
MLA GLOBAL CONSUMER TRACKER

2019

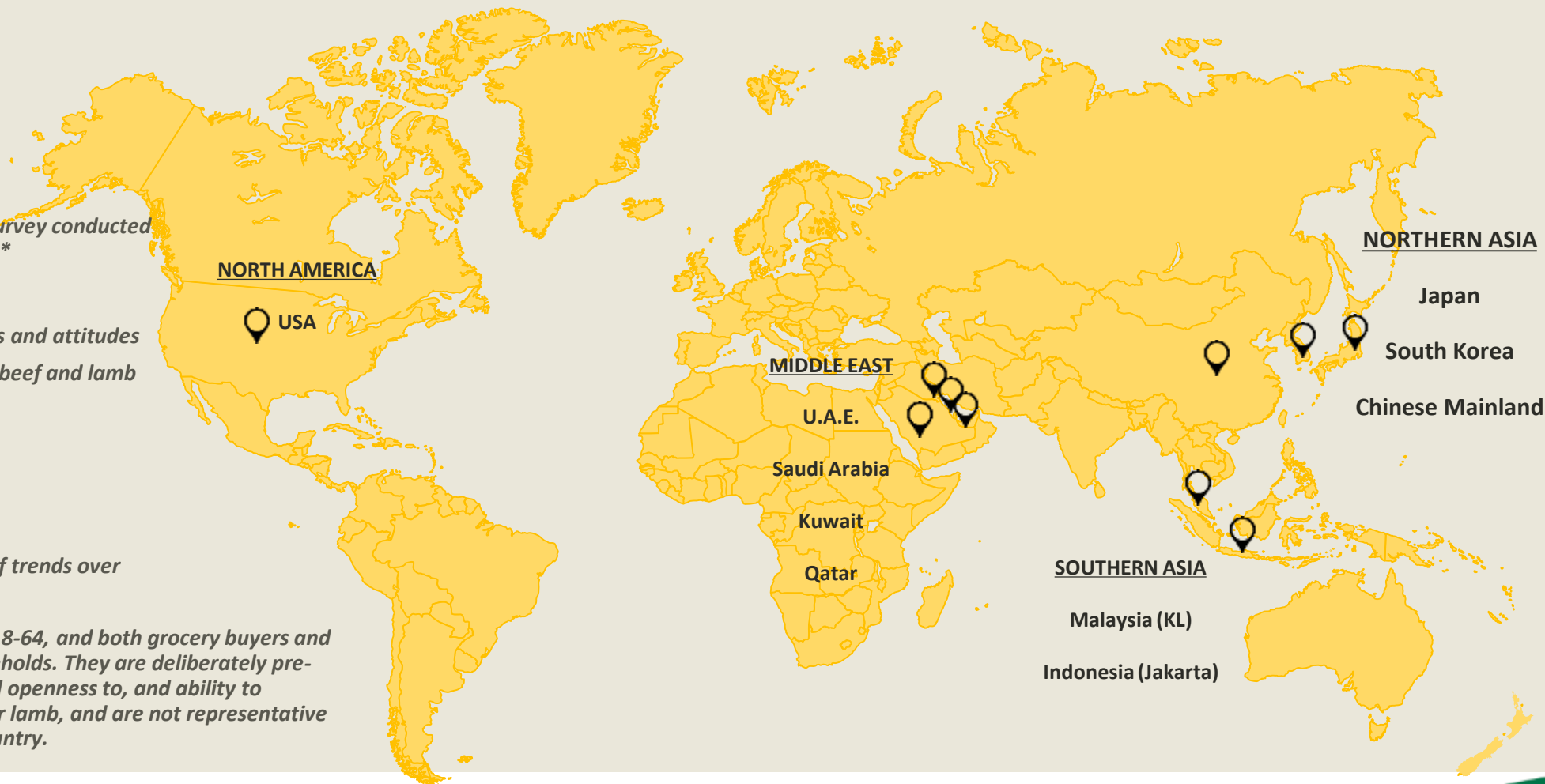


INTRODUCING MLA'S GLOBAL CONSUMER TRACKER

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



N=500

		COUNTRY INCIDENCE	SAMPLE STRUCTURE
Gender	Male	59%	59%
	Female	41%	41%
Age	18-34	52%	52%
	35-49	35%	35%
	50-64	13%	13%
Cities	Kuwait City	83%	100%
Consumption	Buy Fresh Meat at Least Occasionally	-	100%
MGBs	Main Grocery Buyers	-	100%
Children	Households with Children	-	83%
Income	KD 4,800 or under	49%	10%
	4,801KD-18,000KD	34%	40%
	18,001KD- 36,000KD or more	17%	50%
Religion	Islam	85%	87%

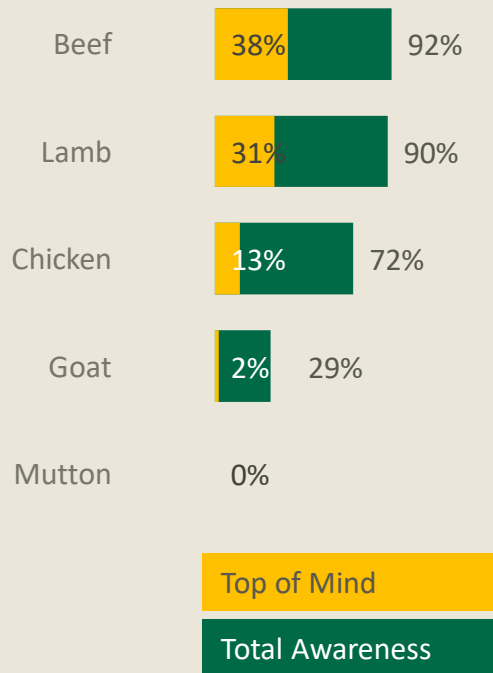


PROTEIN LANDSCAPE

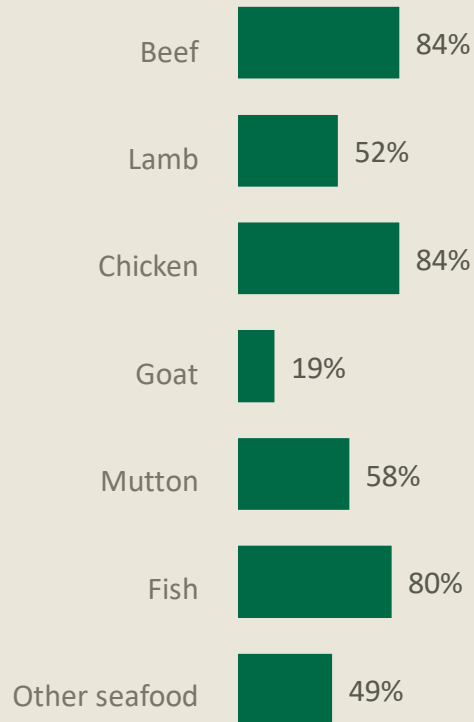
PROTEIN KEY METRICS: Beef, Lamb and Chicken dominate awareness and consumption



