MLA Global:
CONSUMER TRACKER

Vietnam 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 COO Brand Health & Perceptions

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

Topic 1: Lamb Deep dive

A quick dive into lamb purchase behaviours, some barriers for those not using and facilitators for those who are

Topic 2: Purchase Channel online

Usage, barriers and facilitators of online red-meat purchase

Topic 3: Trust, On pack claims & True Aussie awareness & perceptions

A look at the Trust in COO brands, what Vietnamese consumers seek on pack and True Aussie logo performance and key associations tied to the TA brand.

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**

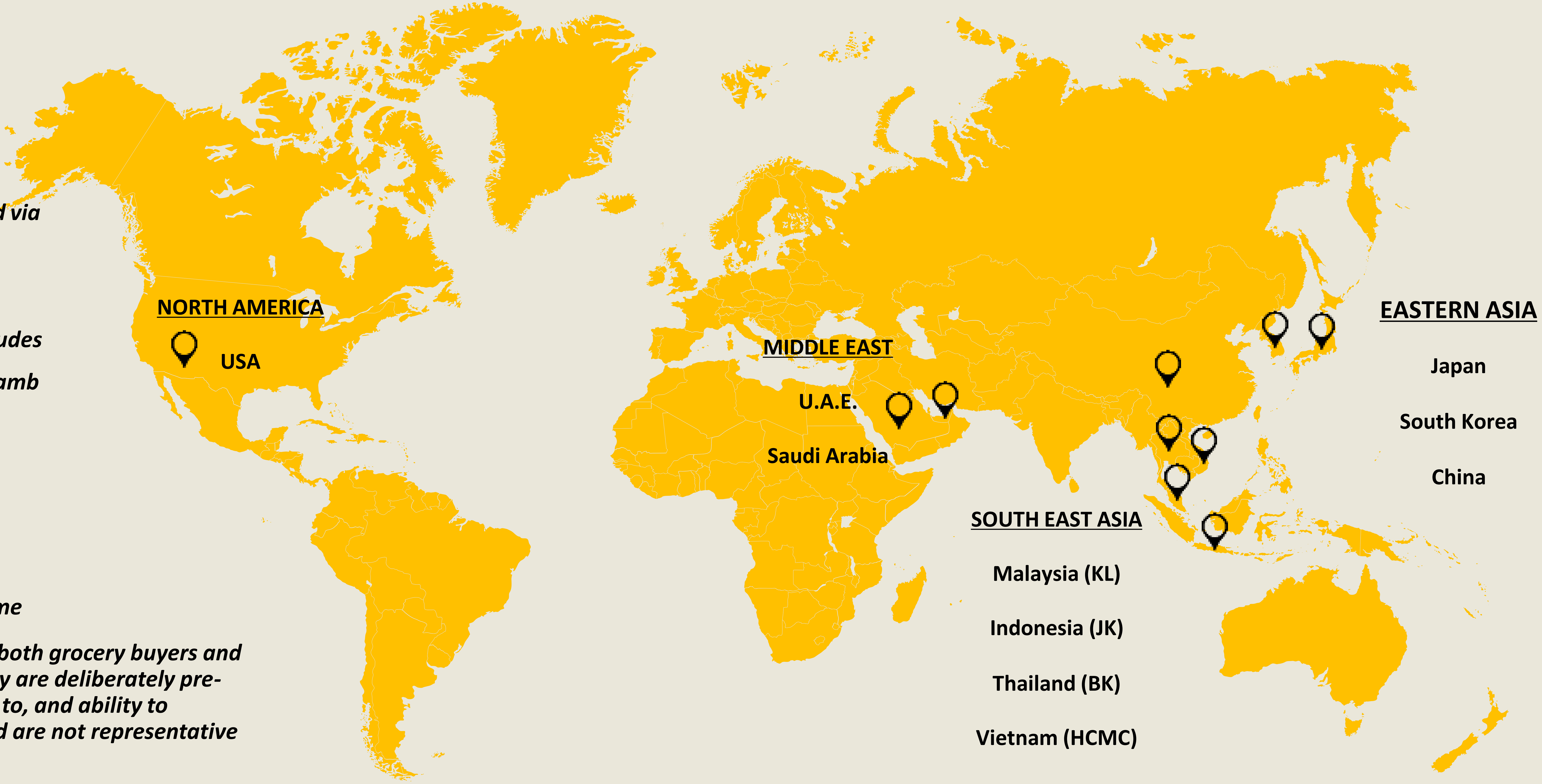
Surveying consumers about

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

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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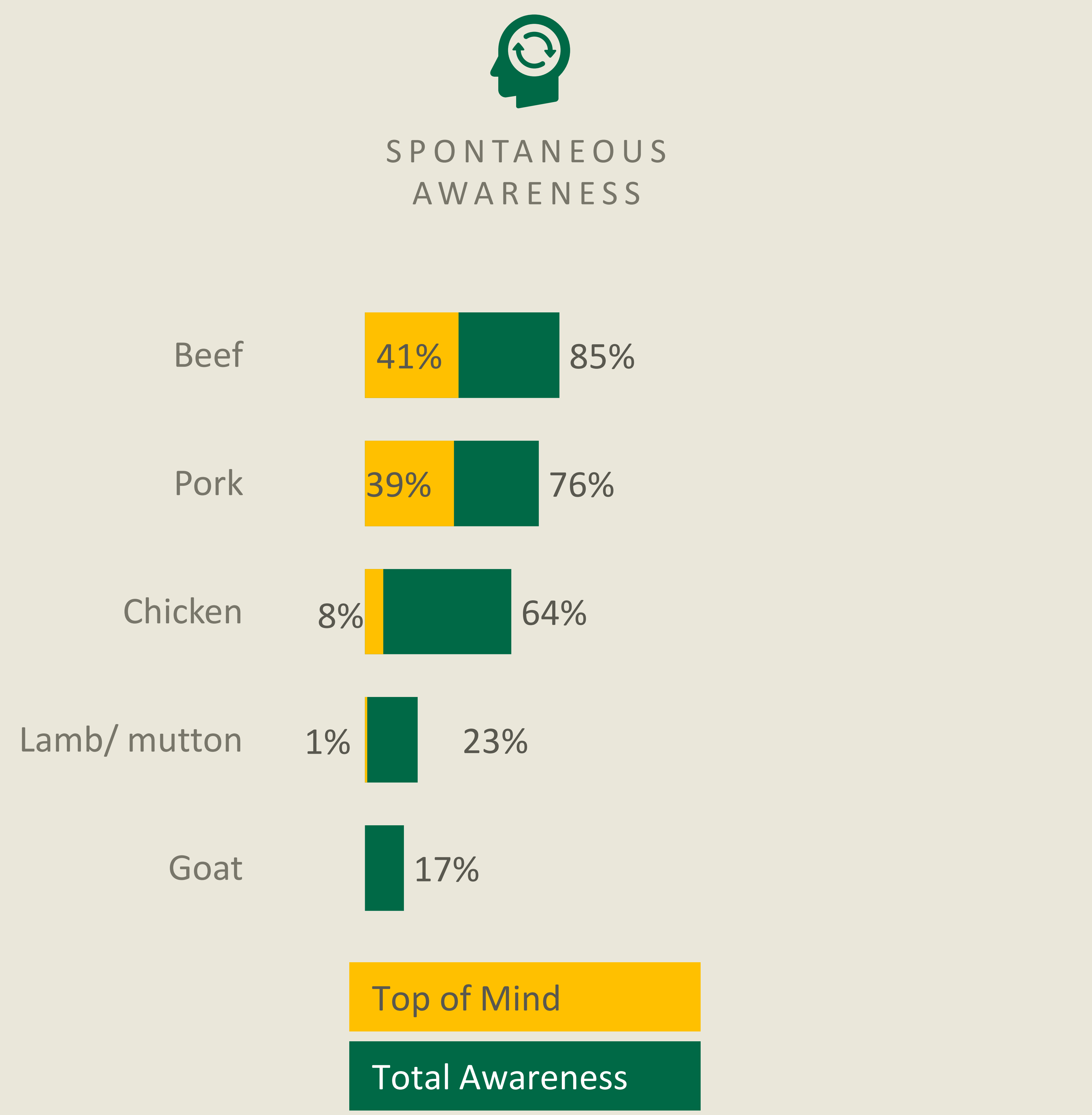
DEMOGRAPHICS

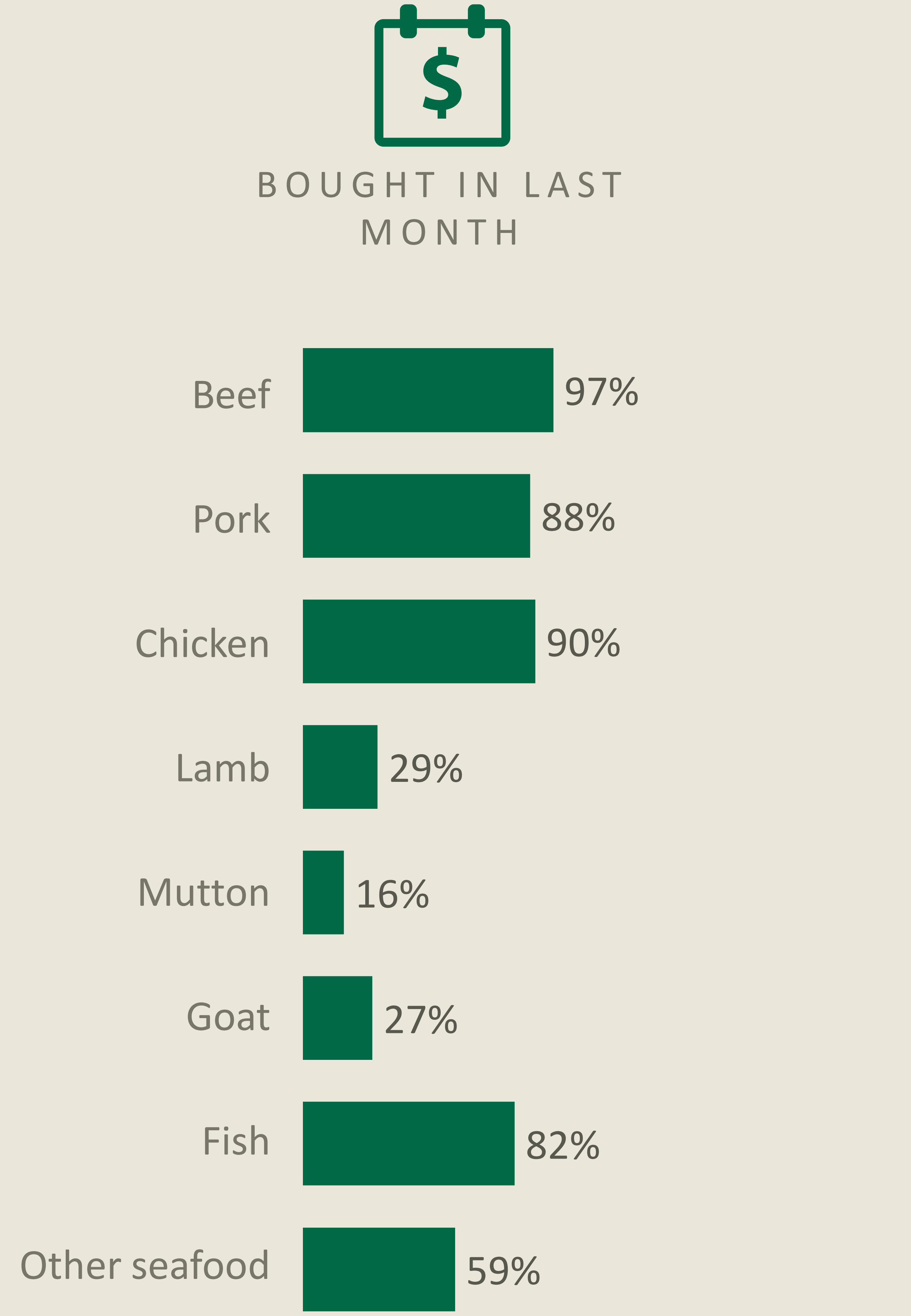
Sample is made up of 500 consumers

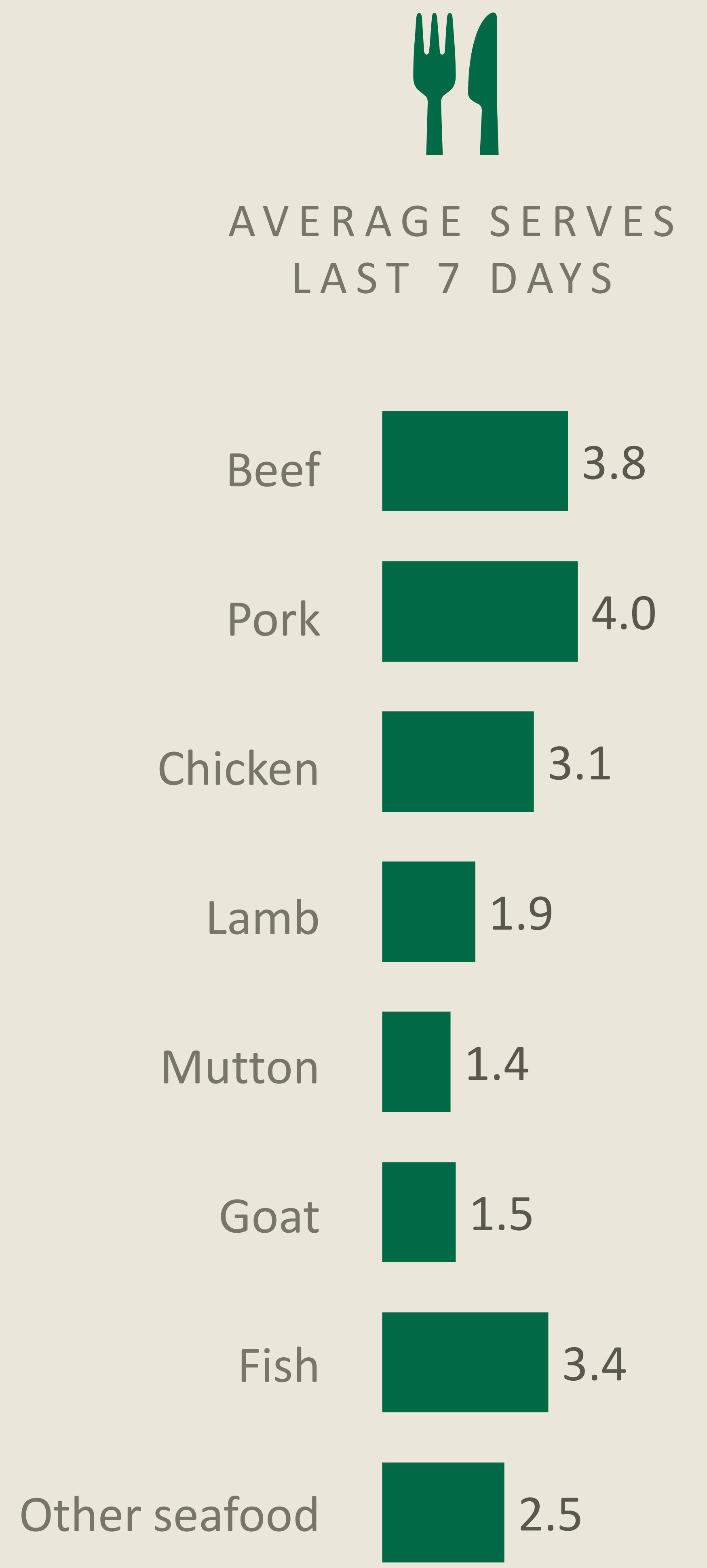
		COUNTRY INCIDENCE	SAMPLE STRUCTURE
Gender	Male	50%	35%
	Female	50%	65%
Age	18-34	27%	54%
	35-49	21%	35%
	50-64	11%	11%
Cities	Ho Chi Minh City	9%	100%
Consumption	Buy Fresh Meat at Least Occasionally	100%	100%
MGBs	Main Grocery Buyers	83%	97%
Children	Households with Children	-	77%
Income	Under 180,000,000 dong	-	12%
	180,000,000 - 299,999,999 dong	-	23%
	300,000,000+ dong	-	64%

PROTEIN LANDSCAPE

Amongst the sample interviewed, Beef is the most top of mind protein with almost universal claimed penetration in the past 1 month (97%). It is only beaten by pork for serves in the past 7 days (Beef 3.8, Pork 4.0); followed by fish (3.4) and chicken (3.1).







