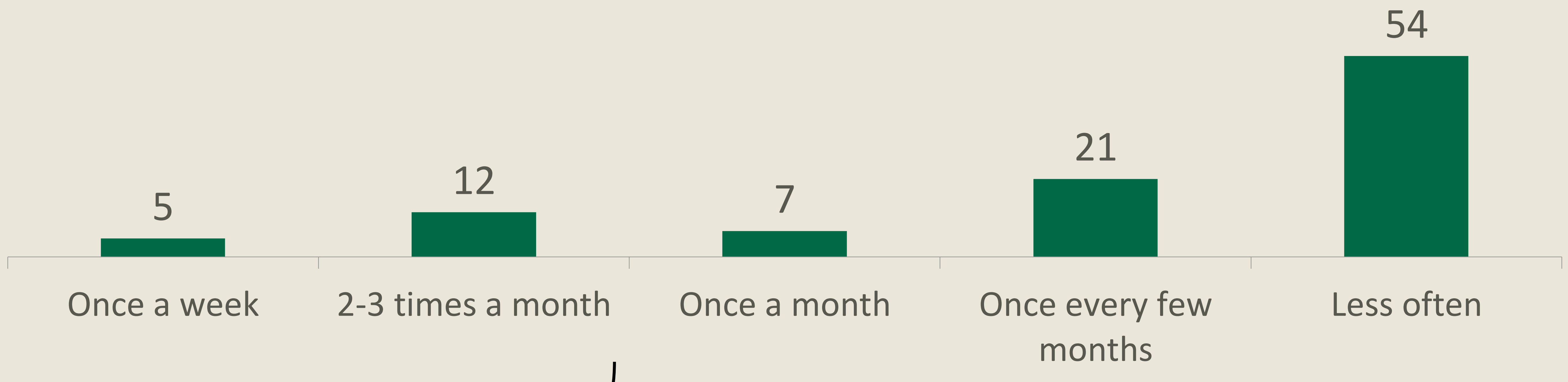
About 1 in 4 claim to have bought beef online at some point and if these the majority are doing so less than once every few months. Interestingly those who most frequently do so tend to be the less regular grocery buyers and meal planners.

EVER BOUGHT BEEF ONLINE:



SKEWS: High Income (9M+),

FREQUENCY:



More frequent online beef purchase
Skews to less regular shoppers and meal planners

NOTE: This is total beef, not captured at imported or COO level

KANTAR

ONL2B. How often do you buy beef online
ONL3B. Which of the following reasons best describes why you buy beef online
ONL4B. Which of these reasons also contributes to why you buy beef online
Base: (n=134)