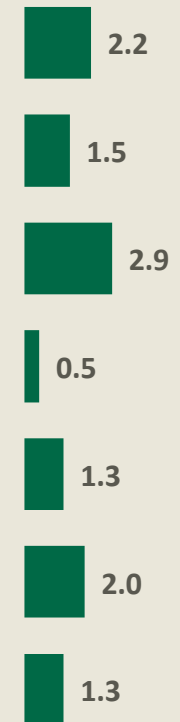
SPONTANEOUS AWARENESS



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

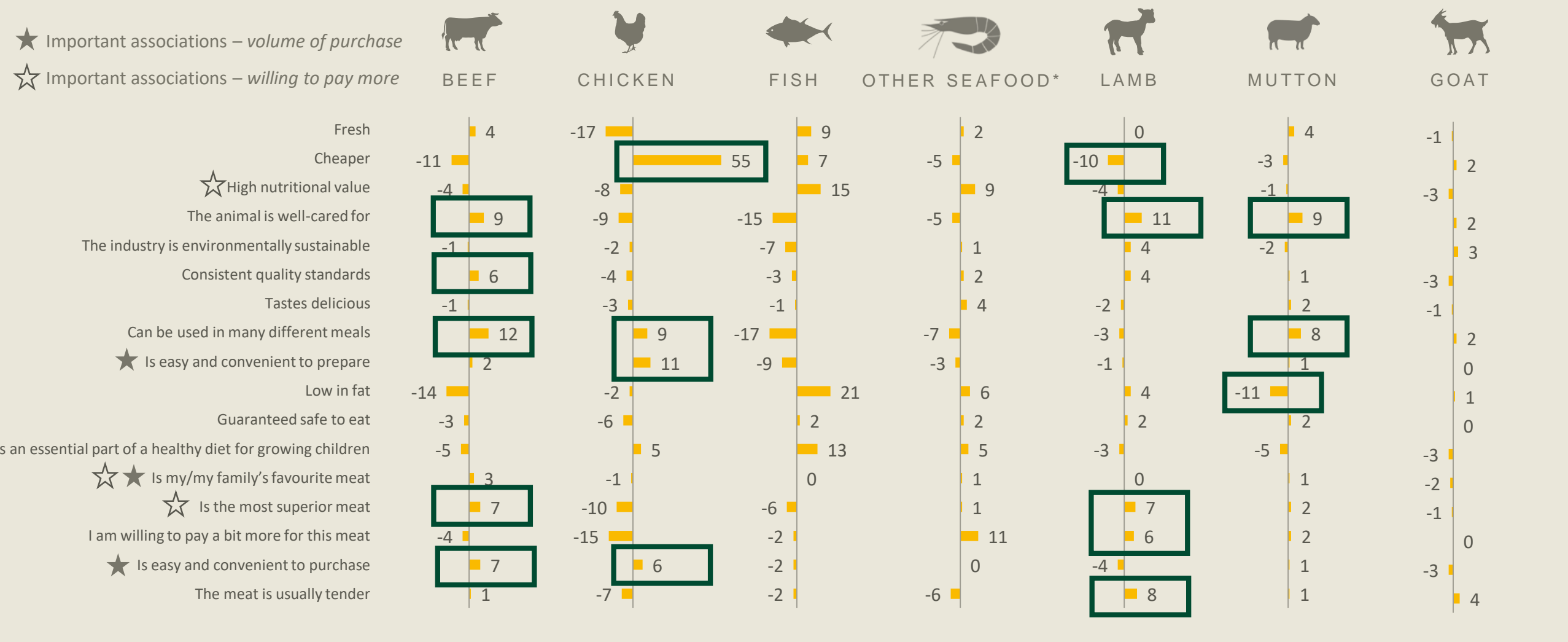
	Japan	Korea	Chinese Mainland	Hong Kong SAR	Singapore	Malaysia	Thailand	Indonesia	Saudi	UAE	Jordan	Qatar	Kuwait	USA	Mexico	Chile	UK
1	Is my/my family's favourite meat	Is easy and convenient to prepare	Is my/my family's favourite meat	Is my/my family's favourite meat	Is my/my family's favourite meat	Is 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 (along with lamb), can be used in different meals, easy to purchase and consistent quality. Lamb is also perceived as tender and there is a willingness to pay more for this protein. Chicken is cheap, easy to prepare and purchase, and can be used in a variety of meals. Mutton is associated with being fatty, well cared for and can be used in different meals.



BEEF

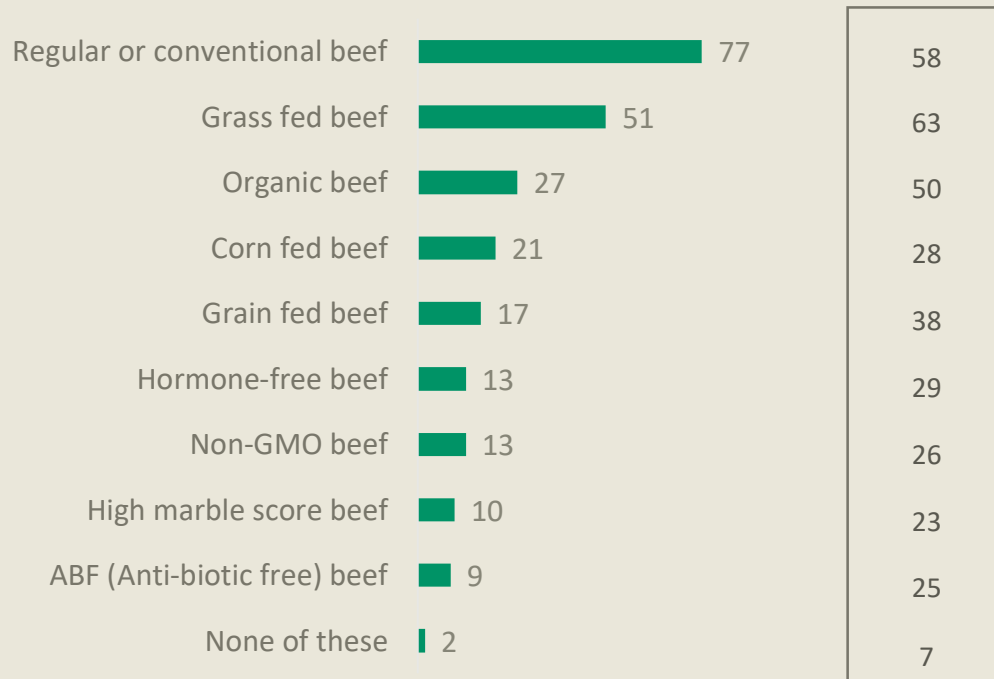
DEEP DIVE



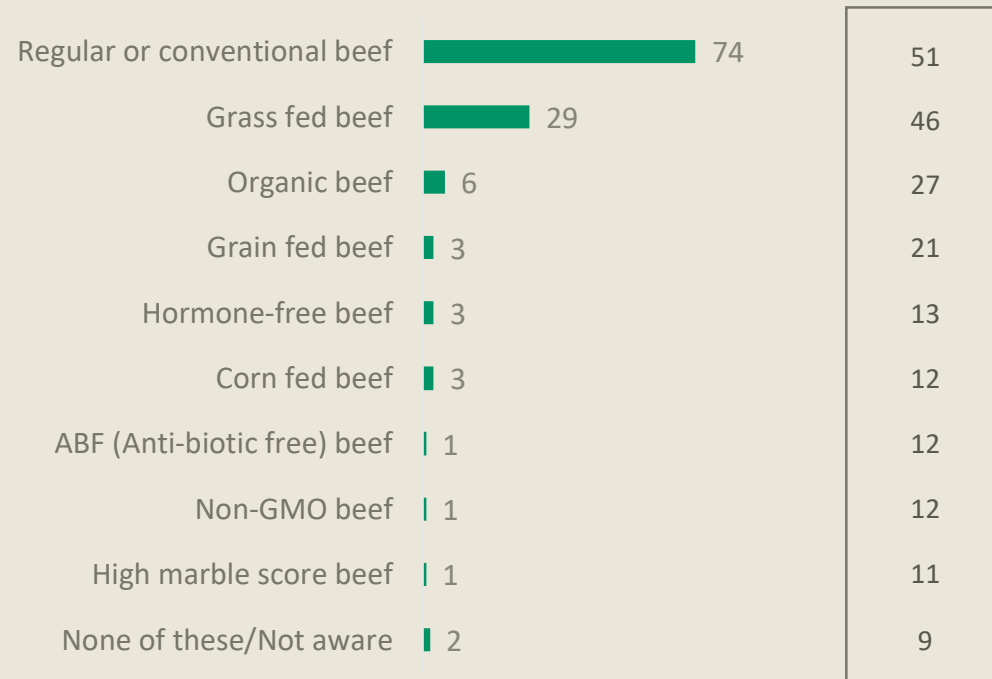


AWARENESS AND PURCHASE OF BEEF TYPES

AWARENESS OF TYPES OF BEEF (%)



