
MLA GLOBAL CONSUMER TRACKER

2019

A photograph of a large herd of cattle, including white and brown cows, standing in a dry, grassy field. A single tree is visible in the background under a clear sky. The scene is lit with warm, golden light, suggesting late afternoon or early morning.

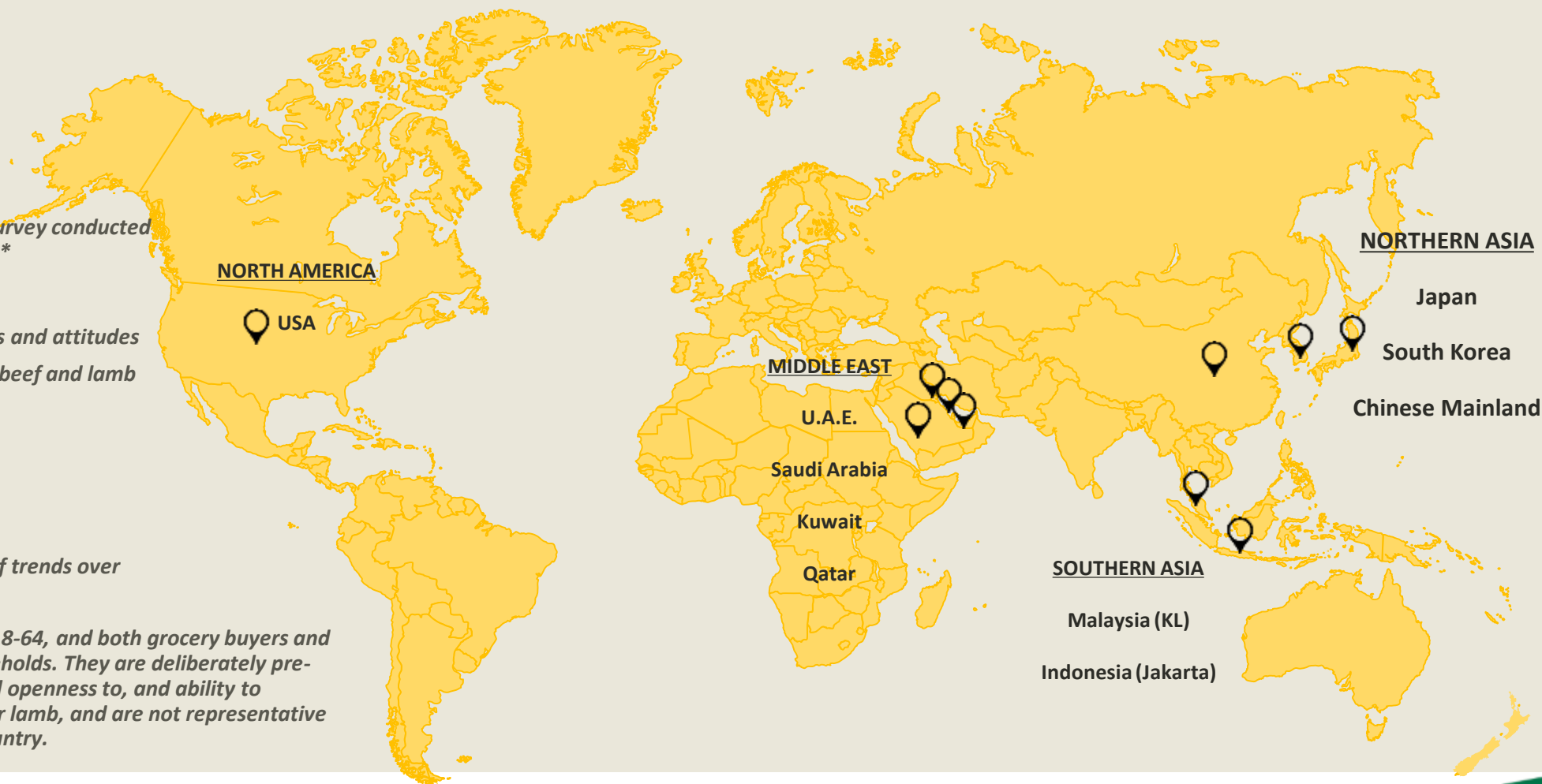
QATAR

INTRODUCING MLA'S GLOBAL CONSUMER TRACKER

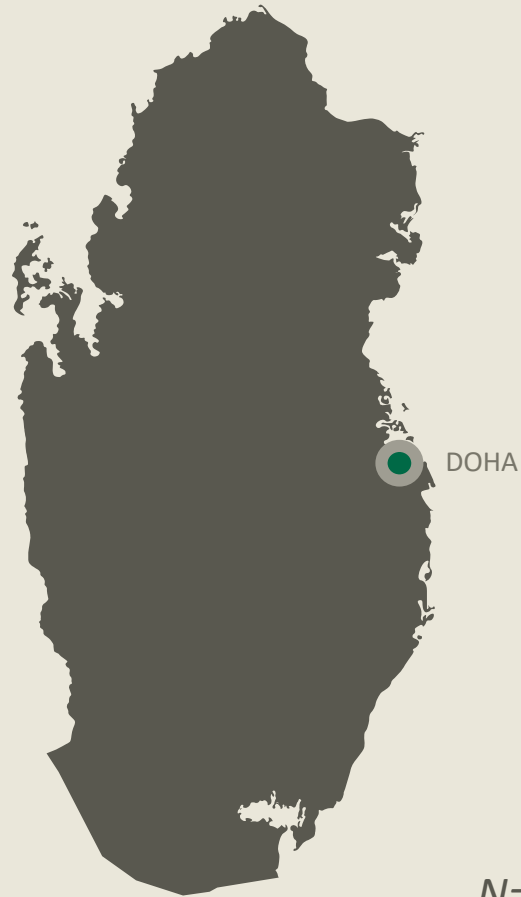
Diverse markets, with some universal truths.

7,800
interviews

- Annual quantitative consumer survey conducted via a 20-minute online interview*
- Surveying consumers about
 - their meat consumption habits and attitudes
 - their perception of Australian beef and lamb versus competitors
 - Drivers of purchase
 - Path to purchase in retail
- 10 markets in 2019
- Historical data allows tracking of trends over time
- Respondents selected are aged 18-64, and both grocery buyers and meal planners for affluent households. They are deliberately pre-selected based on their potential openness to, and ability to purchase, Australian beef and/or lamb, and are not representative of the overall market in each country.



DEMOGRAPHICS



		COUNTRY INCIDENCE	SAMPLE STRUCTURE
Gender	Male	77%	77%
	Female	23%	23%
Age	18-34	53%	53%
	35-49	39%	39%
	50-64	8%	8%
Cities	Doha	72%	100%
Consumption	Buy Fresh Meat at Least Occasionally	-	100%
MGBs	Main Grocery Buyers	-	100%
Children	Households with Children	-	83%
Income	48,000 QAR or under	49%	5%
	48,001 QAR -180,000 QAR	34%	46%
	180,001 QAR or more	17%	49%
Religion	Islam	78%	98%

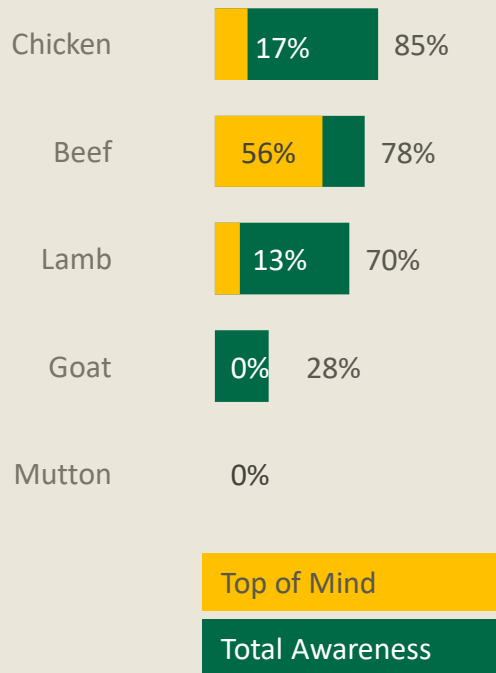


PROTEIN
LANDSCAPE

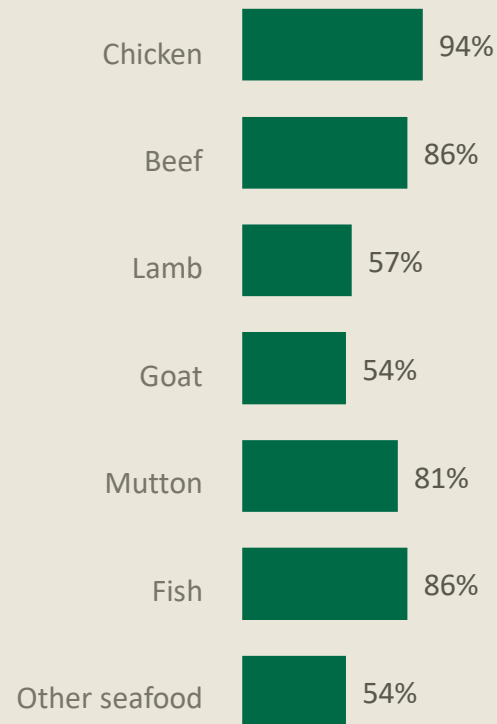
PROTEIN KEY METRICS: Beef, Chicken & Lamb dominate awareness and consumption



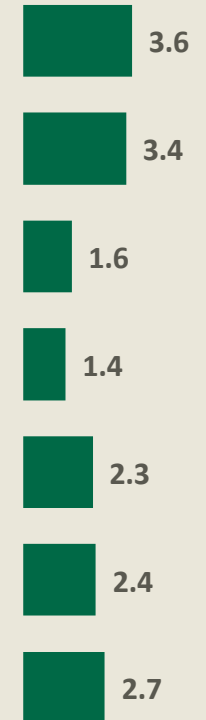
SPONTANEOUS AWARENESS



BOUGHT IN LAST MONTH



AVERAGE SERVES LAST 7 DAYS



WHAT IS IMPORTANT WHEN CHOOSING PROTEIN? When selecting protein, being a family favourite is important everywhere. A favourite doesn't become a favourite overnight, so being easy and convenient to prepare may be key, and there are certainly nuances for some markets e.g. Korea and meal variety; Saudi Arabia and quality standards; USA with superiority .