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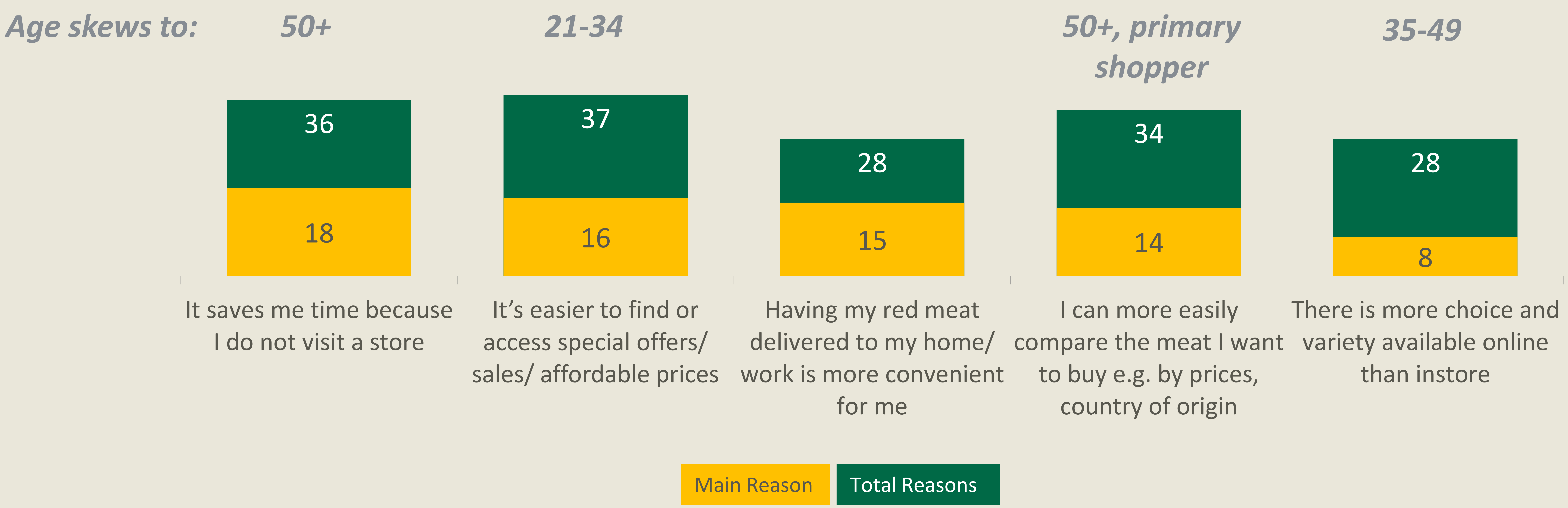
Currently those shopping online for beef are attracted by ease of accessing offers/sales, customer reviews of quality (consistent quality a core driver of volume/value!), saving time/not needing to visit a store and ease of direct comparison.

FACILITATORS OF BUYING BEEF ONLINE (TOP 5):



KANTAR