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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: (n=500)

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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

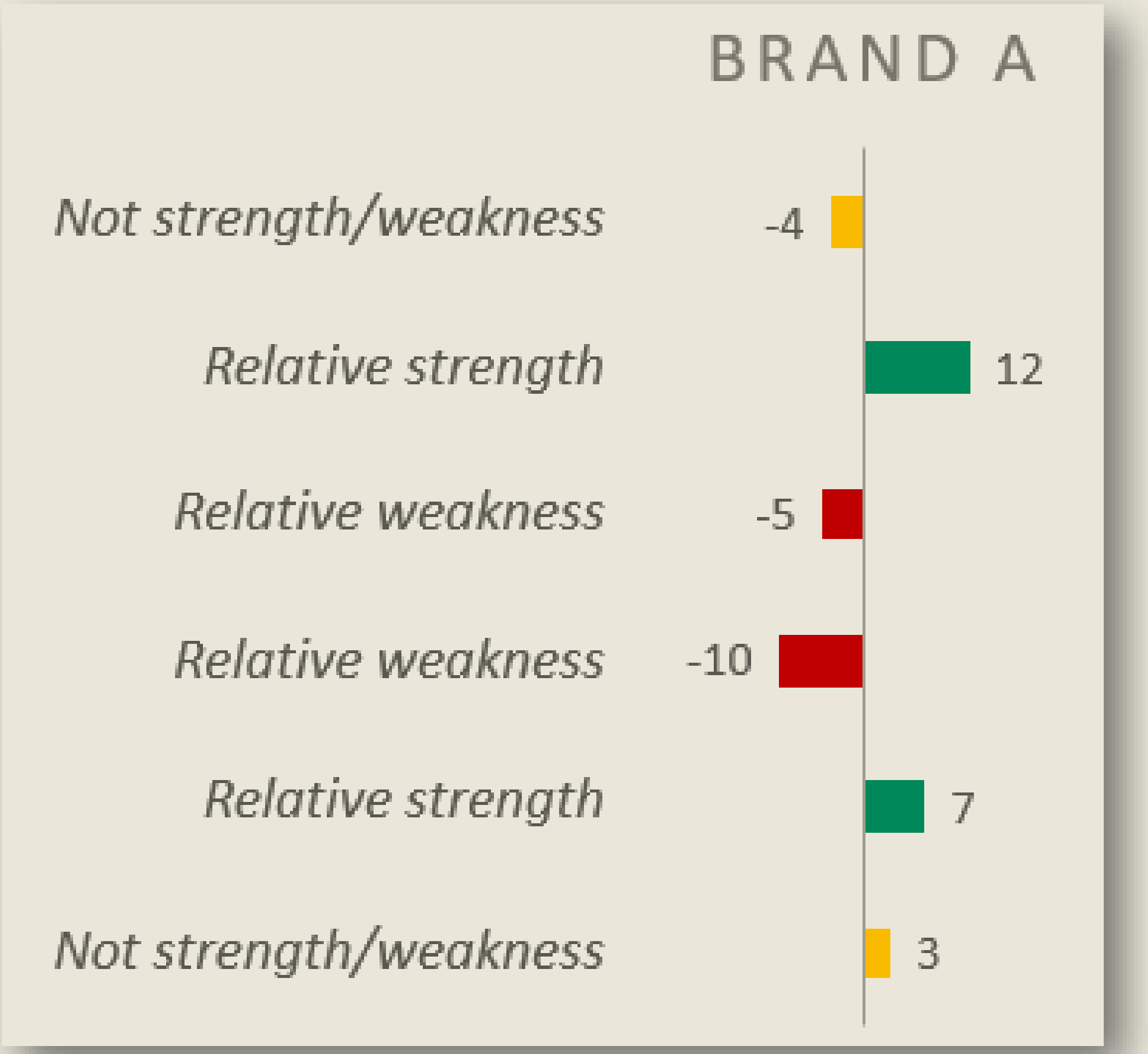
Image Profiling removes two effects from the data:

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 considered to be a fresh, nutritious and versatile protein of consistently high quality that is more sustainable and well-cared for vs other proteins.

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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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Mutton, Lamb and Goat see similar profiles / play similar roles as the superior meats that these consumers are willing to pay more for vs others and believe are well cared for. Lamb pulls ahead with tenderness and greater consistent quality.

★ Important associations – *volume of purchase*

☆ Important associations – *willing to pay more*

	BEEF	MUTTON	LAMB	GOAT	PORK	CHICKEN	FISH	OTHER SEAFOOD
Fresh	5	-2	-7	-2	6	0	6	2
Cheaper	-1	-2	-5	-2	14	15	16	-3
High nutritional value	11	1	4	4	-13	-11	0	2
The animal is well-cared for	9	7	7	7	-2	0	-14	-9
☆ The industry is environmentally sustainable	13	4	-3	2	1	1	3	-3
★ Consistent quality standards	9	3	4	1	1	-2	-10	-2
☆ Tastes delicious	0	1	3	1	-4	-2	-8	2
Can be used in many different meals	7	-3	-11	-3	15	7	4	-1
Is easy and convenient to prepare	-3	-5	-9	-7	16	12	0	0
Low in fat	-2	1	4	3	-22	-4	12	9
Guaranteed safe to eat	-2	1	0	-2	3	2	-1	-3
Is an essential part of a healthy diet for growing children	-3	-4	-5	-4	1	-1	9	4
★ Is my/my family's favourite meat	-3	-3	-5	-6	4	5	0	4
☆ Is the most superior meat	2	11	18	7	-15	-18	-18	3
I am willing to pay a bit more for this meat	-8	6	13	6	-13	-13	-13	5
★ Is easy and convenient to purchase	-13	-10	-15	-7	17	13	10	0
The meat is usually tender	-4	-2	10	1	-3	0	5	-6

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.

Competitively, Pork and Chicken are the easy proteins – convenient to purchase/ prepare, versatile and cheaper. Fish is easy to purchase, fresh, cheap, low fat and healthy for children. From a relative sense, white meat pulls ahead in favourite.

★ Important associations – *volume of purchase*

☆ Important associations – *willing to pay more*

	BEEF	MUTTON	LAMB	GOAT	PORK	CHICKEN	FISH	OTHER SEAFOOD
Fresh	5	-2	-7	-2	6	0	6	2
Cheaper	-1	-2	-5	-2	14	15	16	-3
High nutritional value	11	1	4	4	-13	-11	0	2
The animal is well-cared for	9	7	7	7	-2	0	-14	-9
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★ Consistent quality standards	9	3	4	1	1	-2	-10	-2
☆ Tastes delicious	0	1	3	1	-4	-2	-8	2
Can be used in many different meals	7	-3	-11	-3	15	7	4	-1
Is easy and convenient to prepare	-3	-5	-9	-7	16	12	0	0
Low in fat	-2	1	4	3	-22	-4	12	9
Guaranteed safe to eat	-2	1	0	-2	3	2	-1	-3
Is an essential part of a healthy diet for growing children	-3	-4	-5	-4	1	-1	9	4
★ Is my/my family's favourite meat	-3	-3	-5	-6	4	5	0	4
☆ Is the most superior meat	2	11	18	7	-15	-18	-18	3
I am willing to pay a bit more for this meat	-8	6	13	6	-13	-13	-13	5
★ Is easy and convenient to purchase	-13	-10	-15	-7	17	13	10	0
The meat is usually tender	-4	-2	10	1	-3	0	5	-6

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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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PROTEIN LANDSCAPE IMPLICATIONS:

Beef and Lamb have distinct profiles suggesting consumers are clear with the role each can play vs. Chicken, Pork and Fish - with strengths that can be leveraged by AU producers

What do we see?

1 Beef, Pork and Chicken the most popular proteins

Beef, Pork and Chicken are the top of mind proteins with a considerable lead over lamb. Beef achieves almost universal claimed penetration in the past 1 month (97%). It is only beaten by pork for serves in the past 7 days; followed by fish and chicken.

2 A clear positioning for Beef to leverage

Beef is considered fresh, nutritious, versatile, consistently high quality and more sustainable and well-cared for. Pork and Chicken are convenient to purchase/ prepare, versatile and cheaper. Fish is easy to purchase, fresh, cheap, low fat and healthy for children. From a relative sense, white meat pulls ahead in favourite.

3 A distinct profile for Lamb – but opportunity for greater serves

Mutton/Lamb/Goat have similar profiles - superior, well-cared for generating a higher willingness to pay. Lamb pulls ahead with greater consistent quality and tenderness but penetration remains lower than the key proteins.

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 Vietnamese consumers.

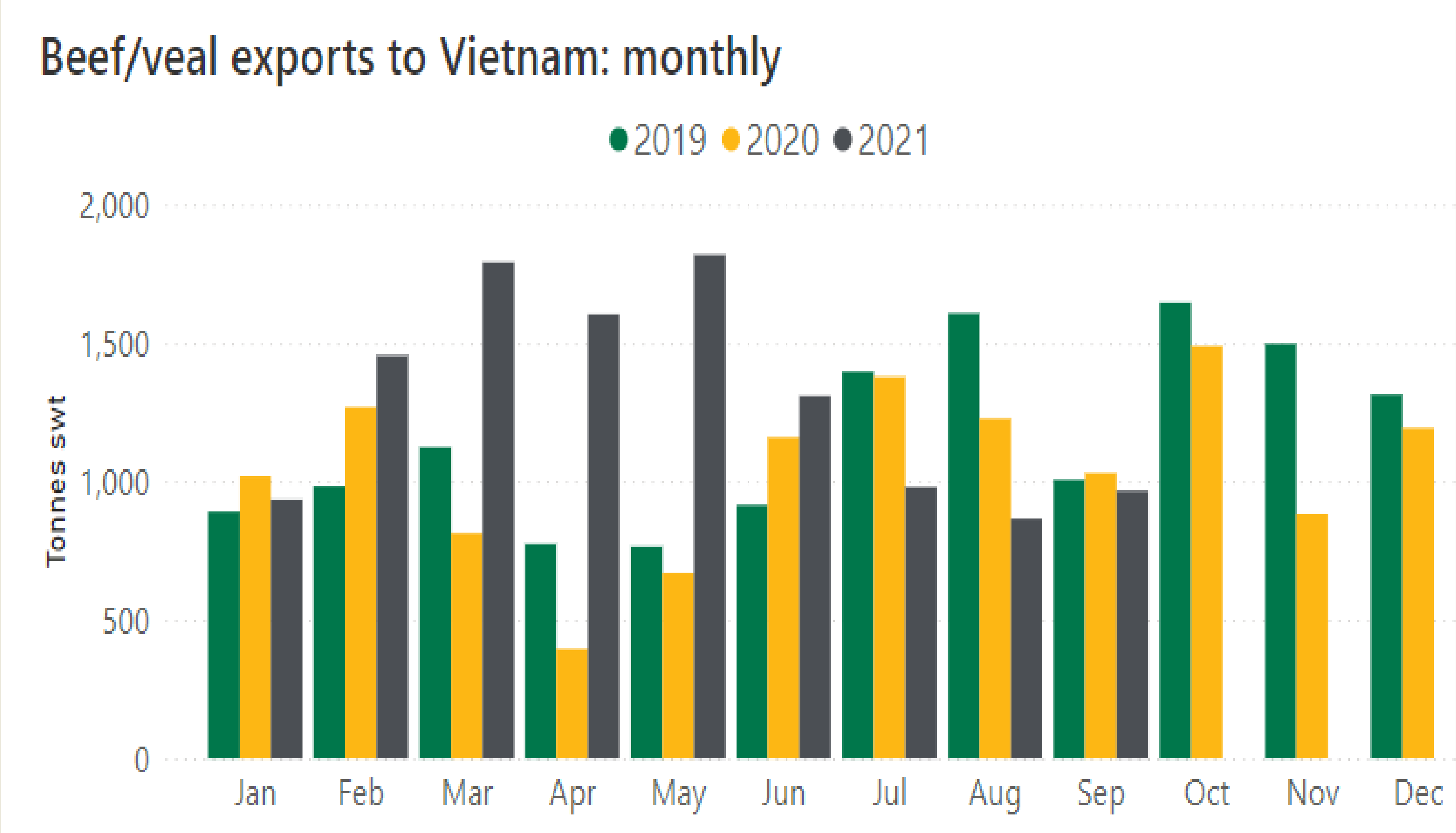
Is there an opportunity to connect lamb to more special occasions that leverage the nuanced benefits of lamb in superiority and tenderness?

BEEF
BRAND HEALTH & 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.

Import of Australian Beef to Vietnam has increased year on year, as has competitors India and USA. New Zealand remains a more niche player.

MLA market snapshot – Vietnam Beef imports from Australia (2019-2021)



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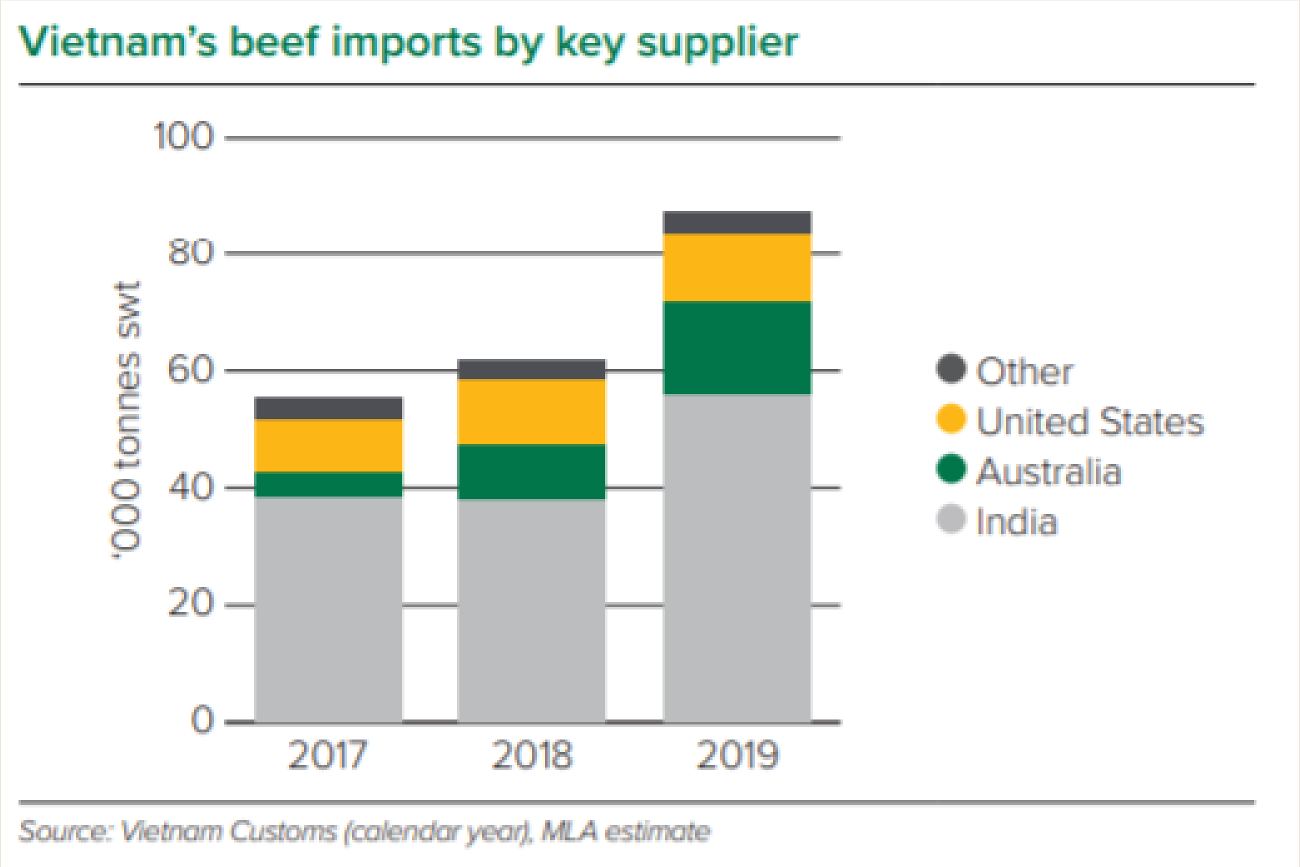
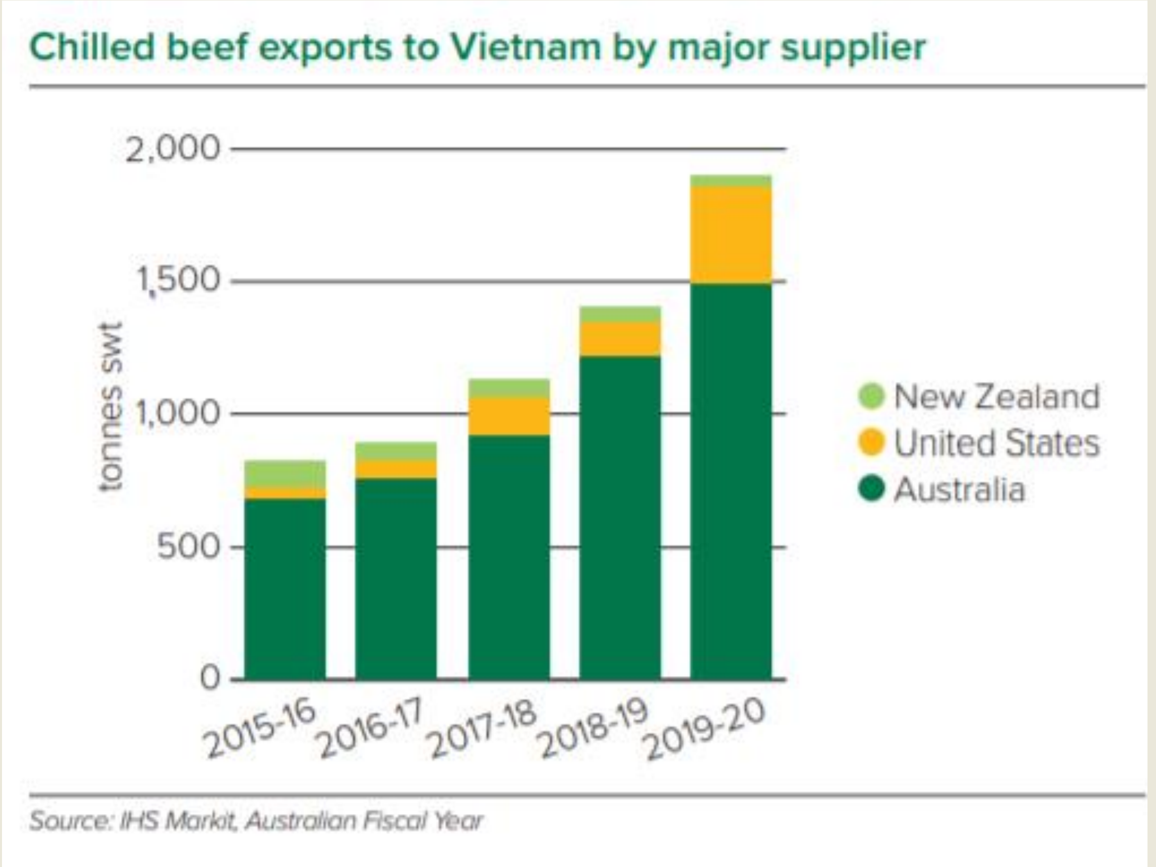