HIGHEST CORRELATION WITH VOLUME OF PURCHASE

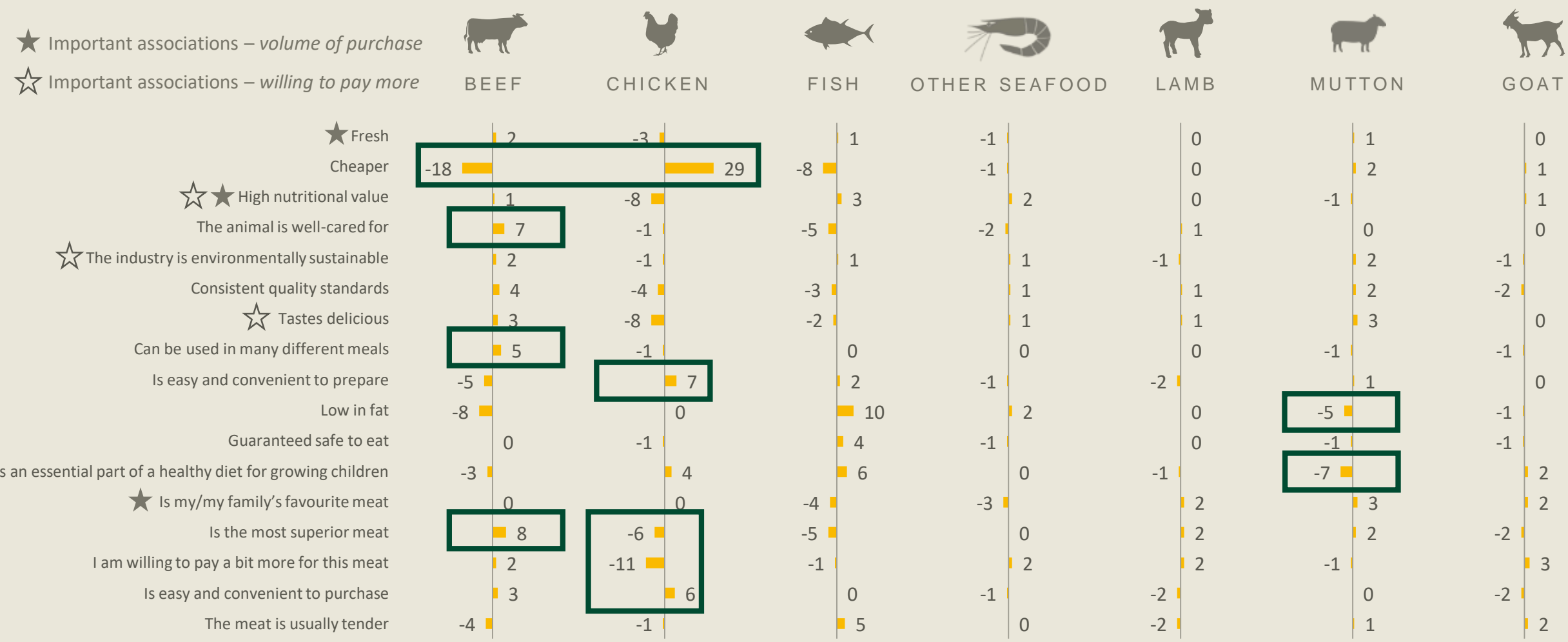
	Japan	Korea	Chinese Mainland	Hong Kong SAR	Singapore	Malaysia	Thailand	Indonesia	Saudi	UAE	Jordan	Qatar	Kuwait	USA	Mexico	Chile	UK
1	Is my/my family's favourite meat	Is easy and convenient to prepare	Is my/my family's favourite meat	Is my/my family's favourite meat	Is my/my family's favourite meat	Is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

WHAT IS IMPORTANT WHEN PAYING A PREMIUM FOR PROTEIN? There are generally four characteristics across markets that are important when consumers seek to pay a premium for their protein: *superiority of product, taste expectations, family appeal and nutrition.*

HIGHEST CORRELATION WITH WILLINGNESS TO PAY MORE

	Japan	Korea	Chinese Mainland	Hong Kong SAR	Singapore	Malaysia	Thailand	Indonesia	Saudi	UAE	Jordan	Qatar	Kuwait	USA	Mexico	Chile	UK
1	Is the most superior meat	Is my/my family's favourite meat	High nutritional value	Is the most superior meat	Is the most superior meat	Tastes delicious	Is the most superior meat	The animal is well-cared for	Is my/my family's favourite meat	Is my/my family's favourite meat	Tastes delicious	Tastes delicious	Is the most superior meat	Is the most superior meat	Tastes delicious	Tastes delicious	Is my/my family's favourite meat
2	Guaranteed safe to eat	Is the most superior meat	Tastes delicious	Is my/my family's favourite meat	Is my/my family's favourite meat	Is the most superior meat	Tastes delicious	Tastes delicious	High nutritional value	High nutritional value	Is my/my family's favourite meat	The industry is environmentally sustainable	High nutritional value	Is my/my family's favourite meat	The animal is well-cared for	Is the most superior meat	Is the most superior meat
3	The animal is well-cared for	Consistent quality standards	Is the most superior meat	Guaranteed safe to eat	Tastes delicious	Is my/my family's favourite meat	Consistent quality standards	Consistent quality standards	Tastes delicious	The industry is environmentally sustainable	Is the most superior meat	High nutritional value	Is my/my family's favourite meat	Consistent quality standards	Is the most superior meat	Fresh	Tastes delicious
4	The meat is usually tender	High nutritional value	The industry is environmentally sustainable	High nutritional value	Consistent quality standards	The animal is well-cared for	High nutritional value	Is the most superior meat	Fresh	Is easy and convenient to prepare	High nutritional value	Is the most superior meat	Tastes delicious	Tastes delicious	High nutritional value	Is my/my family's favourite meat	The meat is usually tender
5	Fresh	Tastes delicious	Is my/my family's favourite meat	Tastes delicious	High nutritional value	High nutritional value	Is my/my family's favourite meat	Is my/my family's favourite meat	Is the most superior meat	The meat is usually tender	Guaranteed safe to eat	The animal is well-cared for	Consistent quality standards	The meat is usually tender	Consistent quality standards	The meat is usually tender	The animal is well-cared for

PROTEIN IMAGE PROFILES – Beef is regarded as the superior meat, expensive, can be used in different meals, and well cared for. Chicken is cheap, easy to prepare and purchase. Lamb has a very unclear profile whereas Mutton is associated with being fatty and weakly associated with being an essential part of a growing child’s diet.



BEEF

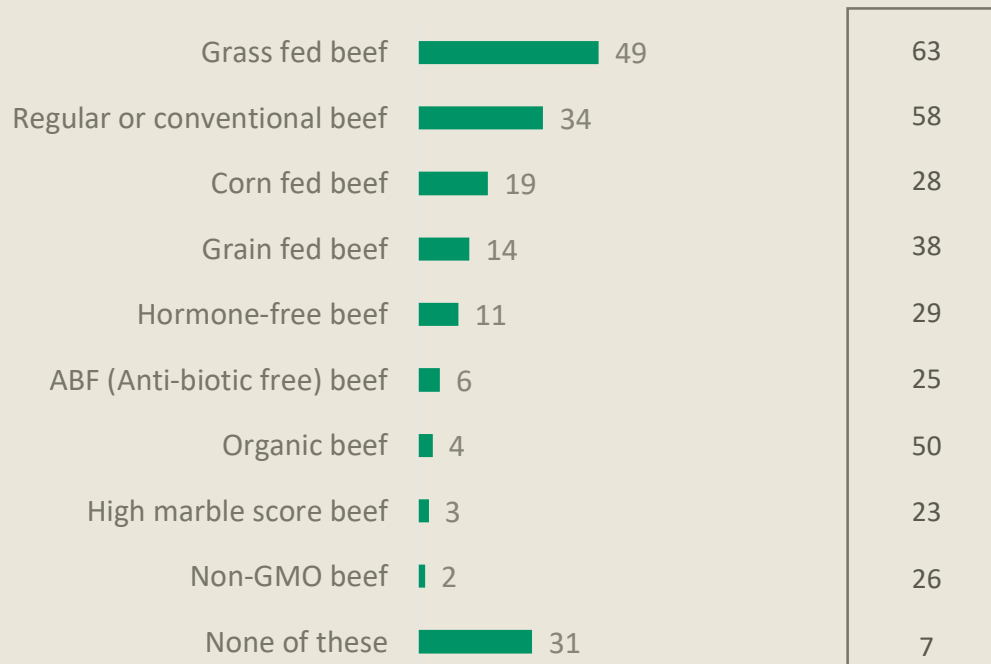
DEEP DIVE



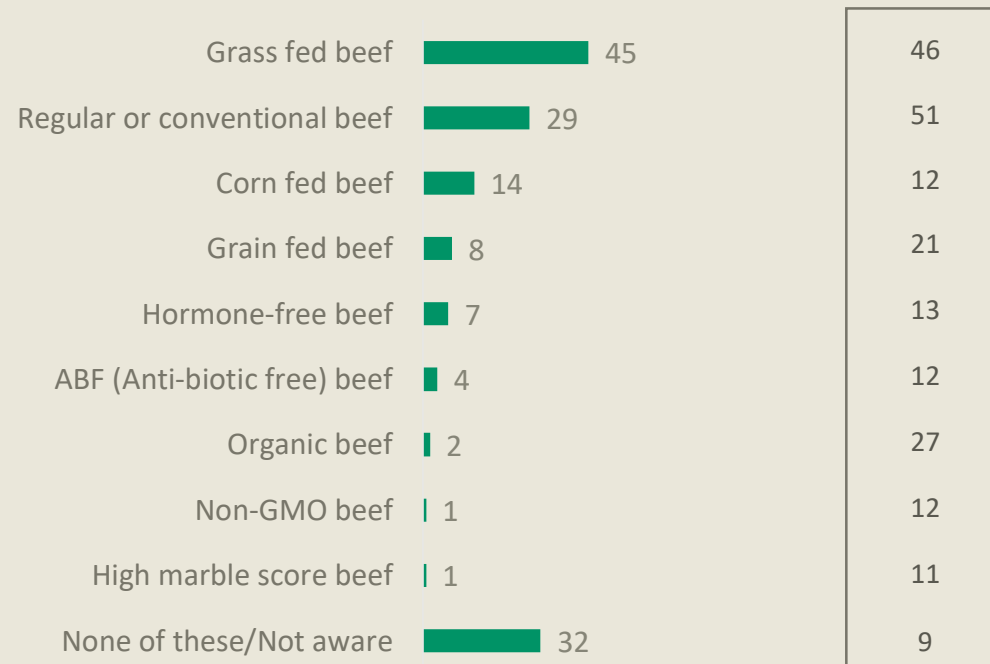


AWARENESS AND PURCHASE OF BEEF TYPES

AWARENESS OF TYPES OF BEEF (%)