BEEF BOUGHT IN THE PAST (%)

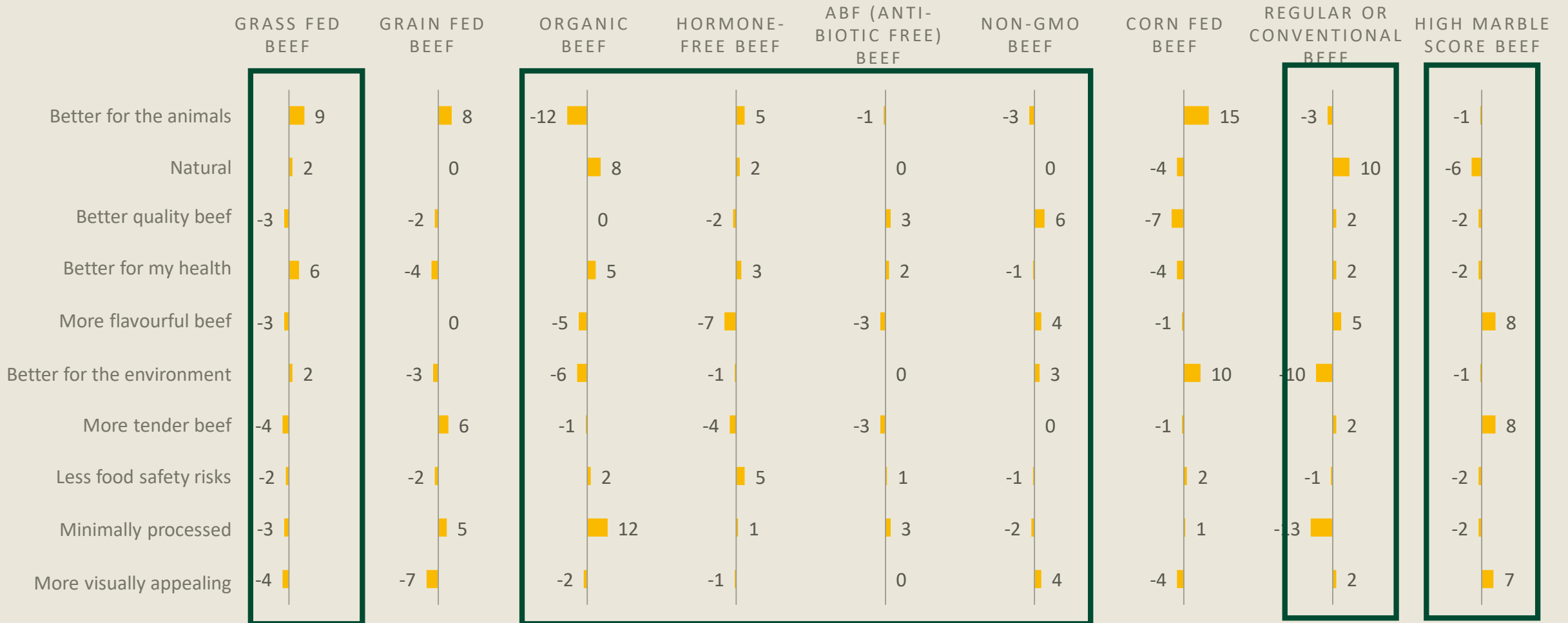


Global Average

QGF1. Which of the following types of beef are you aware of?
QGF2. And which types of beef have you bought in the past?
Base (n=479)



IMAGE PROFILES – TYPES OF BEEF



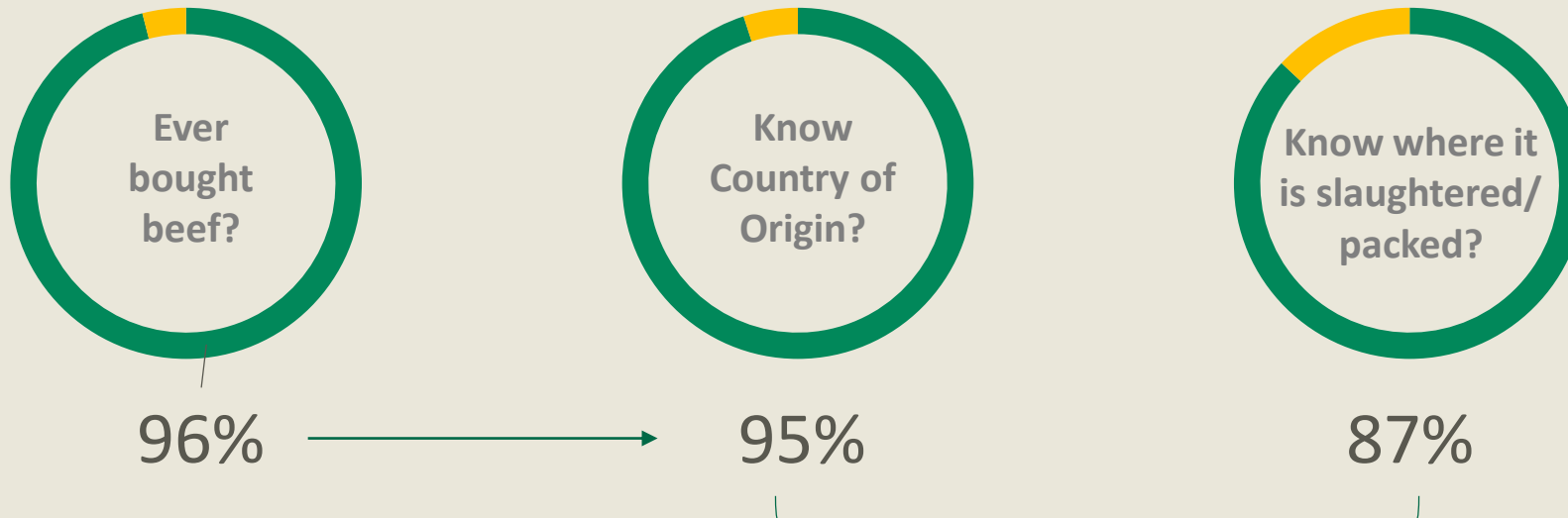


BEEF COUNTRY OF ORIGIN

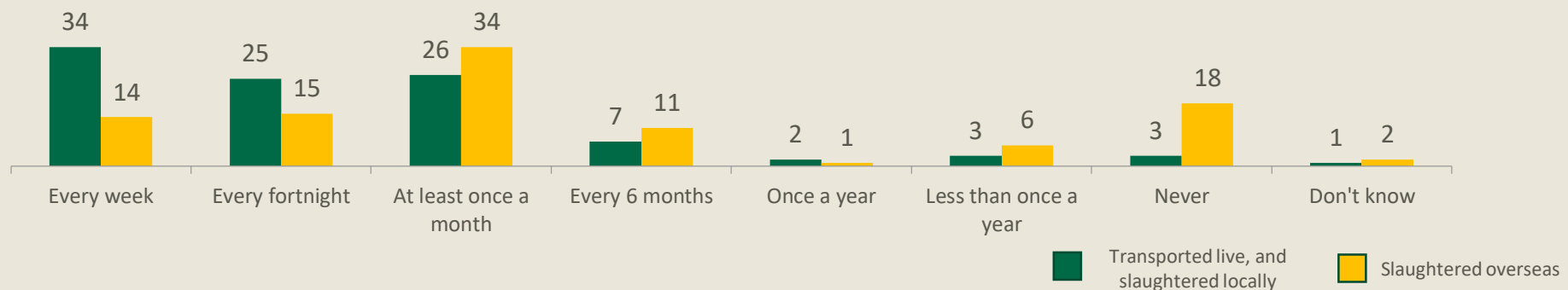
All questions in this section were asked of beef buyers only (must have ever bought beef). They also must have previously bought, or would consider buying, imported beef.