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Base: (n=134)

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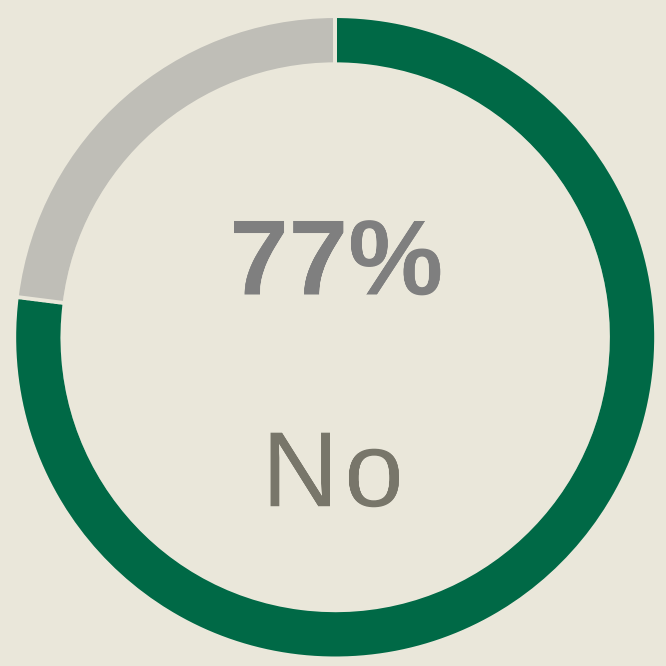
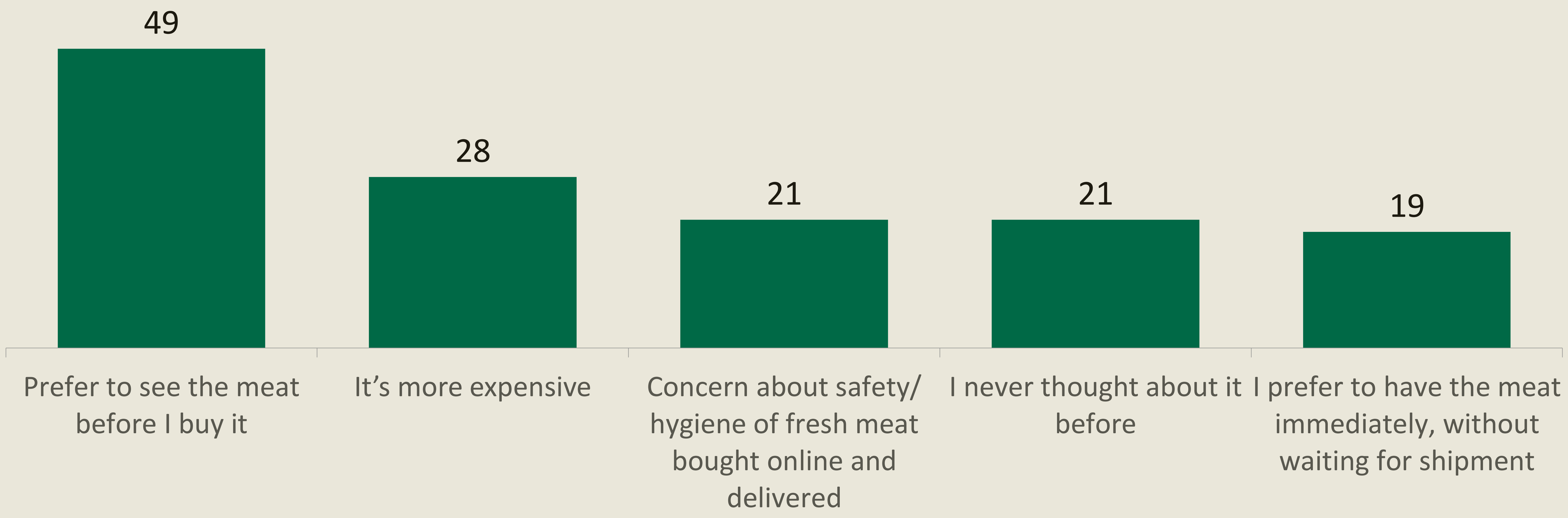
And we see this somewhat reflected in the barriers to online for consumers who haven't purchased beef online, who have a preference for seeing the meat in person and concerns over freshness in the top 3 barriers.