BEEF BOUGHT IN THE PAST (%)



Global Average



IMAGE PROFILES – TYPES OF BEEF





BEEF COUNTRY OF ORIGIN

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



BEEF BUYERS – KEY STATISTICS

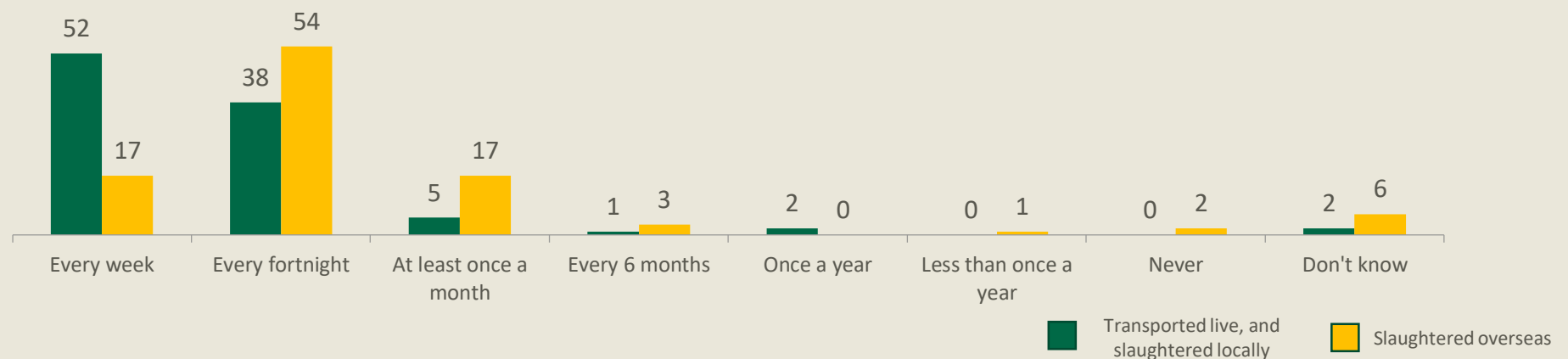


99%

95%

88%

FREQUENCY OF BUYING IMPORTED BEEF



(CH3) Do you ever buy beef? (Rebased to total – n=500)
 (GF3B) Do you know the country of origin of the beef you buy? n=493
 (GF3C) Do you know which country the beef you buy is slaughtered, cut and packaged in? n=493
 (CH4A) How often do you buy the following types of imported Halal compliant beef? n=493
 Consideration of imported beef *base too low – (CH5) Would you ever consider buying imported beef?

Following Slide:
 Base too low for BBH10 (Barriers to Australian Beef)



DRIVERS OF POWER – Goodness, High Quality and Superior are the most important factors in consumers minds when thinking about beef. Profiles of all COO competitors are not distinct, including AU beef other than easy to purchase and not cheap. Local beef has the strongest profile, having stronger associations with freshness, nutritious and sustainability.

DRIVERS OF POWER
(ranked top to bottom)



	AUSTRALIAN BEEF	LOCAL BEEF	AMERICAN BEEF	INDIAN BEEF / BUFFALO MEAT	NEW ZEALAND BEEF	CANADIAN BEEF	BRAZILIAN BEEF	SOUTH AFRICAN BEEF	PAKISTANI BEEF
GOODNESS 30%									
The animal is well-cared for	-2	1	3	1	2	0	0	-1	-6
The meat is usually tender	-3	1	0	2	0	1	-1	-1	0
Fresh	-4	4	0	2	0	1	-2	-1	-3
More nutritious	2	4	-1	1	1	0	-1	-1	0
The fat is nicely marbled	7	0	1	-2	-1	1	0	0	-2
Guaranteed safe to eat	-4	-2	-1	0	-1	-1	-5	2	-6
HIGH QUALITY 23%									
The industry is environmentally sustainable	-1	9	1	-2	1	0	0	0	5
Offers a variety of cuts that suit the meals I make	-4	1	1	1	2	2	-1	-1	2
Consistent quality standards	-1	3	1	1	2	-2	2	-1	2
I trust that this beef is slaughtered according to sharia law and is therefore Halal	-4	-1	-3	0	0	0	-3	1	-4
SUPERIOR 20%									
Is the most superior beef	0	3	1	-1	3	0	1	-1	-2
Is my/my family's favourite beef	1	-2	1	1	3	-1	1	-1	1
LOW FAT 15%									
Low in fat	-3	4	-1	-2	2	0	3	0	-1
CONVENIENCE 12%									
Is easy and convenient to purchase	9	0	0	1	-2	-1	2	-1	3
CHEAP 0%									
Cheaper	21	-28	-1	0	-4	0	3	1	9

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=259) 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.



DRIVERS OF PREMIUM – Goodness and High Quality also drive perceptions of premium for beef. In this market there is little distinction in consumers minds regarding their view of everyday consumption of beef vs drivers of premium. The factors driving premium are the same for power, it is just their comparative size of factors that marginally shift.



DRIVERS OF PREMIUM
(ranked top to bottom)

	AUSTRALIAN BEEF	LOCAL BEEF	AMERICAN BEEF	INDIAN BEEF / BUFFALO MEAT	NEW ZEALAND BEEF	CANADIAN BEEF	BRAZILIAN BEEF	SOUTH AFRICAN BEEF	PAKISTANI BEEF
GOODNESS 26%									
The animal is well-cared for	-2	1	3	1	2	0	0	-1	-6
The meat is usually tender	-3	1	0	2	0	1	-1	-1	0
Fresh	-4	4	0	2	0	1	-2	-1	-3
More nutritious	2	4	-1	1	1	0	-1	-1	0
The fat is nicely marbled	-7	0	1	-2	-1	1	0	0	-2
Guaranteed safe to eat	-4	-2	-1	0	-1	-1	-5	2	-6
HIGH QUALITY 22%									
The industry is environmentally sustainable	-1	9	1	-2	1	0	0	0	5
Offers a variety of cuts that suit the meals I make	-4	1	1	1	2	2	-1	-1	2
Consistent quality standards	-1	3	1	1	2	-2	2	-1	2
I trust that this beef is slaughtered according to sharia law and is therefore Halal	-4	-1	-3	0	0	0	-3	1	-4
SUPERIOR 20%									
Is the most superior beef	0	3	1	-1	3	0	1	-1	-2
Is my/my family's favourite beef	1	-2	1	1	3	-1	1	-1	1
CONVENIENCE 14%									
Is easy and convenient to purchase	9	0	0	1	-2	-1	2	-1	3
LOW FAT 13%									
Low in fat	-3	4	-1	-2	2	0	3	0	-1
CHEAP 8%									
Cheaper	21	-28	-1	0	-4	0	3	1	9

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=259) 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.



BEEF DRIVERS TO POWER & PREMIUM



POWER



PREMIUM

1. GOODNESS	30%	1. GOODNESS	26%
2. HIGH QUALITY	23%	2. HIGH QUALITY	22%
3. SUPERIOR	20%	3. SUPERIOR	20%
4. LOW FAT	15%	4. CONVENIENCE	14%
5. CONVENIENCE	12%	5. LOW FAT	13%
6. CHEAP	0%	6. CHEAP	8%

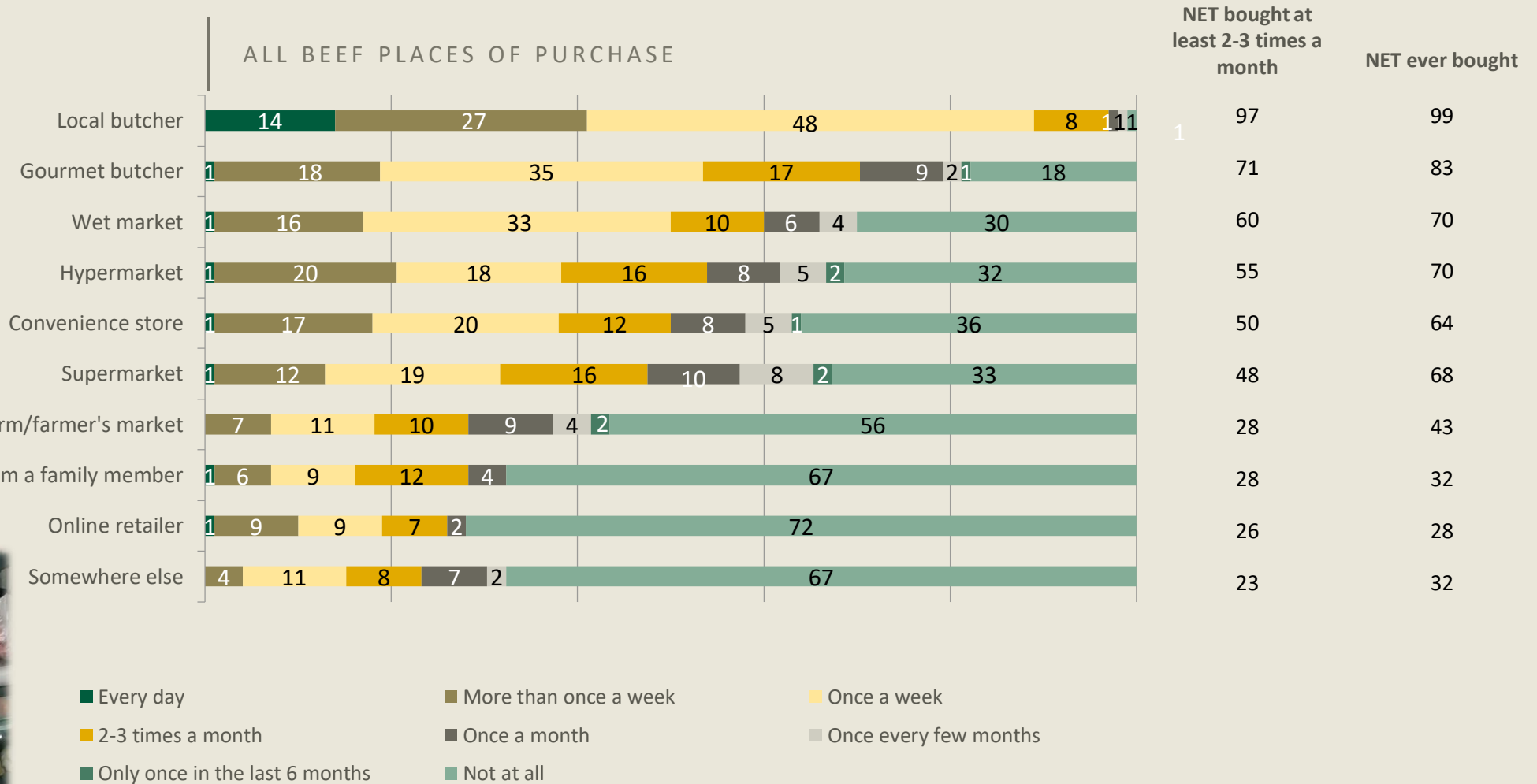
POINT OF PURCHASE





BEEF PLACES OF PURCHASE

The butcher (local & gourmet), wet market and Hypermarket are the most frequented places for beef purchase followed by the convenience store.



