MLA Global:
CONSUMER TRACKER

Indonesia 2021

Presentation Deck

KANTAR

MEAT & LIVESTOCK AUSTRALIA

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 & Lamb COO Brand Health & Perceptions

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

Topic 1: Purchase Channel & Online

Current channel frequency, + Usage, barriers and facilitators of online red-meat purchase

Topic 2: True Aussie awareness & perceptions

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

Topic 3: COO Trust perceptions

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

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, online channel*
- *Trust and 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 500 consumers

		COUNTRY INCIDENCE	SAMPLE STRUCTURE
Gender	Male	50%	-
	Female	50%	100%
Age	18-34	24%	55%
	35-49	22%	39%
	50-64	13%	4%
Cities	Jakarta	4%	100%
Consumption	Buy Fresh Meat at Least Occasionally	97%	100%
MGBs	Main Grocery Buyers	91%	95%
Children	Households with Children	81%	80%
Income	Under Rp39,999,999	-	13%
	Rp40,000,000 – Rp69,999,999	-	16%
	Rp70,000,000+	-	71%

PROTEIN LANDSCAPE

Awareness and consumption of protein in Indonesia is mostly stable since last year with beef remaining the most top of mind protein and beef, chicken and fish all purchased monthly by between 8 and 9 in 10.

SPONTANEOUS AWARENESS

	Top of Mind	Total Awareness	'20	'19	'18
Beef	61%	89%	90	87	85
Chicken	20%	60%	63	58	57
Lamb/Mutton	1%	30%	28 ▲	22	19
Goat	1%	21%	21	19	21

BOUGHT IN LAST MONTH

		'20	'19	'18
Beef	90%	89	86	86
Chicken	96%	93	94	94
Lamb	22%	23 ▲	14	11
Mutton	21%	17 ▲	11	10
Goat	35%	34 ▲	28	27
Fish	85% ▲	80	82	81
Other Seafood	44%	39	42	39

AVERAGE SERVES LAST 7 DAYS

		'20	'19	'18
Beef	2.1	2.2	2.4	2.1
Chicken	3.2	3.3	3.6	3.5
Lamb	1.1	1.0	1.0	0.9
Mutton	0.9	0.8	0.9	0.8
Goat	1.1	1.1	1.2	1.1
Fish	2.7 ▼	3.0	3.3	3.3
Other Seafood	1.8	1.9	2.3	2.3

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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=500), 20'(n=500) , 19'(n=499)

▲▼ *Sig. different at 95%*

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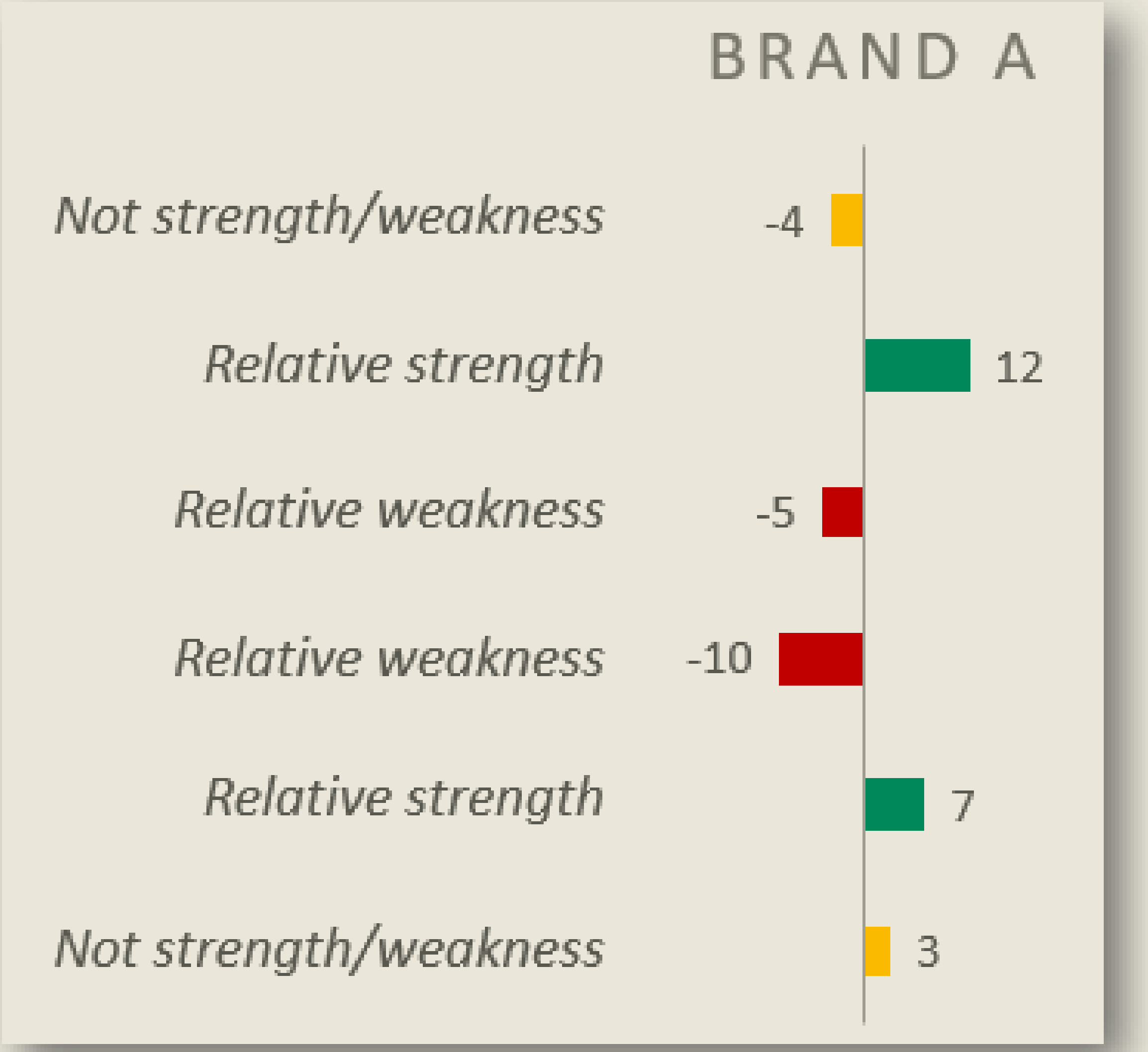
IMAGE PROFILE: Understanding relative strengths and weaknesses

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.

Beef is well defined in consumers minds known for taste, quality, superiority which supports a willingness to pay a premium, but also seen as versatile. Lamb also known for superiority and premium. Red meat is seen as well-cared for.

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+5 or more = relative category strength

-5 or less = relative category weakness.

CH12. Which of the following things do you associate with each type of protein? Base: (n=500)

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Fish and chicken popularity comes mostly from the perceived value for money as they are both seen as cheaper, as well as easy to purchase and prepare. Beef competes with chicken as a family favourite meal.

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CH12. Which of the following things do you associate with each type of protein? Base: (n=500)

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

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PROTEIN LANDSCAPE IMPLICATIONS:
Beef is the most TOM protein in market, and on a monthly basis bought by most households, about as many Indonesians purchasing monthly as chicken and fish.

What do we see?

1 — Beef most TOM and similar levels of purchase to Chicken and fish

Beef remains TOM and lamb has consolidated its gains from last year. Beef, chicken and fish all bought by at least 8 in 10 on a monthly basis., Chicken has the highest penetration.

2 — A clear positioning for Beef to leverage

Beef holds a clear positioning within the proteins, seen as superior, premium quality and sharing family favourite with Chicken.

3 — Chicken and Fish sharing key assets while playing distinct roles

Chicken is versatile and fish is healthy and both are seen as cheap and easy/convenient to purchase and prepare,

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 Indonesian consumers – quality and superior being the clearest alignment with what AU can communicate.

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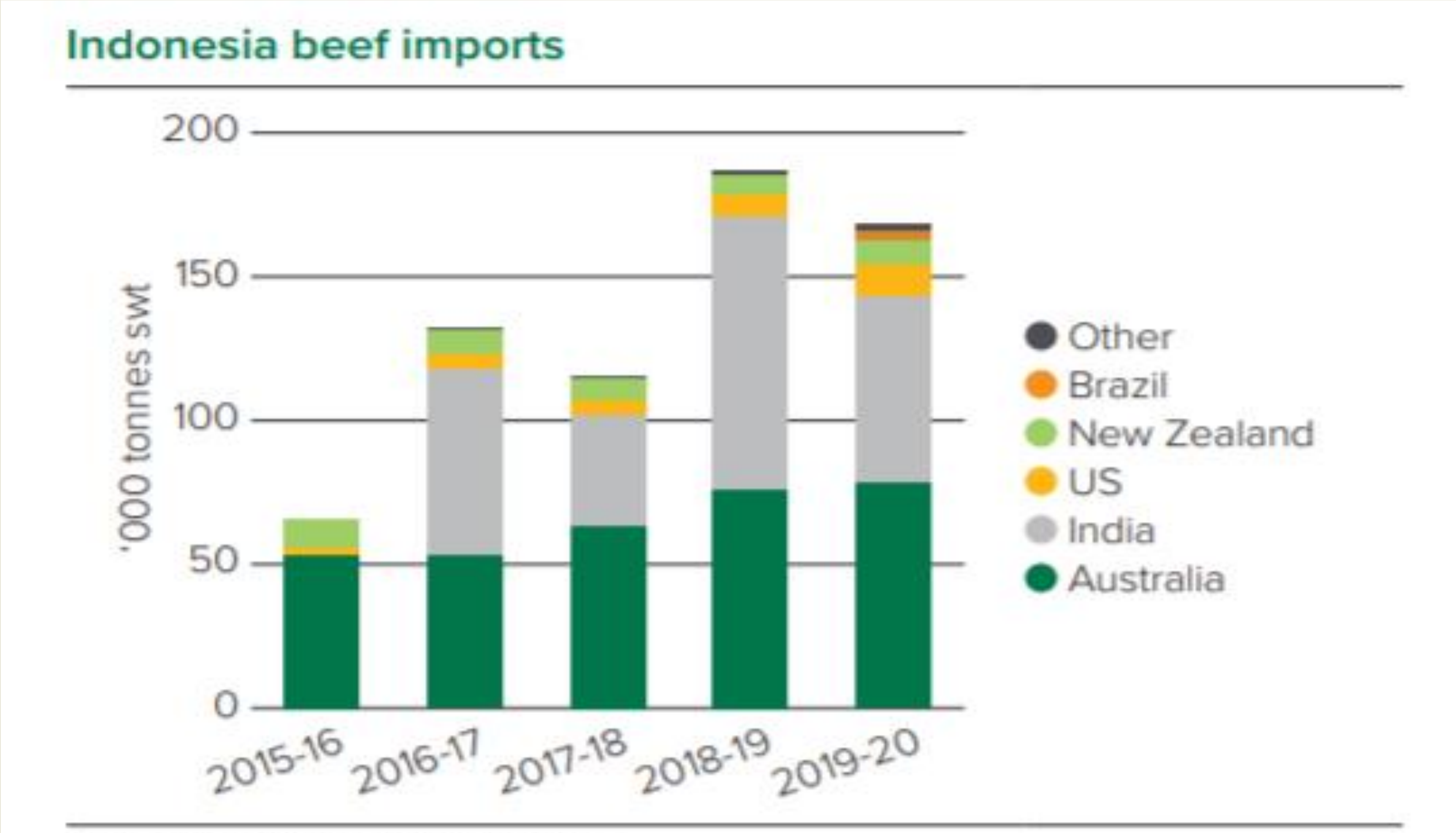
BEEF

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.

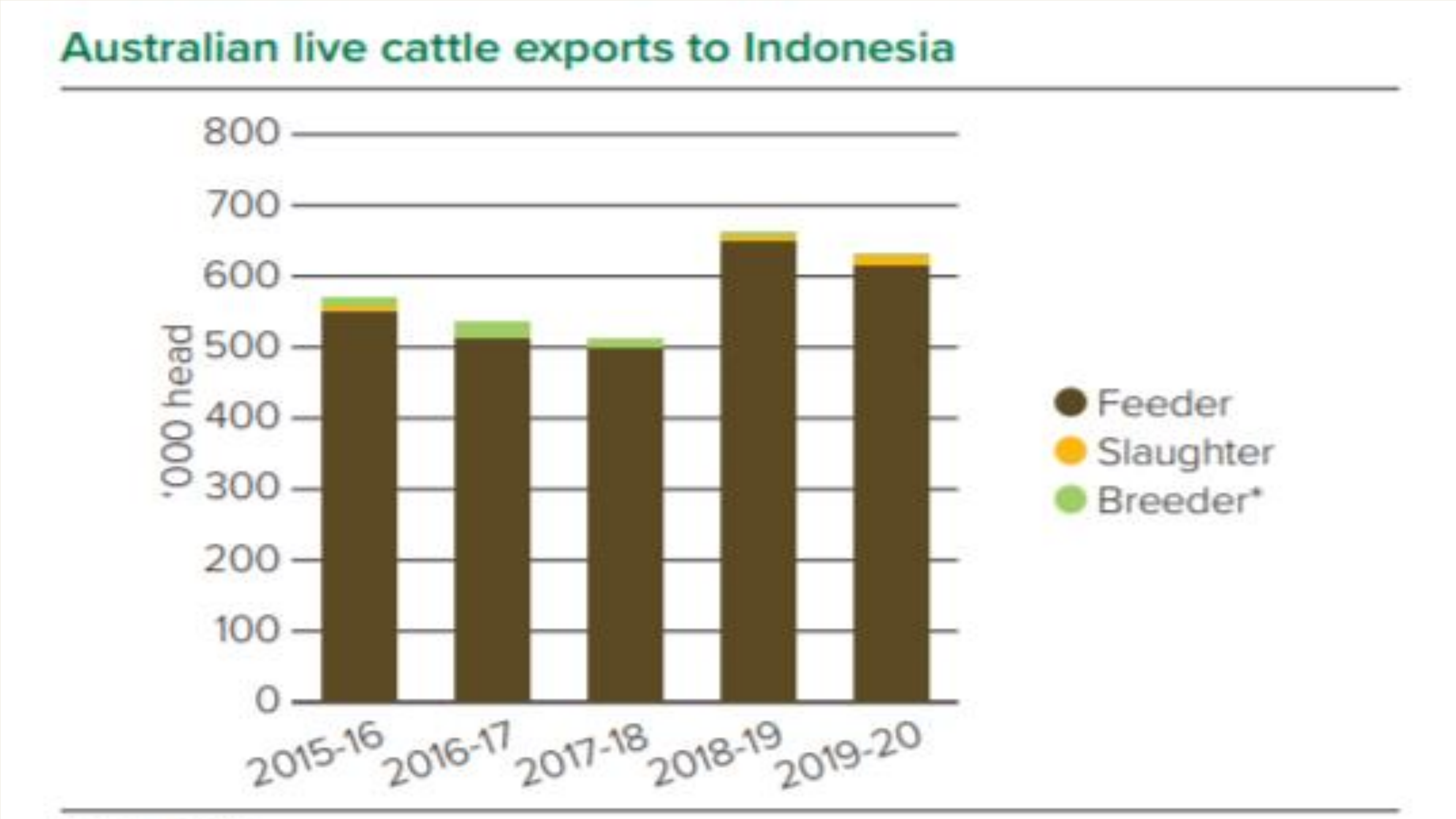
As some context, the volume of AU beef exported into Indonesia has been increasing overtime, as has US albeit at far smaller levels. Levels of Indian product fluctuate.