BEEF BUYERS – KEY STATISTICS



FREQUENCY OF BUYING IMPORTED BEEF

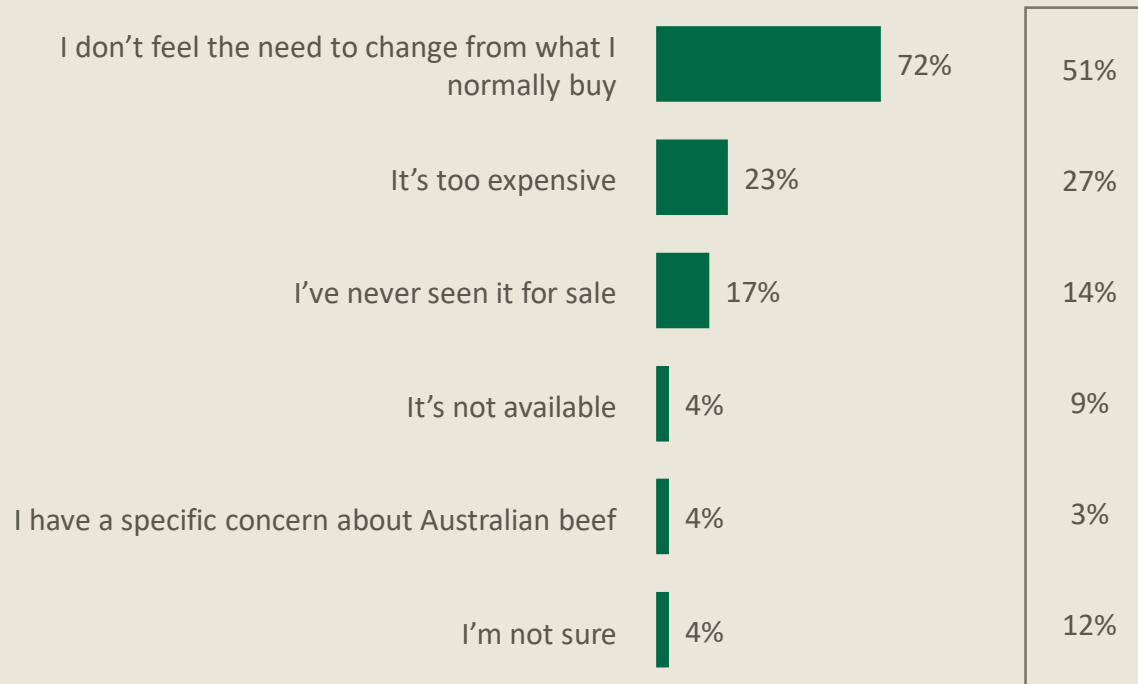


(CH3) Do you ever buy beef? (Rebased to total – n=500)
 (GF3B) Do you know the country of origin of the beef you buy? n=479
 (GF3C) Do you know which country the beef you buy is slaughtered, cut and packaged in? n=479
 (CH4A) How often do you buy the following types of imported Halal compliant beef? n=479
 Consideration of imported beef *base too low*– (CH5) Would you ever consider buying imported beef?



BARRIERS TO BUYING AUSTRALIAN BEEF

Why have you never eaten Australian beef?

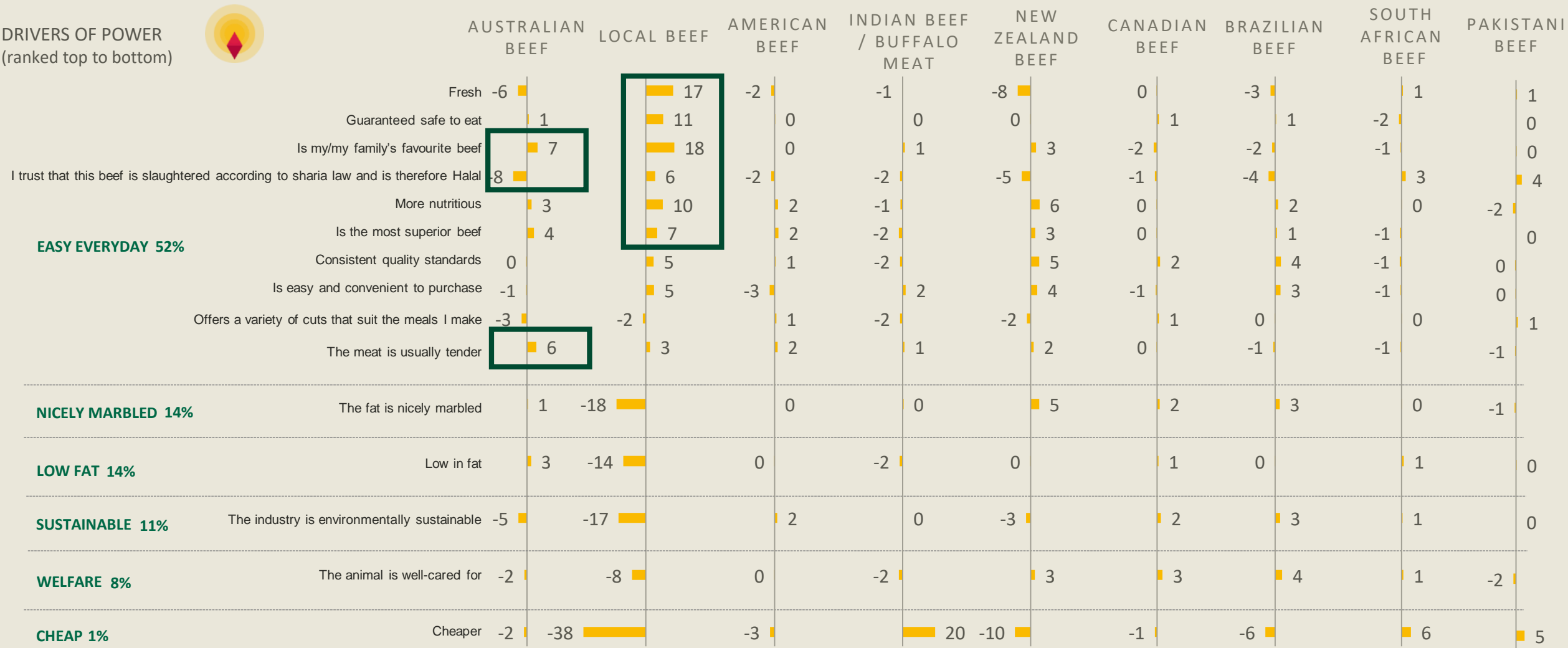


Global Average

DRIVERS OF POWER – Easy Everyday is a key driving factor in consumers minds when thinking about beef. This comprises many components from Fresh to tenderness. Local beef has the strongest profile particularly around family favourite, freshness, safe to eat and nutritious, superior & halal. AU beef has strengths as a family favourite & tenderness but a relative weakness in freshness & halal. Many COO imports have indistinct profiles apart from NZ which is similar to Australia



DRIVERS OF POWER
(ranked top to bottom)



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=270) 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 – Easy Everyday is also the key factor driving 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, with marbling slightly increasing.