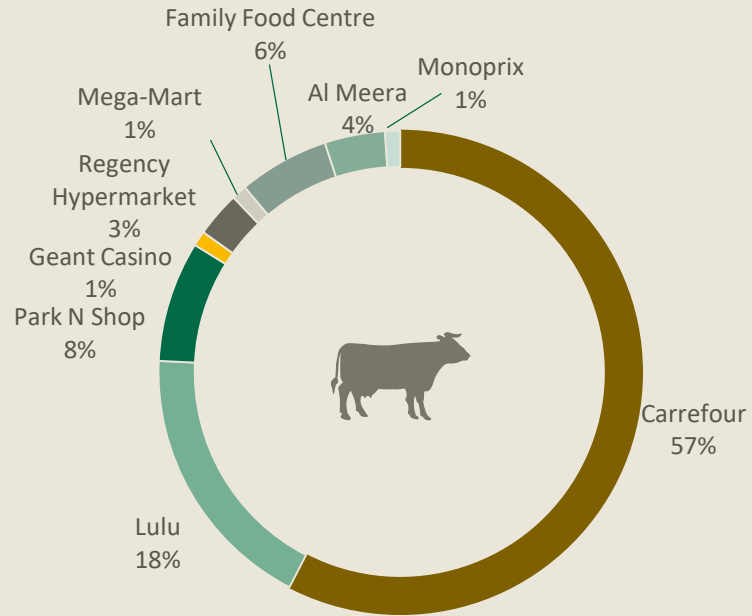


BEEF - MOST COMMON PLACES OF PURCHASE

SUPERMARKET

NET bought at least once a month

58

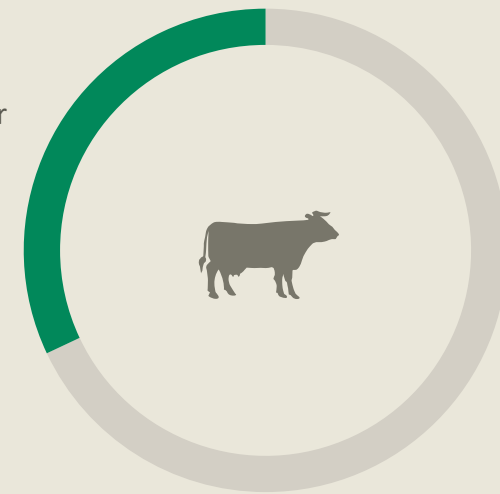


HYPERMARKET

63

Other 32%

Geant / Al Meera 68%

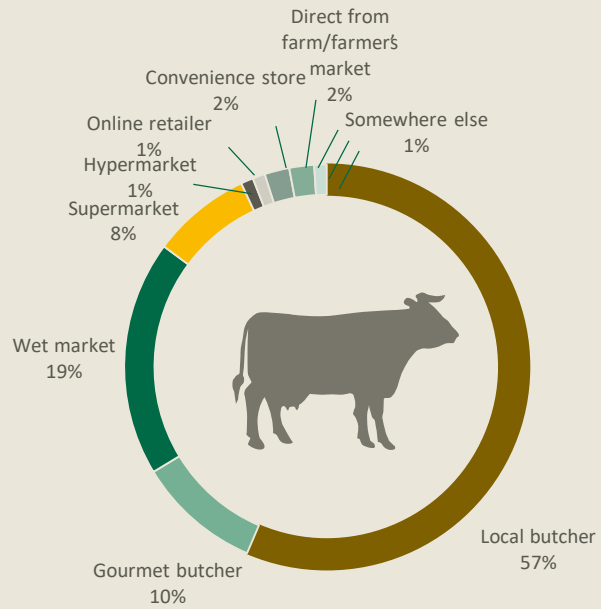




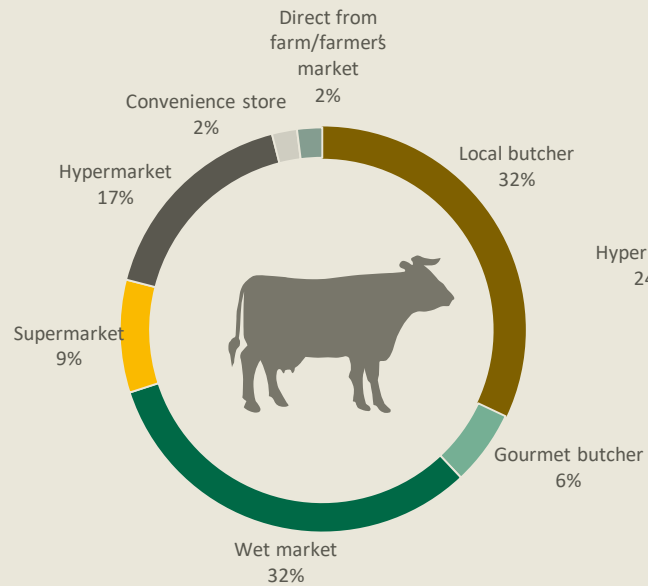
BEEF PLACES OF PURCHASE – BY COUNTRY OF ORIGIN

MAIN PLACE OF PURCHASE OF:

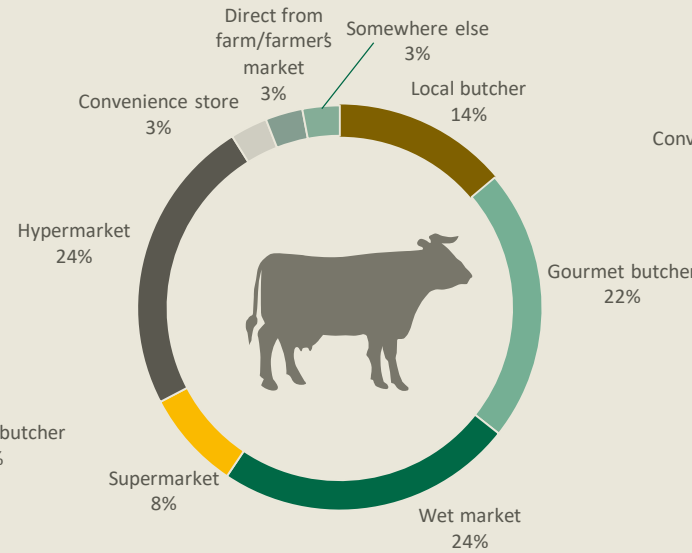
LOCAL BEEF



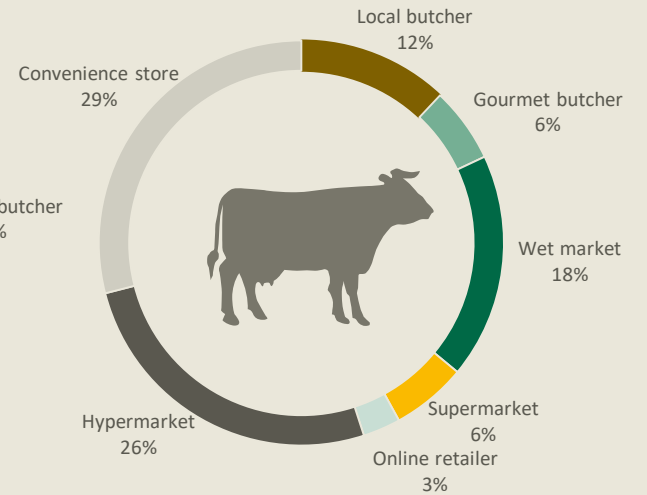
AUSTRALIAN BEEF



NEW ZEALAND BEEF



AMERICAN BEEF



BARRIERS TO PURCHASING BEEF ONLINE

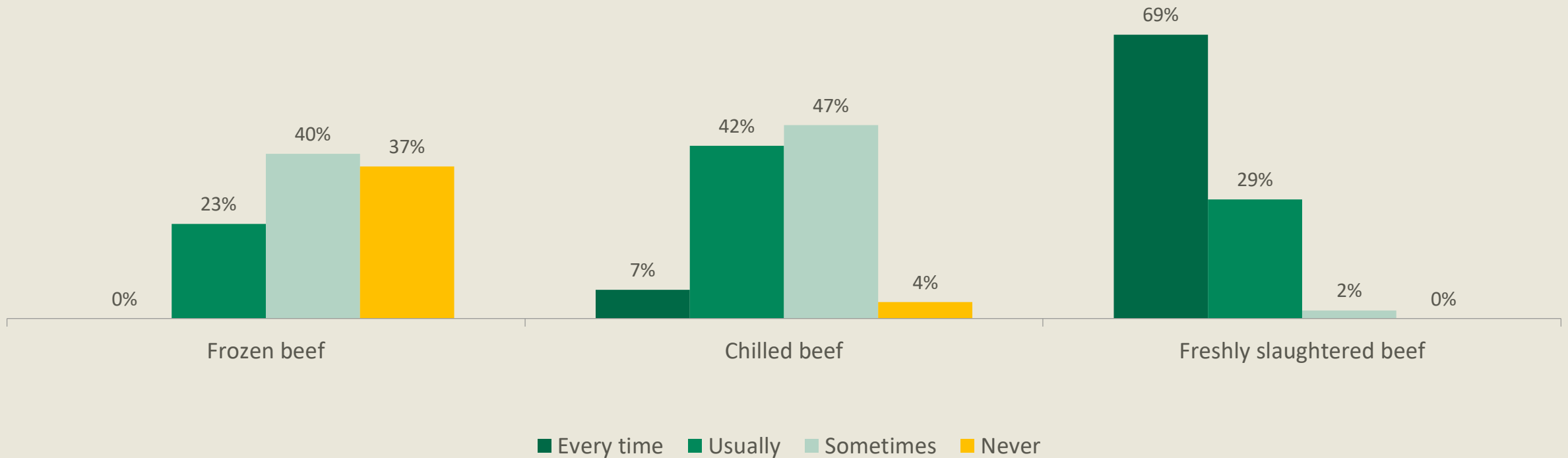
MAIN REASONS FOR NOT BUYING FROM AN ONLINE RETAILER