MLA market snapshot – Indonesian Beef, imports (August 2019)



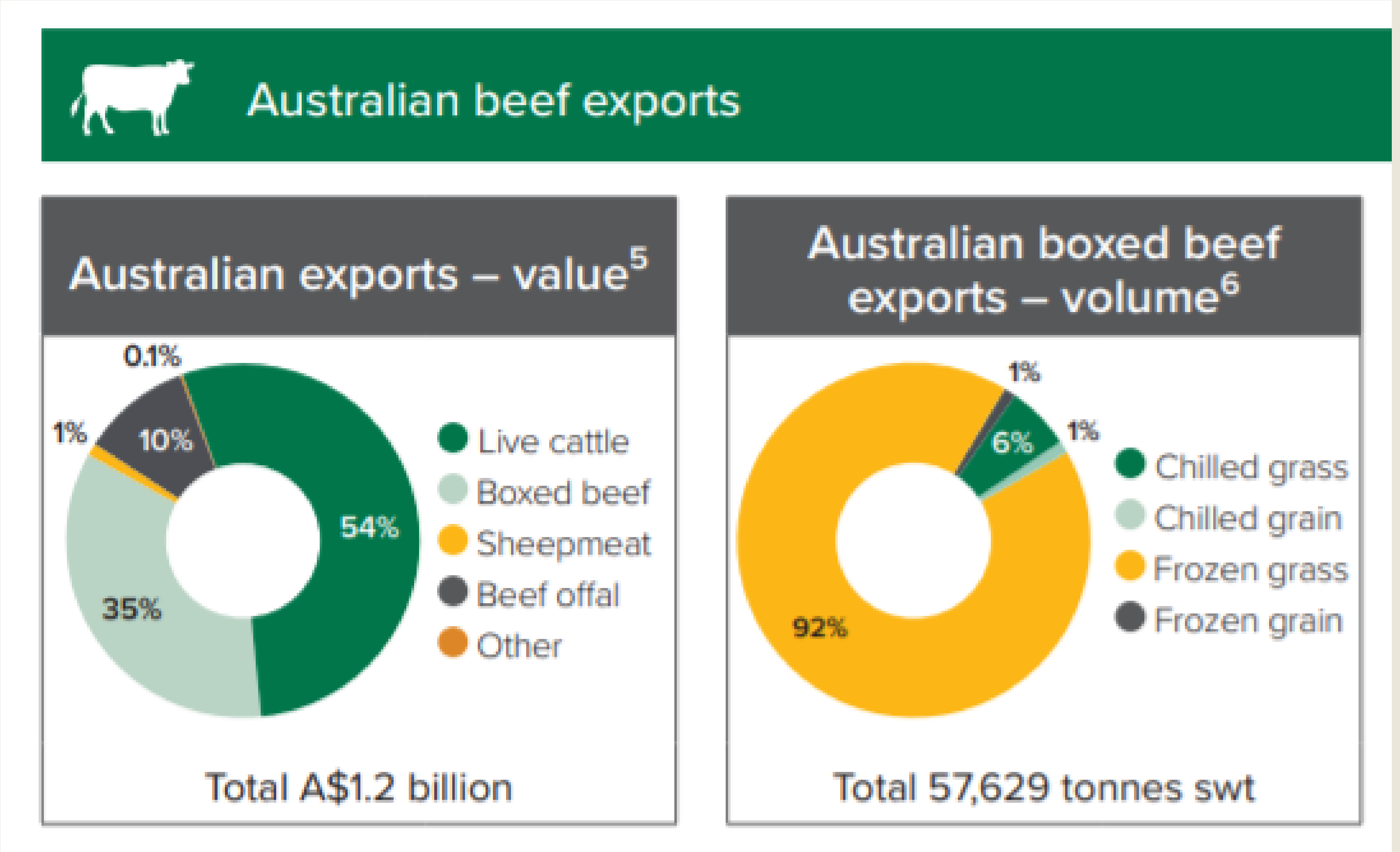
Source: IHS Markit, Australian Fiscal Year

MLA market snapshot – Indonesian Beef, live cattle exports from Australia (August 2019)



Source: DAWE
* included breeder and productive cattle as per DAWE's classification

MLA beef exports to Indonesia in terms of Volume and Value



https://www.mla.com.au/globalassets/mla-corporate/prices--markets/documents/os-markets/red-meat-market-snapshots/2020/2020-indonesia-market-snapshot.pdf

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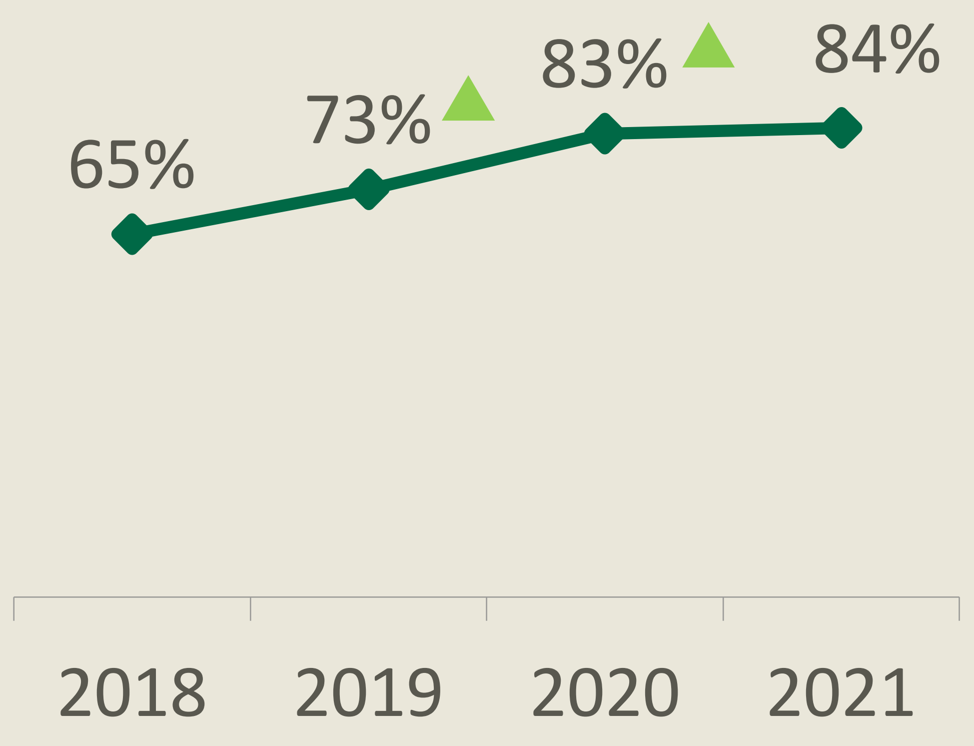
Claimed knowledge of COO increased consistently from 2018 to 2020 and is stable in 2021. In 2021, there was a slight shift in imported beef purchase frequency (from 33% to 30%) and local beef is purchased more frequently (39%).

Know Country of Origin?



FREQUENCY OF BUYING
KEY: **LOCAL** AND **IMPORTED** BEEF

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(GF3B) Do you know the country of origin of the beef you buy? Base: (n=499)
(CH4) How often do you buy imported beef? Base: (n=499)
(CH4LOC) How often do you buy local beef? Base: (n=499)

Sig. different at 95%

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Local beef is the most popular COO. Other COO’s are stable, slowing the increasing trend of past month and most often consumption AU beef that was seen in previous years.

BRAND HEALTH – BEEF

	LOCAL BEEF %	’20	‘19	‘18	AUSTRALIAN BEEF %	’20	’19	‘18	NEW ZEALAND BEEF %	’20	’19	‘18	AMERICAN BEEF %	’20	’19	‘18	INDIAN BEEF/ BUFFALO MEAT %	’20	’19	‘18
Spontaneous awareness	32 ▼	41	28	38	83 ▲	75	72	72	30	27	32	30	34	33	28	23	9	12	8	6
Total Awareness	92	89	81	81	94	92	83	85	63	68	61	60	65	66	57	50	34 ▼	46	35	32
Ever Eaten	91 ▲	83	78	79	81	76	70	66	44	42	32	29	38	41	32	31	13	16	16	7
Eat P12M	90 ▲	80	75	77	65	61	59	52	33	34	23	17	27	32	25	19	9	14	10	4
Eat P3M	85 ▲	74	72	72	50	50	44	30	23	22	15	9	16	22	16	10	7	10	7	3
Past Month	81 ▲	71	68	66	38	43	32	20	17	15	12	4	10	16	12	6	6	6	4	3
Most Often	69 ▲	59	64	62	19	23	15	12	2	2	4	2	2	4	1	1	0	0	1	2

Uplifts likely driven by name adjustment: Removing Daging Pejal to show just ‘Daging Sapi Lokal’

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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: ‘21(n=247) ‘20 (n=256), 19’(n=260), 18’(n=247) Base – Bought beef in past month or ever buy beef

▲▼ *Sig. different at 95%*

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Local beef plays well to all the top drivers to choice/volume in Indonesia, and this is what helps the COO drive volume. Imports AU, US and NZ share the superior space (AU leads) but NZ combines this with a strength on 'goodness'.

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

		LOCAL BEEF	AUSTRALIAN BEEF	AMERICAN BEEF	INDIAN BEEF	NEW ZEALAND BEEF
Everyday favourite (27%)	Cheaper	31	-16	-6	6	-12
	Is easy and convenient to purchase	26	-12	-6	0	-12
	I trust that this beef is slaughtered according to sharia law and is therefore Halal	26	-13	-7	3	-9
	Guaranteed safe to eat	7	-4	-2	0	-1
	Is my/my family's favourite beef	16	-2	-5	-1	-6
Superior (19%)	The fat is nicely marbled	-29	12	12	-2	8
	Is the most superior beef	-21	11	5	-2	8
	The meat is usually tender	-16	8	1	-1	8
Goodness (17%)	More nutritious	-11	2	3	-1	7
	The industry is environmentally sustainable	-13	1	0	1	9
	The animal is well-cared for	-20	5	4	1	9
Variety of Quality Cuts (16%)	Offers a variety of cuts that suit the meals I make	1	1	4	-3	0
	Consistent quality standards	-19	11	5	-2	7
Fresh (12%)	Fresh	11	-5	-1	-2	-2
Low Fat (9%)	Low in fat	-14	0	3	1	4

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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=247). *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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When looking at what drives premium (vs volume/choice), a sense of superiority grows in importance – positioning AU well as the strongest player in this space delivering marbling and tenderness that consumers connect to superiority.

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

Group	Attribute	LOCAL BEEF	AUSTRALIAN BEEF	AMERICAN BEEF	INDIAN BEEF	NEW ZEALAND BEEF
Superior (29%)	The fat is nicely marbled	-29	12	12	-2	8
	Is the most superior beef	-21	11	5	-2	8
	The meat is usually tender	-16	8	1	-1	8
Goodness (22%)	More nutritious	-11	2	3	-1	7
	The industry is environmentally sustainable	-13	1	0	1	9
	The animal is well-cared for	-20	5	4	1	9
Low Fat (18%)	Low in fat	-14	0	3	1	4
Variety of Quality Cuts (14%)	Offers a variety of cuts that suit the meals I make	1	1	4	-3	0
	Consistent quality standards	-19	11	5	-2	7
Everyday Favourite (9%)	Cheaper	31	-16	-6	6	-12
	Is easy and convenient to purchase	26	-12	-6	0	-12
	I trust that this beef is slaughtered according to sharia law and is therefore Halal	26	-13	-7	3	-9
	Guaranteed safe to eat	7	-4	-2	0	-1
	Is my/my family's favourite beef	16	-2	-5	-1	-6
Fresh (8%)	Fresh	11	-5	-1	-2	-2

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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=247). *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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Assurance on safety and Halal (True Aussie?) are important to enabling volume but to grow value there is opportunity for us to continue to focus on AU’s strength in tenderness.

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. Fresh	1. Fresh
	2. Guaranteed safe to eat	2. Guaranteed safe to eat
	3. I trust that this beef is slaughtered according to sharia law and is therefore Halal	3. Is my/my family’s favourite beef
	4. Is easy and convenient to purchase	4. Offers a variety of cuts that suit the meals I make
	5. Is my/my family’s favourite beef	5. The meat is usually tender

BEEF BRAND HEALTH & PERCEPTIONS - IMPLICATIONS:

AU Beef has strong equity in Indonesia, offering tender, marbled beef of consistent quality to support a sense of superiority and premium.

What do we see?

1

A two horse race – AU and Local

AU and Local are the dominant but distinctly different beef COO brands in Indonesia. AU's TOM awareness strongest and growing this year, and the rest of the funnel stable.

2

AU shares superior with NZ which is building further differentiation

AU has built and maintained strengths in the same associations as last year, particularly around superior, marbling and tenderness as well as consistent quality.

BUT these are shared with NZ, which has also developed some distinct strengths in nutritious and sustainable ('Goodness'). Local owns the key drivers to power and premium of fresh, safe.

Now what?

Maintaining AU's positioning around superior quality and care, will be important in maintaining our more powerful position as the leading import COO brand.

AU Beef should focus on communicating its tenderness and consistent quality strengths to reinforce a power/premium position ahead of NZ.

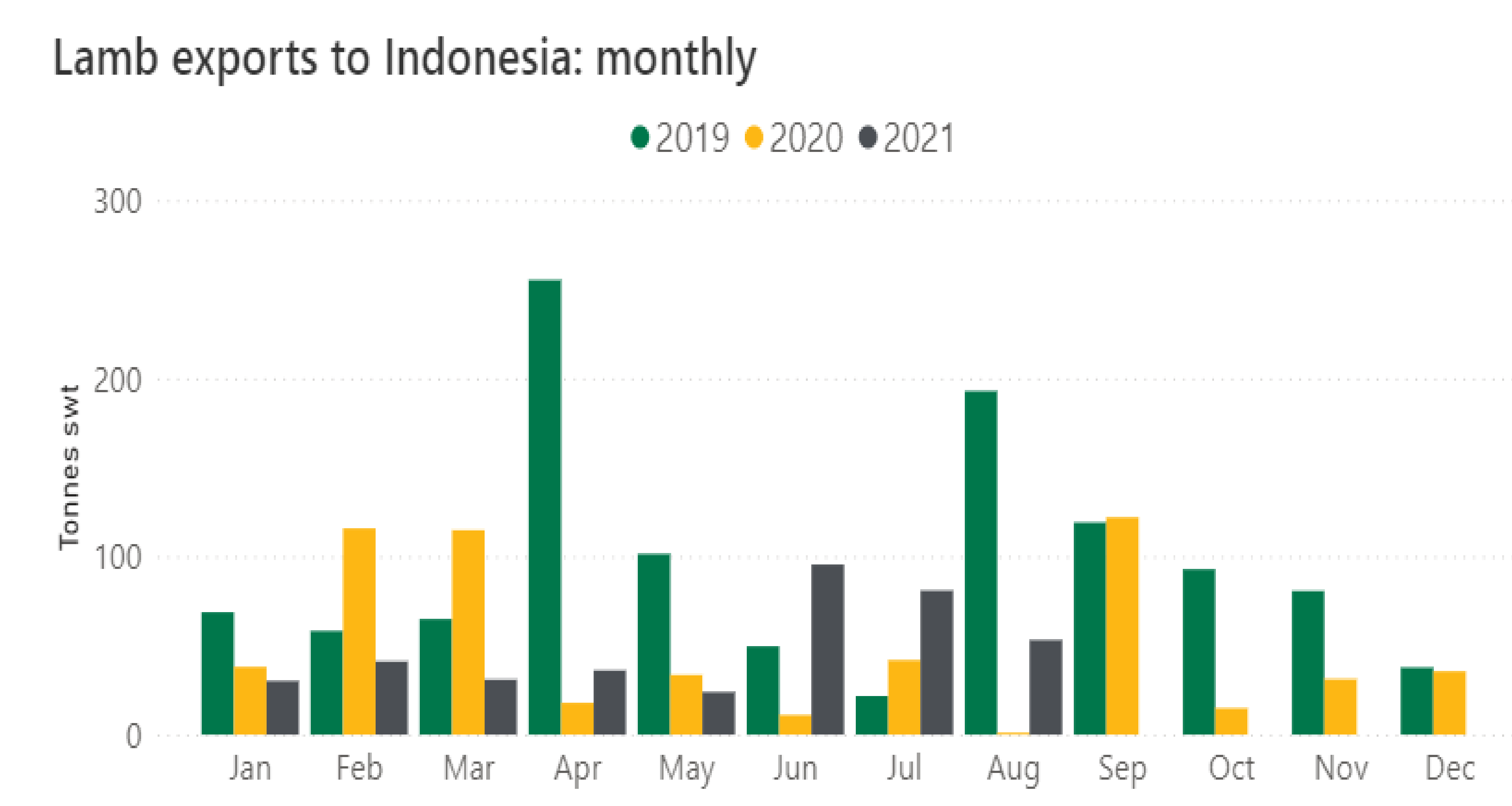
LAMB

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.

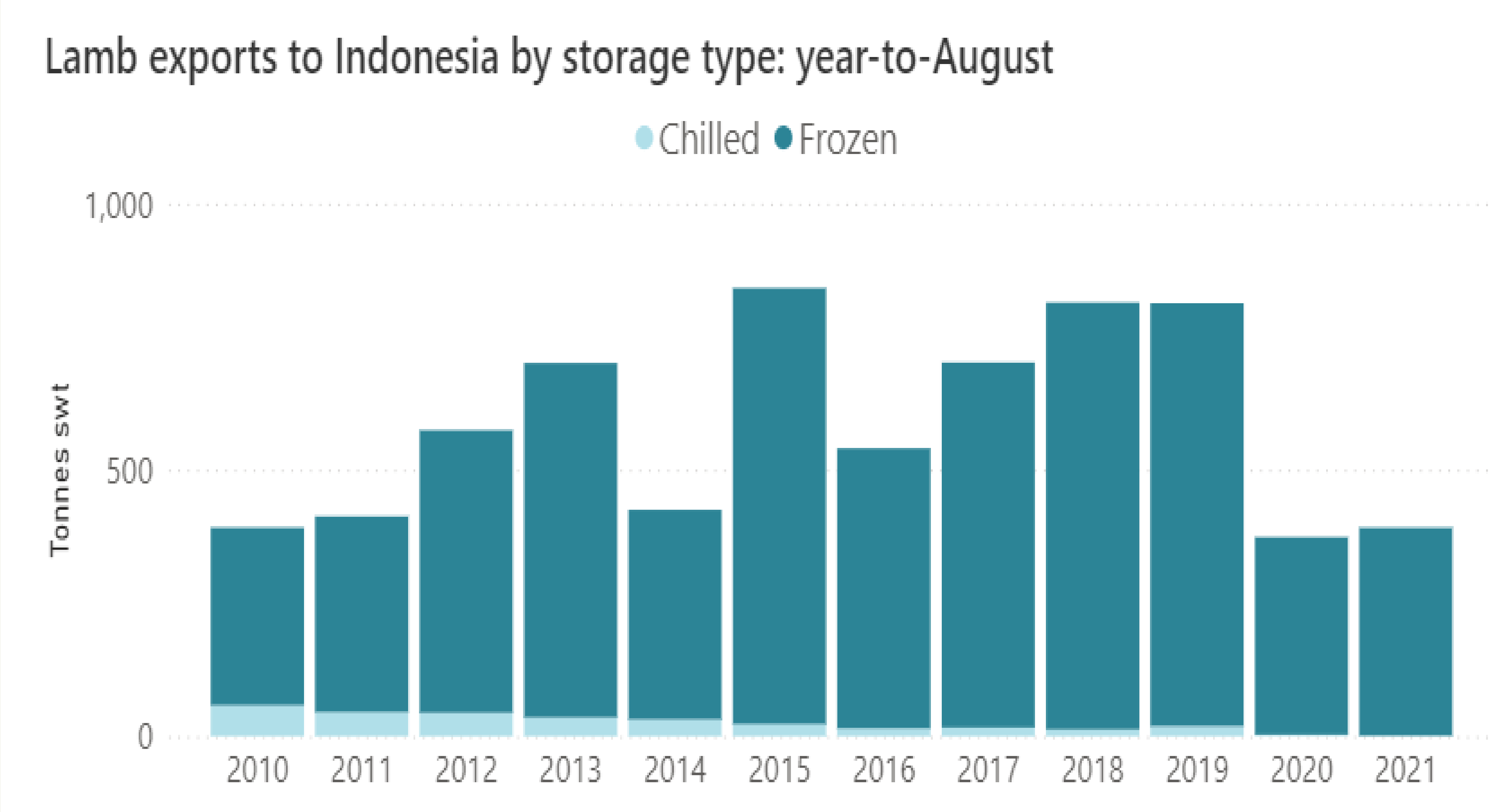
AU lamb exports to Indonesia are largely in line with 2020 at a total level, but down vs. strong 2019.