EVER BOUGHT BEEF ONLINE:



BARRIERS TO BUYING BEEF ONLINE:

No notable differences by age or shopper type.



R10B. Which of the below would you say are the main reasons you have never done this
Base: (n=452)

CHANNEL, ONLINE FACILITATORS & BARRIERS - IMPLICATIONS:
Increases in the usage of online channel seen in 2020 have remained in 2021, a change in mix of channels used vs long term trend presents opportunities for imported product.

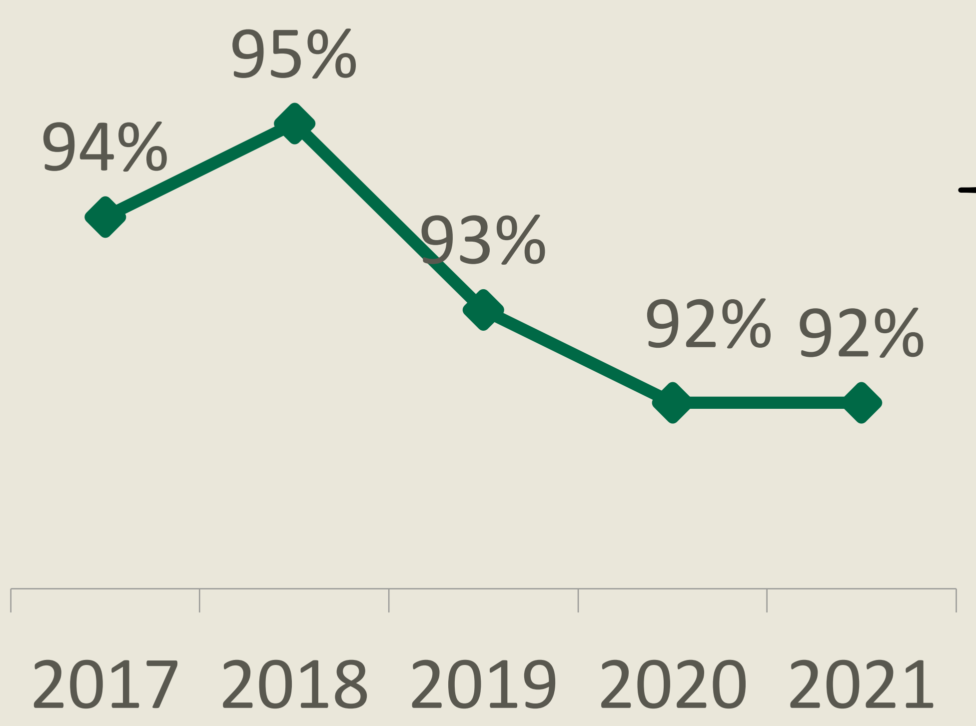
	1	2	3
	Growth in the channel is maintained, but not yet mainstream	**Convenience, value and comparability key facilitators**	**Limit to potential while seeing meat and freshness concerns remain**
What do we see?	Monthly or more frequent purchase of beef online increased during 2020 and has maintained that same level this year, while also reducing the number who never use. But this remains low in comparison to traditional channels.	The largest facilitators of online beef purchase are the convenience of access and direct delivery, as well as ability to compare on key variables in the more structured online environment.	For half of those who do not buy online the main barrier is the need to see their real produce when they buy it. Concerns over freshness are a barrier for 1 in 4
Now what?	Online channel growth will continue, but some time before it will be mainstream, so strategies should be built for specific needs rather than mass distribution.	Supporting distributors or retailers to facilitate this convenience could help to increase the frequency of use amongst those already comfortable with the channel.	Systems in place for provision that can reassure on freshness will go some way to supporting the opportunity, but main barrier suggests limited opportunities to replace the regular shopping trip for the time being.

BEEF
TRUE AUSSIE

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

Claimed awareness of the term True Aussie remains consistently high, above 9 in 10, and claimed/prompted logo recognition remains stable at 4 in 10.

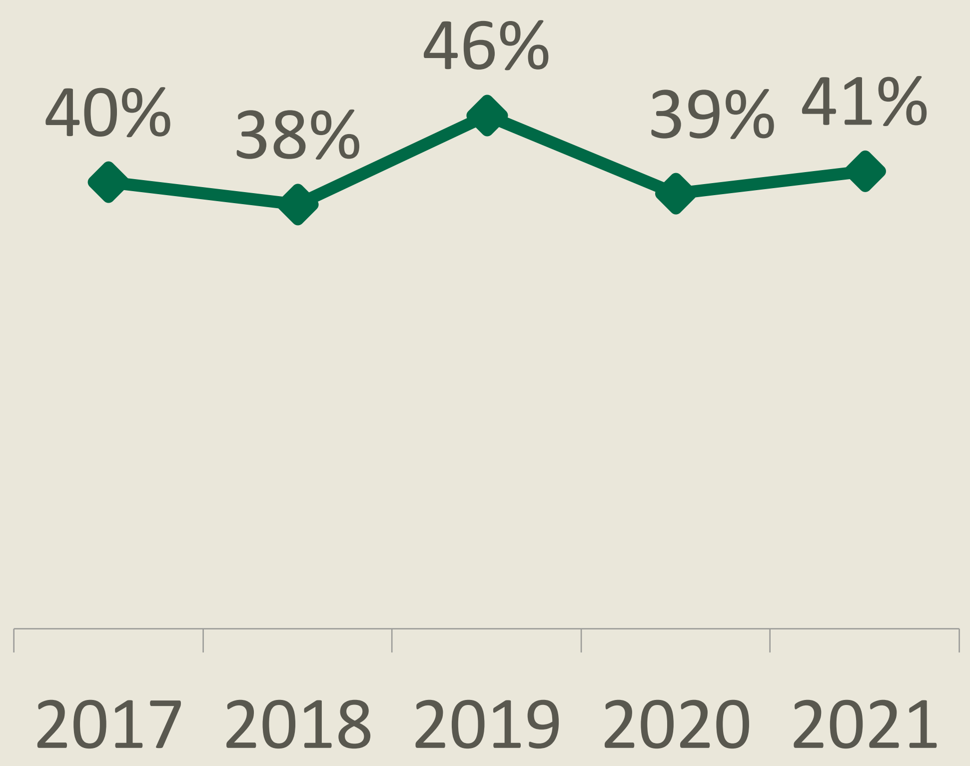
Term: ‘True Aussie’