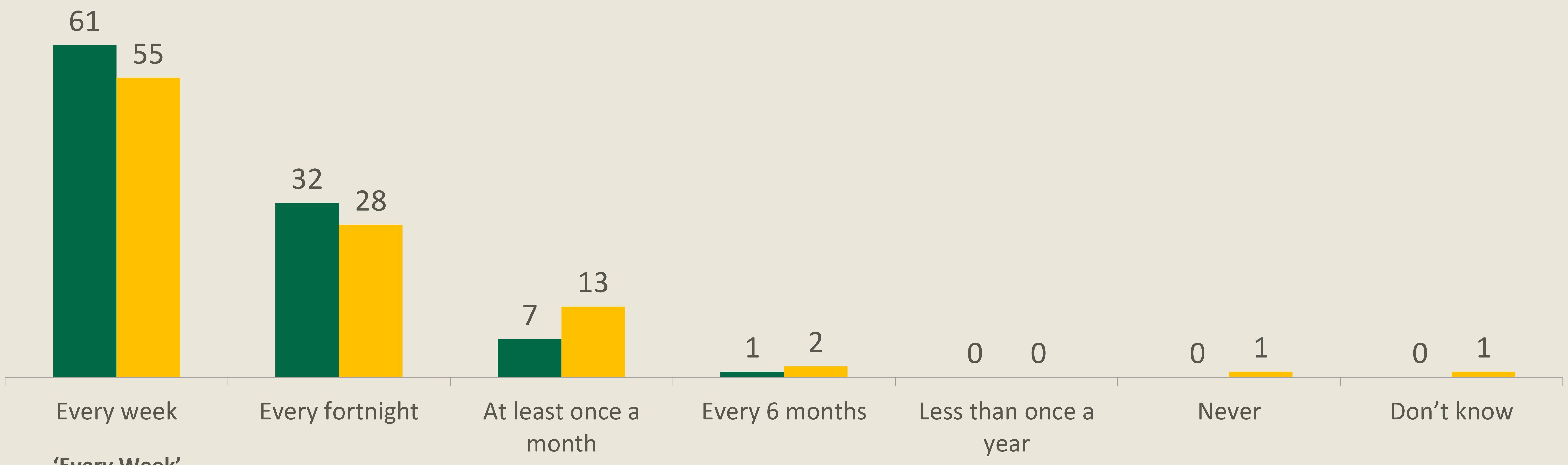
https://www.mla.com.au/globalassets/mla-corporate/prices--markets/documents/os-markets/red-meat-market-snapshots/2020/2020-vietnam-market-snapshot.pdf

Almost all consumers claim to know the COO of the beef they buy (96%) with the majority buying beef weekly – well above typical global levels. Purchase frequency of imported beef trails just behind levels of imported.

96%

Global Average: 87%

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



'Every Week' Global Average:
Local: 23%
Imported: 29%

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(GF3B) Do you know the country of origin of the beef you buy? Base: (n=500)
(CH4) How often do you buy imported beef? Base: (n=500)
(CH4LOC) How often do you buy local beef? Base: (n=500)

Global Average: USA, KSA, UAE, China, Malaysia, Japan, Korea, Indonesia, Thailand & Vietnam

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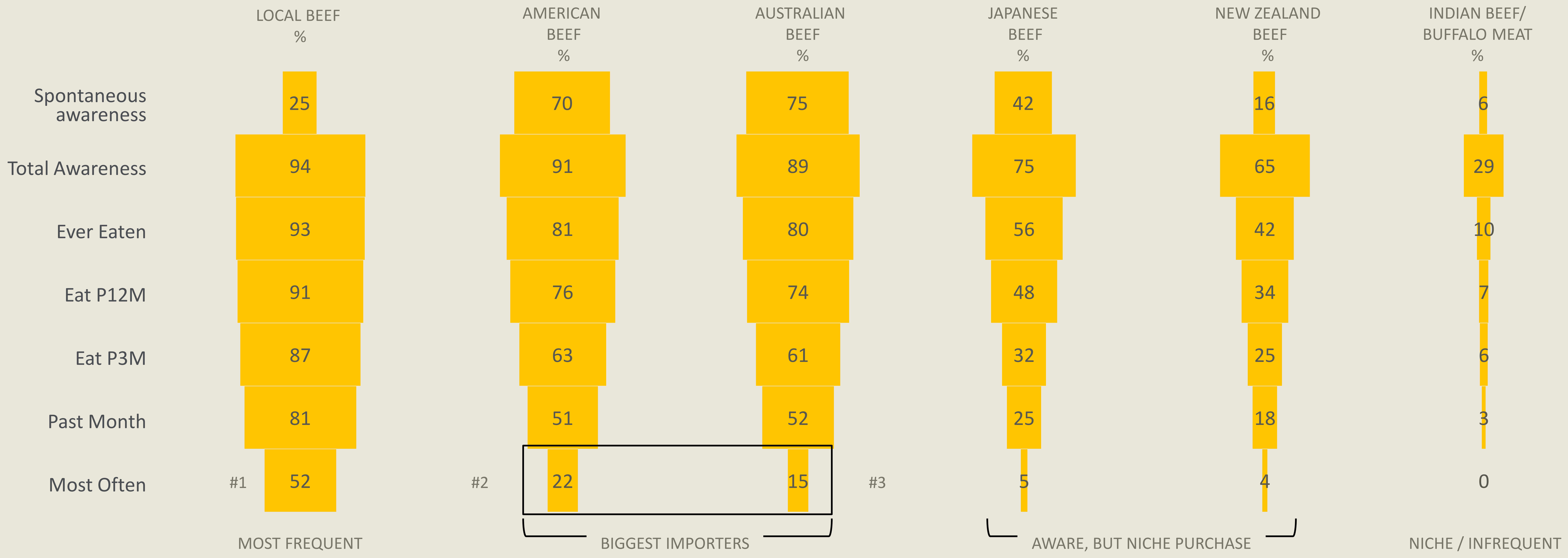
Local beef leads consumption, followed by the biggest import COOs US #2 and AU #3 with strong awareness, but less frequent purchase vs local (job to be done). While well known, Japan and NZ play more niche roles as less frequent purchases.

BRAND HEALTH – BEEF

Canadian Beef spontaneous awareness = 4%



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BBH1. Spontaneous Awareness, BBH2. Prompted Awareness, BBH3. Ever Eaten, BBH4. Eaten last year, BBH5. Eaten in the last 3 months, BBH6. Eaten last month, BBH8. Most often Base: (n=500)
Base – Bought beef in past month or ever buy beef
First time running Brand Health

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Local's equity is driven by accessibility – seen as offering a variety of fresh cuts, that are cheaper and easy/convenient to purchase. In the opposing positioning, Japan plays to superiority offering tender, nutritious, marbled beef of consistently high quality. Indian beef/buffalo is just seen as cheap.

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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=500). *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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This leaves AU, US & NZ to fight as ‘accessible premium’ options. AU/US have some definition on tender/superior/quality to support this, but US is seen as more consistent in quality while AU is a safer family favourite. While small, watch NZ’s similar positioning – consider establishing over them.

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Local's accessibility (cheap and available) limits its ability to justify a premium price. Japan clearly plays to premium, but to high degree that makes it exclusive and niche. This leaves space for an 'accessible premium' COO role - with AU, US and NZ currently vying for this position.

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

		LOCAL BEEF	AUSTRALIAN BEEF	AMERICAN BEEF	INDIAN BEEF/BUFFALO MEAT	NEW ZEALAND BEEF	JAPANESE BEEF
Superior (27%)	Is the most superior beef	-16	2	1	-3	3	18
	More nutritious	-13	2	3	-1	2	8
	The fat is nicely marbled	-13	0	1	2	3	7
	The animal is well-cared for	-15	4	2	0	5	5
Safe For My Family (24%)	Is my/my family's favourite beef	11	4	0	-2	-2	-8
	Guaranteed safe to eat	-7	5	4	-3	0	1
Quality (21%)	The meat is usually tender	-10	4	4	-2	0	6
	Consistent quality standards	-17	3	6	-1	4	7
Environment (15%)	The industry is environmentally sustainable	-5	-1	-1	2	2	1
Low Fat (12%)	Low in fat	-6	-2	0	1	2	5
Easy Everyday (-1%)	Cheaper	36	-12	-12	10	-5	-16
	Is easy and convenient to purchase	26	-2	-1	-1	-7	-14
	Fresh	19	-3	-4	-2	-4	-4
	Offers a variety of cuts that suit the meals I make	13	-4	-1	1	-1	-8

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-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=500). *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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Further strengthening AU's perceived safety can play a dual role as an association relevant for increasing likelihood to choose AU Beef as well supporting a premium price. Consistent quality and variety of cuts are alternative routes – with US currently driving consistent quality.

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. Guaranteed safe to eat
	2. Offers a variety of cuts that suit the meals I make	2. Consistent quality standards
	3. Is my/my family's favourite beef	3. More nutritious
	4. Fresh	4. Is my/my family's favourite beef
	5. Consistent quality standards	5. Offers a variety of cuts that suit the meals I make

BEEF COUNTRY OF ORIGIN:
Claimed Beef COO awareness is high and AU comes to mind readily. The job to be done is connecting AU to beneficial, relevant perceptions to encourage its choice over competitors.

What do we see?

1

Local Beef leads consumption – but room to play for imports

Local beef leads consumption, followed by the biggest import COOs US #2 and AU #3 with strong awareness, but less frequent purchase vs local (job to be done). While well known, Japan and NZ play more niche roles as less frequent purchases.

2

AU competes with US and NZ for 'accessible premium' positioning

Japan plays a super premium/niche role leaving AU, US & NZ to fight to be 'accessible premium' vs Local which is 'easy everyday'. AU/US have some definition on tender/superior/quality to support this, but US is seen as more consistent in quality while AU is a safer family favourite.

Now what?

Strong, established awareness (89%) amongst this core group of Vietnamese consumers suggests the job to be done is connecting Australian Beef to beneficial associations/perceptions that encourage its more frequent choice over other imported COOs/competitor (as opposed to a focus on building awareness)

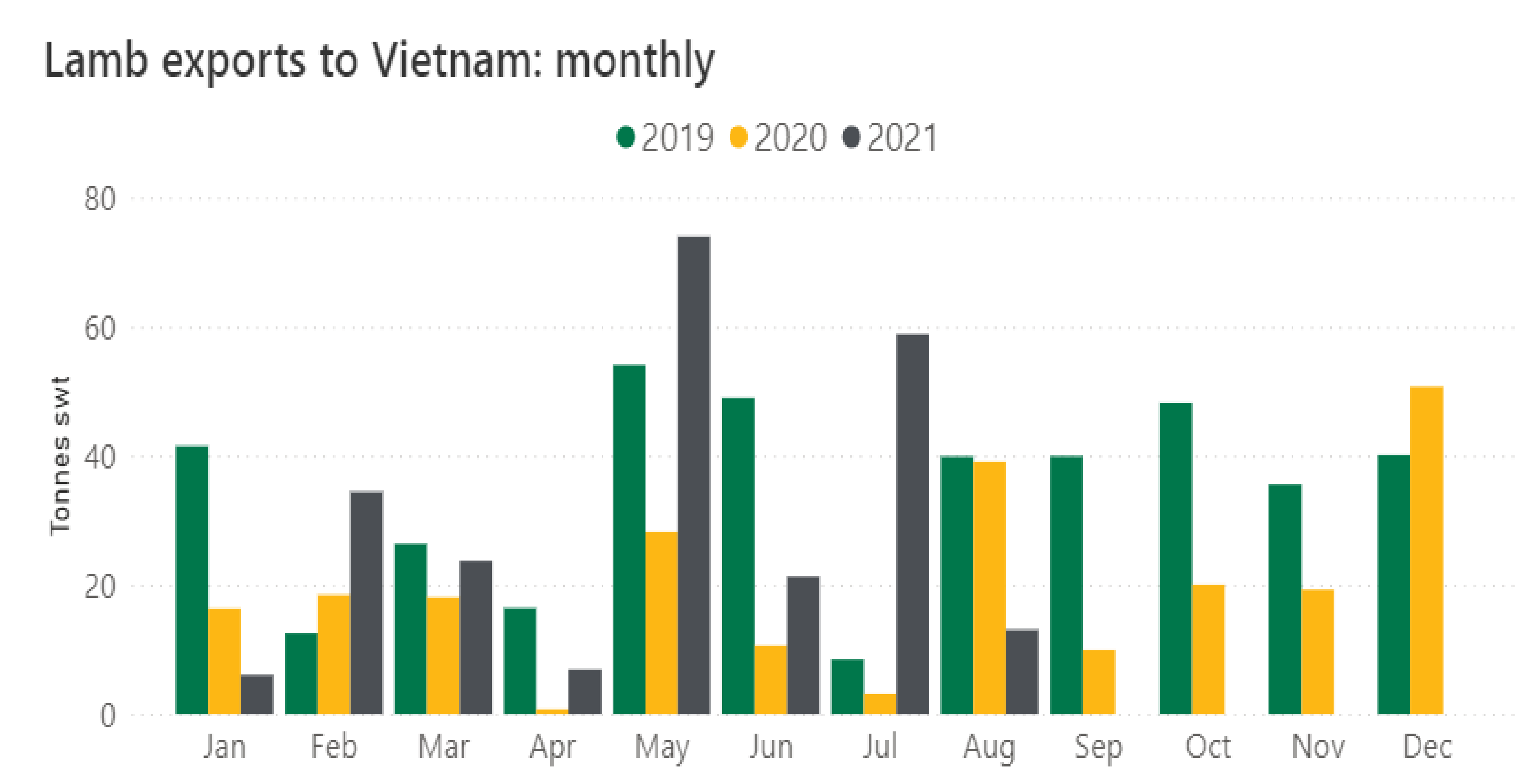
Further strengthening AU's perceived safety can play a dual role as an association relevant for increasing likelihood to choose AU Beef as well supporting a premium price.