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
EASY EVERYDAY 45%									
Fresh	-6	17	-2	-1	-8	0	-3	1	1
Guaranteed safe to eat	1	11	0	0	0	1	1	-2	0
Is my/my family's favourite beef	7	18	0	1	3	-2	-2	-1	0
I trust that this beef is slaughtered according to sharia law and is therefore Halal	-8	6	-2	-2	-5	-1	-4	3	4
More nutritious	3	10	2	-1	6	0	2	0	-2
Is the most superior beef	4	7	2	-2	3	0	1	-1	0
Consistent quality standards	0	5	1	-2	5	2	4	-1	0
Is easy and convenient to purchase	-1	5	-3	2	4	-1	3	-1	0
Offers a variety of cuts that suit the meals I make	-3	-2	1	-2	-2	1	0	0	1
The meat is usually tender	6	3	2	1	2	0	-1	-1	-1
NICELY MARBLED 16%									
The fat is nicely marbled	1	-18	0	0	5	2	3	0	-1
SUSTAINABLE 12%									
The industry is environmentally sustainable	-5	-17	2	0	-3	2	3	1	0
LOW FAT 11%									
Low in fat	3	-14	0	-2	0	1	0	1	0
WELFARE 9%									
The animal is well-cared for	-2	-8	0	-2	3	3	4	1	-2
CHEAP -7%									
Cheaper	-2	-38	-3	20	-10	-1	-6	6	5



BEEF DRIVERS TO POWER & PREMIUM



POWER



PREMIUM

1. EASY EVERYDAY	52%
2. NICELY MARBLED	14%
3. LOW FAT	14%
4. SUSTAINABLE	11%
5. WELFARE	8%
6. CHEAP	1%

1. EASY EVERYDAY	45%
2. NICELY MARBLED	16%
3. SUSTAINABLE	12%
4. LOW FAT	11%
5. WELFARE	9%
6. CHEAP	-7%

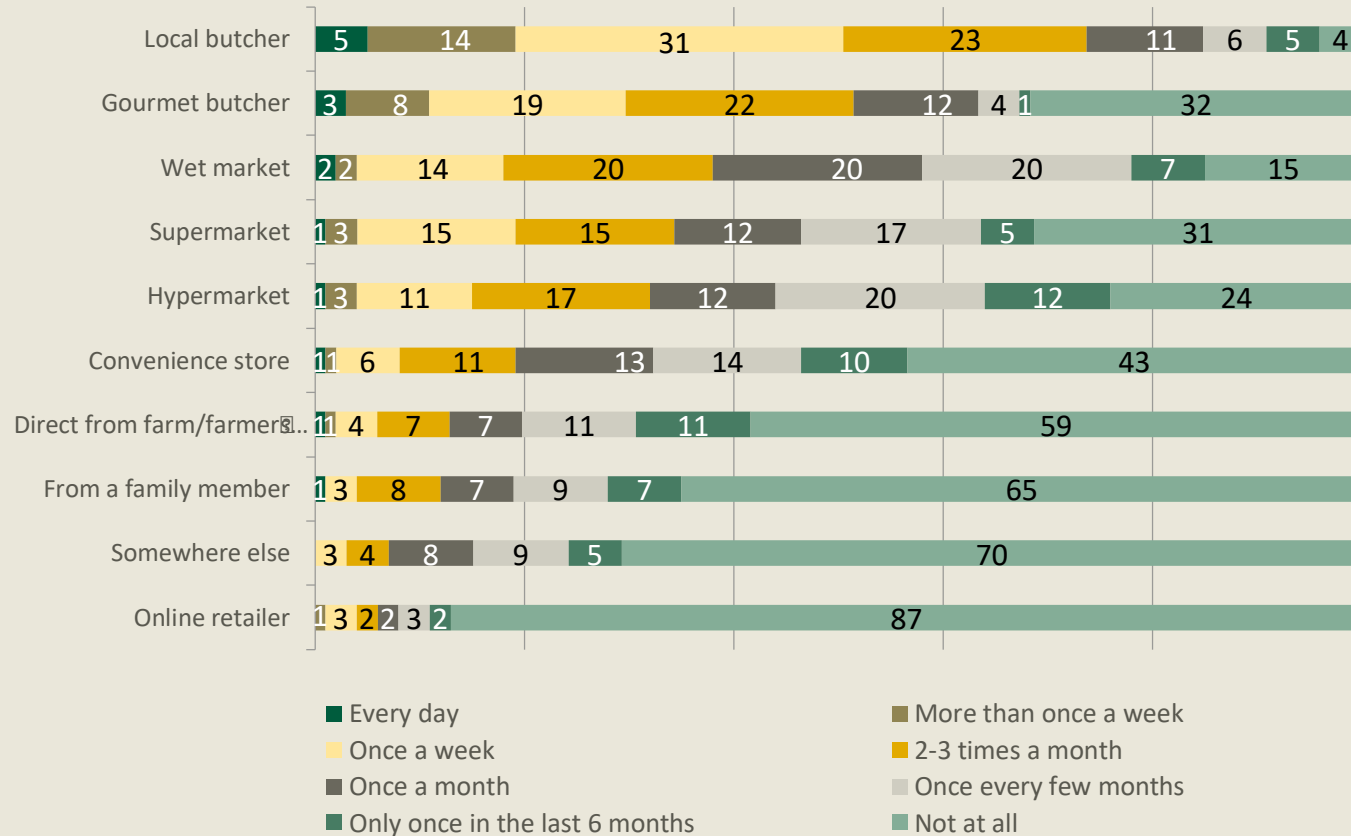
POINT OF PURCHASE





BEEF PLACES OF PURCHASE

ALL BEEF PLACES OF PURCHASE



NET bought at least 2-3 times a month

NET ever bought

Local butcher	73	95
Gourmet butcher	52	69
Wet market	38	85
Supermarket	34	68
Hypermarket	32	76
Convenience store	19	56
Direct from farm/farmer	13	42
From a family member	12	35
Somewhere else	7	29
Online retailer	6	13