18-34: 81%
35-49: 95%
50-65: 97%

<5M: 90%
5-9M: 92%
9M+: 96%

TRUE AUSSIE BEEF
オーストラリア産牛肉



18-34: 35%
35-49: 41%
50-65: 46%

<5M: 31%
5-9M: 47%
9M+: 49%

After exposure to the True Aussie logo, the #1 spontaneous association is Australia, followed closely by quality and safety.

% of respondents who spontaneously mention:

KANTAR

QTA5. If you saw this logo on a packaged piece beef/lamb, what would it make you think about the meat?
Base: Beef '21 (n=325)

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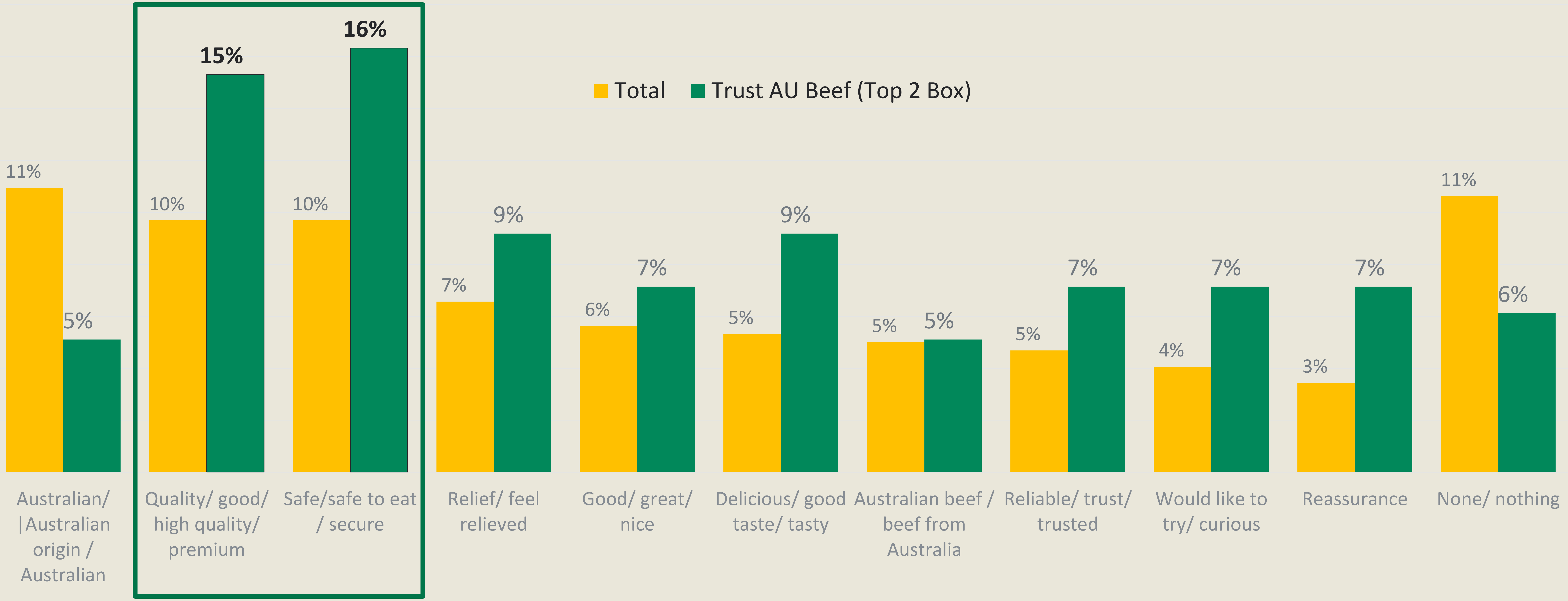
For those who claim to Trust AU Beef, quality and safety improve significantly as associations with TA, suggesting there is a level of established equity in the TA logo driving the two fundamental building blocks of Trust.