MLA market snapshot – Indonesia Lamb imports from Australia (2019-2021)



https://www.mla.com.au/prices-markets/overseas-markets/market-trade-statistics/

MLA Indonesia Lamb Imports from Australia by storage type (2010-2021)



https://www.mla.com.au/prices-markets/overseas-markets/market-trade-statistics/

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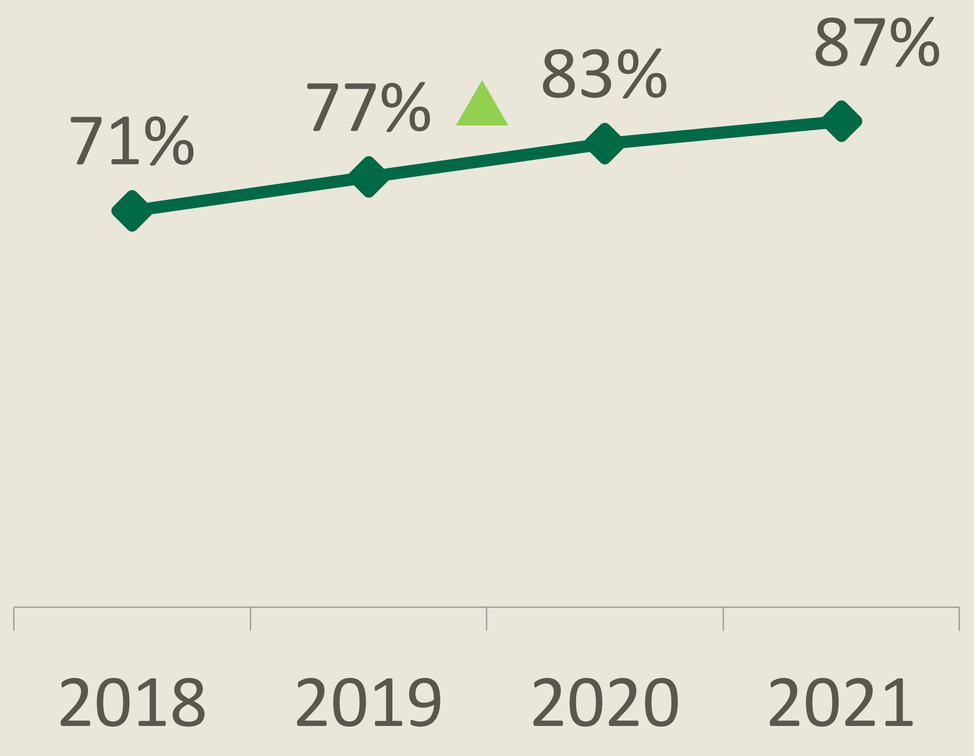
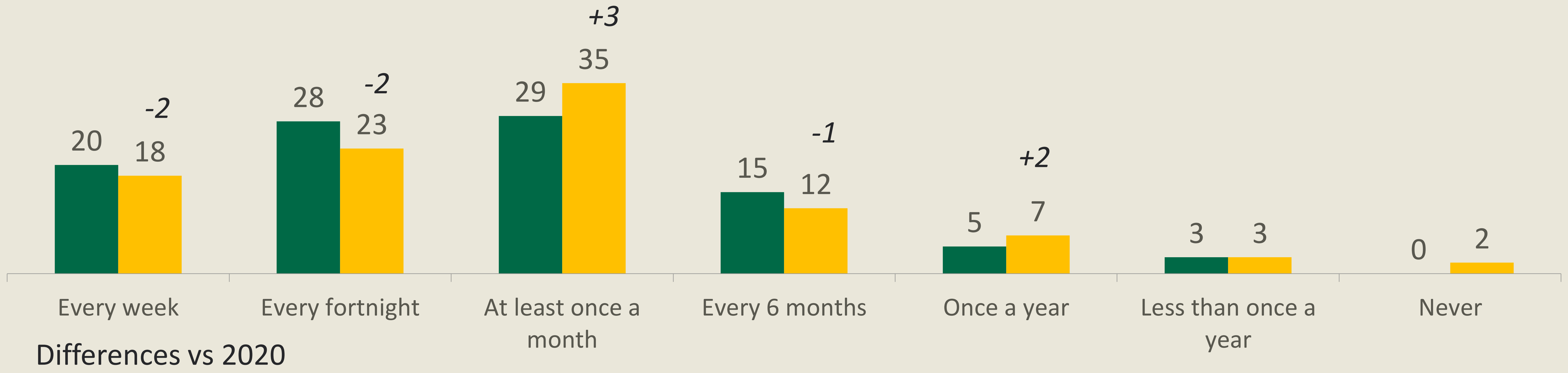
There has been a consistent increase in knowledge of lamb COO in Indonesia since 2018. There has, however been a slight decline in purchase frequency of international lamb (45% to 41% for weekly and fortnightly combined).



FREQUENCY OF BUYING
KEY: **LOCAL** AND **IMPORTED** LAMB



Brand health funnels in Indonesia are stable this year, while Australian has the strongest TOM awareness Local goat is the strongest brand in market and eaten most often by more than half of Indonesians.

BRAND HEALTH – LAMB

	Local Indonesian goat %	'20	'19	'18	Australian lamb %	'20	'19	'18	New Zealand lamb %	'20	'19	'18
Spontaneous awareness	32	35	26	25	74	73	67	69	40	43	44	48
Total Awareness	96	95	96	96	95	92	93	91	86	88	86	81
Ever Eaten	88	90	90	88	75	70	64	61	49	50	47	46
Eat P12M	81	84	85	78	65	59	51	47	39	43	37	31
Eat P3M	73	75	76	71	53	44	39	37	29	32	28	23
Past Month	64	66	64	61	40	37	33	30	23	24	21	18
Most Often	51	55	55	54	23	24	21	18	12	10	8	10

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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: '21(n=253) '20 (n=244) '19 (n=239) '18 (n=210)
Base – Bought lamb in past month or ever buy lamb

Sig. different at 95%

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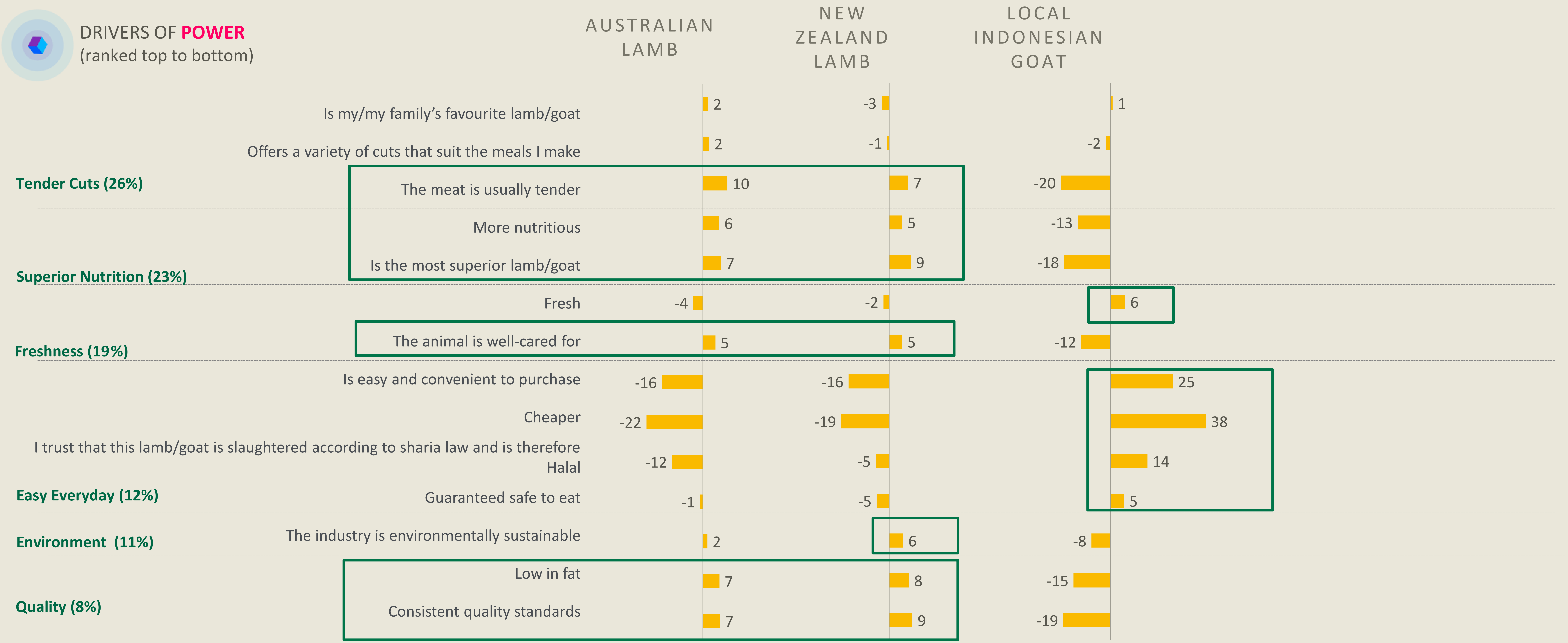
AU lamb needs to focus on "tender cuts" to drive volume and "quality" and "superior nutrition" to drive value.

Driving these perceptions… *Contribute to driving…*

	Group of Perceptions	Power (Volume)	Premium (Value)
1	TENDER CUTS	26%	22%
2	SUPERIOR NUTRITION	23%	22%
3	FRESHNESS	19%	16%
4	EASY EVERYDAY	12%	-4%
5	ENVIRONMENTAL	11%	14%
6	QUALITY	8%	23%

AU and NZ lamb have very similar image profiles and both defining in the top drivers of power – tender and superior. Local goat popularity is led by its cheapness, convenience to purchase and the guarantee of Halal.



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+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=253). *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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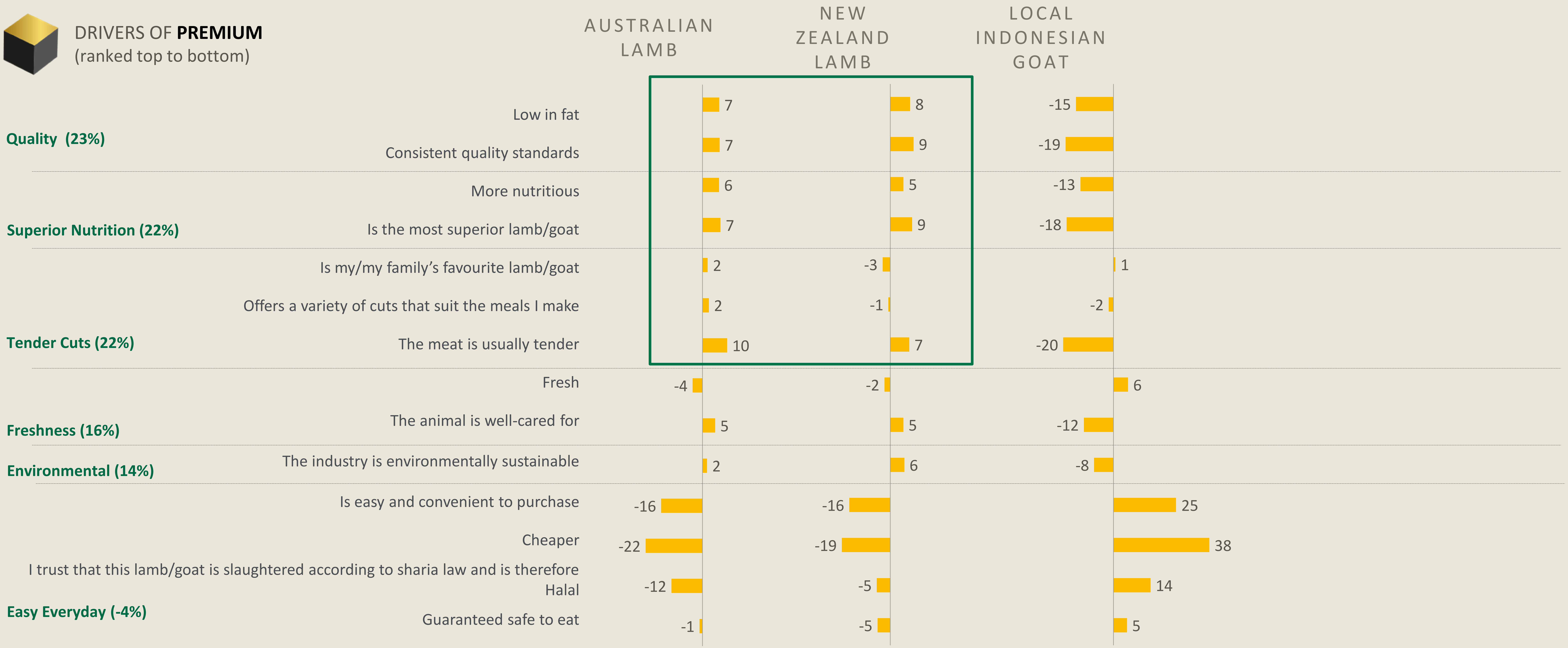
The drivers of premium are all areas shared with NZ and show just how much the two lamb COOs mirror one another.



KANTAR

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

LBH9. Here are some things which people have said about beef. 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=253). *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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With the key attributes in the Indonesian market driving both Power and Premium, leveraging those we are already known for (Superior, Nutritious and Well cared for) will allow us to reinforce our strong 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. Guaranteed safe to eat	1. The animal is well-cared for
	2. Is the most superior lamb	2. Is the most superior lamb
	3. The animal is well-cared for	3. Guaranteed safe to eat
	4. Fresh	4. More nutritious
	5. More nutritious	5. Consistent quality standards

LAMB COO BRAND HEALTH & PERCEPTIONS - IMPLICATIONS:
The lamb category has remained more stable than beef in 2021, with AU maintaining and relying a little on established salience but local continuing to dominate.

What do we see?

1

Lamb category relatively stable on brand health with AU highest TOM awareness, but Local strong from trial to consumption

Local has the strongest brand with over half saying they eat it most often AU awareness remains as strong as years past, and ahead of competitors. AU has continued to build over time (although stable this year) and remains ahead of NZ.

2

AU and NZ sharing similar positioning on key drivers of premium

AU and NZ share clear strengths on superior, nutritious, animal well-cared for and tender, which all drive both Power and Premium.

Now what?

With a similar positioning to NZ on some key drivers of Power and Premium we will need to ensure that we are communicating these more effectively, or distinctively to ensure we are differentiated from NZ. Variety and family favourite are not current strengths but have improved slightly this year and if built would allow us to maintain the strong consumer pre-disposition.

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SHOPPING BEHAVIOUR & RED MEAT ONLINE

Wet market Butcher and Supermarket are the most frequently shopped in Indonesia for beef, similarly for Lamb the same channels are the most frequently used. Hypermarkets in the top 4 for both proteins, but with larger basket size fewer making very frequent visits.