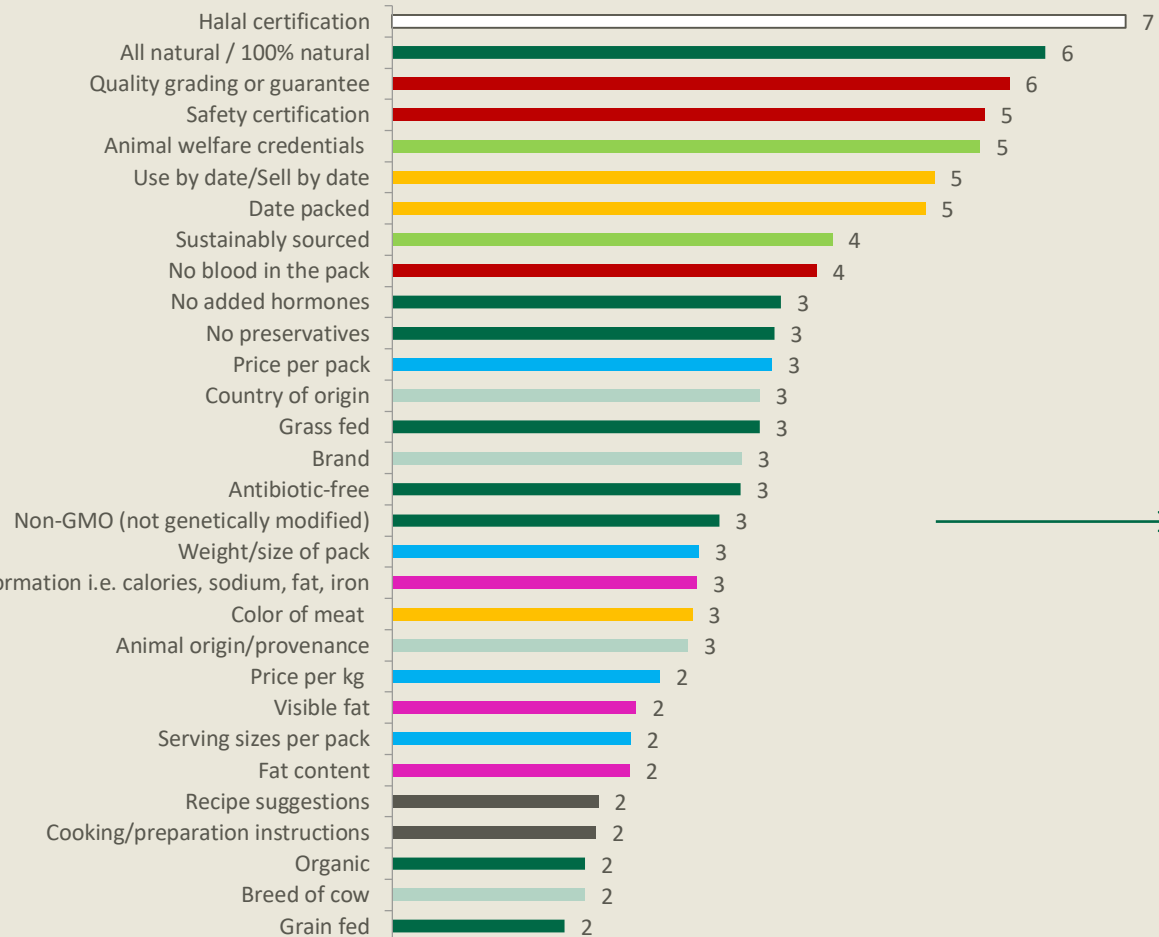
BEEF - COMPARING FROZEN, CHILLED AND FRESHLY SLAUGHTERED

HOW OFTEN YOU BUY THOSE TYPES OF BEEF



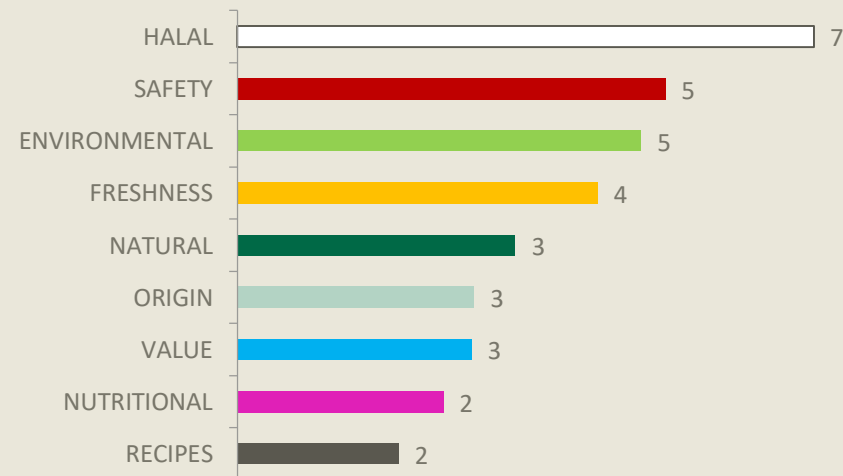
BEEF CLAIMS & THEMES IMPORTANCE – ON PACK OR AT SHELF

Claims – ranked by Relative Importance




The most important areas for Qatar BEEF buyers are around the core themes of *Halal, safety, environment and fresh*. Claims around these areas are most likely to motivate consumers to choose BEEF

Themes



Base: Total (n=251)

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?



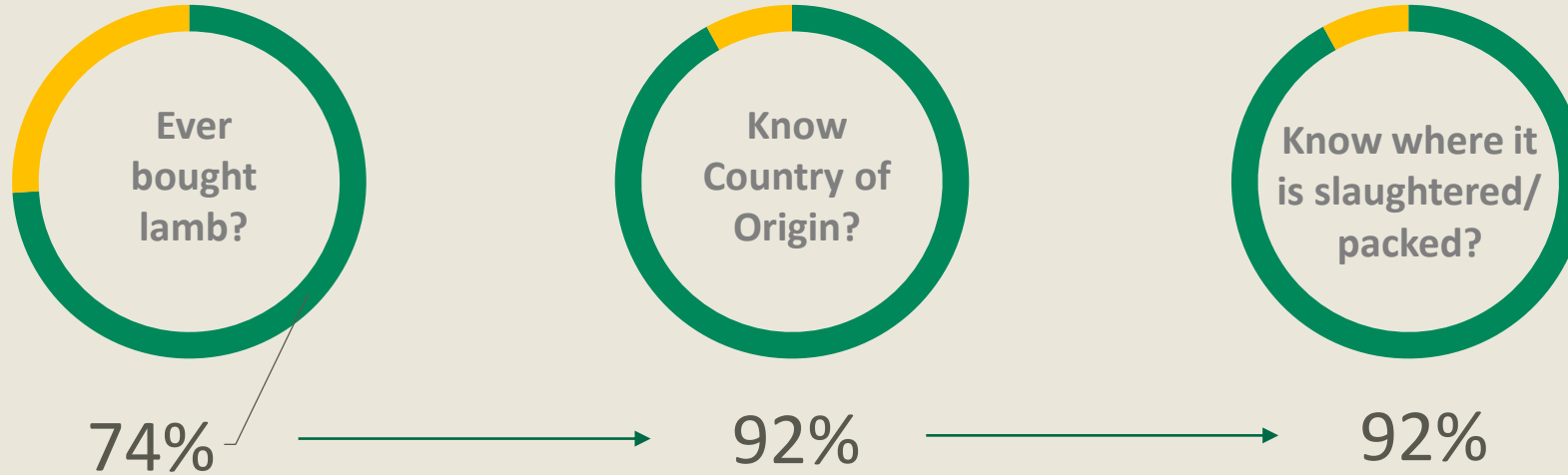
LAMB

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.



LAMB BUYERS – KEY STATISTICS



FREQUENCY OF BUYING IMPORTED LAMB



(CH6) Do you ever buy lamb? (Rebased to total – n=500)
 (LBH1A) Do you know the country of origin of the lamb you buy? (n=368)
 (CH7) How often do you buy imported lamb? (n=368)
 (LBH1b) Do you know which country the lamb you buy is slaughtered, cut and packaged in?(n=368)

Following Slide:
 Base too low for LBH10 (Barriers to Australian Lamb)



LOCAL LAMB DEFINITION

Lamb that is...

Lamb that is raised overseas, transported live, and slaughtered locally



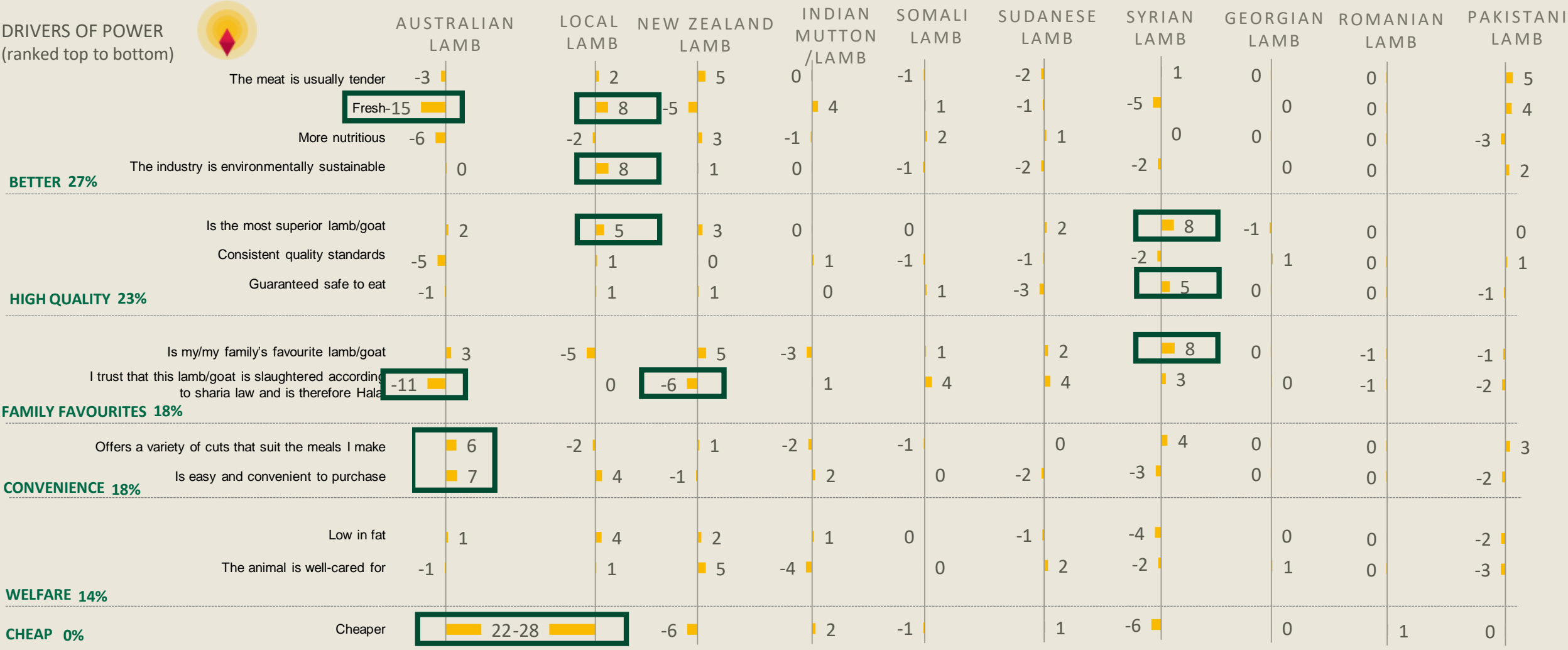
Lamb that is both raised and slaughtered locally