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

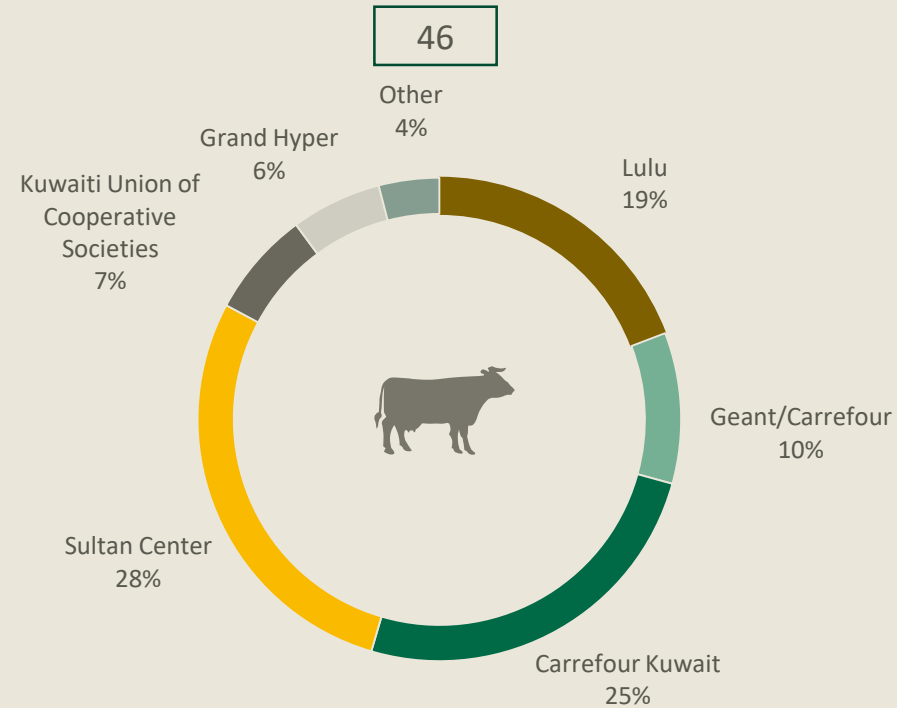




BEEF - MOST COMMON PLACES OF PURCHASE

SUPERMARKET

NET bought at least once a month

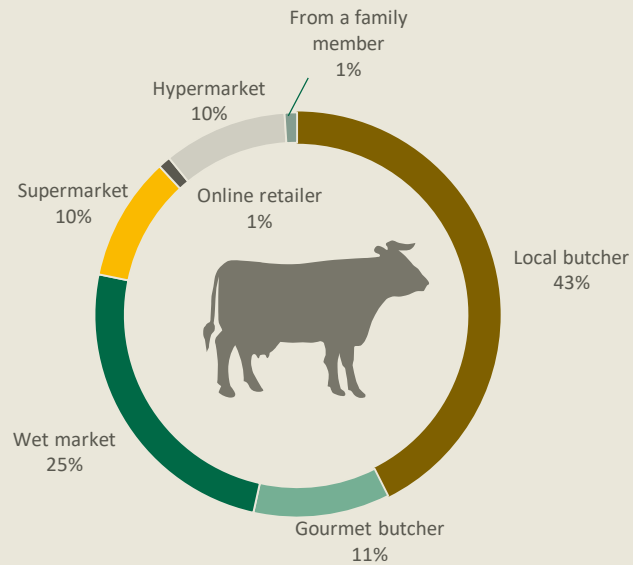




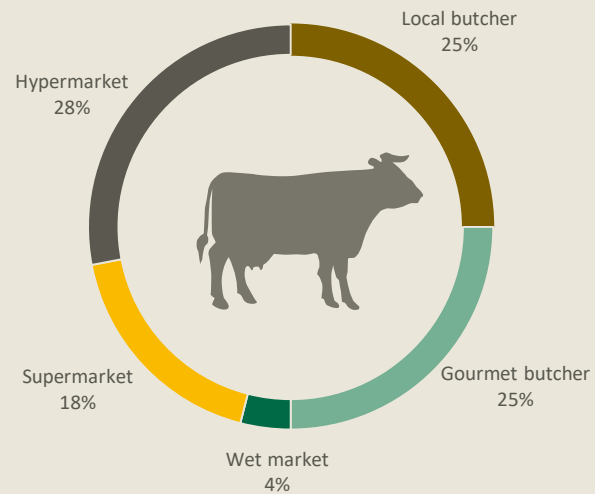
BEEF PLACES OF PURCHASE – BY COUNTRY OF ORIGIN

MAIN PLACE OF PURCHASE OF:

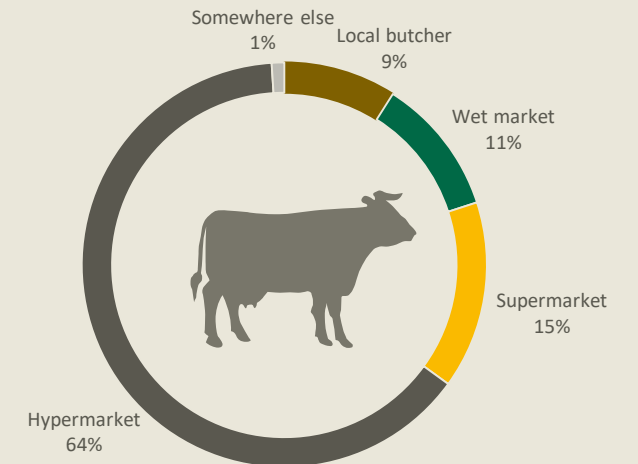
LOCAL BEEF



AUSTRALIAN BEEF

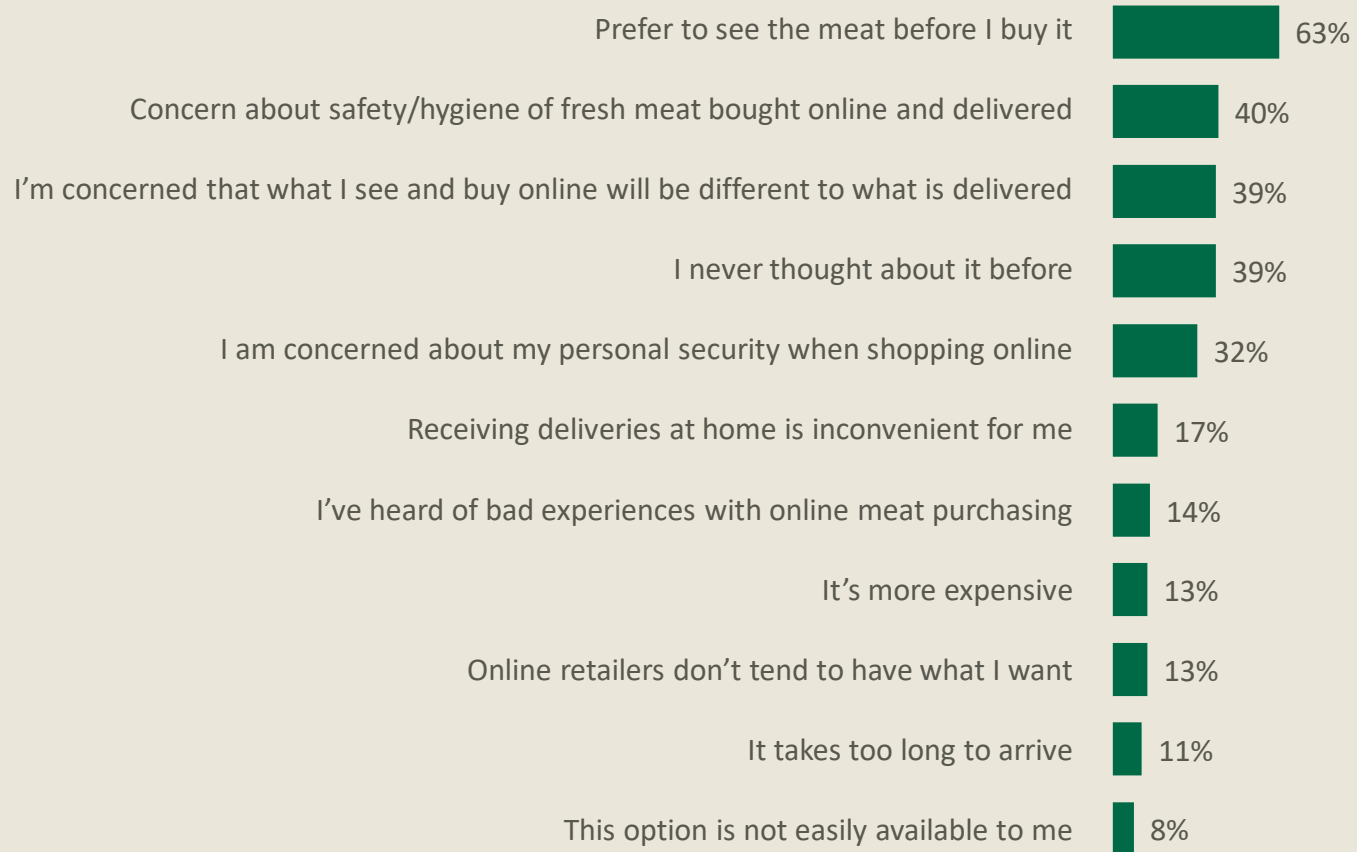


NEW ZEALAND BEEF



BARRIERS TO PURCHASING BEEF ONLINE

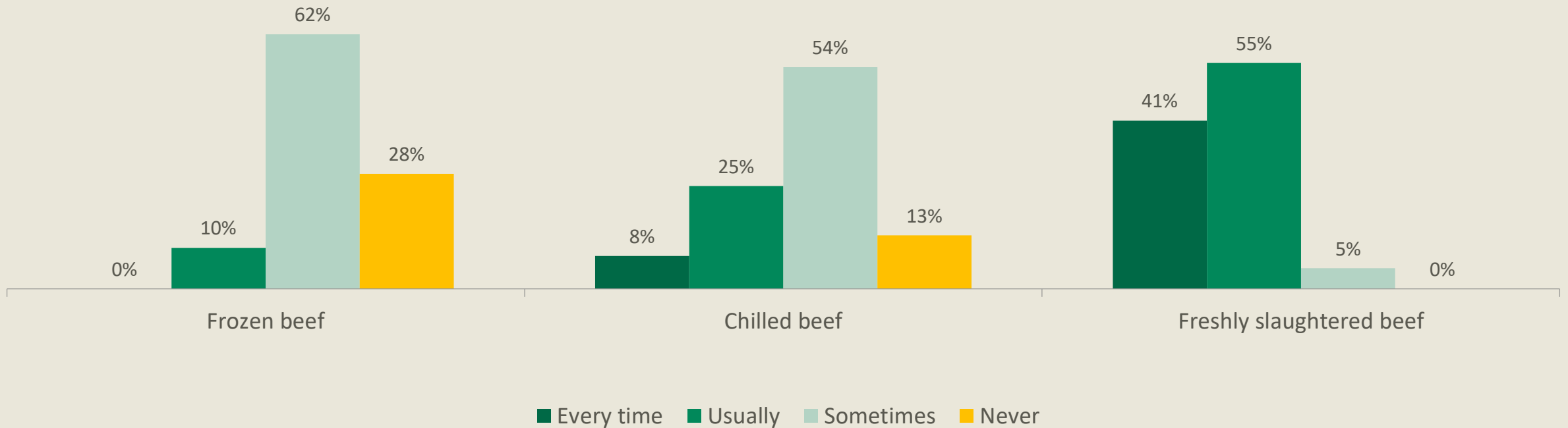
MAIN REASONS FOR NOT BUYING FROM AN ONLINE RETAILER