KANTAR

QR3A. How often have you bought beef from each of these locations in the last six months? Base: '21 (n=243) '20 (n= 249)
Online Retailer: Online Supermarket 67%, Online-Only Retailer 51%, Other 2% (ONL5B. Where did you buy your beef online)

Sig. different at 95%

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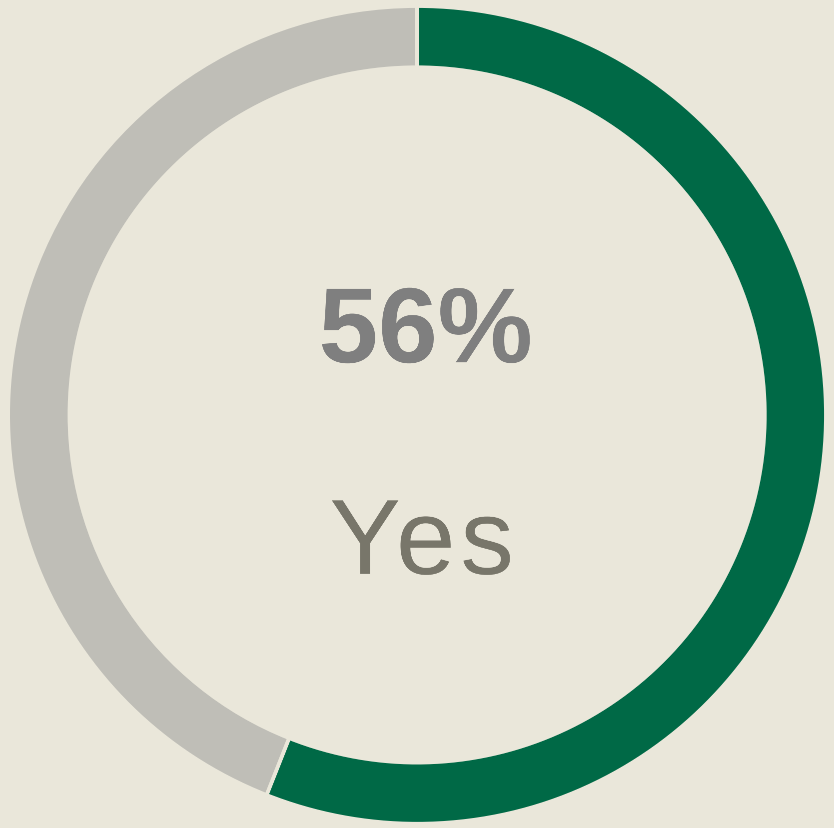
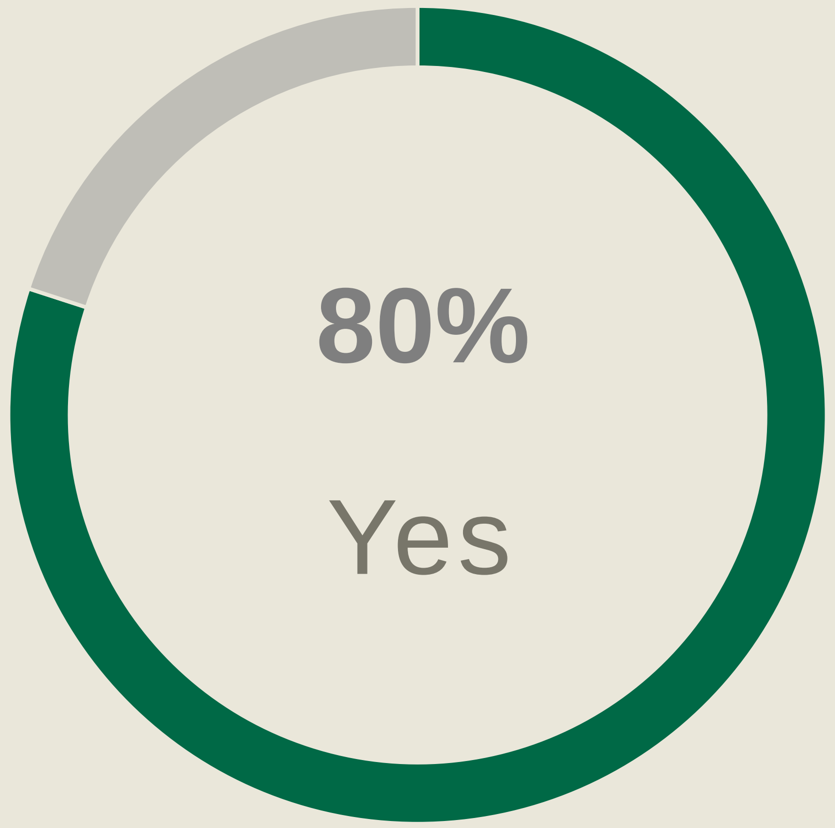
Penetration for beef purchase online relatively high, just under half saying they have not bought beef online in the past. And penetration even higher for lamb with only 1 in 5 claiming they have never bought lamb on online.

EVER BOUGHT BEEF ONLINE:



Skews: Are more likely than average to have kids in the household.

EVER BOUGHT LAMB ONLINE:



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=135)

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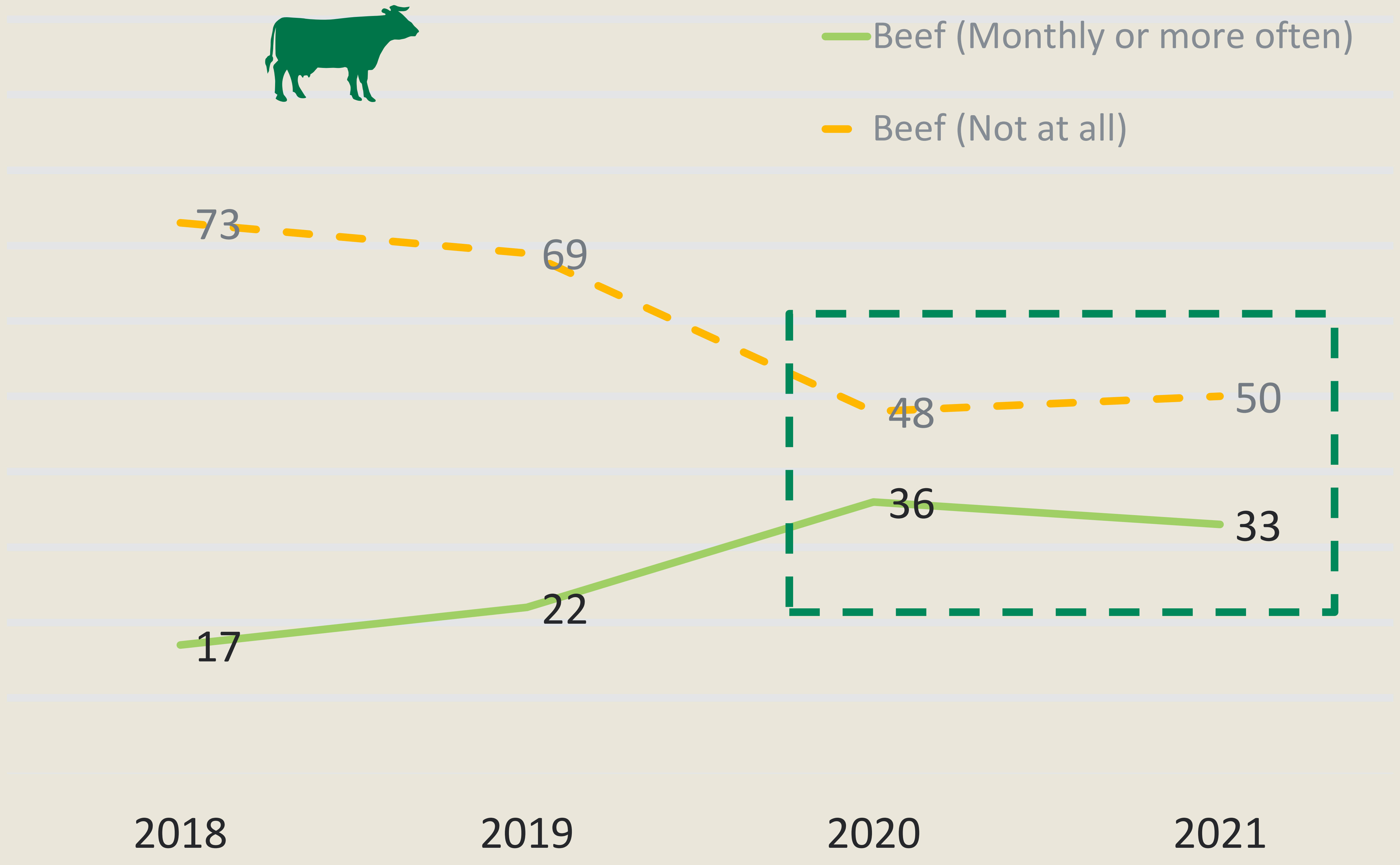
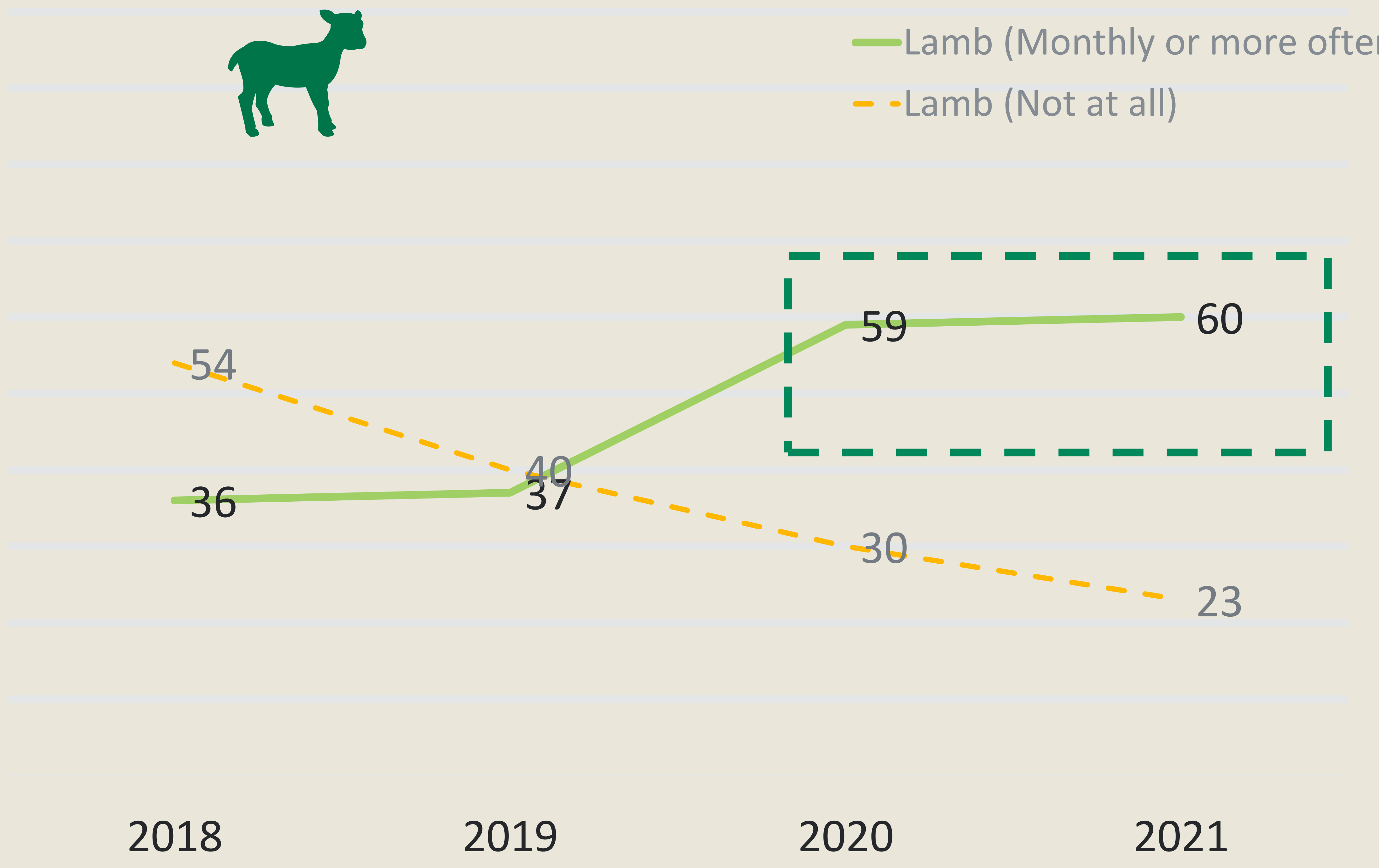
Purchase of been and lamb online rose in 2020, in line with a number of other markets, as seen in the pandemic. It has remained stable since then with 1 out of 3 people claiming to use this method for beef and up at almost 2 in 3 for lamb.

ONLINE CHANNEL USE – OVER TIME

Monthly or more often
SKEWS: 18-34.
For beef they are also more likely than average to have kids in the household and have a higher income.





KANTAR

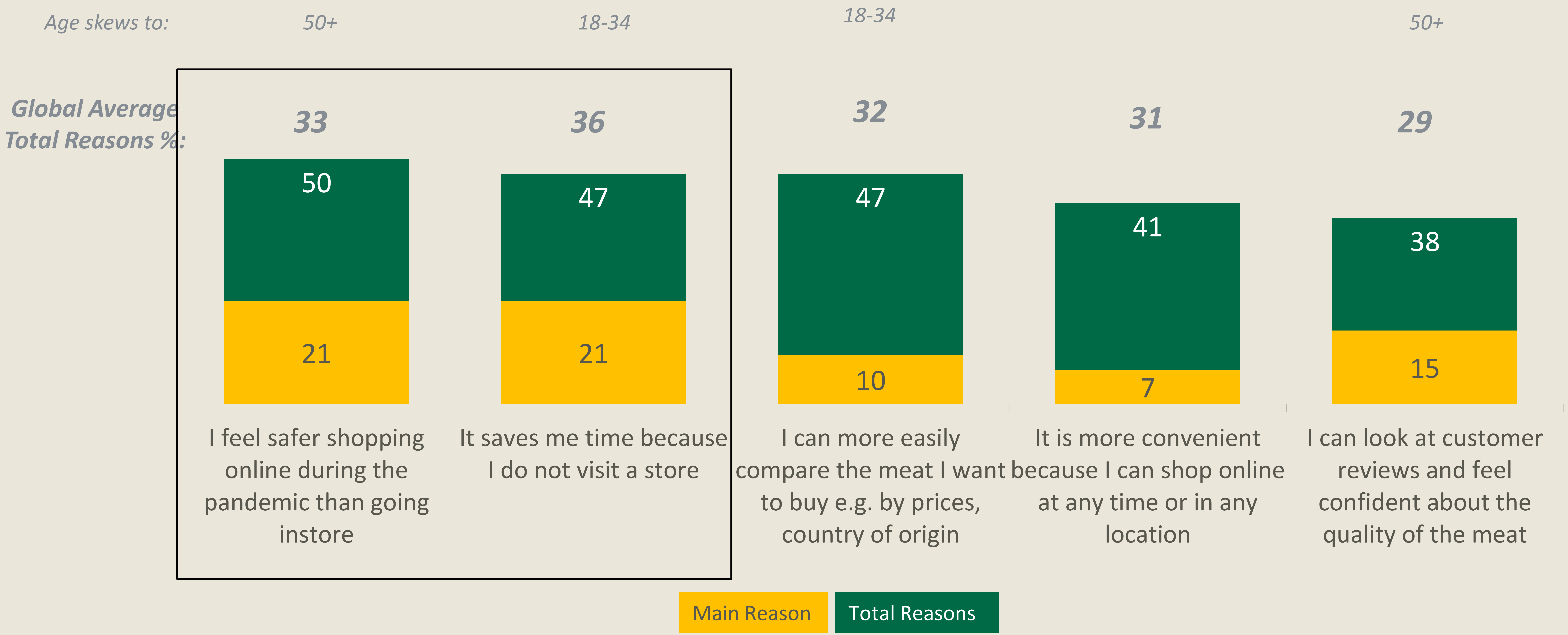
QR3A. How often have you bought beef from each of these locations in the last six months? Base: '21(n=243) '20(n= 249) '19(n=243) '18(n=249)
Online Retailer: Online Supermarket 67%, Online-Only Retailer 51%, Other 2% (ONL5B. Where did you buy your beef online)

Sig. different at 95%

MEAT & LIVESTOCK AUSTRALIA

Those that do shop online found that it was safer during the pandemic, and also that it saves time. Ability to make comparisons is also important overall, but less of a primary driver.

FACILITATORS TO BUYING BEEF ONLINE:



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=135)

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For lamb the primary drivers are slightly different. Safety during the pandemic was the most top of mind reason (same as beef), but overall customer reviews and convenience were bigger, and ahead of the global average.

FACILITATORS TO BUYING LAMB ONLINE:

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=135)

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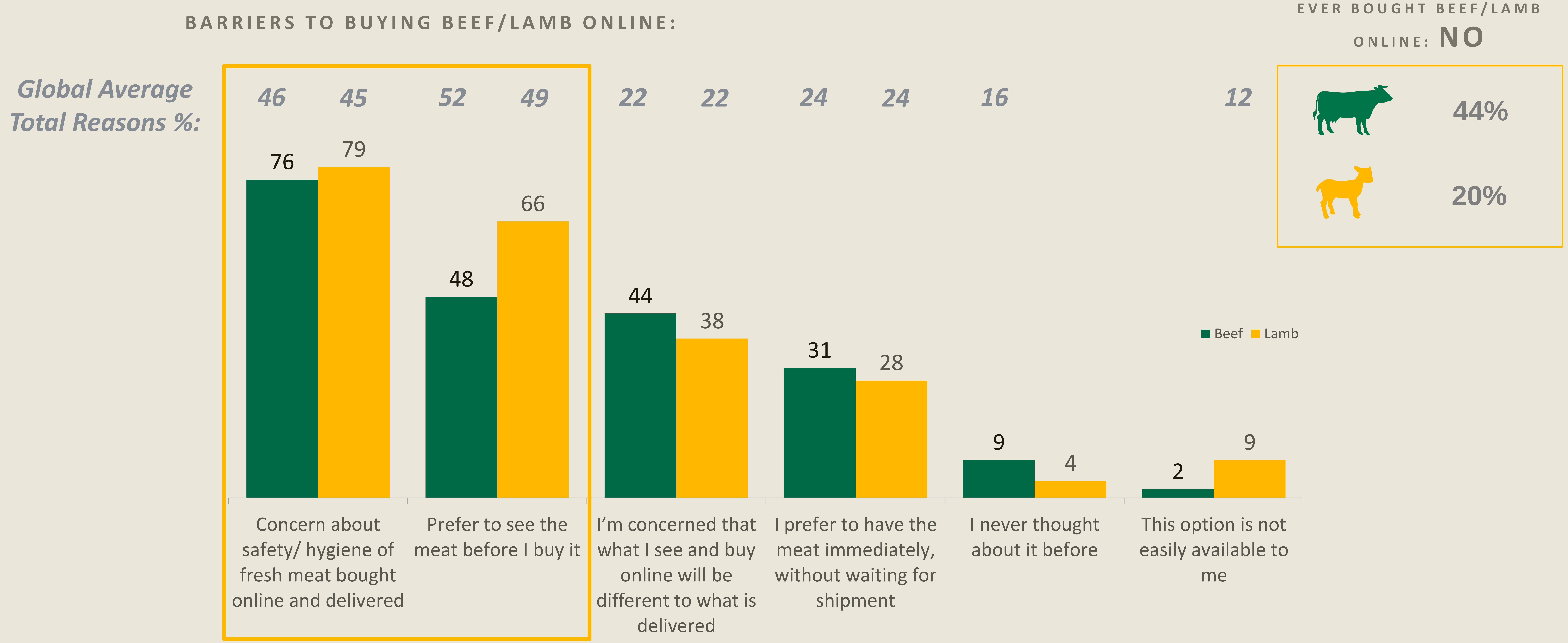
Barriers to buying beef online are very strongly linked to the concern of safety or freshness of the meat, with 3 in 4 people in Indonesia stating this as a concern.