■ YES ■ NO



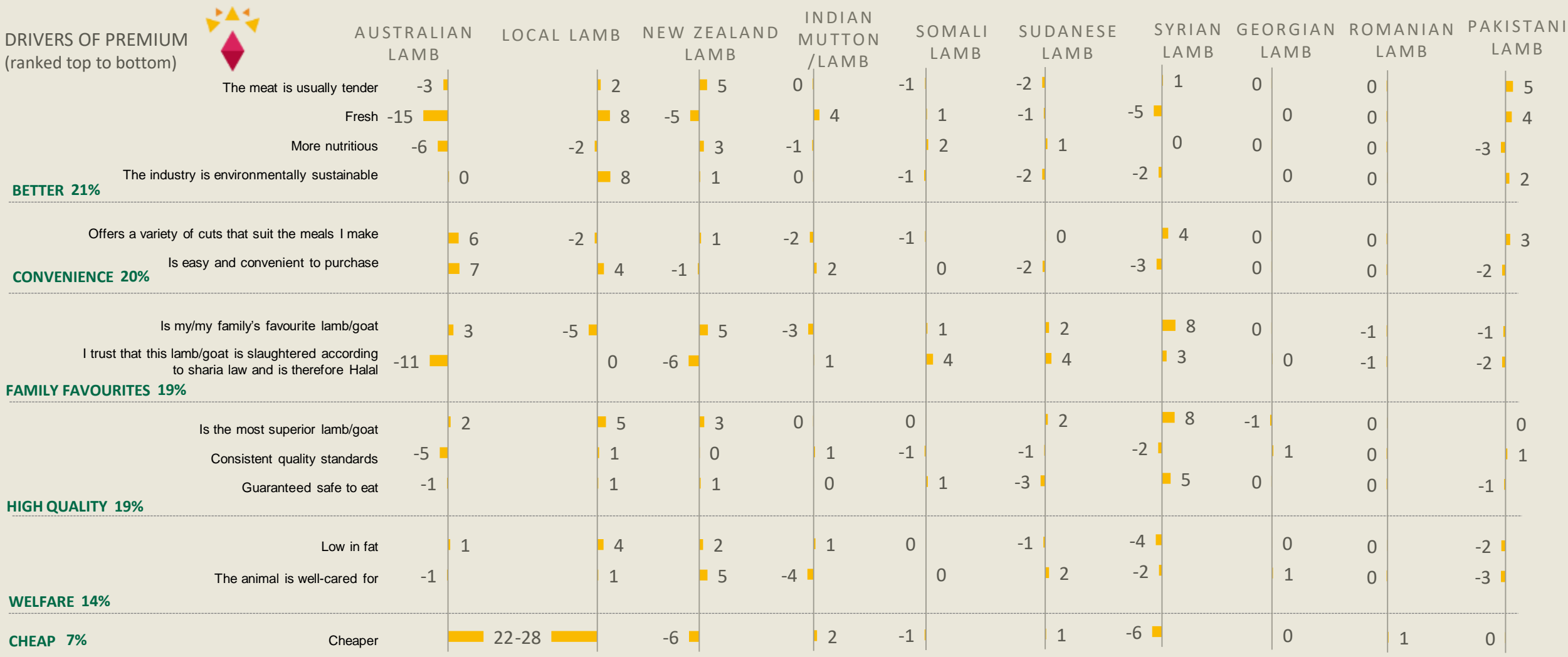
DRIVERS OF POWER - Better and High Quality drive share of mind when consumers think about lamb. Local lamb has the strongest associations with freshness, sustainable industry and superior. Australian lamb has a positive association with offering cuts that suit meal preparation, convenient to purchase and is cheaper. NZ lamb is associated with tenderness, a family favourite and animal welfare.



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=241) 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.



DRIVERS OF PREMIUM – Better and Convenience drive perceptions of premium for lamb. In this market there is little distinction in consumers minds regarding their view of everyday consumption of lamb vs drivers of premium. As for beef, the factors driving premium are the similar for power, it is just their comparative size of factors that marginally shift.



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=241) 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.



LAMB DRIVERS TO POWER & PREMIUM



POWER



PREMIUM

1. BETTER	27%	1. BETTER	21%
2. HIGH QUALITY	23%	2. CONVENIENCE	20%
3. FAMILY FAVOURITES	18%	3. FAMILY FAVOURITES	19%
4. CONVENIENCE	18%	4. HIGH QUALITY	19%
5. WELFARE	14%	5. WELFARE	14%
6. CHEAP	0%	6. CHEAP	7%

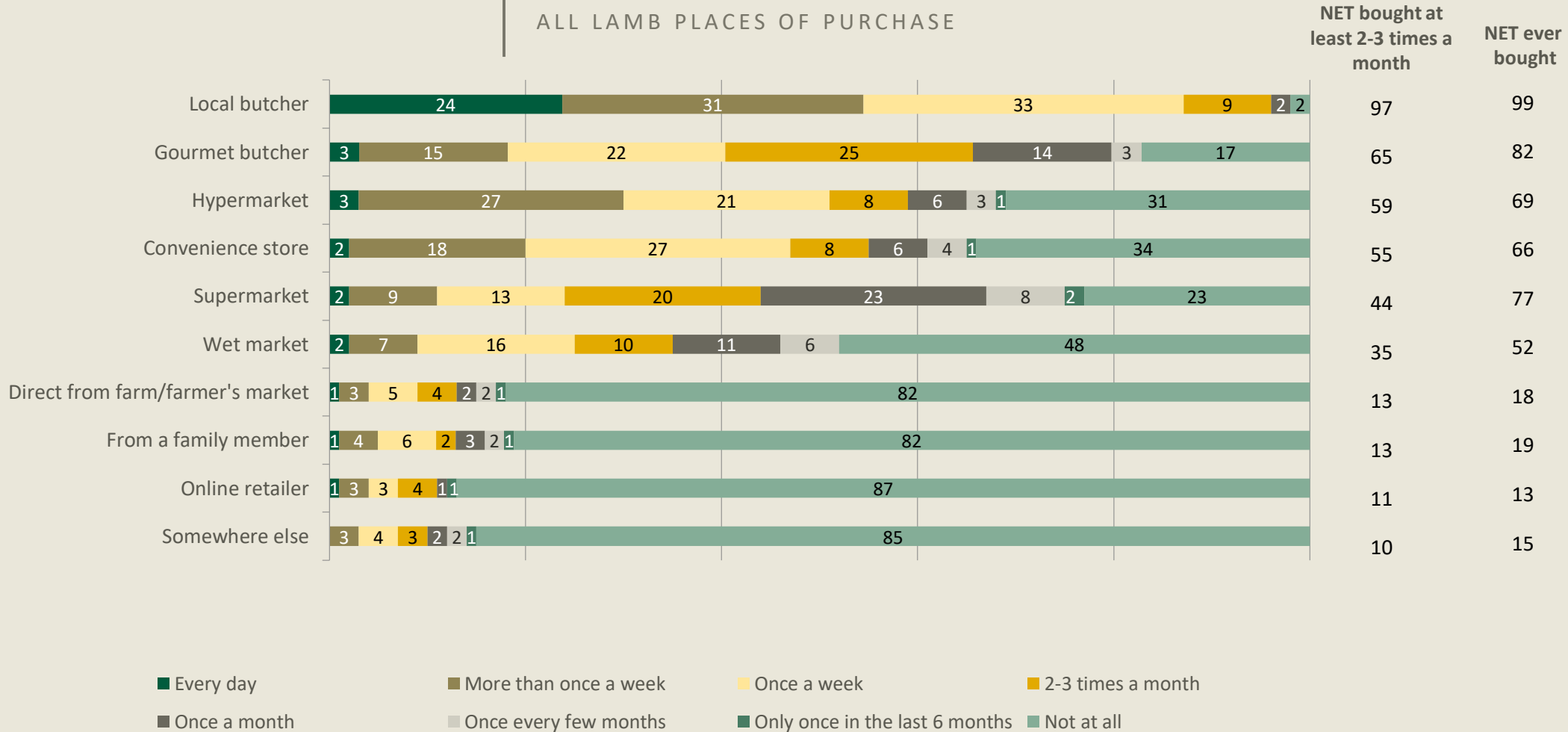
POINT OF PURCHASE





LAMB PLACES OF PURCHASE

ALL LAMB PLACES OF PURCHASE



The local butcher, gourmet butcher, Hypermarket and convenience store are the most frequented places for lamb purchase.