Watchout for US which leverages consistent quality to drive premium and while small, watch NZ's similar positioning to AU – consider leveraging our superior awareness, consumption and volume to establish a clear, beneficial position before them.

LAMB
DEEP DIVE

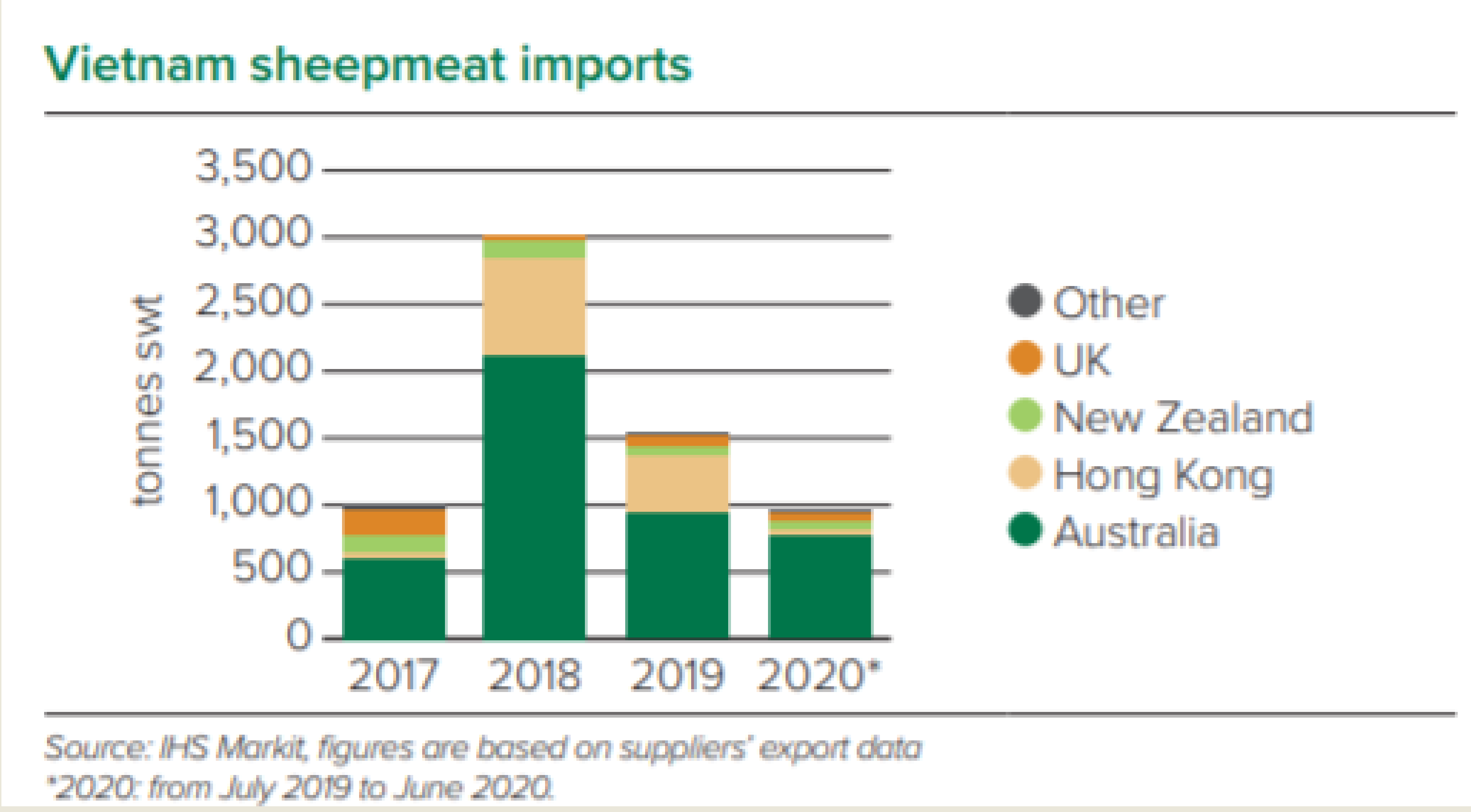
Import of Australian Lamb to Vietnam has increased, peaking in May 2021 but remains small vs volumes of Beef into the market.

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



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

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



- Vietnam has a relatively small sheepmeat (including goatmeat) market, with domestic production and imports estimated at around 8,000 tonnes carcase weight equivalent (cwe) and 2,000 tonnes shipped weight equivalent (swe) per year, respectively (Source: GIRA).
- Australia, New Zealand and the UK are the major sheepmeat suppliers to Vietnam. A large portion of sheepmeat imports to Vietnam is used for transshipments. As a result, the fluctuation in shipments to Vietnam reflects demand conditions in third markets rather than actual demand for domestic consumption in Vietnam.

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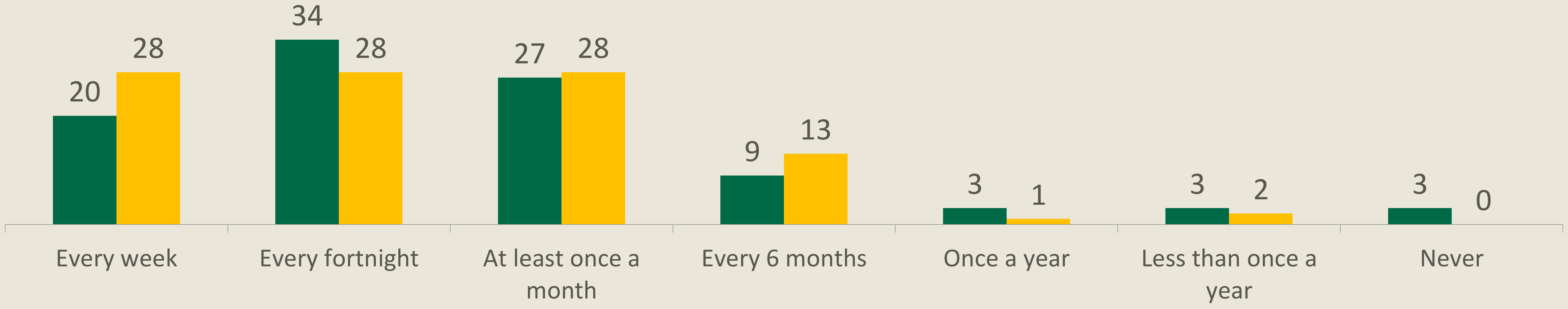
Of those who are buying lamb, almost all claim to know the COO of the lamb they purchase. Once buying, they are also slightly more likely to buy imported lamb on a weekly basis than local product. Just over half are buying both fortnightly.

93%

FREQUENCY OF BUYING
LOCAL AND **IMPORTED** LAMB



(LBH1A) Do you know the country of origin of the lamb you buy? Base: (n=334)
(CH7) How often do you buy imported lamb/Halal compliant lamb? Base: (n=334)
(CH7LOC) How often do you buy local lamb/Halal compliant lamb? Base: (n=334)

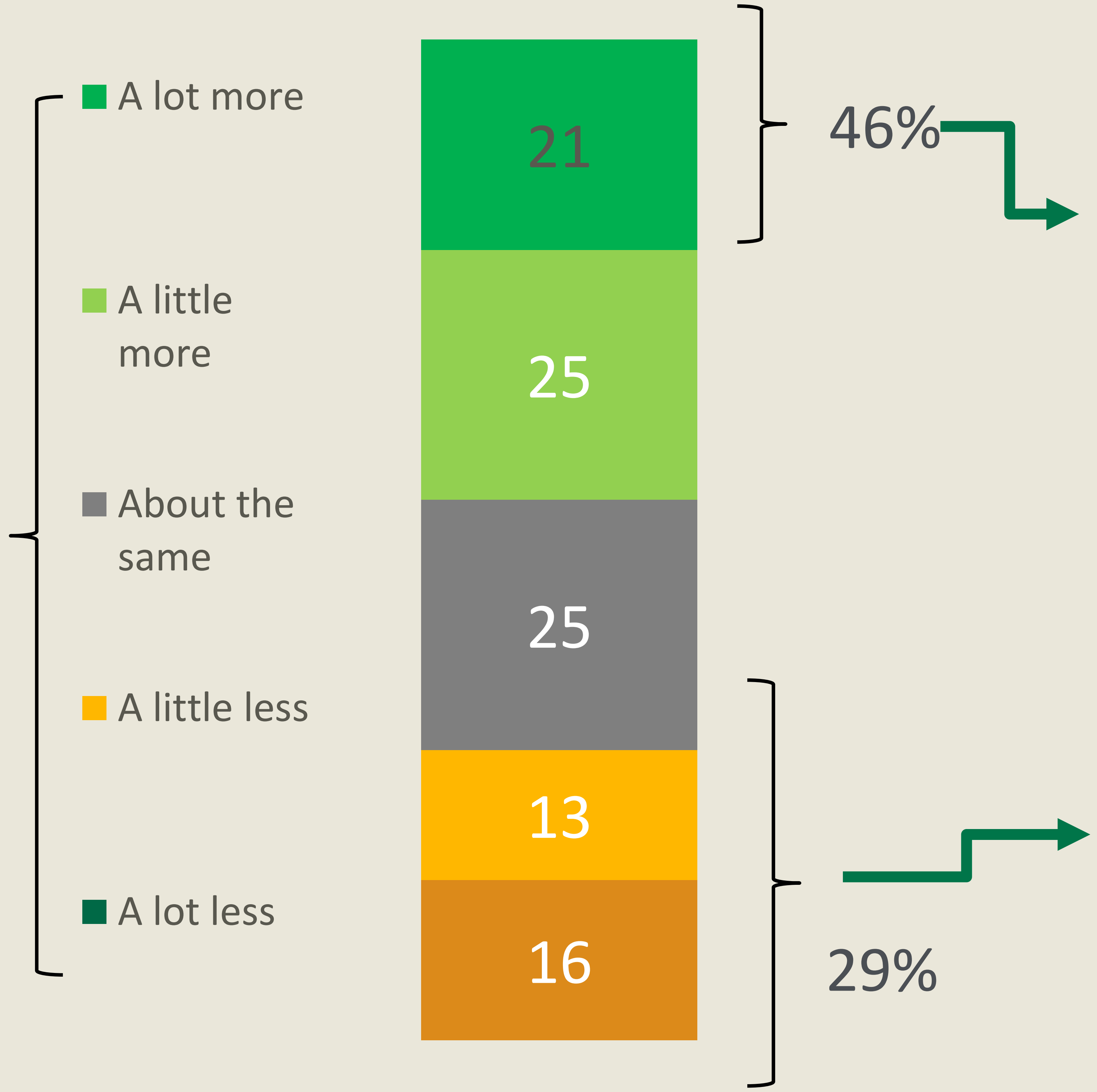
Close to 7 in 10 of those we spoke with have bought lamb in the past, and there have been some substantial shifts in how much they are buying versus last year. Quality, confidence and family needs driving increases. Reductions, in line with global, are to do with affordability and availability.

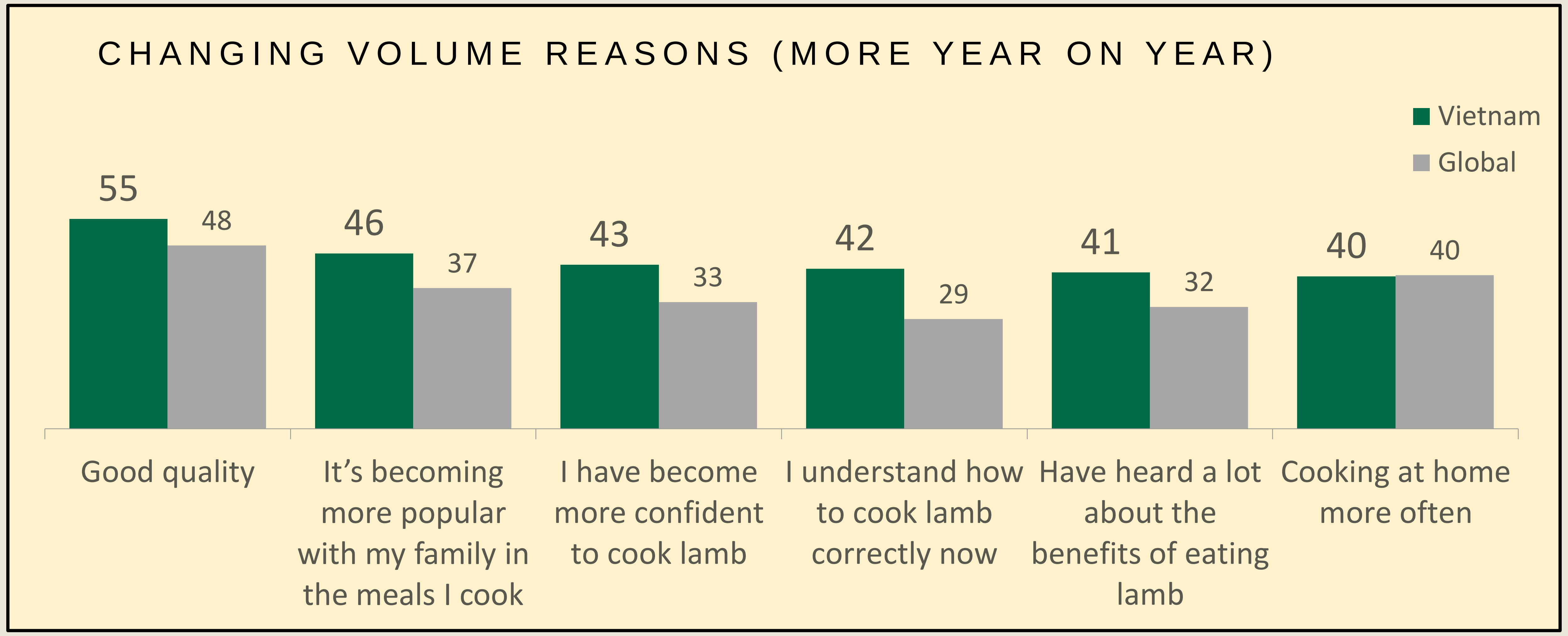
EVER BOUGHT LAMB:

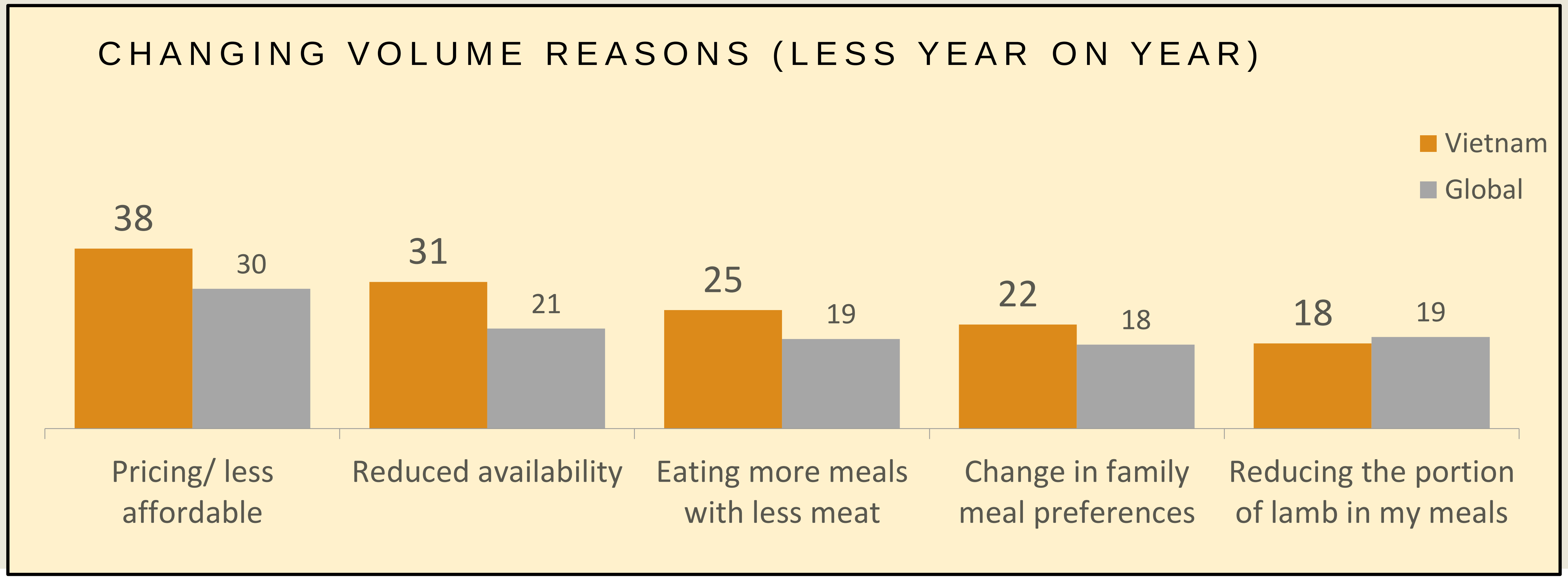
67%

Yes

VS LAST YEAR, I AM BUYING…







CH6. Do you ever buy lamb? - Rebase to total. Base: (n=500)
VOLL1. Amount of lamb purchased. Base: (n=334)

VOLL3. Why you have reduced the amount of lamb you are purchasing Base: (n=99)
VOLL2. Why you have increased the amount of lamb you are purchasing Base: (n=153)

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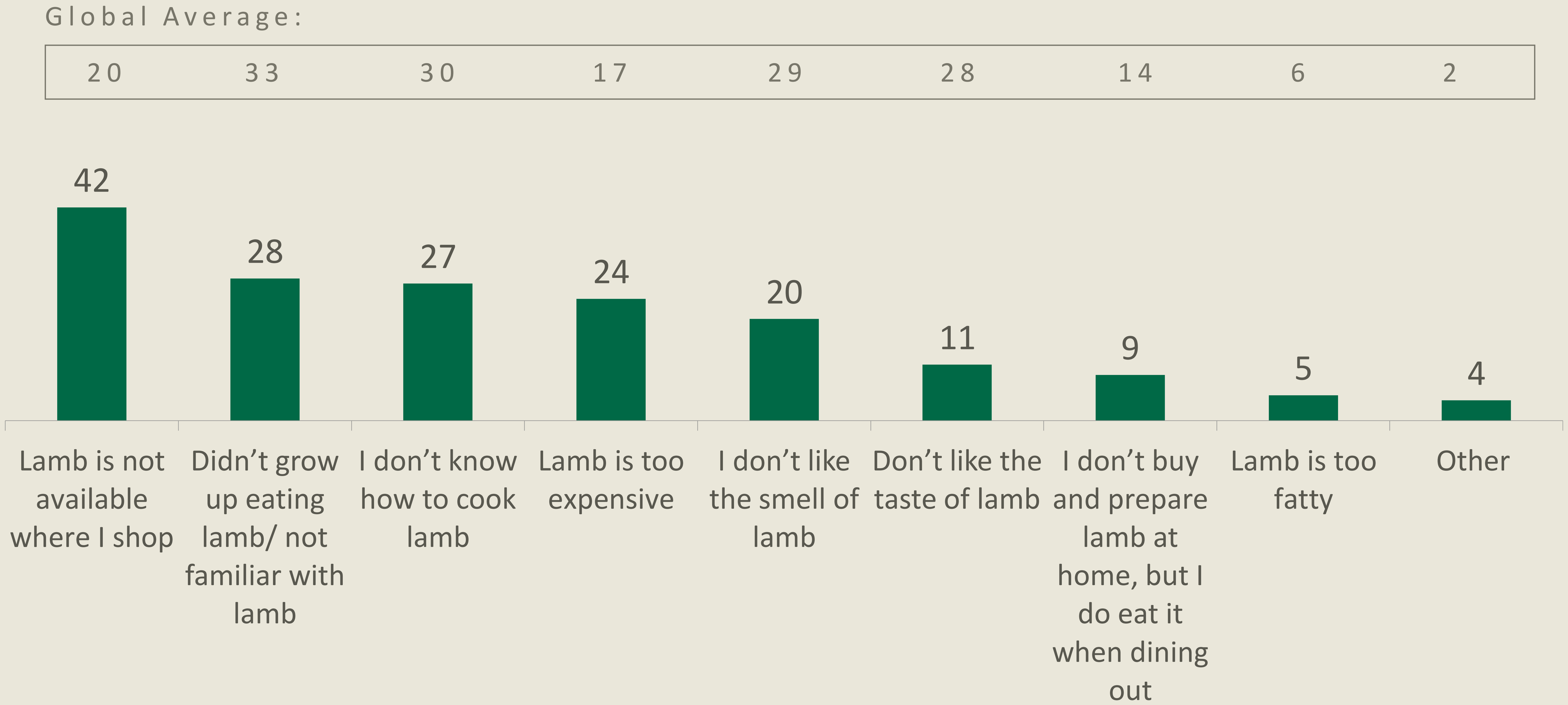
One third of the total sample report never buying lamb and with availability the primary barrier, a challenge for 2 in 5, considerably above the global average. This indicates an unfamiliarity with the meat and preparation.

33%

Of the sample have never bought lamb



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CH6. Do you ever buy lamb? Base: (n=500) (Never bought lamb rebased to total sample)
QCH6a. Why do you not buy lamb? Base: (n=166)

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LAMB DEEP DIVE - IMPLICATIONS:
Almost all of the 2 in 3 who have purchased lamb know where it is coming from and a reasonable proportion are buying frequently. Availability and affordability key barriers

What do we see?

1

Those buying lamb currently are fairly committed to the category

While there is a gap to fill with 1 in 3 not purchasing lamb, for those who do they know where it comes from, they are buying regularly and a reasonable proportion (about 1/3 of all Vietnamese consumers are buying more lamb than last year.

2

Confidence for users and greater access will grow the lamb category further

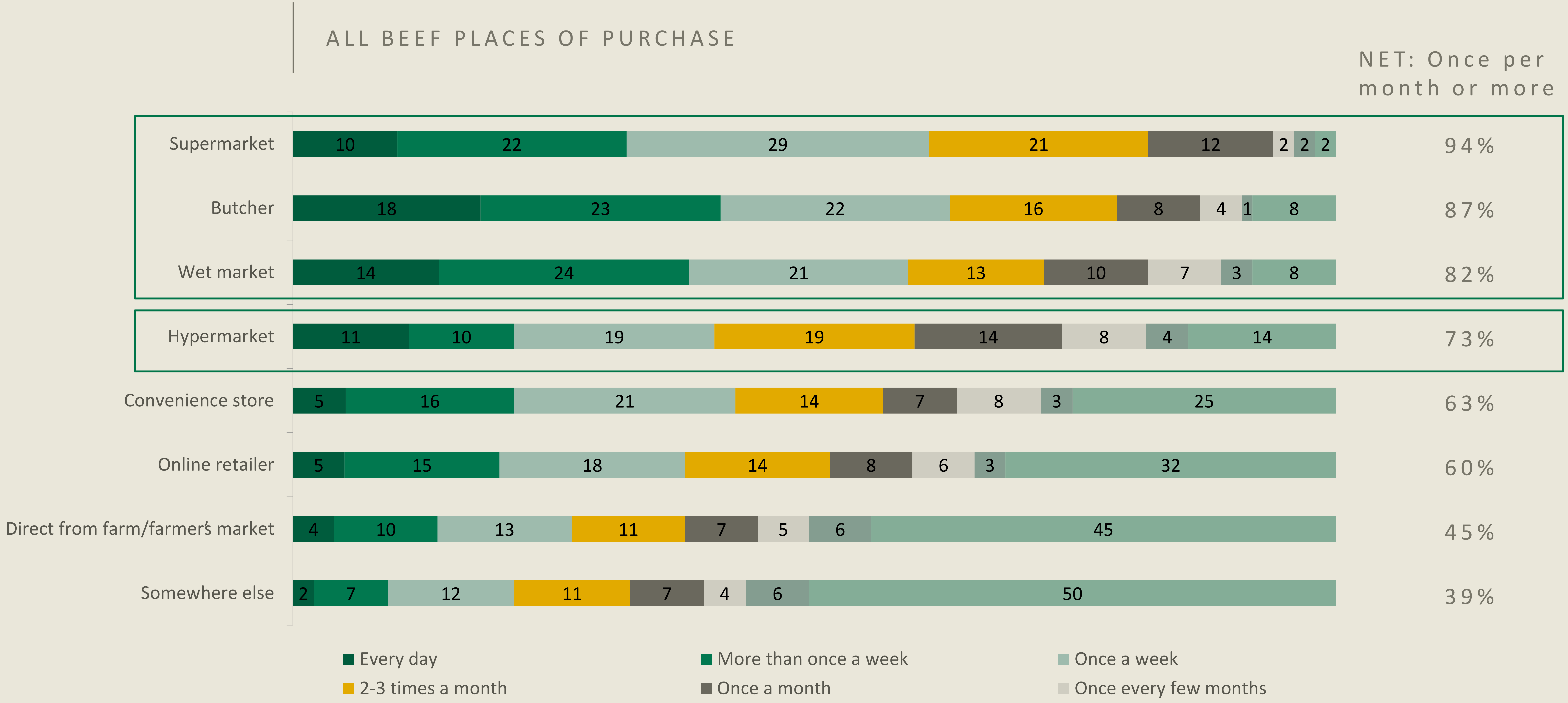
Availability is the key barrier, and increasing confidence and familiarity appear to be both key facilitators and the flip side of some established barriers.

Now what?

With availability the key reason for diminished purchase and the main barrier by some way for those who have not used, and confidence and familiarity lesser barriers, it appears that this challenge is surmountable if MLA can support distributors and retailers to ensure lamb is as accessible. Is there a further opportunity to provide collateral or support to build confidence further in what and how to prepare lamb?

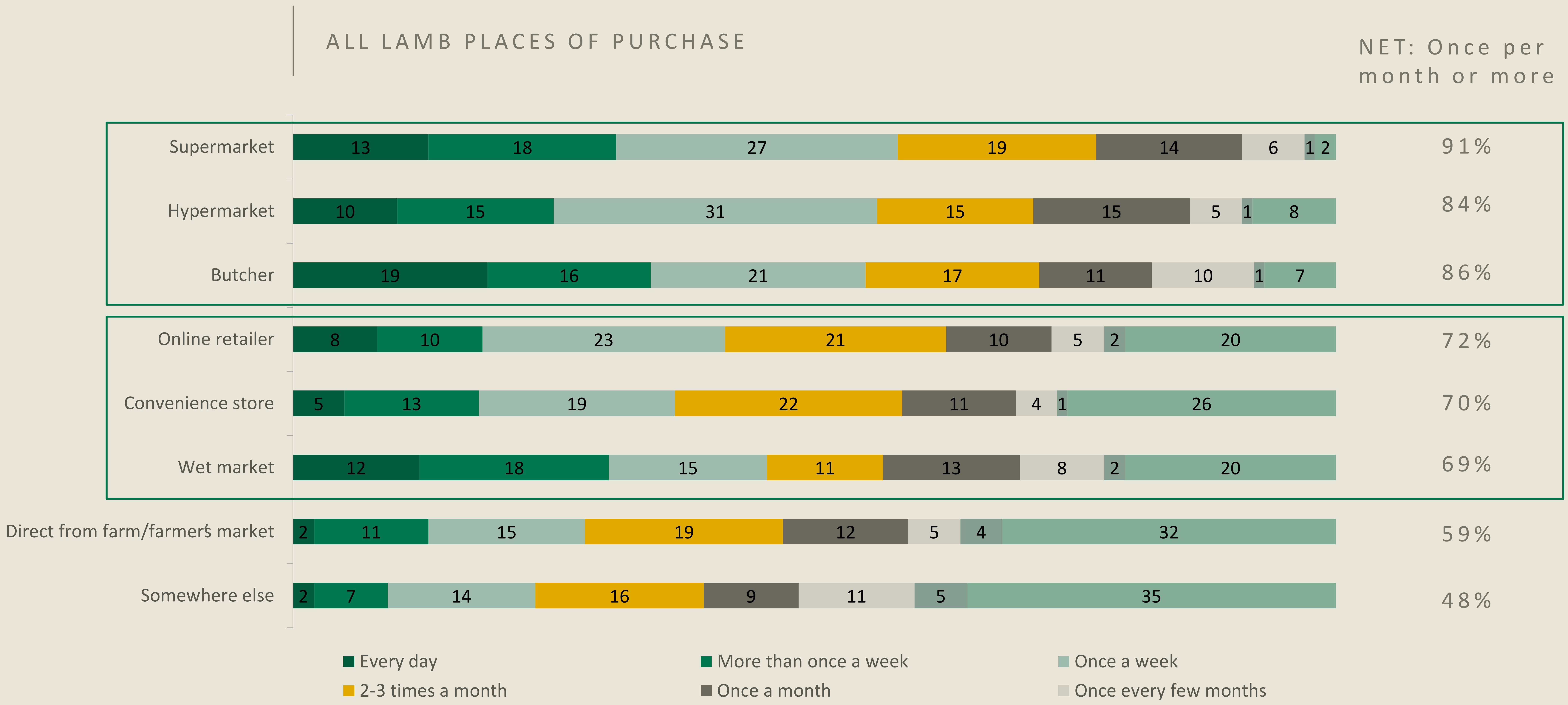
SHOPPING BEHAVIOUR

Supermarkets are by far the most popular places to buy beef, however frequency of buying beef at a wet market or butcher is slightly higher. 3 out of 5 beef purchasers in Vietnam claim to buy beef online at least once a month.



QR3A. How often have you bought beef from each of these locations in the last six months? Base: (n=249)
Online Retailer: Online Supermarket 84%, Online-Only Retailer 47%, Other 4% (ONL5B. Where did you buy your beef online)

Supermarkets, hypermarkets and butchers stand apart from other channels in terms of frequency, although wet markets, if used are visited very frequently with 30% going more than once a week. Claimed monthly online purchase of lamb is relatively high in Vietnam.



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QR3B. How often have you bought beef from each of these locations in the last six months? Base: (n=248)
Online Retailer: Online Supermarket 93%, Online-Only Retailer 36%, (ONL5L. Where did you buy your lamb online)

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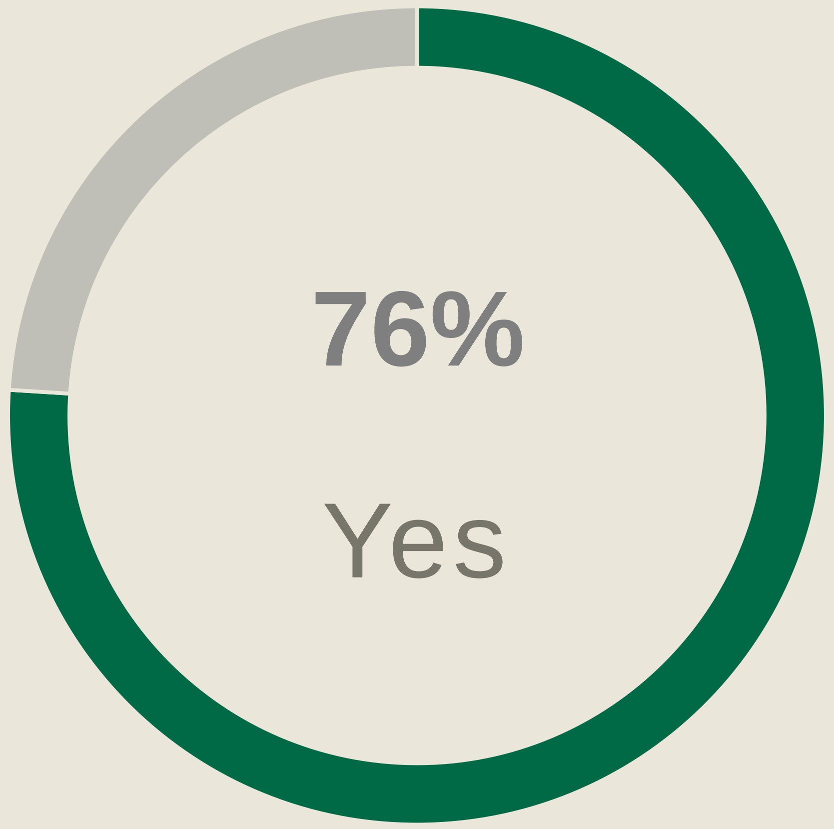
RED MEAT ONLINE

¾ of Vietnam beef buyers claim to have bought beef online. Those that do shop online, tend to do this at least once a month.