R10B. Which of the below would you say are the main reasons you have never done this Base: (n=108)

CHANNEL, ONLINE FACILITATORS & BARRIERS - IMPLICATIONS:
Monthly online channel use has increased seen since 2018, with the pandemic a driver in building the behaviour but convenience the ongoing driver for Indonesians.

What do we see?

1

Growth in the channel is maintained, preferred by younger Indonesians

Indonesian consumers of beef and lamb have increasingly been using the online channel to purchase red meat. This appears to be more prevalent for purchasers of lamb, with 4 in 5 saying they have used it in the past. Monthly users skew to under 35s.

2

Safety has played a role in building penetration, but convenience and time saving the longer term drivers

Safety of the channel compared to shopping in bricks and mortar stores has played a role in building penetration, but convenience and time saving are primary reasons and facilitators that can be leveraged into the future

3

Limit to potential while seeing meat and freshness concerns remain

The biggest barriers for buying beef and lamb online in Indonesia are concerns about safety/freshness of the product and wanting to see it before buying, which seems to be bigger for Lamb, and both of which are higher than most other markets (in line with Malaysia).

Now what?

Online channel is established, with the greater comfort on lamb suggesting further growth potential. Current strategies should be built for specific needs rather than mass distribution.

Supporting distributors/retailers to facilitate convenience and reassurance of quality (through users or easy comparison) could help to increase the frequency of use amongst those already comfortable with the channel.

Dialling up fresh cues or communicating fresh guarantees can support confidence for those not currently using online channels, but a preference for seeing/selecting meat in person will limit the opportunity to replace the regular shopping trip for now.

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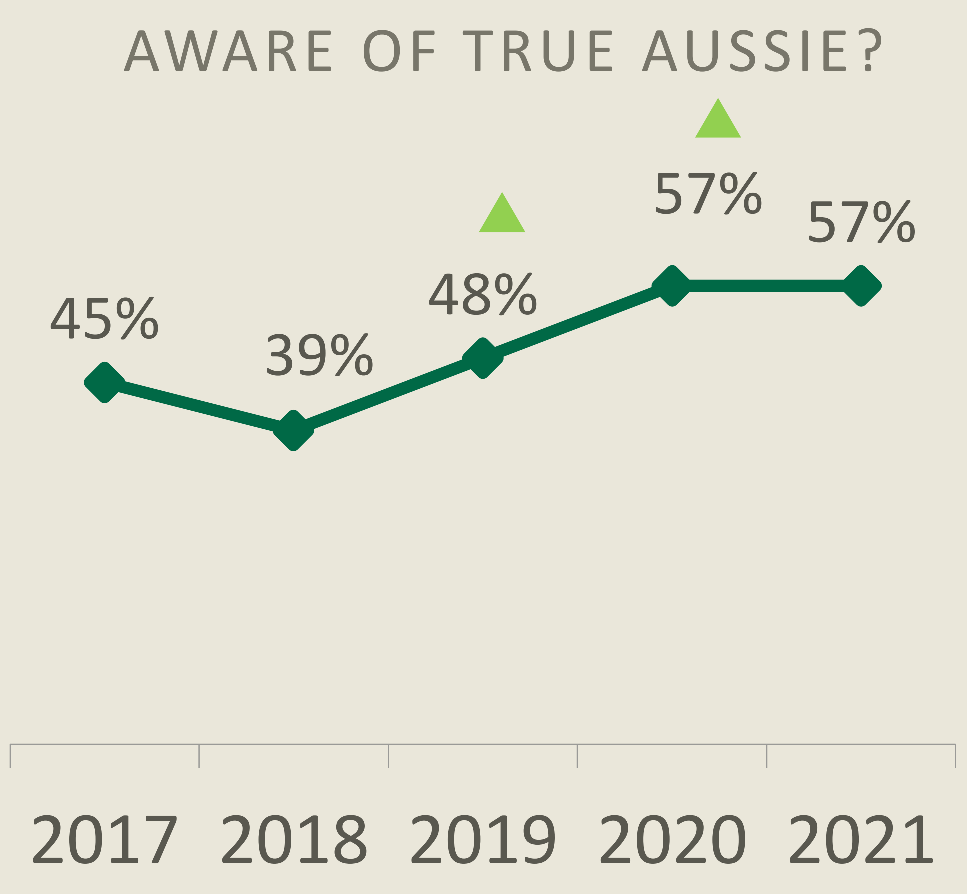
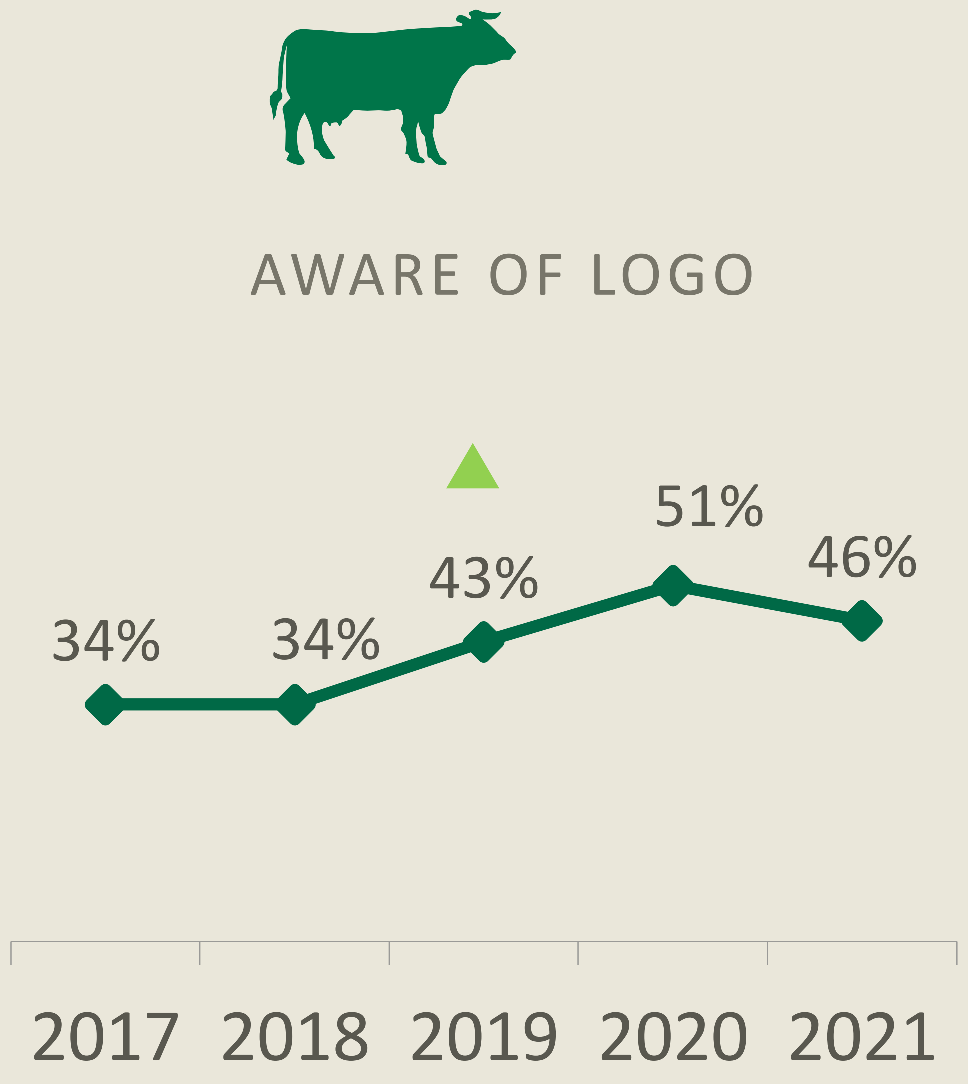
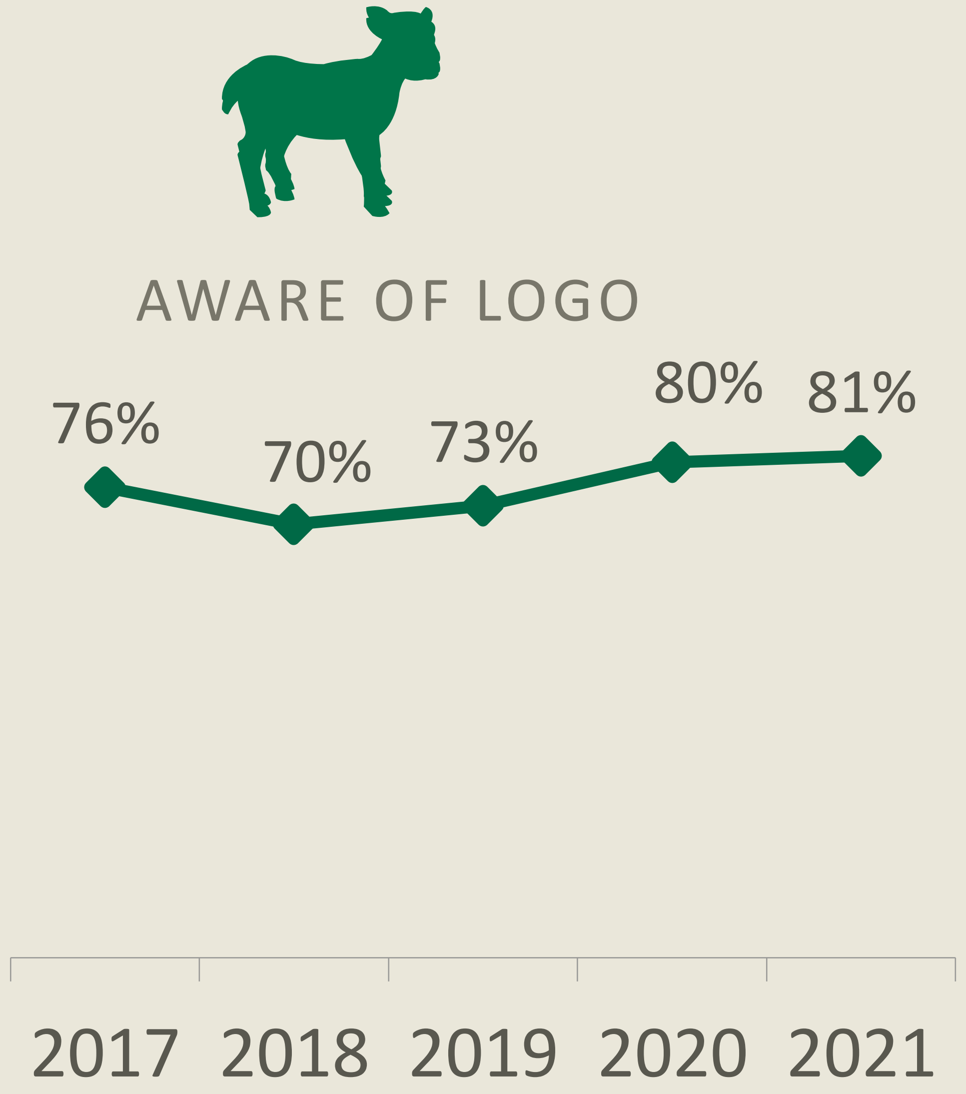
Awareness of the term “True Aussie” as well as the logo has remained stable in 2021, with awareness very clearly being driven by the lamb logo.







Term: ‘True Aussie’

TRUE AUSSIE BEEF

TRUE AUSSIE LAMB

KANTAR

QTA1. Have you heard the term “True Aussie” before? Base: ‘21(n=500); ‘20(n=500); ’19 (n=499), ‘18(n=457),’17 (n=212)
QTA3. Have you ever seen this logo before? Base: Beef ‘21(n=247); ’20 (n=256); Beef ‘19 (n=260); Beef ‘18 (n=247); Beef ‘17 (n=115); Lamb ’21 (n=253); ’20 (n=244); ‘19 (n=239); ‘18 (n=210); ‘17 (n=97)

Sig. different at 95%

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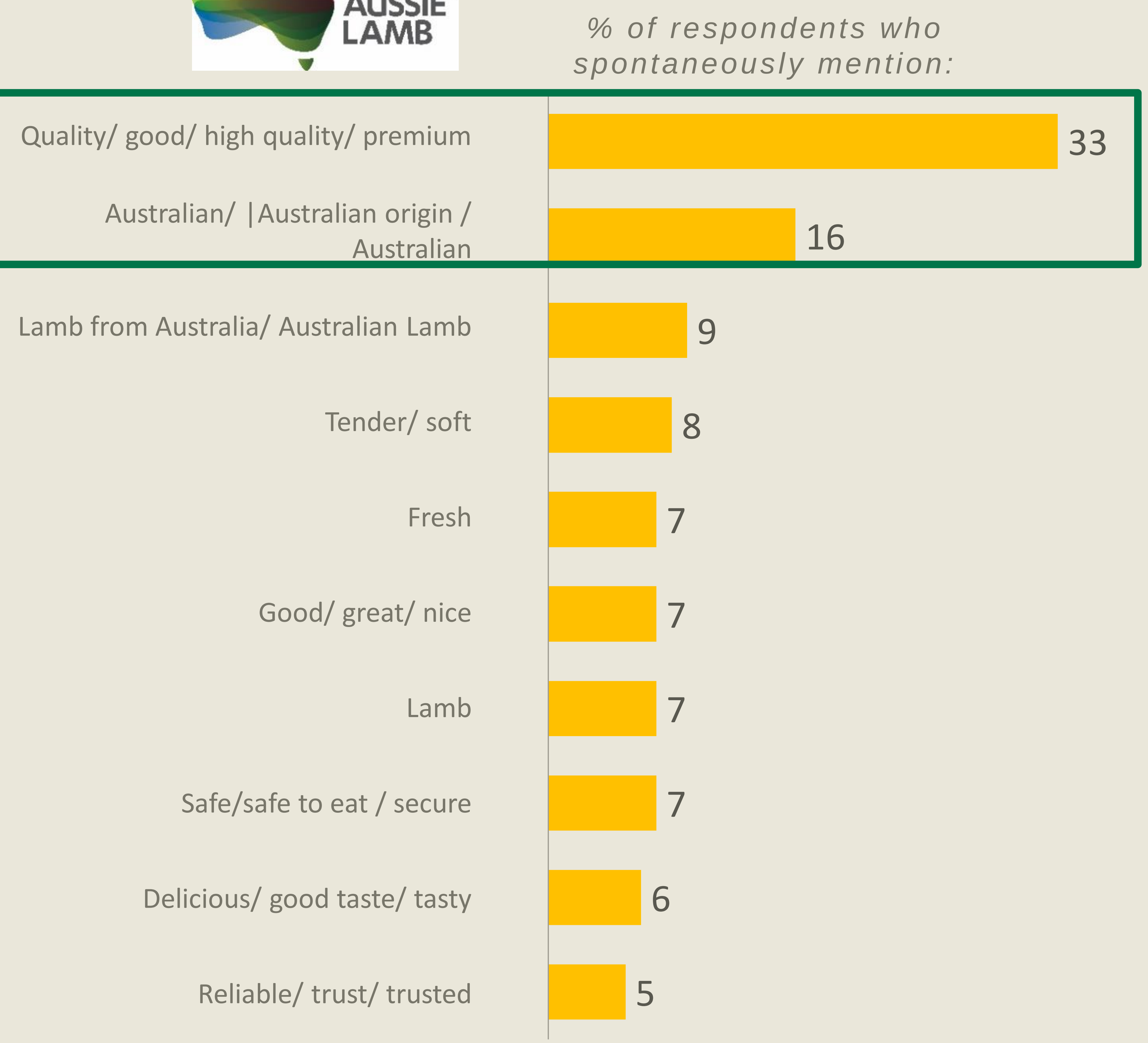
“True Aussie” logo most clearly communicates two key associations - our COO ‘Australia’ and ‘high quality’. This is the case for lamb and beef.