% of respondents who spontaneously mention:



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QTA5. If you saw this logo on a packaged piece beef/lamb, what would it make you think about the meat?
Base: Beef '21 (n=325)

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TRUE AUSSIE - IMPLICATIONS:
True Aussie has established consistent brand recognition in Japan, and the logo communicates quality and safety, suggesting some equity to play with in building Trust.

What do we see?

1

Stable, high awareness of the term True Aussie (claimed/prompted)

Claimed awareness of the term True Aussie remains high, above 9 in 10, and claimed logo recognition remains stable.

2

General takeout is generic, but 'Australia' has positive meaning

The associations with the logo at an overall level are first and foremost of 'Australia' generally, along with Consistent Quality and Safety – the two key drivers of Volume and Premium

True Aussie can help to build Trust in AU product

These two important elements of safety and quality rise to the top amongst people who already claim they trust AU COO product.

Now what?

There is an apparent base of recognition established in the market – younger consumers are the target for building this awareness.

This suggests there is a role for TA assets to reinforce the associations that will allow AU product to win in market, and continue to build the Trust that underpins brand choice.

FINAL THOUGHTS

FINAL THOUGHTS

1. Beef's strong platform of salience, and very clear set of distinctive strengths show it has a clear role for JP consumers. This can be leveraged to communicate and reinforce AU Beef's own distinct strengths and role in the repertoire of Japanese consumers.

2. AU Beef should focus on communicating quality-led associations we have to reinforce both safety and quality perceptions. These build brand power and brand premium, the latter being particularly important with an erosion of AU affordability.

3. AU Beef has strong equity, which supports our premium and that we should continue to leverage, but be mindful of USA beef which is salient and has strengths associated with easy everyday use.

4. While AU Beef is the most trusted COO in Japan, there is a large group who are neutral. Associations most clearly positively correlated with Trust are quality credentials, with proof points of Taste and Health. Reinforcing these should build Trust further, and will reinforce our difference and thus premium

5. Online beef purchase has grown but is some way off being mainstream. The opportunity is to support distributors and online retailers with delivering to convenience for specific consumers with targeted needs. This will maximise the currently small opportunity.

6. There is a level of equity in the True Aussie logo and brand, which is communicating key assets of quality and safety while reinforcing Australian. These are the gateway to a differentiated expression of Trust for AU beef.

FOLLOW-UPS

Follow-ups

- How are the factors in the MDF derived and how can the relationship with genki attribute associated be shown more clearly. For the local team the concept of Genki connects to healthy – not necessarily with superior where it clusters in MDF. AU communicates Genki links to everyday health, safe, feel-good and favourite as opposed to premium. Can we see how closely Genki connects to health and safety?
- Factor analysis and flagpole charts(BIPs)/values need to be more clearly explained: how derived, what the scores and values mean, how it takes out brand effect and how interpreted etc
- Trust: Top 5 for AU but would be also useful to see T5 for US beef

KANTAR

MEAT & LIVESTOCK AUSTRALIA

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Meat & Livestock Australia Limited | ABN 39 081 678 364 | Level 1, 40 Mount Street, North Sydney NSW 2060 Postal address: Locked Bag 991, North Sydney NSW 2059 | Ph +61 2 9463 9333 | Fax +61 2 9463 9393 | mla.com.au

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