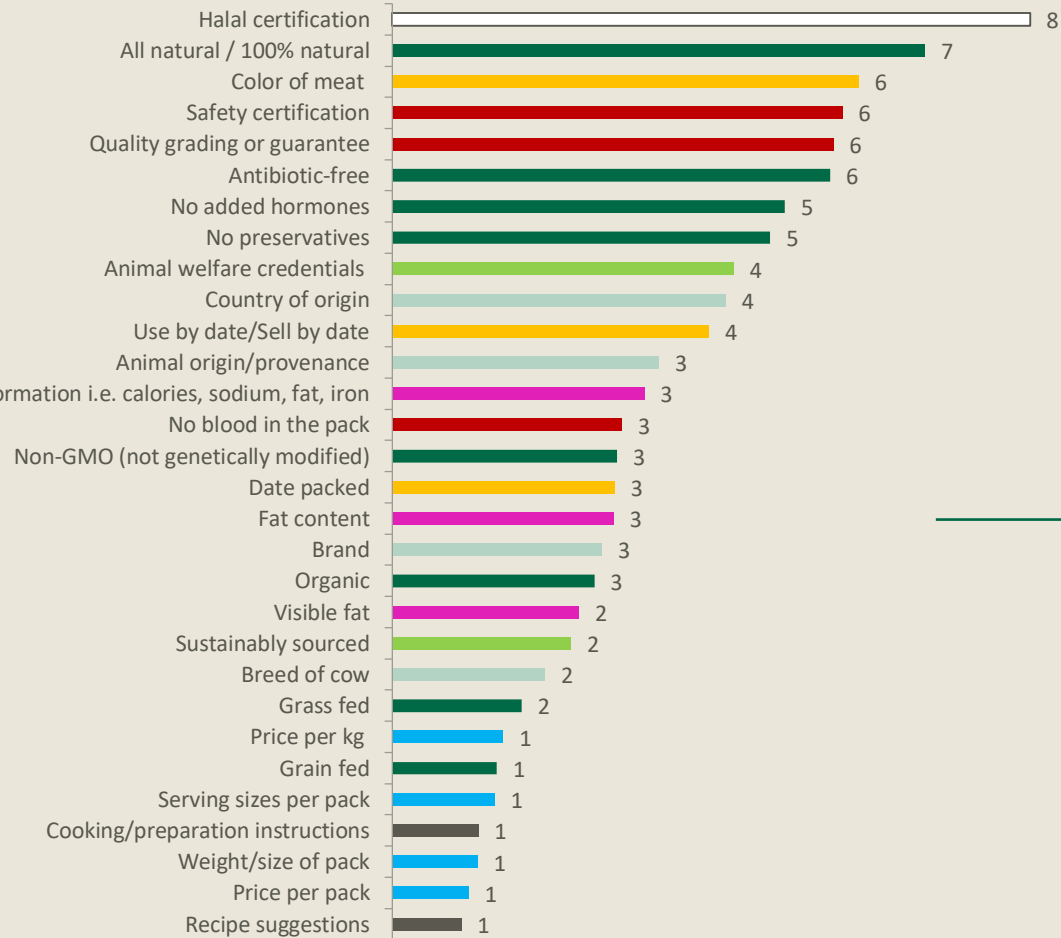
BEEF - COMPARING FROZEN, CHILLED AND FRESHLY SLAUGHTERED

HOW OFTEN YOU BUY THOSE TYPES OF BEEF



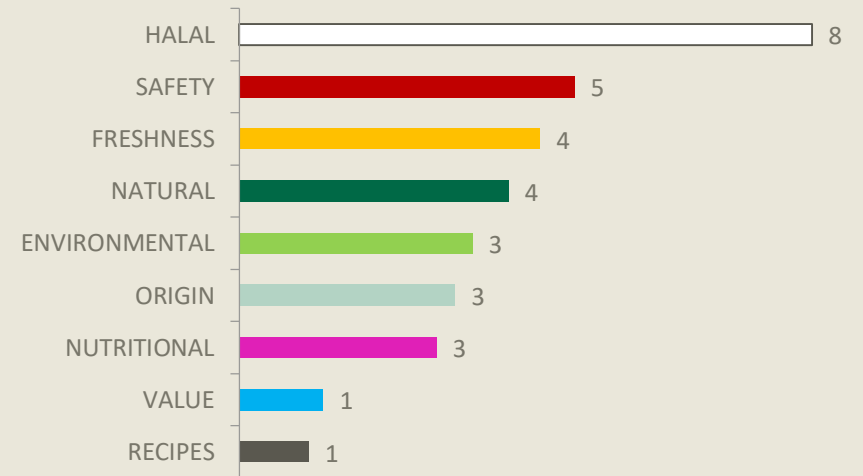
BEEF CLAIMS & THEMES IMPORTANCE – ON PACK OR AT SHELF

Claims – ranked by Relative Importance



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

Themes



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?