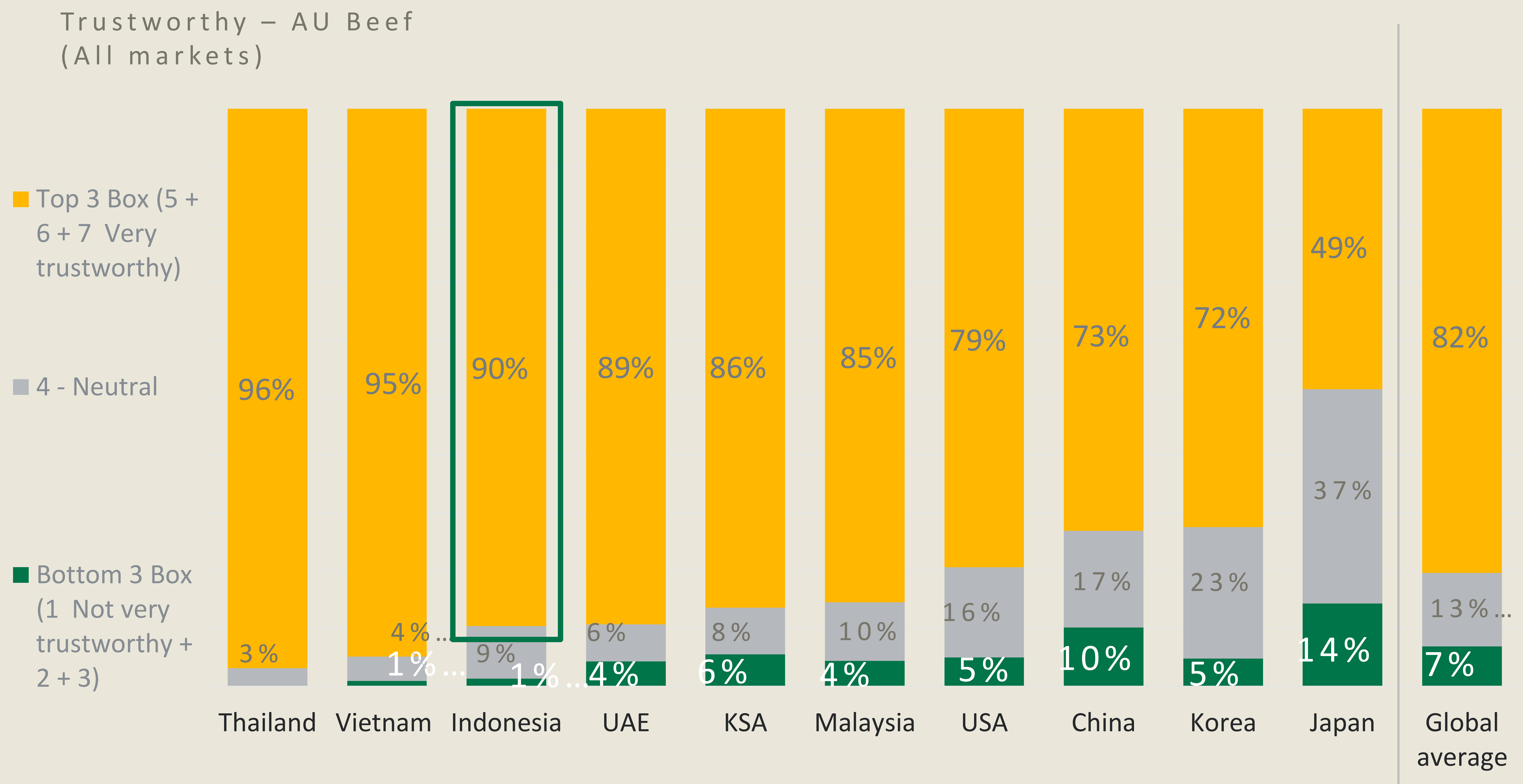
KANTAR

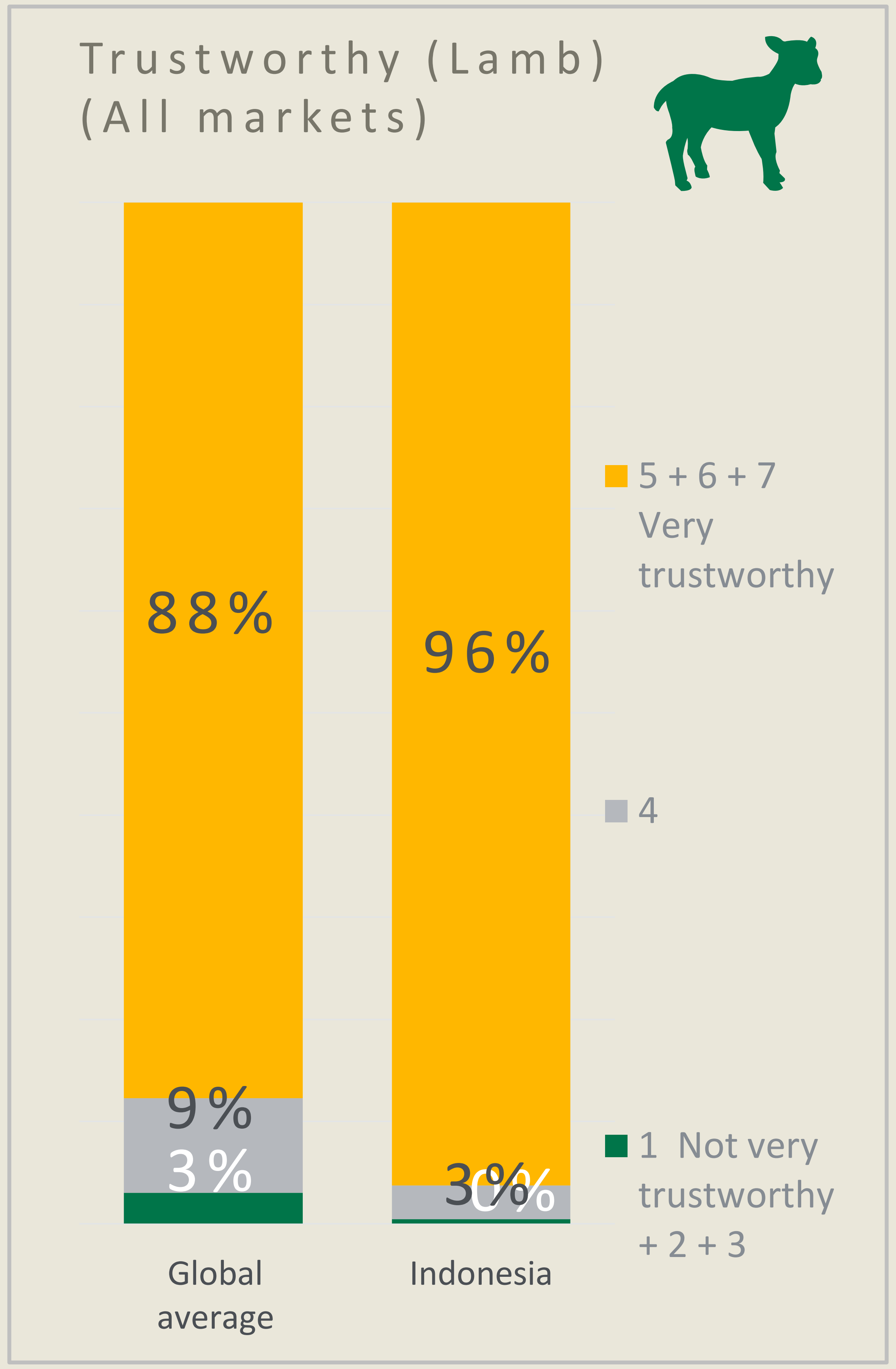
(QTA5) If you saw this logo on a packaged piece beef/lamb, what would it make you think about the meat? Base: Beef ‘21 (n=110); Lamb ‘21 (n=204)

MEAT & LIVESTOCK AUSTRALIA

BEEF & LAMB
COO TRUST PERCEPTIONS

9 out of 10 consumers in Indonesia trust AU Beef. This lands Indonesia in the top 3 countries in terms of trust of the COO.



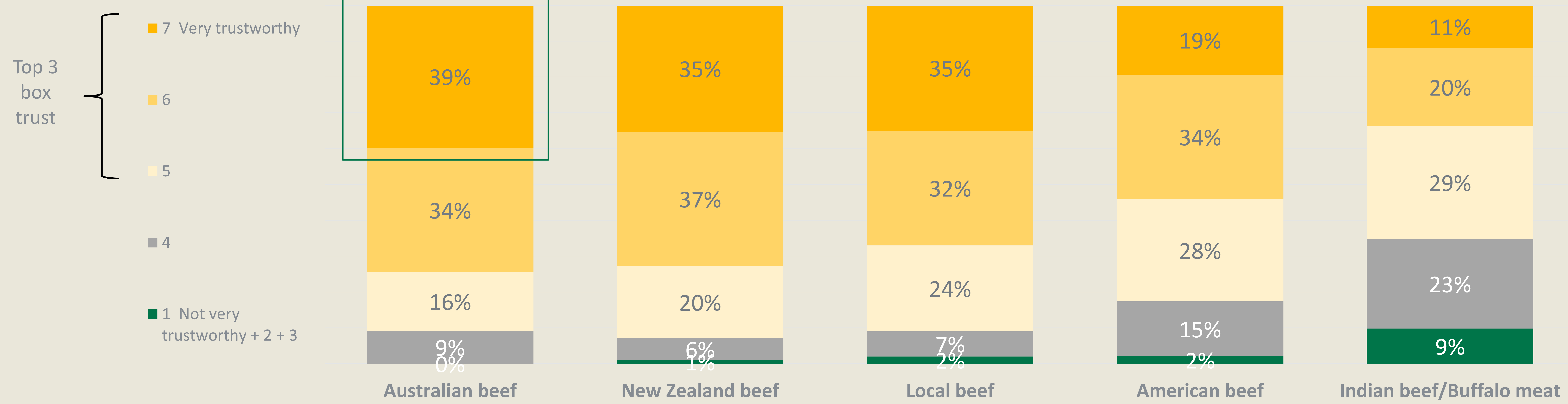


BTR2B. How trustworthy is the imported beef from these countries – 7 Point scale
Base: Japan (n=776); Korea (774); Vietnam (447); USA (n=437); UAE (n=234); Indonesia (231); Thailand (227); Malaysia (227); KSA (n=199); China (197)

In Indonesia there are similar levels of very high trust across AU, NZ, Local, however AU slightly ahead with 4 in 10 saying AU is very trustworthy and nobody saying they don’t trust AU. Even US beef established a fairly high level of Trust compared with other markets.

Trustworthy - COO BEEF (Indonesia)

Top 2 Box	74%	72%	67%	54%	31%



KANTAR

BTR2B. How trustworthy is the imported beef from these countries – 7 point scale
Base: Australia (231) American beef (119), New Zealand beef (198), Local Beef (212), Japanese beef (150), Indian beef/buffalo beef (108)

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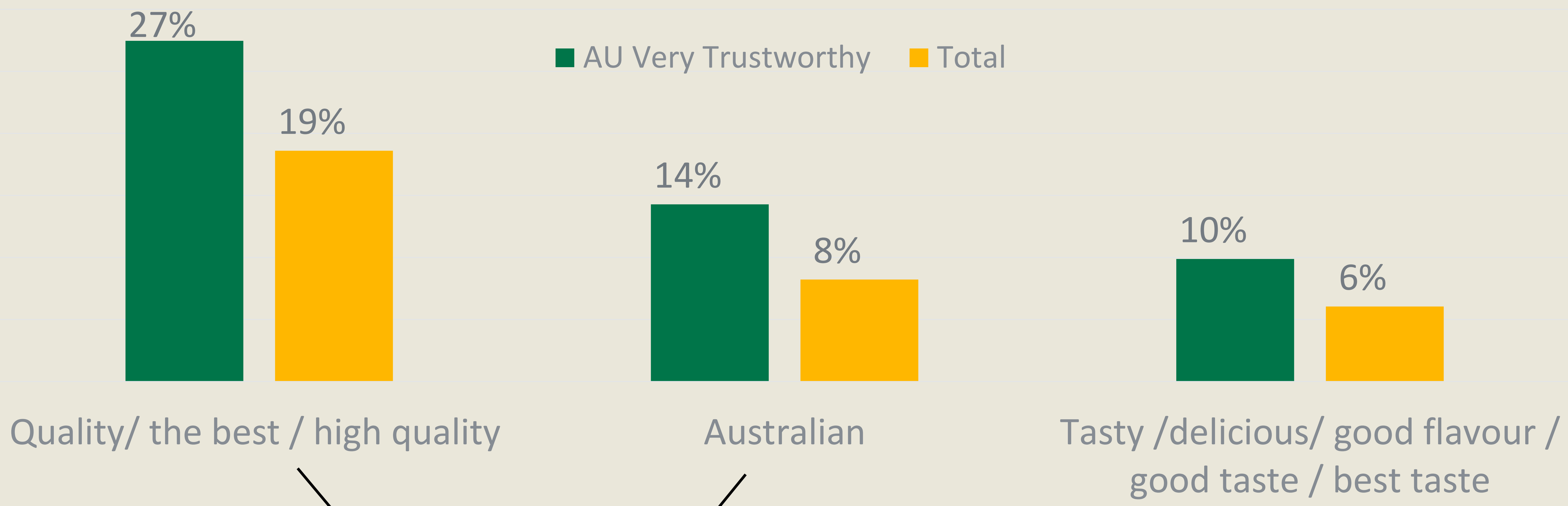
Quality is the #1 reason that people give unprompted for their trust rating, with Australian being #2. And amongst those who say AU is very Trustworthy these both increase.

Top 3 Unprompted Reasons (coded) for Trust rating
Top 3 Box Trust AU BEEF, Top Box Trust AU vs don't Trust AU
(INDONESIA)



These are also the two attributes most clearly communicated by the True Aussie logo.

TRUE AUSSIE BEEF®

Of the 3 people who said they did not Trust AU beef…

- Local preference
- Method of slaughter

were the two reasons given

NOTE: VERY QUALLIE

BTR2B_WHY. Please describe why you chose these scores/rankings.
Total beef (242) Australian Beef (231), AU very Trustworthy (91)

But with a prompted list of attributes we see that Indonesia has a slightly different set of associations that are correlated with Trust. Transparency and Traceability come out at the top, along with consistent quality and ethical rearing.

Trust imagery – Top 5 Trust Image statements Correlated with Trust of AU Beef (All markets)

Japan	Korea	Vietnam	Thailand	Malaysia	Indonesia	China	UAE	KSA
Tastes great	High Quality Beef/Lamb	Tastes great	Is grown with the highest standards at every step	Has consistent quality standards	Has transparency in all steps of production	Tastes great	Tastes great	Comes from the perfect place to produce beef
Has consistent quality standards	Better for my health	Has transparency in all steps of production	Does not use antibiotics or hormones when grown/produced	Has transparency in all steps of production	Can be clearly traced to its origin	Has transparency in all steps of production	Better for my health	Tastes great
High Quality Beef/Lamb	Comes from the perfect place to produce beef	Better for my health	Is processed to the highest standards	Comes from the perfect place to produce beef	Has consistent quality standards	Is processed to the highest standards	Is processed to the highest standards	High Quality Beef/Lamb
Better for my health	Is grown with the highest standards at every step	Is something I see others eating	Ethically and humanely produced	Can be clearly traced to its origin	Ethically and humanely produced	Is something I see others eating	Has transparency in all steps of production	Can be clearly traced to its origin
Is processed to the highest standards	Has consistent quality standards	Is grown with the highest standards at every step	Has transparency in all steps of production	Is processed to the highest standards	Is grown with the highest standards at every step	High Quality Beef/Lamb	Has consistent quality standards	Has consistent quality standards

Quality | Process | Provenance | Traceability & Transparency | Taste/Health | Social

KANTAR

IMGB. Associate with each of the different countries for imported beef (Australian Beef)
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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COO BRAND TRUST - IMPLICATIONS:
AU Beef is the most Trusted imported product, NZ and Local just about on par. Potential role for transparency and traceability to support quality currently associated with AU.

	1	2
	AU beef and lamb are the most trusted in Indonesia, just ahead of NZ and Local	**Strong associations that drive Trust already established, but potential role for traceability to reinforce quality story**
What do we see?	AU has established a very high level of trust amongst Indonesian consumers, NZ and Local not far behind, on par with AU for top 3 box scores. But for AU in particular 2 in 5 saying 'very trustworthy', these consumers mention quality and Australian as unprompted reasons for giving such a high rating.	Indonesian have a strong set of associations with is one of only 3 markets where the perception of being the perfect place to raise beef is in the top 5 associations correlated with Trust in AU product. It is also one of the few markets where both transparency and traceability are coupled in the top 5.
Now what?	While the Trust in Indonesian market is well established, and there is little room for improvement, the next step is moving the 5s and 6s into the 40% of 7s we already have.	Linking the quality that is already clearly associated with our COO brand to transparency in the process is an opportunity further build on the exceptionally high levels of trust in AU beef in the Indonesian market

FINAL THOUGHTS & DISCUSSION

FINAL THOUGHTS

1

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 Indonesian consumers – quality and superior being the clear opportunities.

2

Maintaining AU's positioning around superior quality and care, will be important in maintaining our more powerful position as the leading import COO brand. Tenderness and consistent quality will reinforce power/premium position ahead of NZ.

3

Online channel is established, with the greater comfort on lamb suggesting further growth potential. Support distributors and retailers to facilitate convenience and reassurance of quality, while communicating fresh guarantees to build confidence for those not currently using online channels.

4

With a similar positioning to NZ on some key drivers of Power and Premium we will need to ensure that we are communicating these distinctively to remain differentiated in consumers minds. Versatility would allow us to maintain established consumer pre-disposition

5

True Aussie is doing the job amongst those who recognise it of reinforcing quality and the trusted association with Australia.