EVER BOUGHT BEEF ONLINE:



SKEWS: Vietnam, frequent beef buyers are high income households and children in household

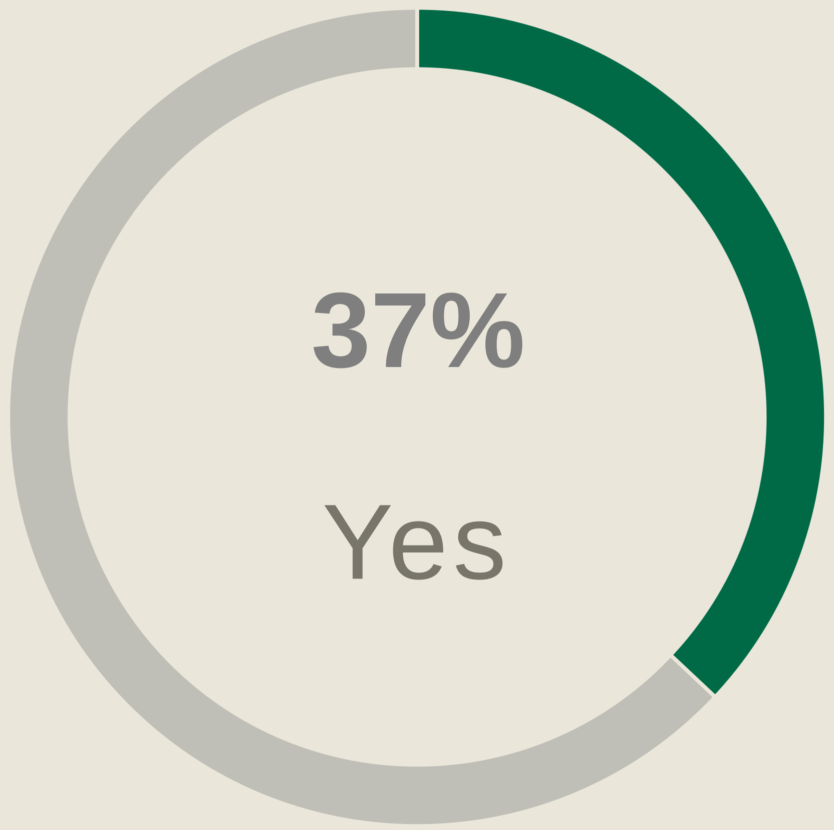
FREQUENCY:

More frequent online beef purchasers skew to 25-29, frequent beef buyers and are less likely than average to have kids in the household.

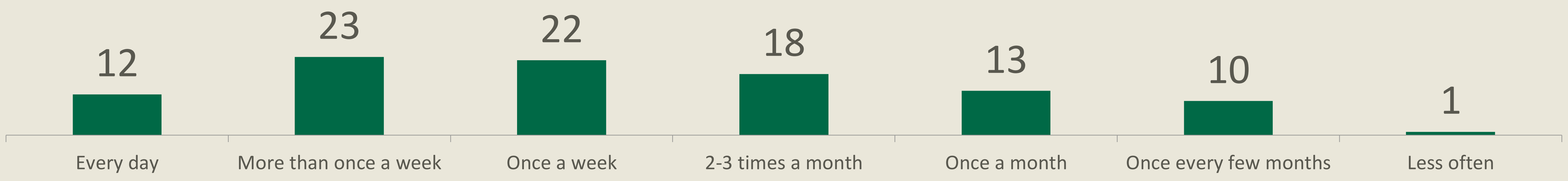
ONL2B. How often do you buy beef online
ONL3B. Which of the following reasons best describes why you buy beef online
ONL4B. Which of these reasons also contributes to why you buy beef online
Base: (n=190)

About 1 in 3 of all consumers in Vietnam claim to have bought lamb online. Those that do shop online, skew to doing so at least once a month.

EVER BOUGHT LAMB ONLINE:



FREQUENCY:



More frequent online beef purchasers skew to 25-29 & 35-39 frequent lamb buyers, higher income households and are likely than average to have kids in the household.

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ONL2L. How often do you buy lamb online

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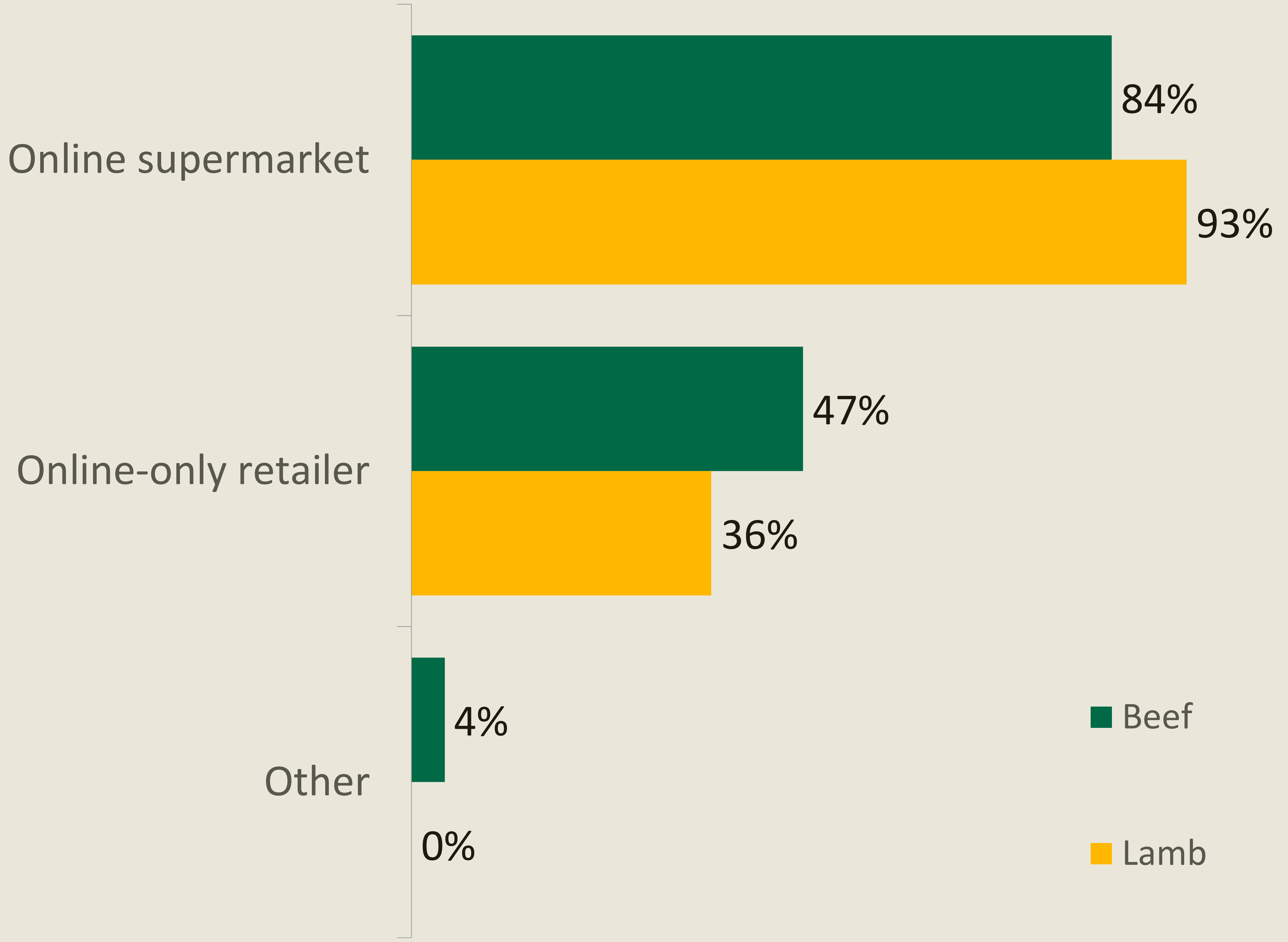
For both beef and lamb it is more often the online platform of supermarkets that is used rather than an online specialist. But this supermarket use is significantly higher for lamb where beef is more balanced. There are also marked preferences in channel by age for beef.

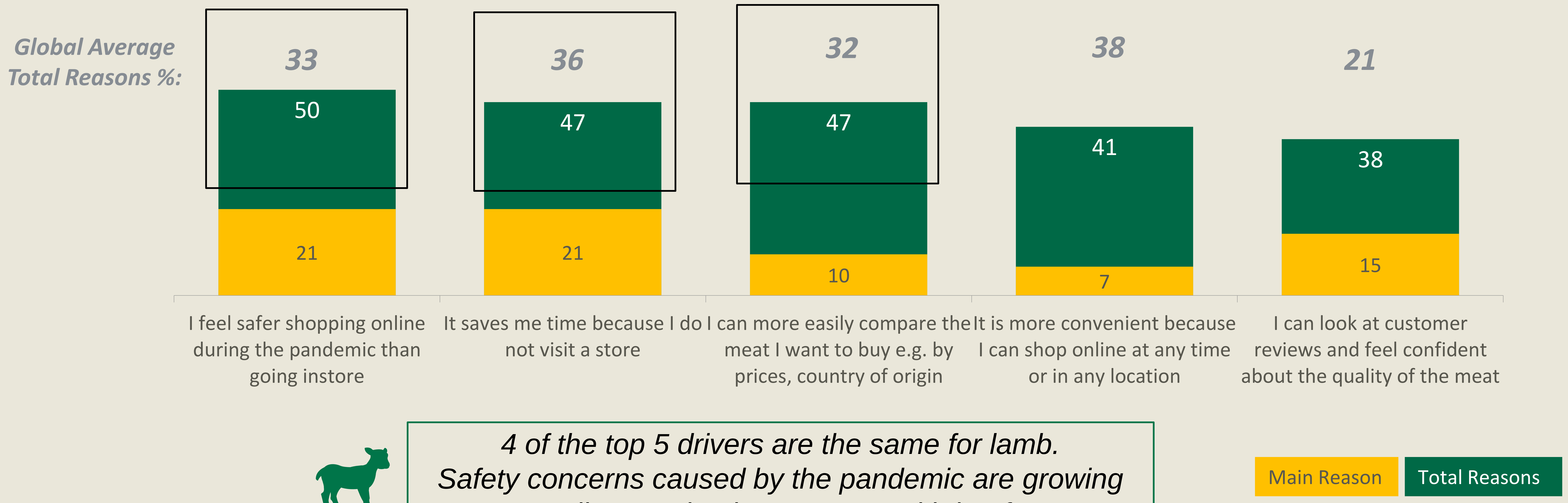
ONLINE CHANNEL – SUPERMARKET vs. SPECIALIST



ONL5B/L. Where did you buy your beef/lamb online?
Base: Beef (n=432) Lamb (n=644)

As seen in other markets, the safety has been a key reason for people transitioning to the channel during the pandemic, however saving time, the opportunity for product comparison, usability of the platform will keep it growing.

FACILITATORS TO BUYING BEEF ONLINE:



4 of the top 5 drivers are the same for lamb. Safety concerns caused by the pandemic are growing online purchasing, as seen with beef.

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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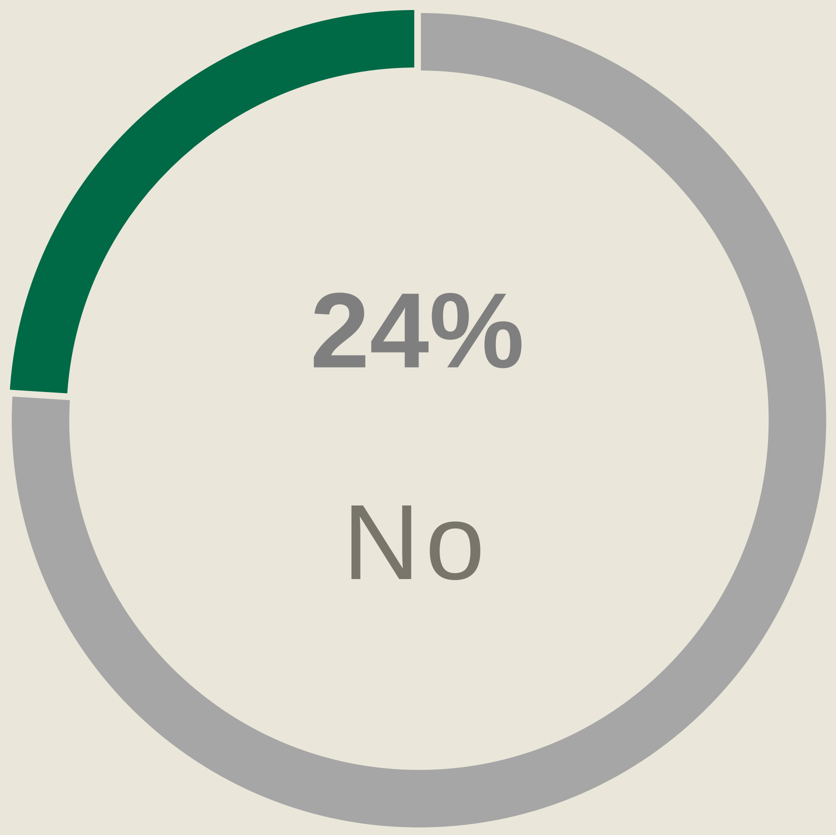
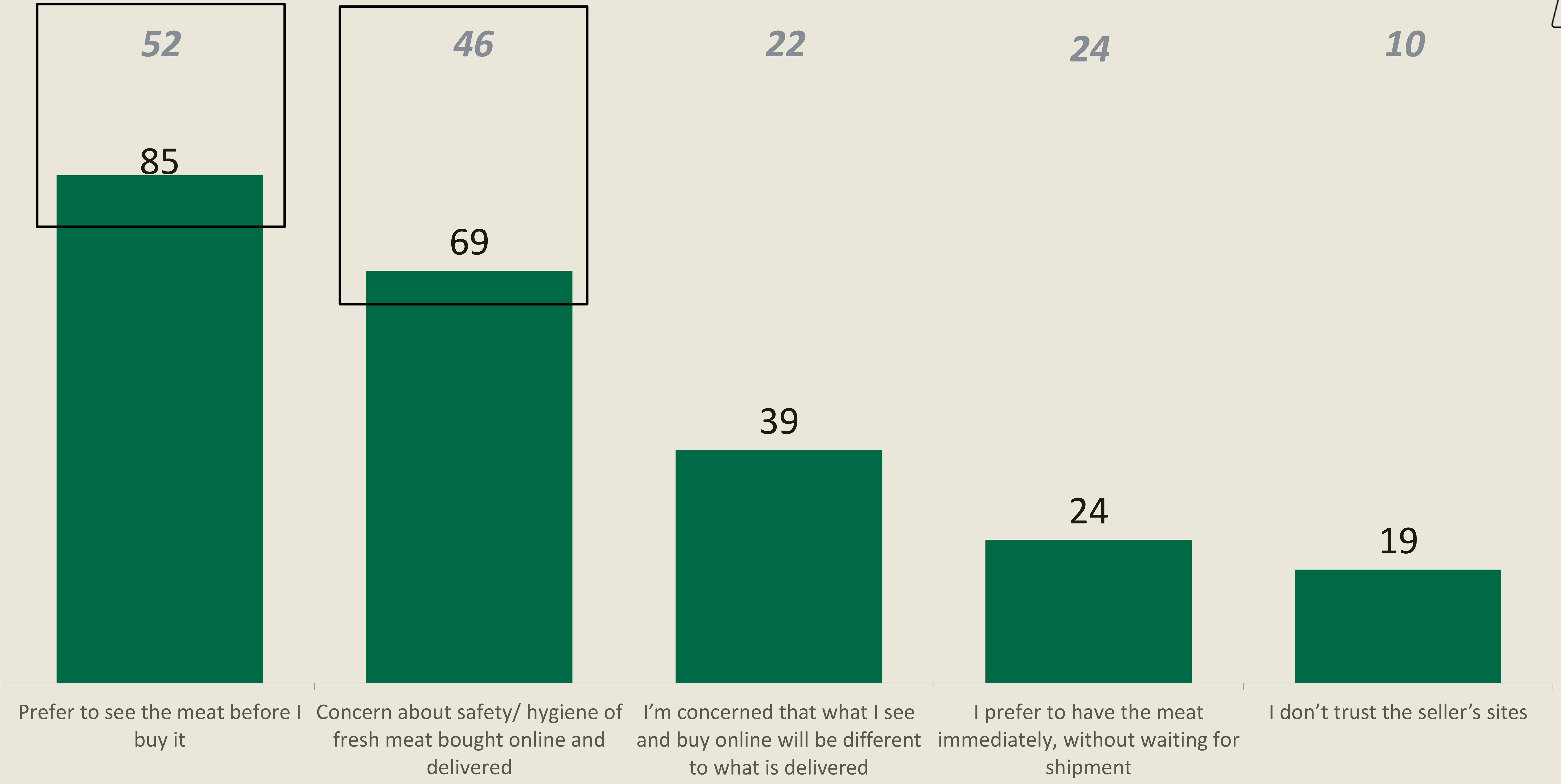
1 in 4 beef consumers in Vietnam have never purchased beef online, and the key barriers are as they are elsewhere – Vietnamese prefer to see the meat before buying and have concerns about the safety and freshness of the product, but more so that anywhere else.