*Caution : Low base

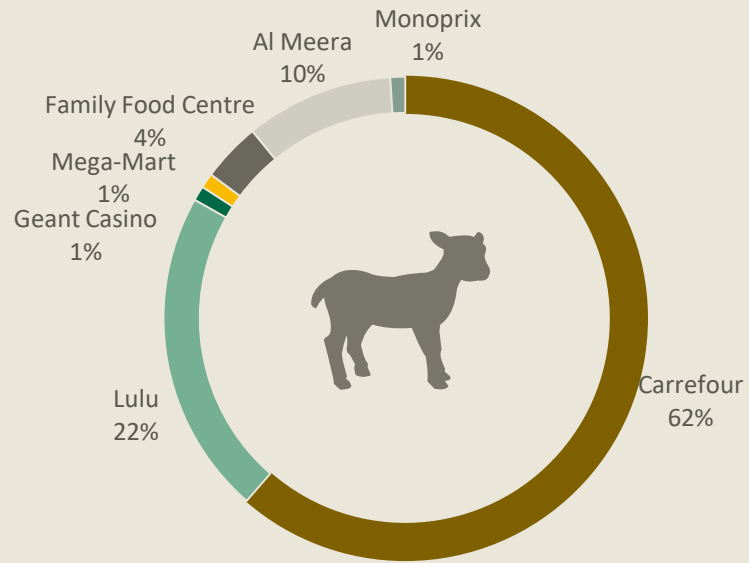


LAMB MOST COMMON PLACES OF PURCHASE

SUPERMARKET

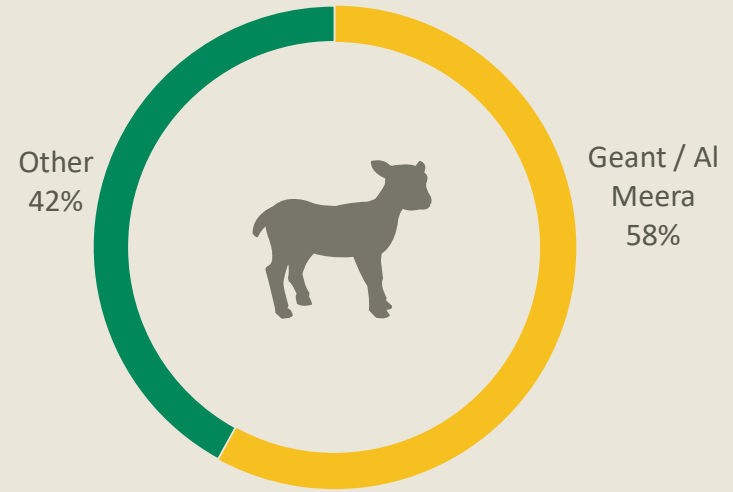
NET bought at least once a month

67



HYPERMARKET

65

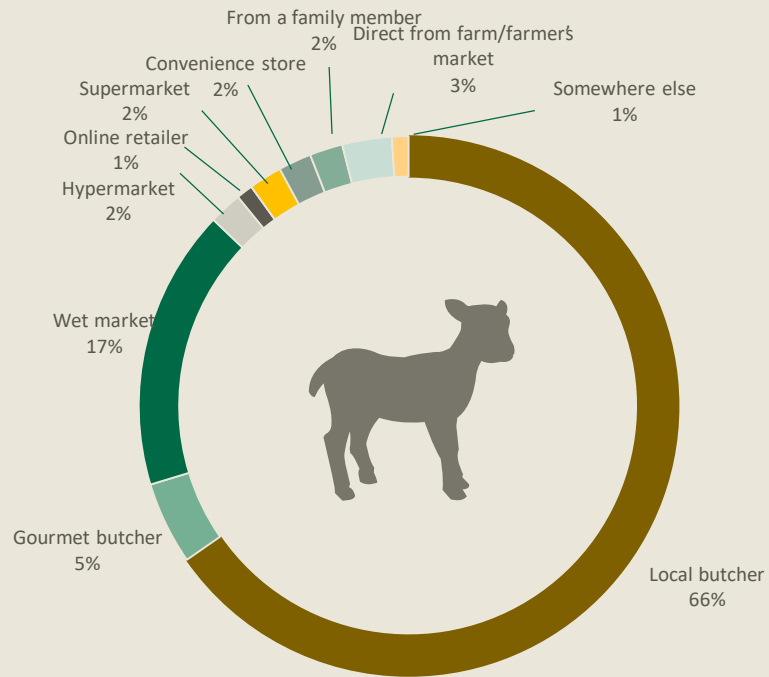




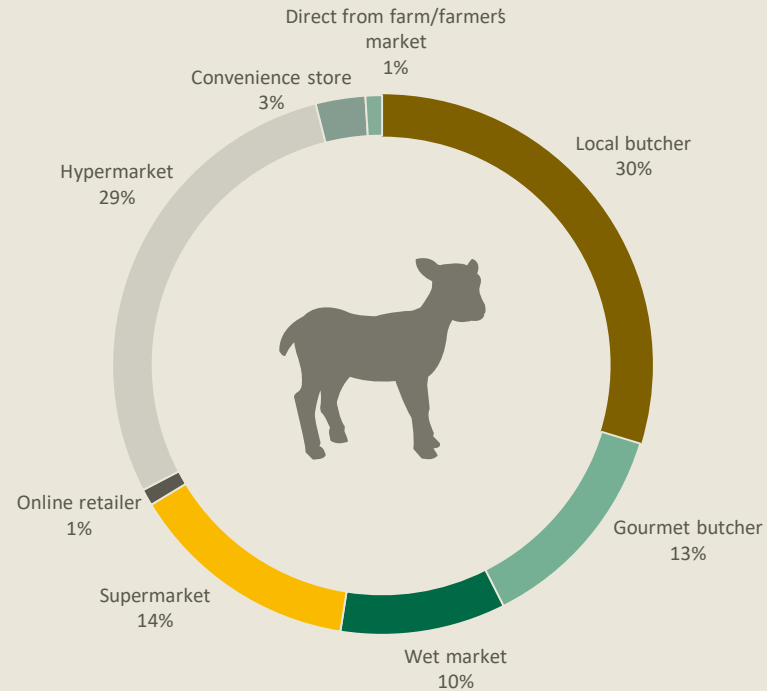
LAMB PLACES OF PURCHASE – BY COUNTRY OF ORIGIN

MAIN PLACE OF PURCHASE OF:

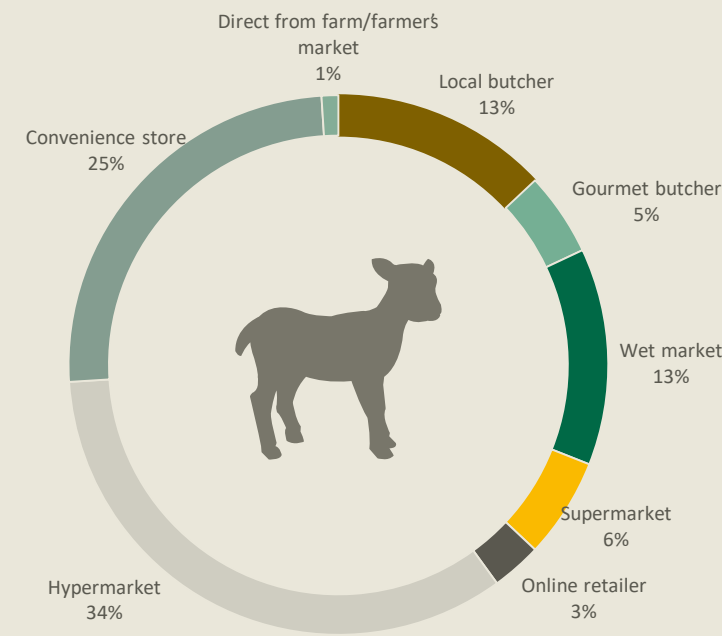
LOCAL LAMB



AUSTRALIAN LAMB

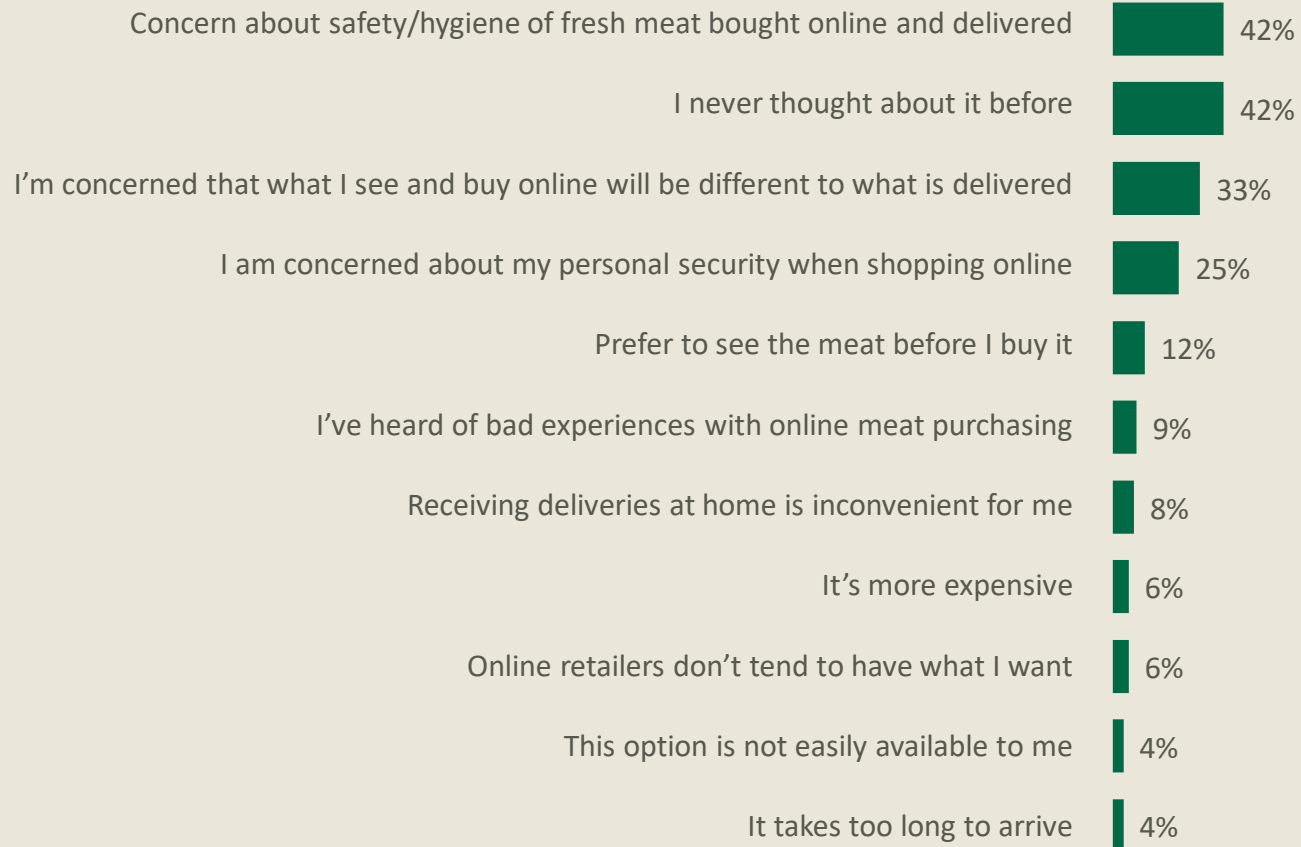


NEW ZEALAND LAMB



BARRIERS TO PURCHASING LAMB ONLINE

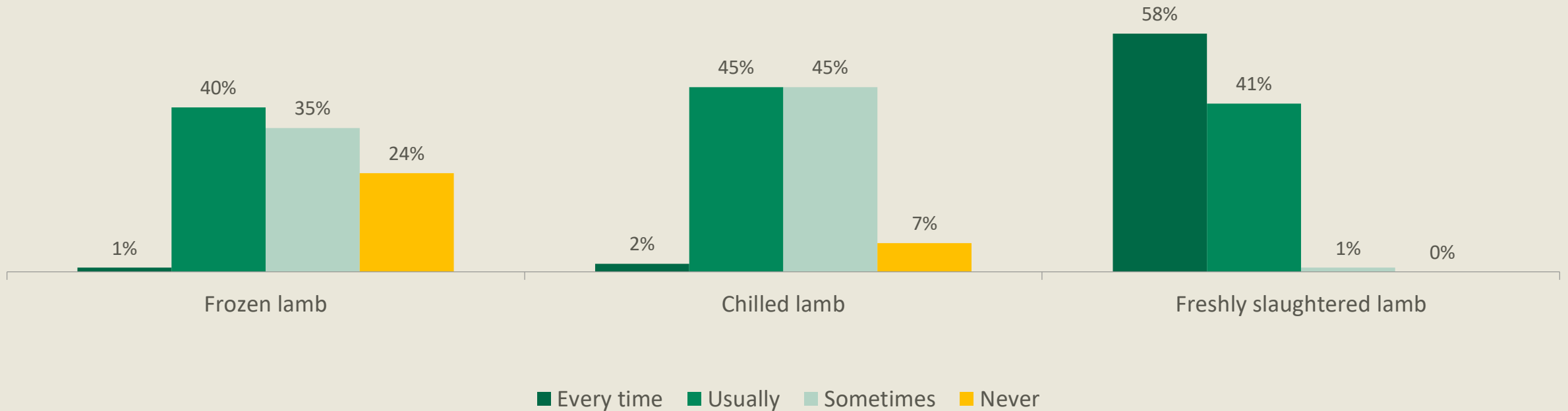
MAIN REASONS FOR NOT BUYING FROM AN ONLINE RETAILER





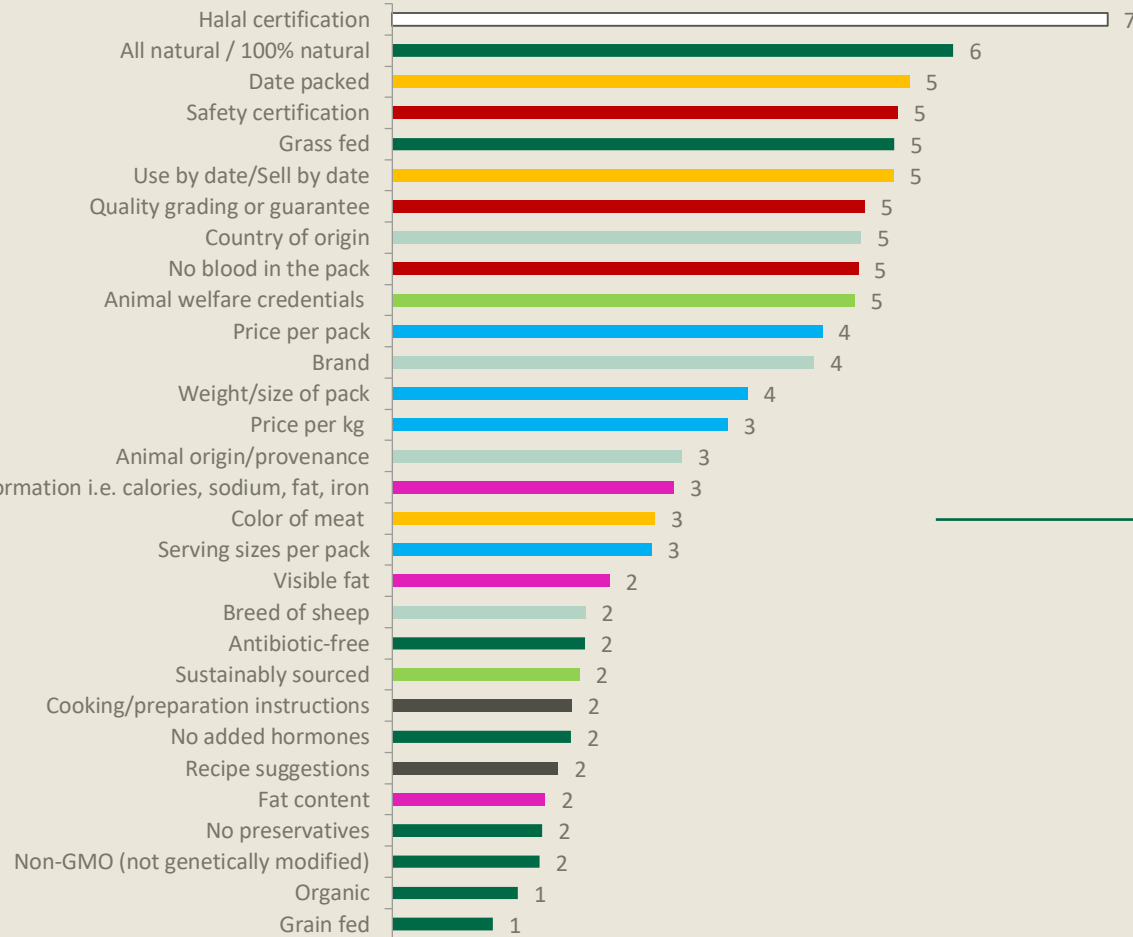
LAMB - COMPARING FROZEN, CHILLED AND FRESHLY SLAUGHTERED

HOW OFTEN YOU BUY THOSE TYPES OF LAMB



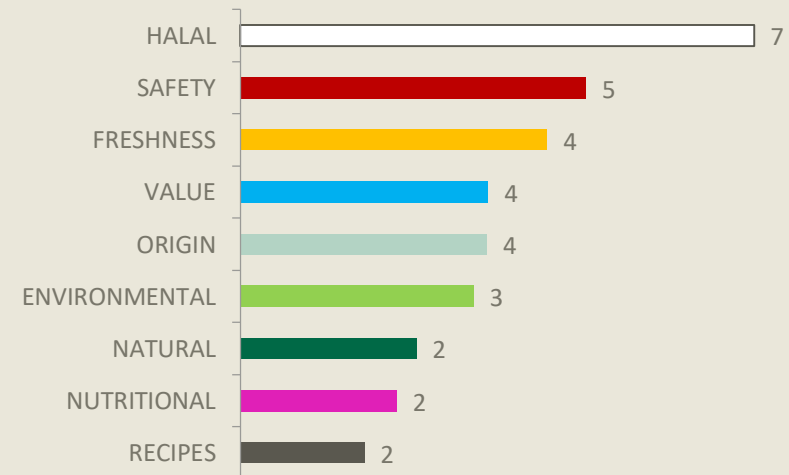
LAMB CLAIMS & THEMES IMPORTANCE – ON PACK OR AT SHELF

Claims – ranked by Relative Importance



The most important areas for LAMB buyers are around the core themes of *Halal, safety and freshness*. Claims around these areas are most likely to motivate consumers to choose LAMB

Themes



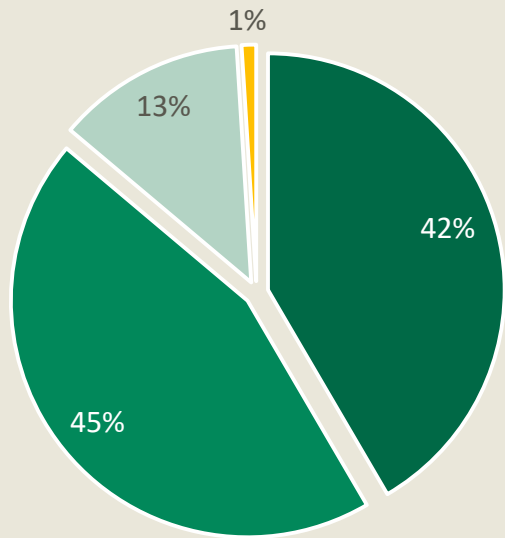
Base: Total (n=249)

QMAX1 LAMB: Please indicate which one is the most likely, and which is the least likely to motivate you to choose / eat LAMB
 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?
 R1b. Approximately how often do you buy lamb?

TRACEABILITY

2019
QATAR

HOW IMPORTANT? 87% Top 2 Box



■ Very important
■ Somewhat important
■ Not very important
■ Not sure

2018

HOW IMPORTANT? (Top 2 Box)



QATAR PRESENTATION - SUMMARY

- Chicken, beef and lamb are the most salient proteins in the Qatar market. Grass fed beef is most familiar beef type to consumers from Qatar, though a third are unfamiliar with any beef type (organic, non-GMO, ABF etc).
- P1M purchase takes in a high variety of proteins, with Chicken and beef having the greatest serves in the past week.
- 'Goodness' is the key driver of power and premium for Beef, with an opportunity for Australia beef to carve out a strength on this factor to grow premium credentials and increase equity/power. Australian beef is currently seen as cheap and convenient, whereas local is fresh and expensive.
- 'Better' credentials help drive premium and power for COO lamb – with Australian Lamb being perceived in line with Australian beef (cheap and convenient).
- Qatar consumers call out packaging as a key marker of quality, followed by the retailer and details of its slaughter (recency and halal).
- The most important on pack indicators Qatar consumers look for is the meat being Halal certified, followed by claims around core themes of being safe & fresh.
- The majority of this market claim to know the country of origin of their beef & lamb including where it was slaughtered/packed.
- Local butchers are key, frequent purchase channel for meat (especially local product), with imported products including Australian Beef lamb and lamb more commonly purchased through hyper and wet markets

APPENDIX

- Reasons why not to buy - Lamb & Goat
- Opportunities to encourage trial
- Attributes importance when selecting between proteins;
- Limitations of meat consumption
- Protein associations to meat type
- Associations to beef types
- Meat substitutes
- Brand health funnels by COO
- COO Propellers
- Drivers to meaning, difference, power & premium
- Power vs. Premium COO Maps
- Repertoire profiling
- True Aussie: awareness, perceptions