6

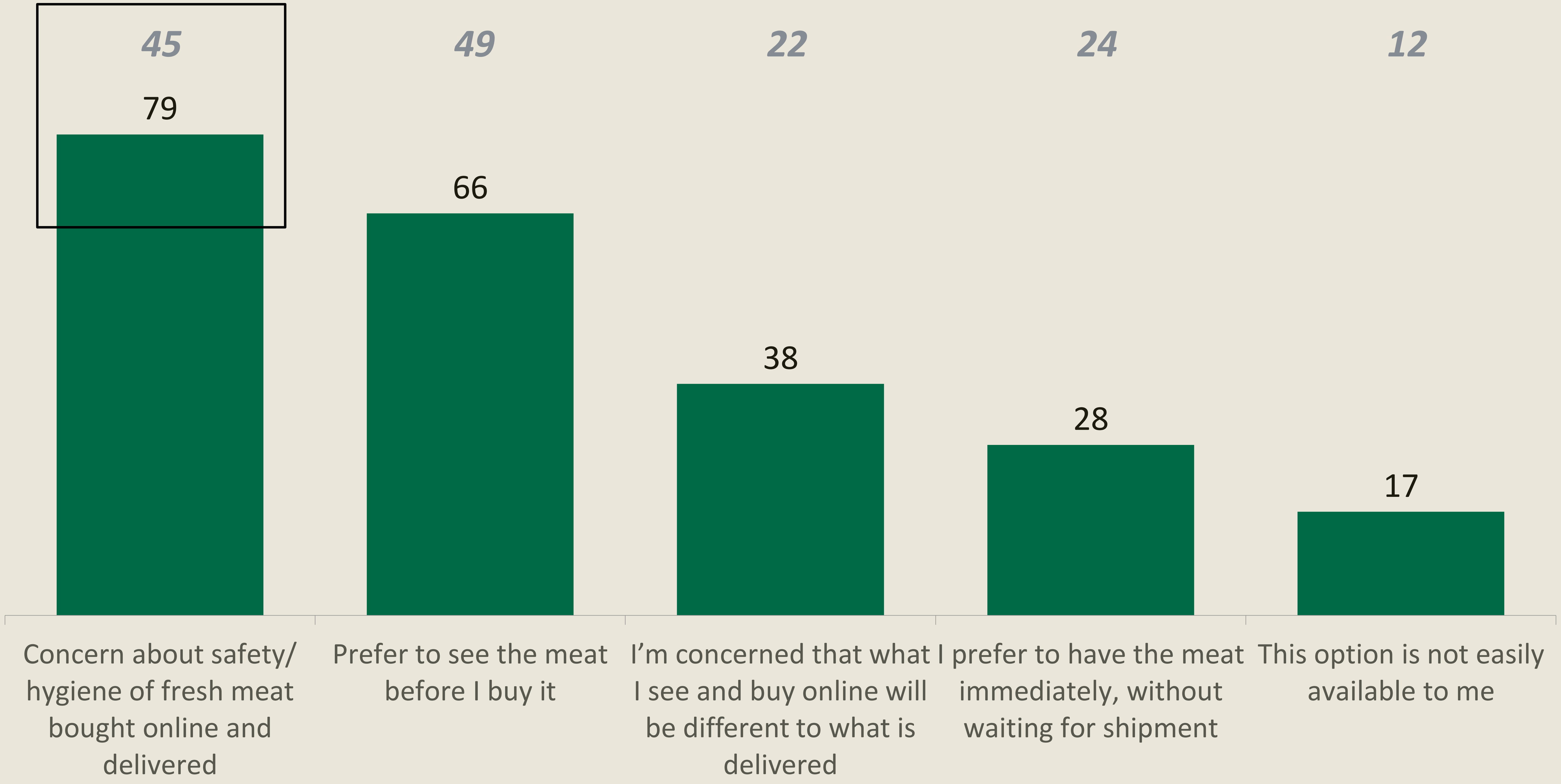
While the Trust in Indonesian market is well established the next step is moving the 5s and 6s into 7s. Linking the quality that is already clearly associated with our COO brand to transparency in the process is an opportunity further build on the exceptionally high levels of trust

LAMB
DEEP DIVE

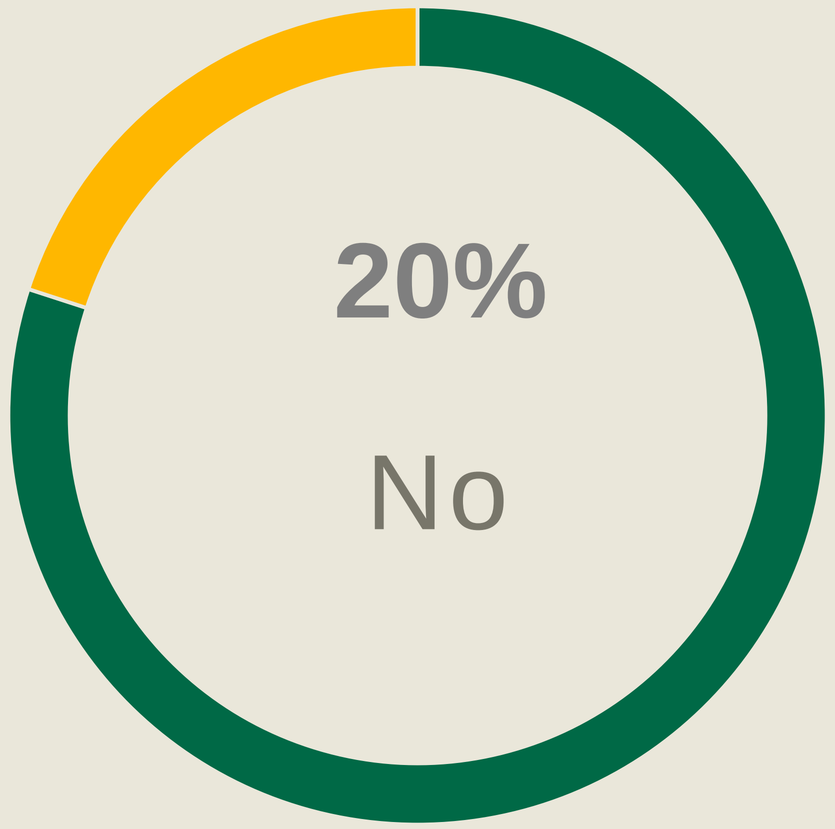
As with beef, the biggest barrier to buying lamb online in Indonesia is the concern of safety and freshness of the meat – although significantly more consumers buy lamb online than beef in Indonesia.

BARRIERS TO BUYING LAMB ONLINE:

Global Average Total Reasons %:

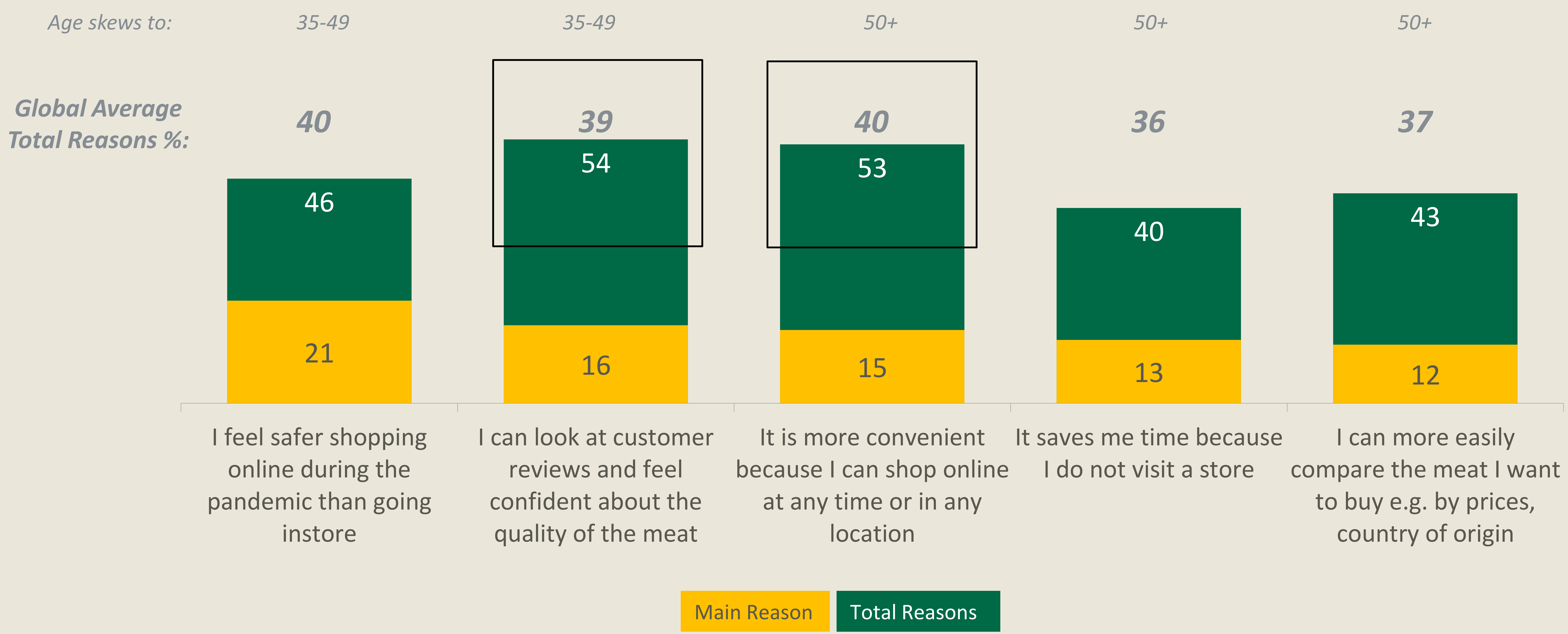


EVER BOUGHT LAMB ONLINE:



Of the people that buy lamb online, the reasons for doing so were strongly due to safer during the pandemic, but also because of customer reviews and convenience, which over-index compared to the global average.

FACILITATORS TO BUYING LAMB ONLINE:



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=135)

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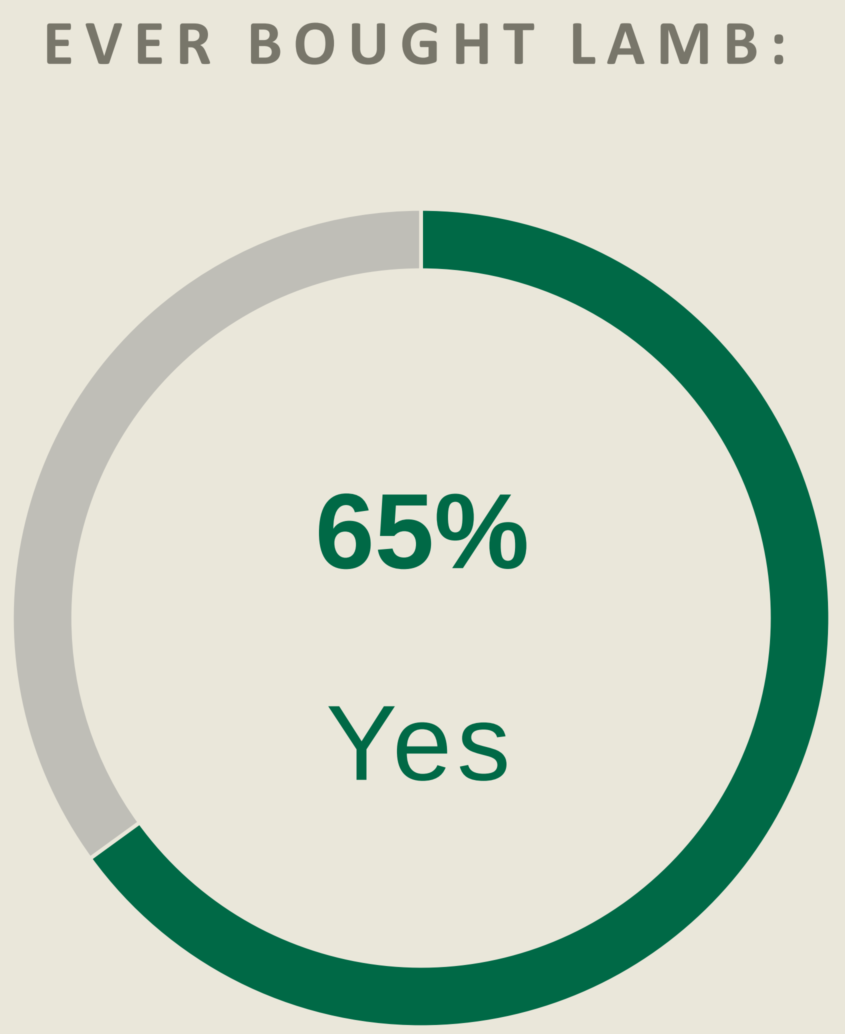
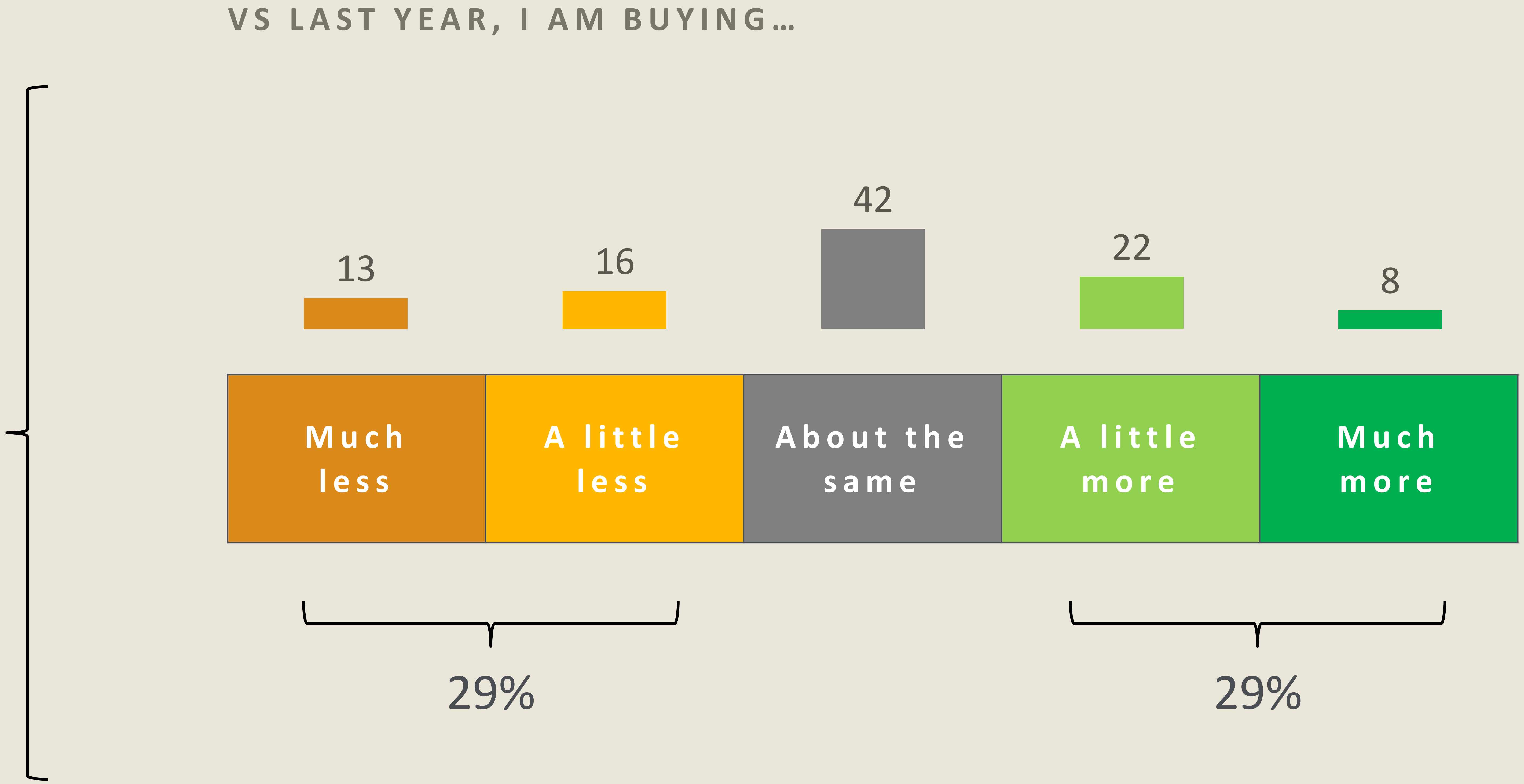
3 out of 5 people in Indonesia have ever bought lamb, with roughly a third saying that they have bought more this year than last year, a third saying they have bought less and a third saying they bought the same.