EVER BOUGHT BEEF ONLINE:



BARRIERS TO BUYING BEEF ONLINE:

Global Average Total Reasons %:



CHANNEL, ONLINE FACILITATORS & BARRIERS - IMPLICATIONS:
Online appears to have established regular usage for both beef and lamb, being led by the Supermarkets online platform.

What do we see?

1

Online established in Vietnam for buyers of both Beef and Lamb

While traditional channels are still the main channels for beef and lamb purchase, a comparatively high proportion of our MGB imported meat buyers claim to be using

2

Online platforms of traditional supermarkets are the platform of choice

For those using the online channel it is predominantly through online arm of traditional supermarkets, but there is some use of online specialists.

3

Safety of meat and need to see it still very large barriers

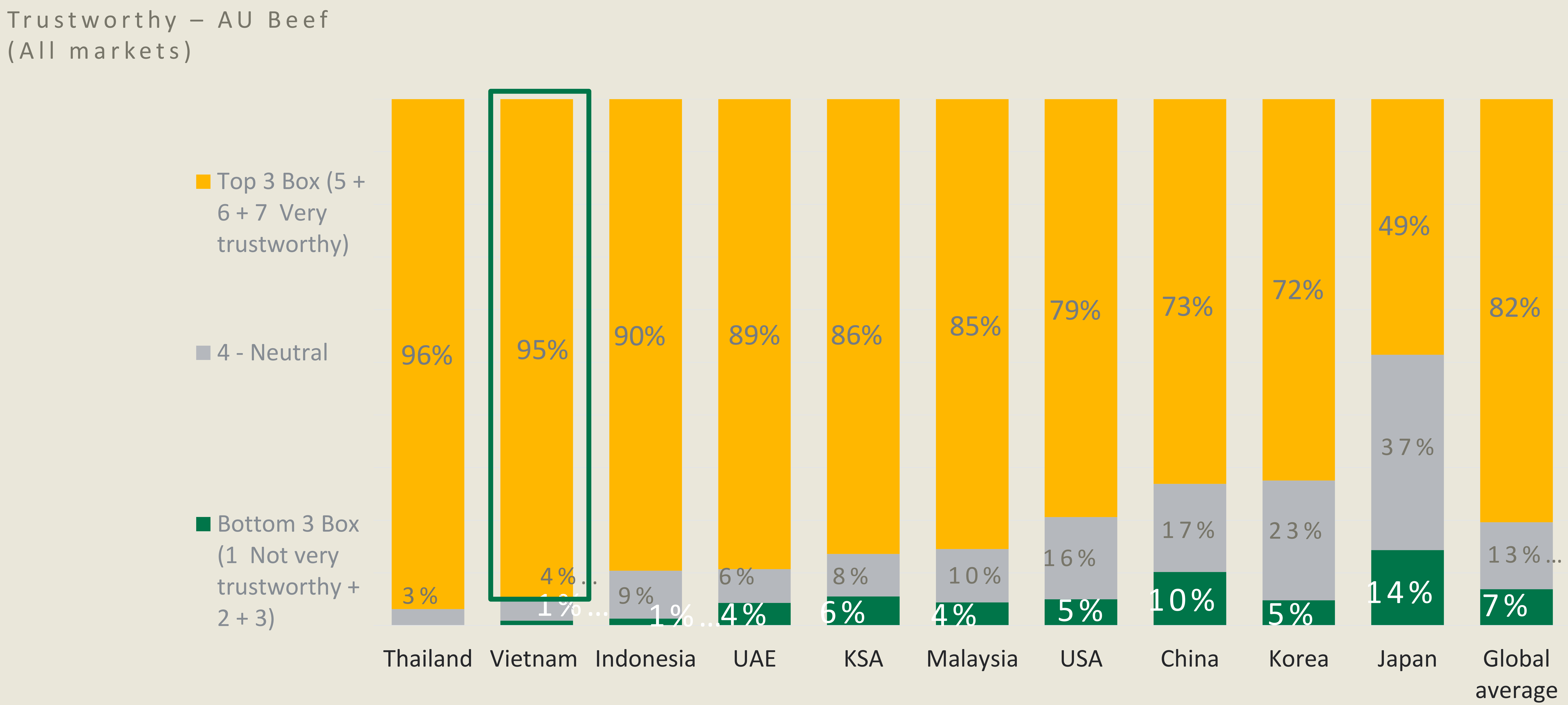
The importance of safety in the market, both as a driver of brand choice, and a significant barrier to use of the online channel, need to see before buying is the highest of all markets

Now what?

Can we leverage this established penetration to find effective alternative ways to reach Vietnamese consumers?
Safety of our product is important in building brand, and owned by AU beef so ensuring we protect this is paramount in any consideration of using the online channel to get AU product to Vietnamese consumers

BEEF COO TRUST PERCEPTIONS

Along with Thailand, Vietnam is the market in which Australian beef is the most trusted with 95% saying they trust Australian beef product, well ahead of the global average of 8 in 10.



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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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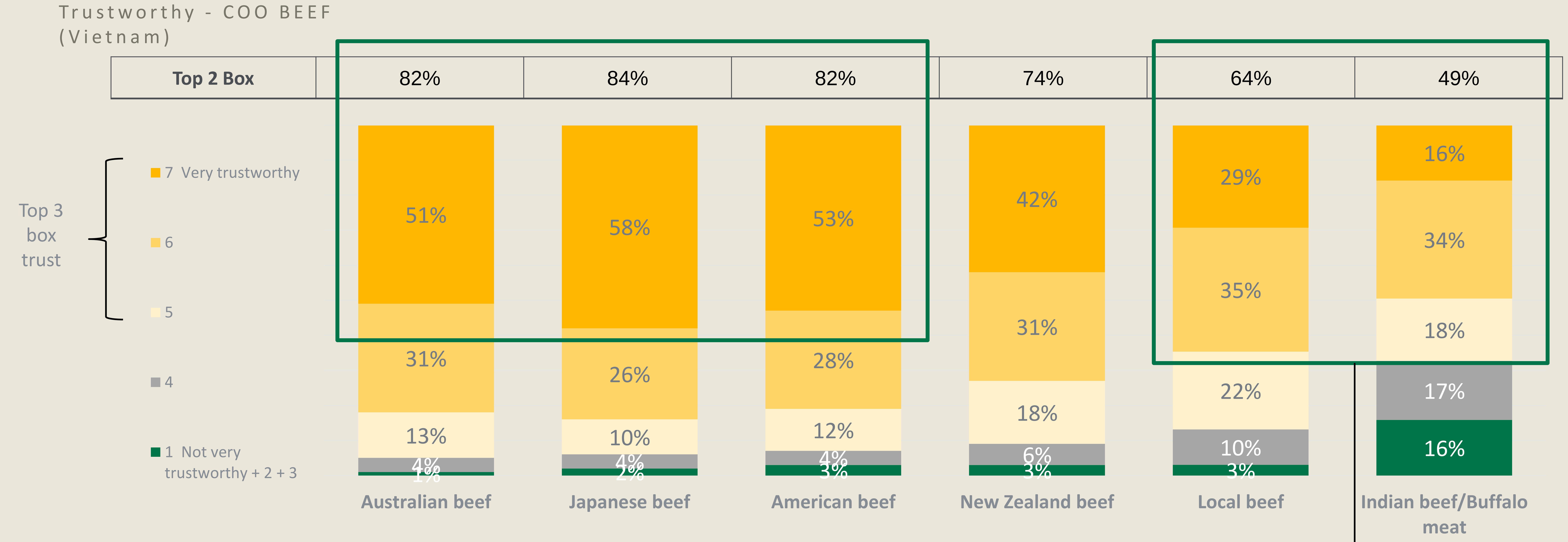
Australian, Japanese and American beef have all established very high levels of Trust in Vietnam, well ahead of other COO beef, and they tend to be trusted by all users. In comparison trust in local is propped up by older Vietnamese and the primary shoppers & meal planners in the household.



Those who trust local and Indian skew heavily to 50+, female, Main shopper and meal planner

KANTAR

BTR2B. How trustworthy is the imported beef from these countries – 7 point scale
Base: Local (n=469), Australian (n=447) American, (457)Indian (146), New Zealand (n=325), Japanese (n=373)

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In Vietnam Trust in Australian Beef is associated, as we see in other markets, with key functional assets of taste and health, as well as elements of transparency and high standards in the process. Interestingly it is one of only two markets where it is important that consumers are reassured by seeing others eating Australian beef.

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

Japan	Korea	Vietnam	Thailand	Malaysia	Indonesia	China	UAE	KSA	USA
Tastes great	High Quality Beef/Lamb	Tastes great	s grown with the ighest 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	Tastes great
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	Has consistent quality standards
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	Is processed to the highest standards
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	Does not use antibiotics or hormones when grown/produced
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	Comes from the perfect place to produce beef

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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ON PACK CLAIMS & TRUE AUSSIE

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MAXDIFF FORCED CHOICE TECHNIQUE:

Prioritising the most important messages shoppers seek on pack/at shelf.

The final moment of truth

The final part of the decision-making process for consumers buying beef or lamb is made at the point of purchase.

This is also the end point opportunity for a brand to influence this purchase.

Packaging, labelling, sampling, posters, and product exert influence through brand and product messages.

Getting to the truth

This section presents the shopper's mindset at the point of purchase; and information that influences their choice, using an attribute sorting technique called MAXDIFF.

With a long list of product attributes, all can seem important.

The solution – forced choice prioritisation

MAXDIFF is a trade-off technique that forces respondents to avoid the middle ground. Respondents are shown 5 statements per screen and asked which they consider to be the most & least likely to motivate them to eat Beef/Lamb.

Repeating this 10 - 15 times per person lets us calculate the relative importance of each factor amongst the whole group.

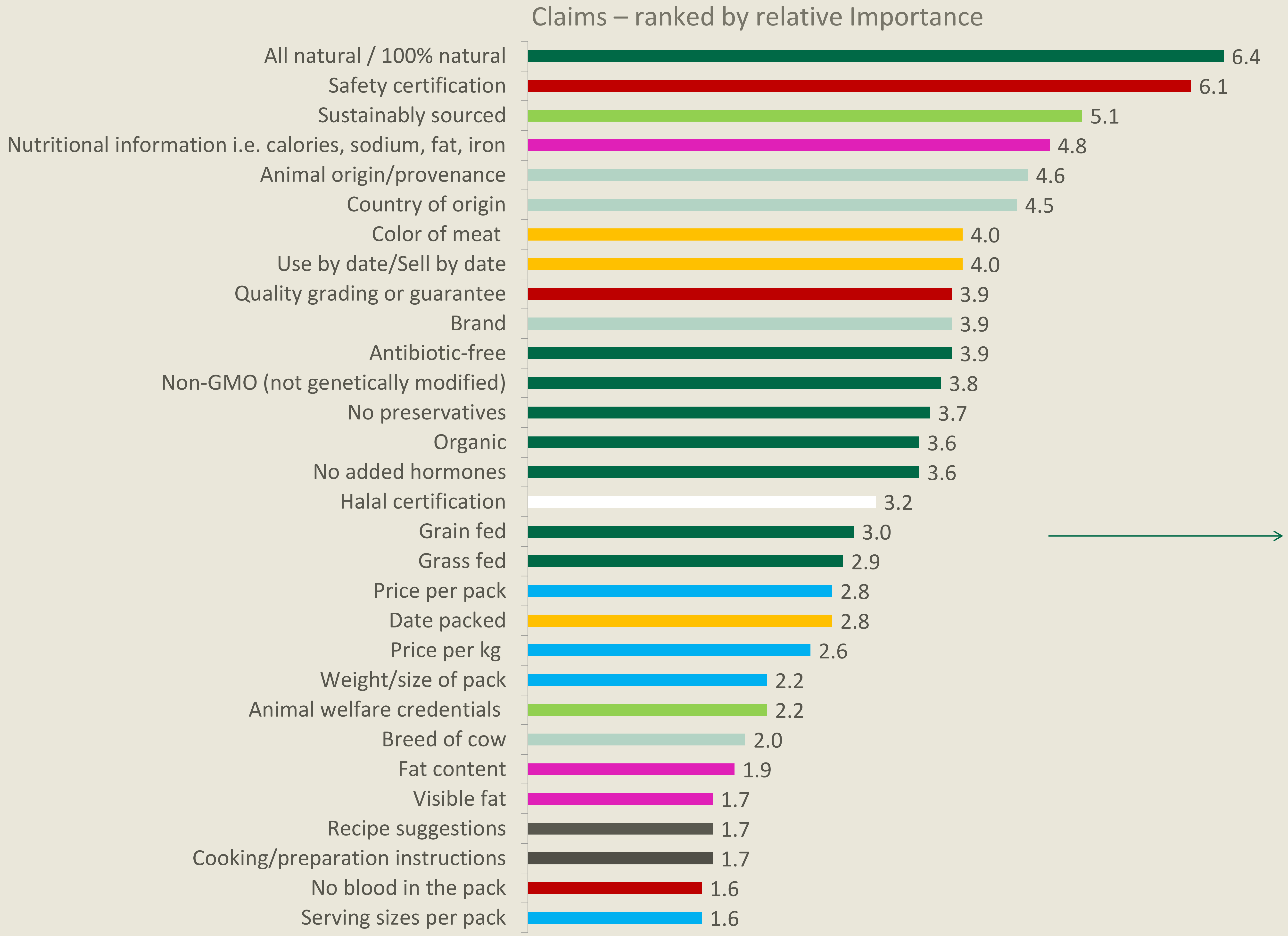
Considering only these five claims , please indicate which one is the **most likely**, and which is the **least likely** to motivate you to choose / eat BEEF....

Task 1 of 12

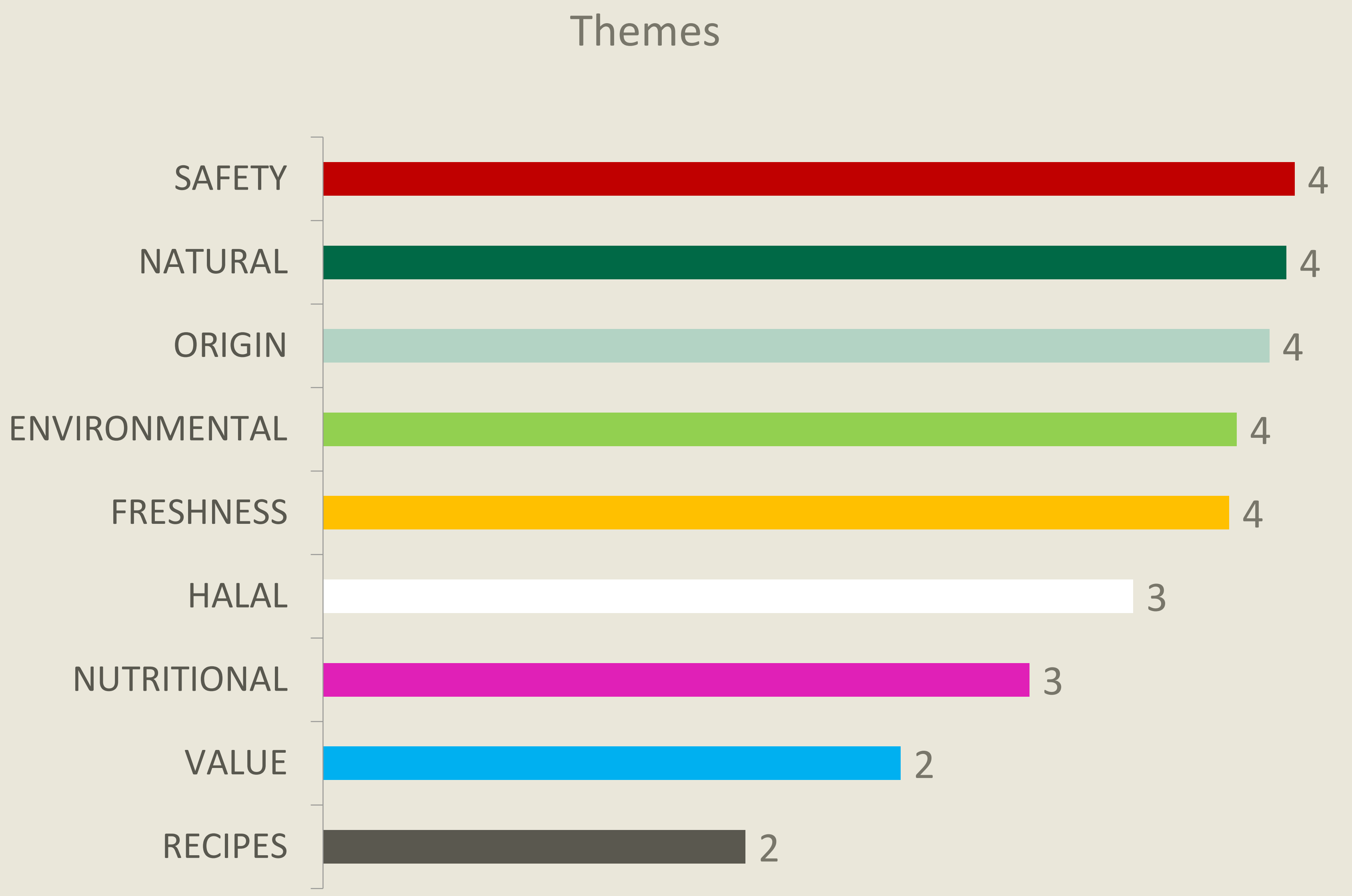
Please select one from the "most" and one from the "least" column. You must choose a different item in each column.

Most likely		Least likely
○	Use by date/Sell by date	○
○	Country of origin	○
○	Serving sizes per pack	○
○	Visible fat	○
○	Breed of cow	○

Being 100% natural is a powerful claim on pack for Beef – seeing a strong response globally. Providing a safety certification also ranks highly in Vietnam. This reflects what we have seen in the brand perceptions, with safety and consistent quality key to driving choice and premium



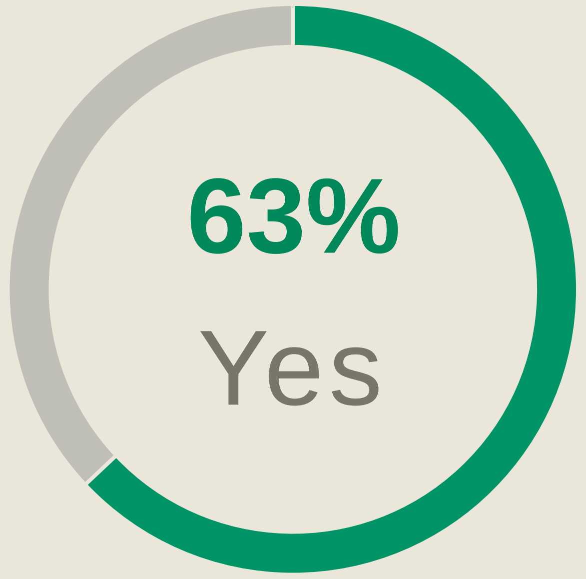
The most important area to Vietnam BEEF buyers is being safe, followed by claims around the core themes of being natural, beef origin and being environmentally friendly. Claims around these areas are most likely to motivate consumers to choose BEEF



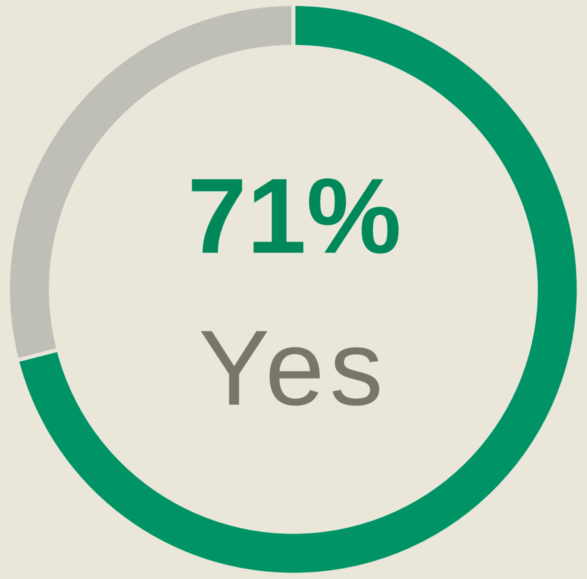
Base: Total (n=249)
QMAX1 BEEF: Please indicate which one is the most likely, and which is the least likely to motivate you to choose / eat BEEF
SCr1. Are you personally responsible for the cooking in your household, either mainly or equally with some other person?
SCr2. How often do you generally buy any meat or seafood for meals for yourself or for people in your household?
R1a. Approximately how often do you buy beef?

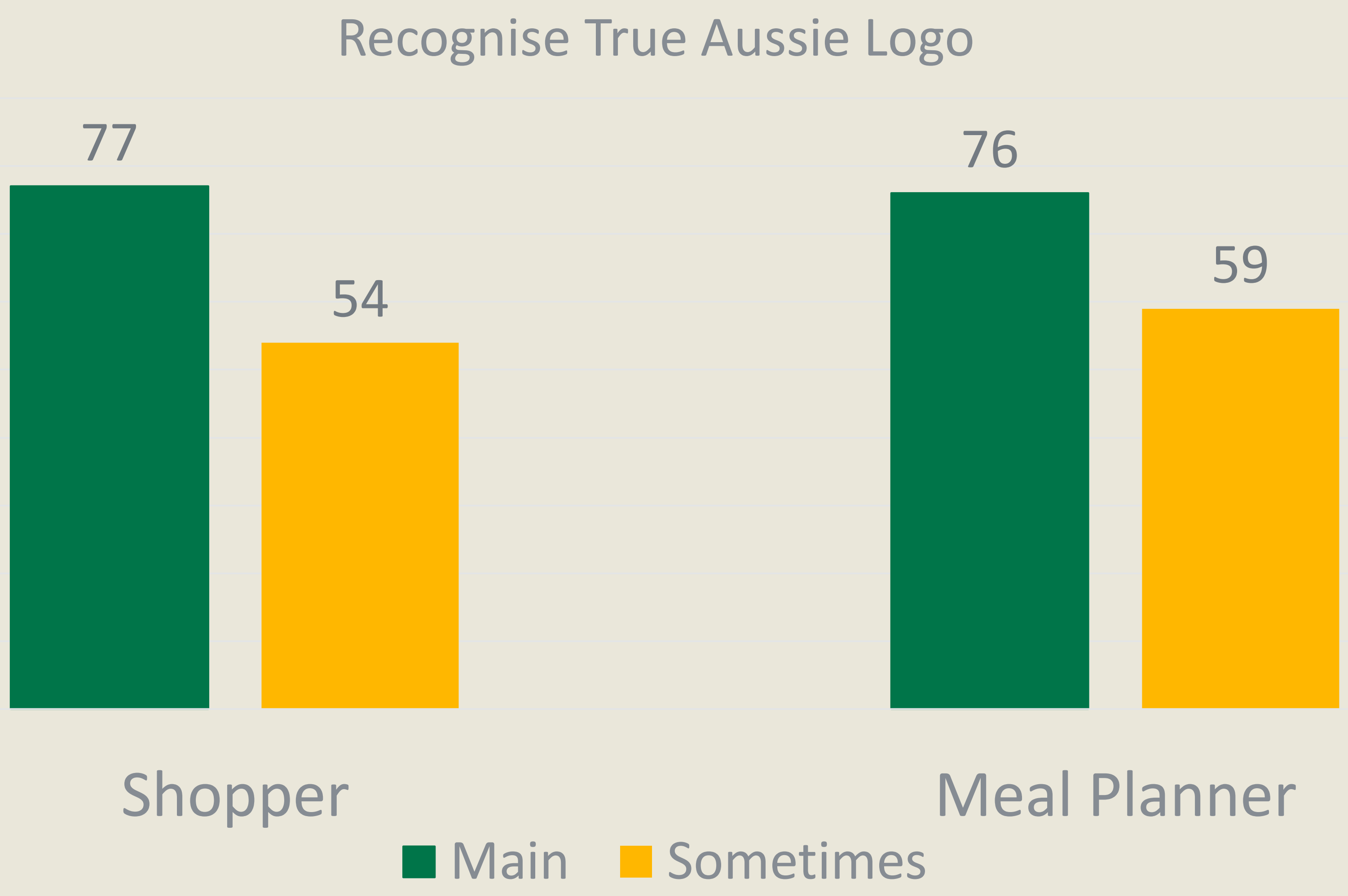
More than half of the respondents recognise the term ‘True Aussie’, whilst every 7 in 10 respondents recognise the True Aussie Beef logo.

Term: ‘True Aussie’



‘True Aussie’ Logo

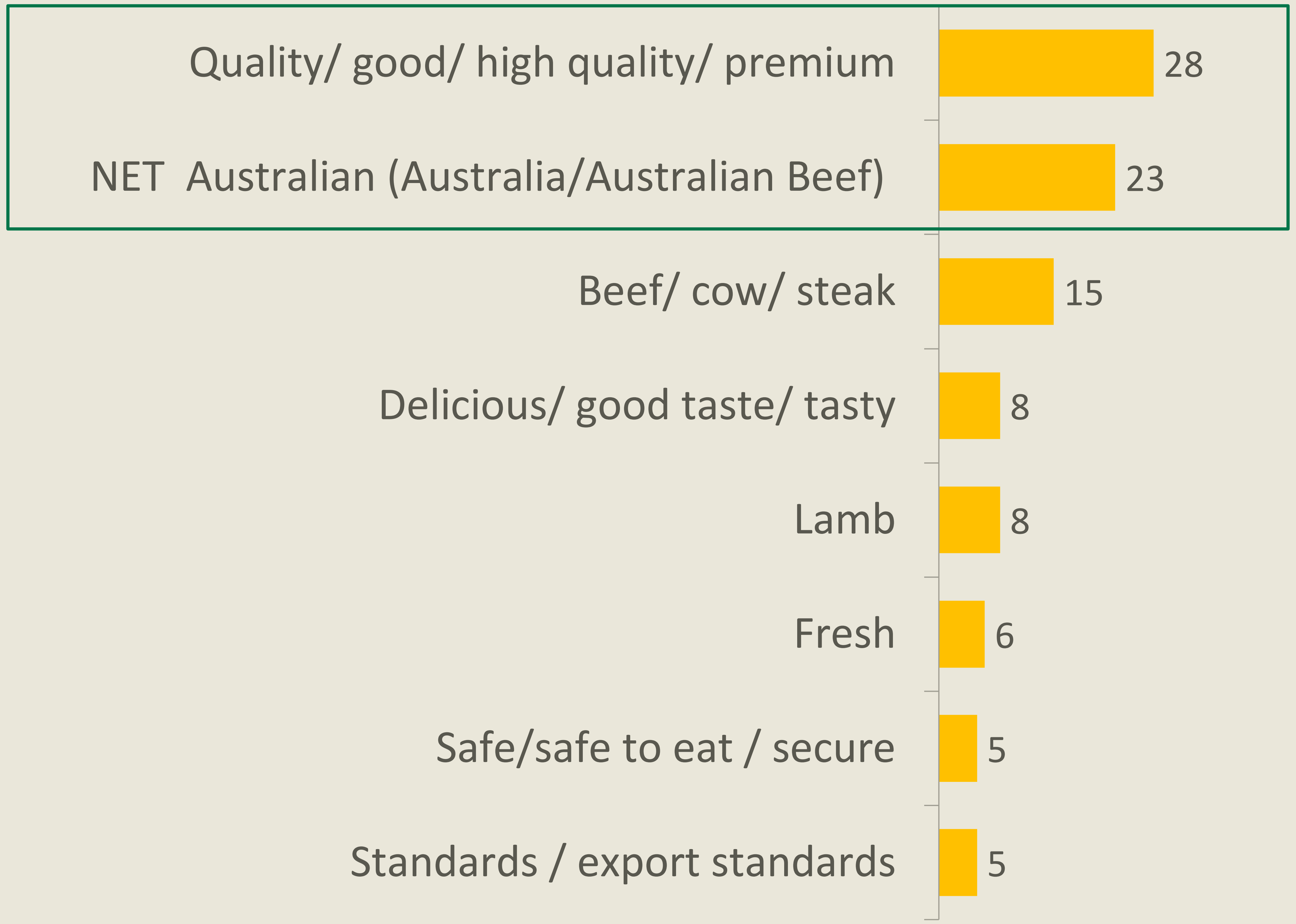




QTA1. Have you heard the term “True Aussie” before? Base: (n=500)
QTA3. Have you ever seen this logo before? Base: Beef (n=500)

The 'True Aussie' logo primarily communicates the idea of high quality/premium with the beef in Vietnam. Associations are also made with the product being beef and the COO being Australia.

% of respondents who spontaneously mention:



These are even more clearly communicated to the main meal planner and grocery buyer

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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 (n=351)

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TRUST, TRUE AUSSIE & KEY CLAIMS- IMPLICATIONS:

Trust is established and very high, but at similar levels to USA beef and Japanese beef. Safety a route to building brand and trust in a differentiated way, leveraging True Aussie

What do we see?

1

Trust extremely high, with over half saying AU is very trustworthy

Japanese, Australian and American all similarly have very high levels of Trust. Quality and Safety are generally the top of mind associations for those who see product as Very Trustworthy, importedd COO expected to have a different (better) approach.

2

Quality and safety along with differentiators sought on pack

As such, Vietnamese consumers are looking for verification on pack, with the most important elements being safety, natural and origin – all of which line up with broader brand associations and trust.

3

And True Aussie can reinforce these associations

Quality and 'Australian' are the two main unprompted elements communicated through the logo. With those more in tune with the purchase and product (main buyers and meal planners) particularly inclined to takeout those key associations.

Now what?

Given the strength we have in safe to eat, but the importance of quality and superiority (two areas we are competing with JP and USA) we should be reinforcing the communication and reassurance we can offer on being safe to eat and offering consistent quality as much as possible to continue to build trust in a differentiated manner. True Aussie would appear to offer a tool to do so.

FINAL THOUGHTS & DISCUSSION

FINAL THOUGHTS

1

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 Vietnamese consumers.

Can we leverage the nuanced benefits of lamb in superiority and tenderness to build this category further?

2

Further strengthening AU's perceived safety can play a dual role as an association relevant for increasing likelihood to choose AU Beef as well supporting a premium price. Watchout for US which leverages consistent quality to drive premium and while small, watch NZ's similar positioning to AU – consider leveraging our superior awareness, consumption and volume to establish a clear, beneficial position before them.

3

Availability the key reason for diminished purchase and the main barrier by some way for those who have not used. Confidence and familiarity lesser barriers, This suggests there is a further opportunity to provide collateral or support to build confidence in what and how to prepare lamb?

4

Safety of our product is important in building brand, and owned by AU beef so ensuring we protect this is paramount in any consideration of using the online channel to get AU product to Vietnamese consumers, but also the opportunity to leverage the platform if we can ensure safe product.

5

We should be reinforcing the communication and reassurance we can offer on being safe to eat and offering consistent quality as much as possible to continue to build trust in a differentiated manner from JP and USA. True Aussie offers a vehicle to do so

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