KANTAR

CH6. Do you ever buy lamb? - Rebase to total. Base: (n=500)
VOLL1. Amount of lamb purchased. Base: (n=324)

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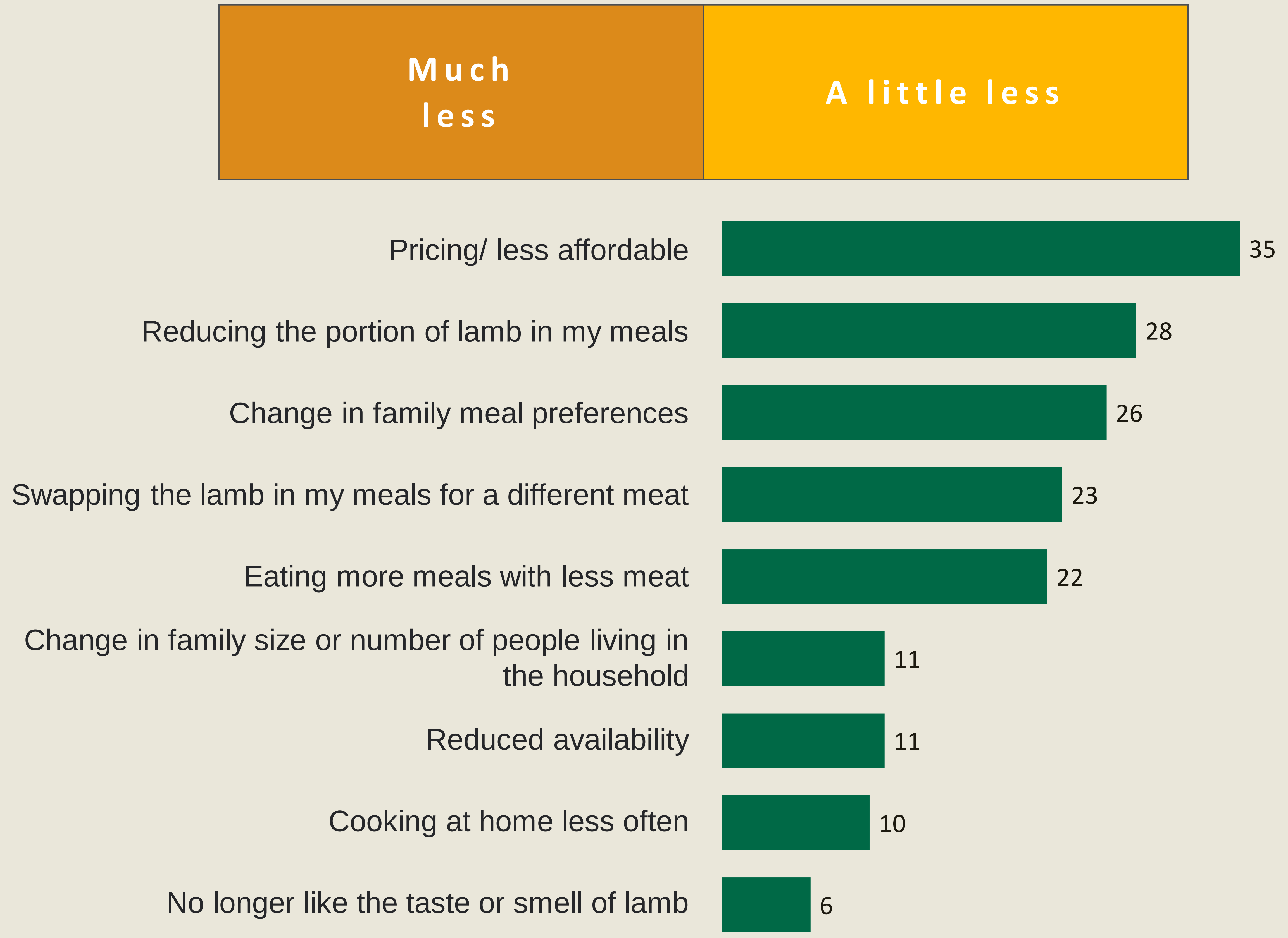
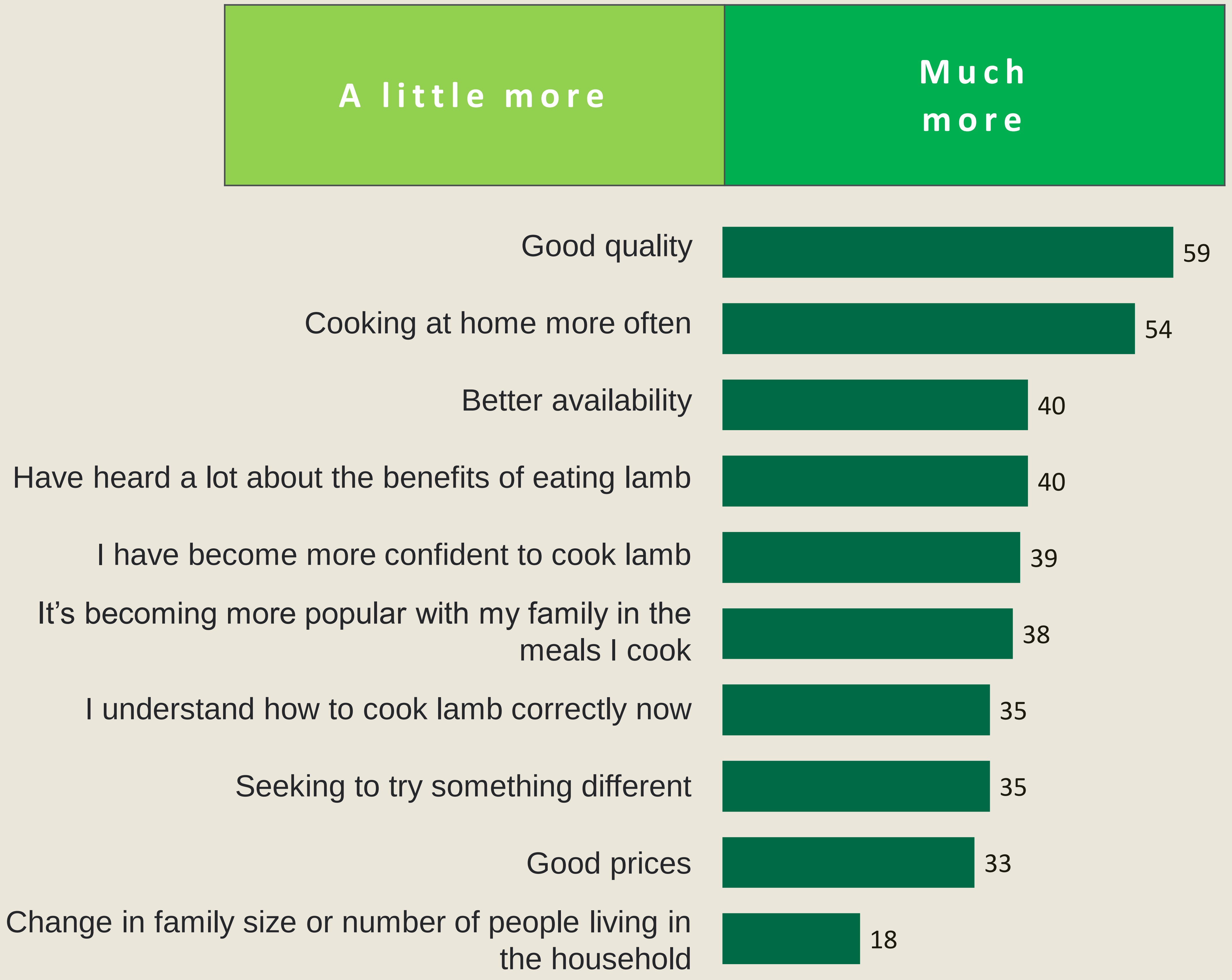
Of the people who are buying less lamb, the main reason is the unaffordable price and reducing lamb intake. On the flip side, those that are buying more are increasing lamb purchase because of the good quality, more cooking at home and lamb is more readily available.

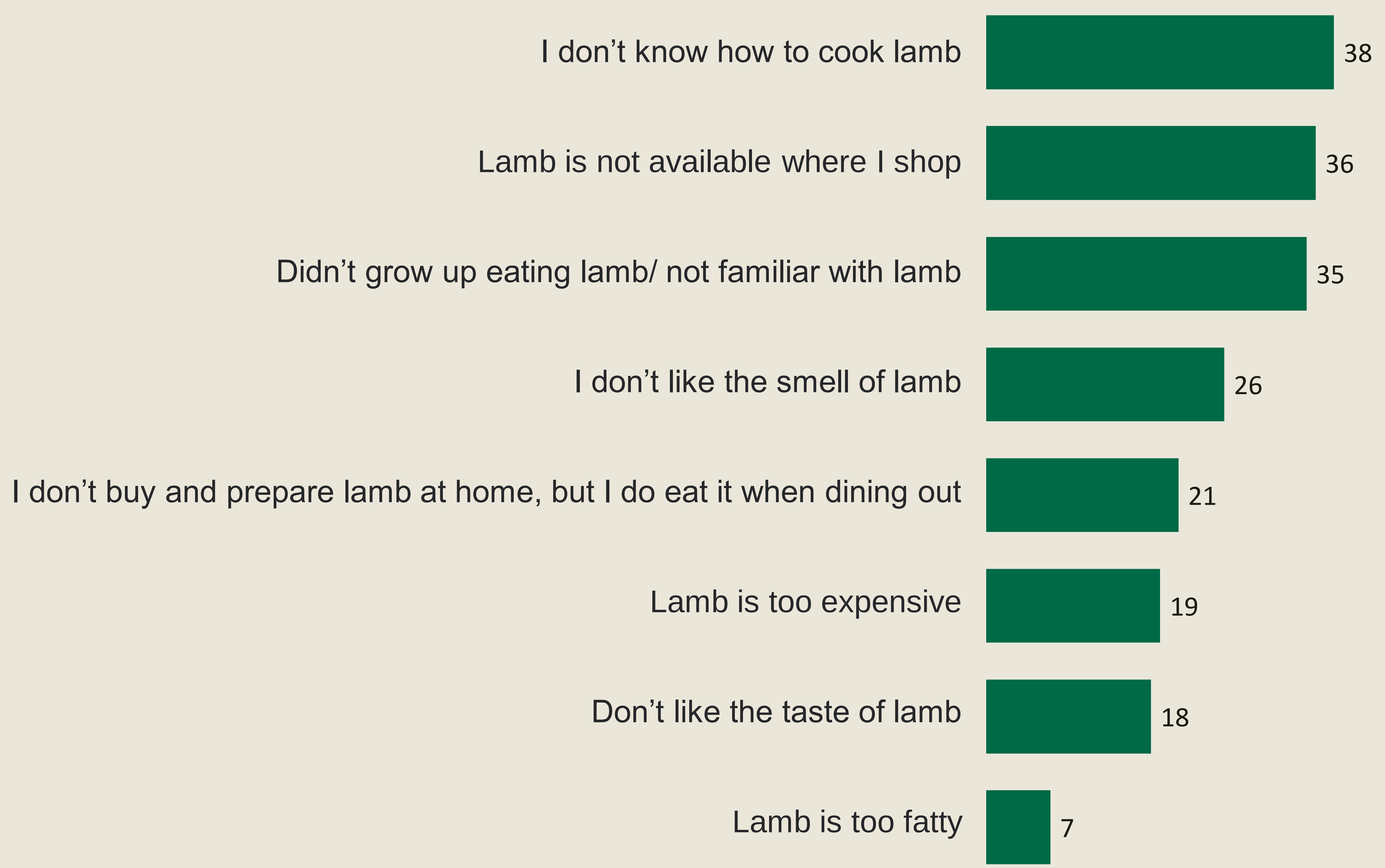




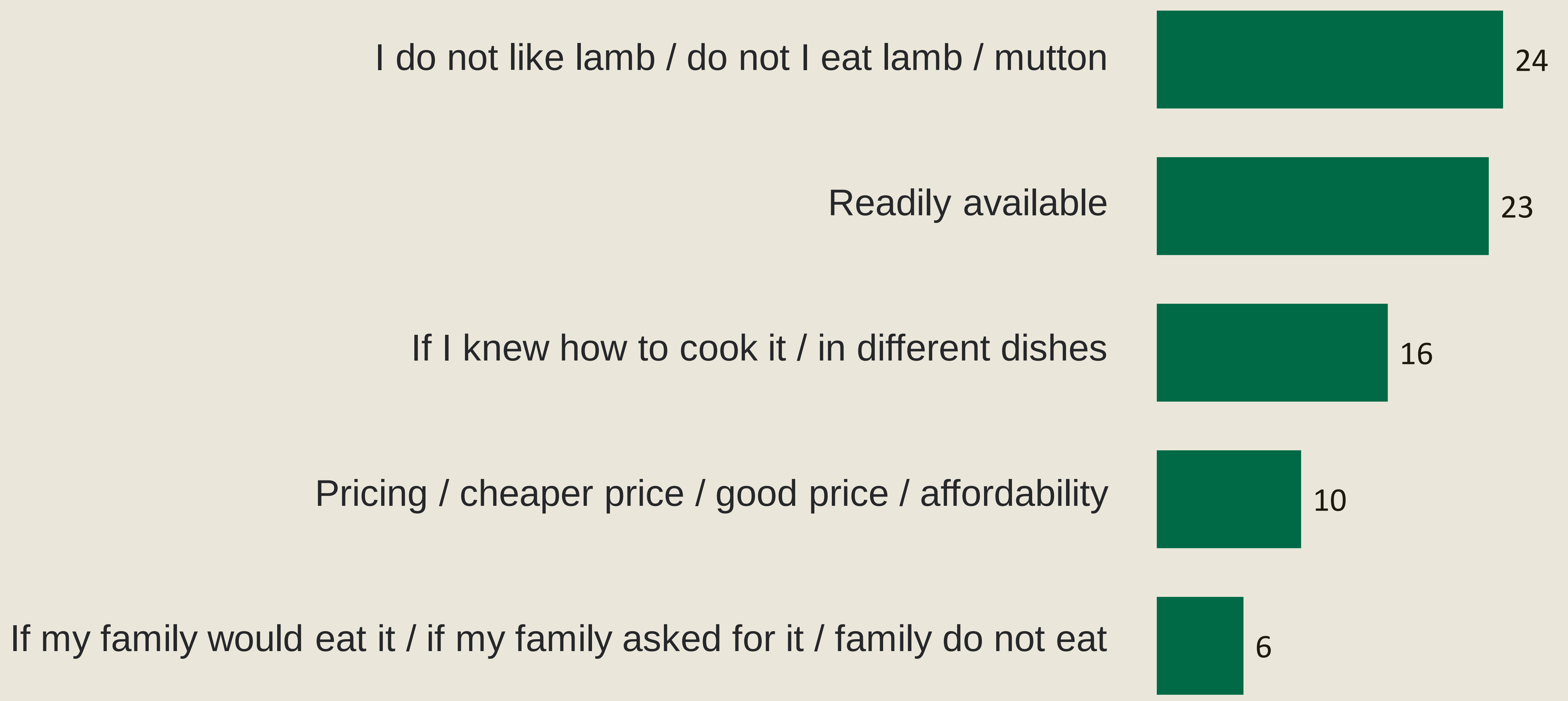
VOLL3. Why you have reduced the amount of lamb you are purchasing. Base: (n=93)
VOLL2. Why you have increased the amount of lamb you are purchasing. Base: (n=95)

The biggest barriers to buying lamb in Indonesia are that it is not available where people shop, also they are not familiar with it and thus people don't know how to cook it.

BARRIERS TO BUYING LAMB:



SPONTANEOUS BARRIERS TO BUYING LAMB:

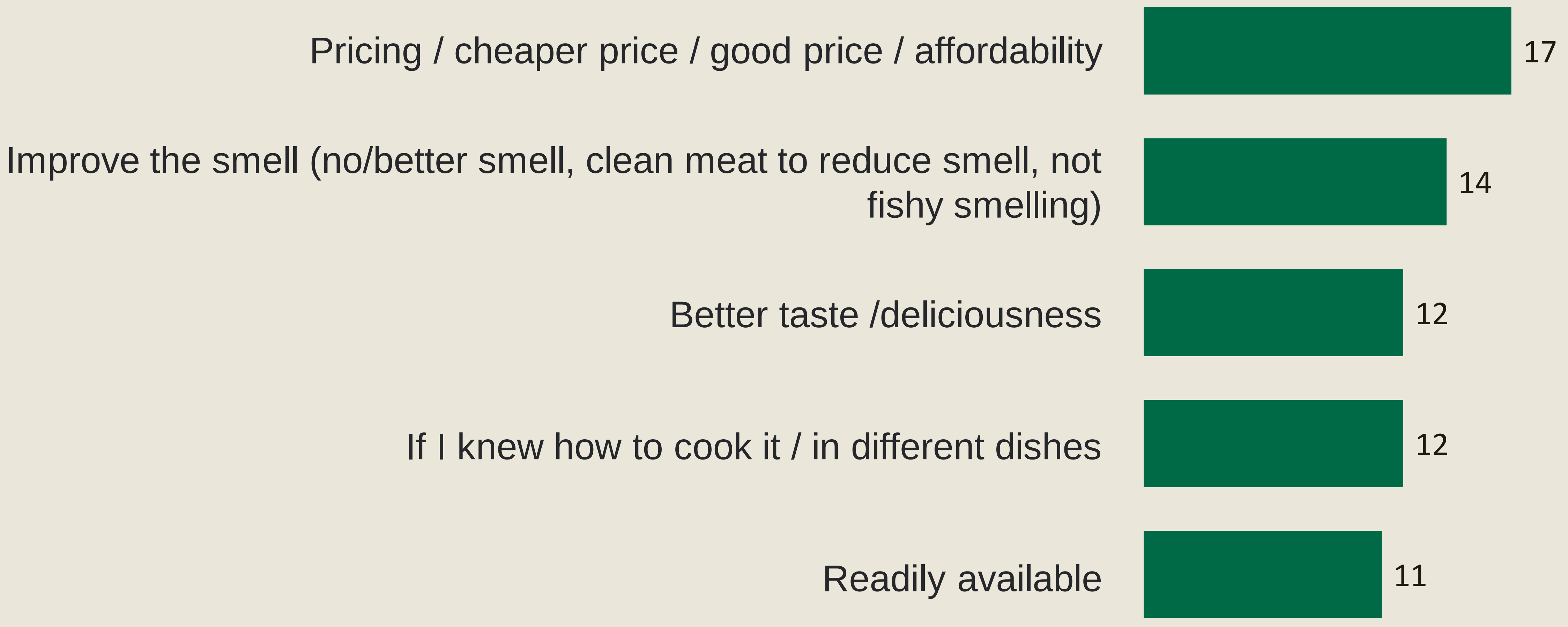


CH6A. Why do you not buy lamb?. Base: (n=176)
CH6OPEN. Why do you not buy lamb. Base: (n=176)

Tips on how to prepare the lamb, as well as recipe ideas would encourage people to buy more lamb.

FACILITATORS TO BUYING LAMB:

SPONTANEOUS FACILITATORS TO BUYING LAMB:



CH6B. Why do you not buy lamb?. Base: (n=176)
CH6bOPEN. What would help convince or encourage you to buy lamb. Base: (n=176)

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