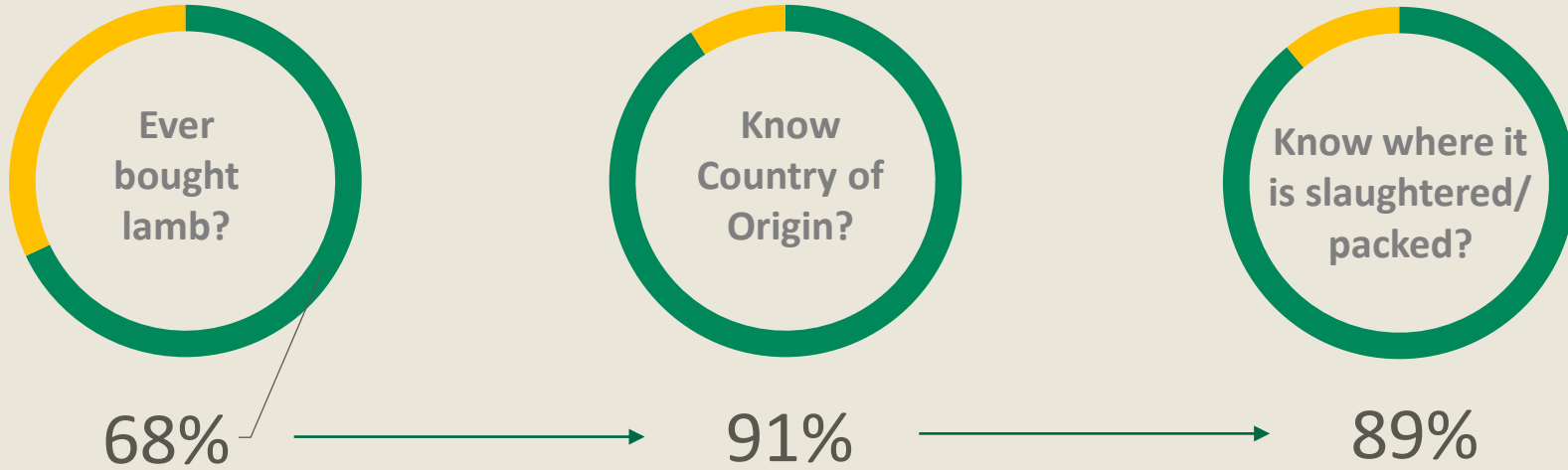
LAMB

COUNTRY OF ORIGIN

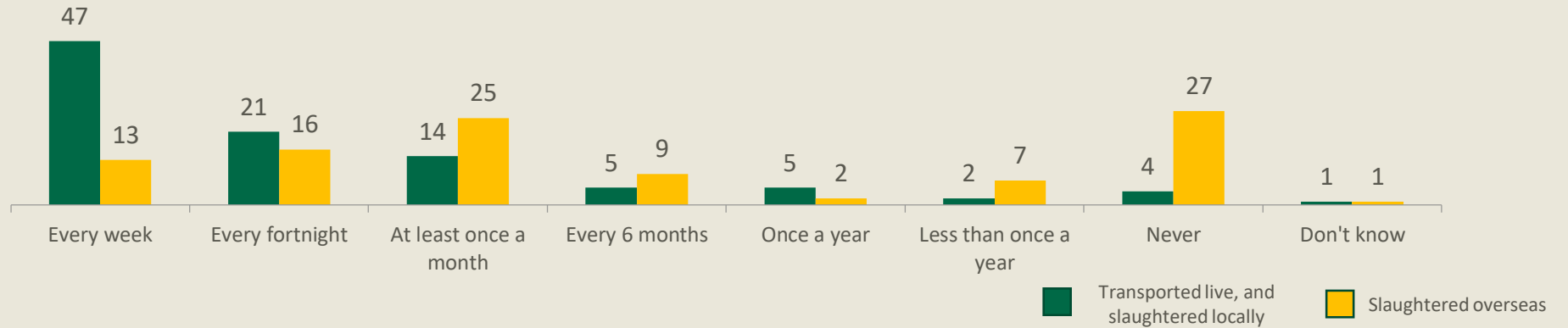
All questions in this section were asked of lamb buyers only (must have ever bought lamb). They also must have previously bought, or would consider buying, imported lamb.



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=341)
 (CH7A) How often do you buy imported lamb? (n=341)
 (LBH1b) Do you know which country the lamb you buy is slaughtered, cut and packaged in?(n=341)



LOCAL LAMB DEFINITION

Lamb that is...

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



Lamb that is both raised and slaughtered locally

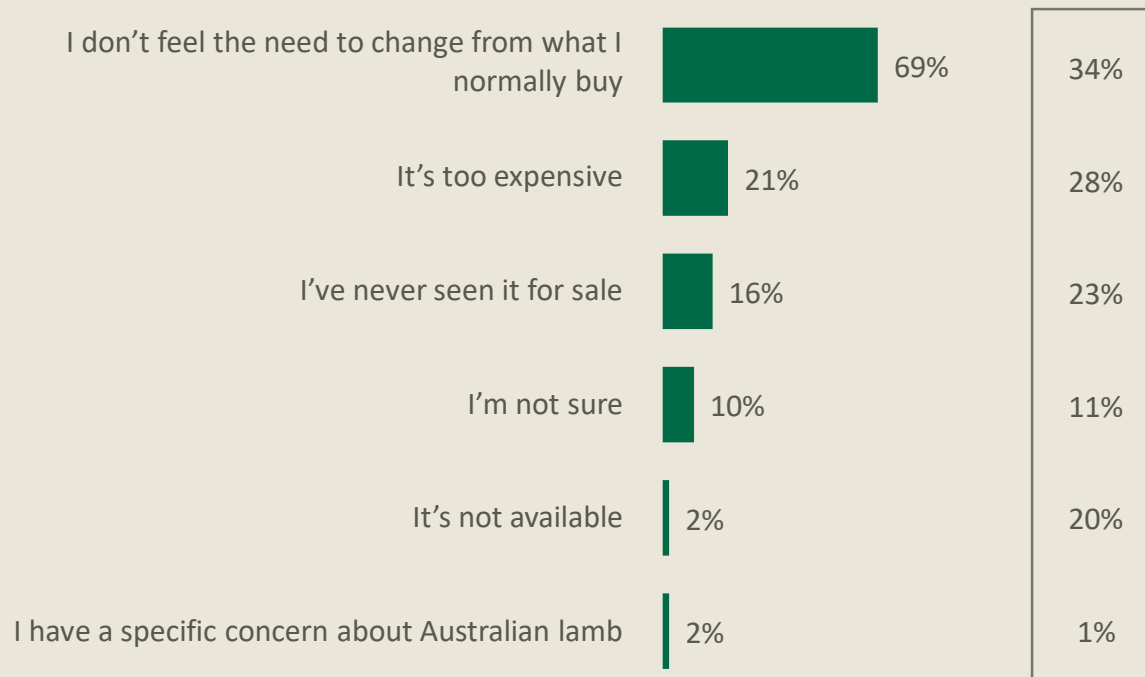


■ YES ■ NO



BARRIERS TO BUYING AUSTRALIAN LAMB

Why have you never eaten Australian lamb?



Global Average



DRIVERS OF POWER - A range of factors drive share of mind when consumers think about lamb. Better, High Quality & Sustainable followed by Fresh are key drivers. Local lamb has the strongest associations with freshness, sustainable industry, a family favourite, halal & easy to purchase. Australian lamb has a positive association with quality standards, a sustainable industry, and is not cheap. NZ lamb is associated with tenderness. Other than Syrian lamb the other COO profiles are indistinct.



DRIVERS OF POWER
(ranked top to bottom)

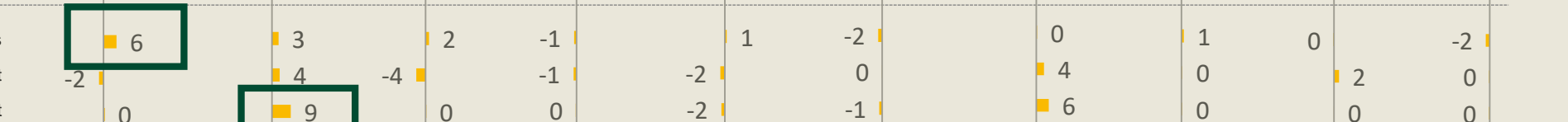
BETTER 20%

Is the most superior lamb/goat
More nutritious



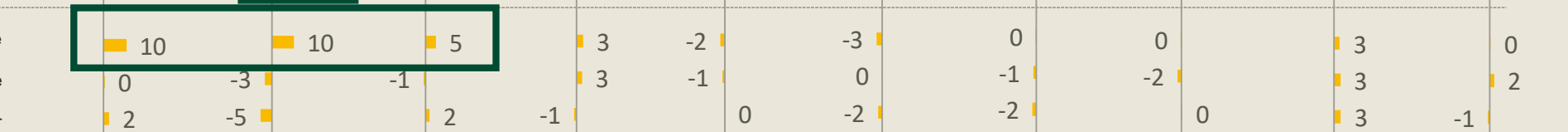
HIGH QUALITY 16%

Consistent quality standards
Guaranteed safe to eat
Is my/my family's favourite lamb/goat



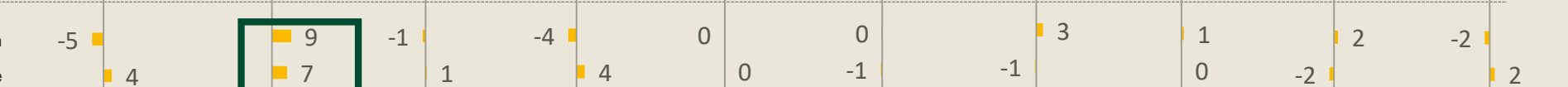
SUSTAINABLE 14%

The industry is environmentally sustainable
Offers a variety of cuts that suit the meals I make
The animal is well-cared for



FRESH 13%

Fresh
Is easy and convenient to purchase



LOW FAT 12%

Low in fat



HALAL 12%

I trust that this lamb/goat is slaughtered according to sharia law and is therefore Halal



TENDER 12%

The meat is usually tender



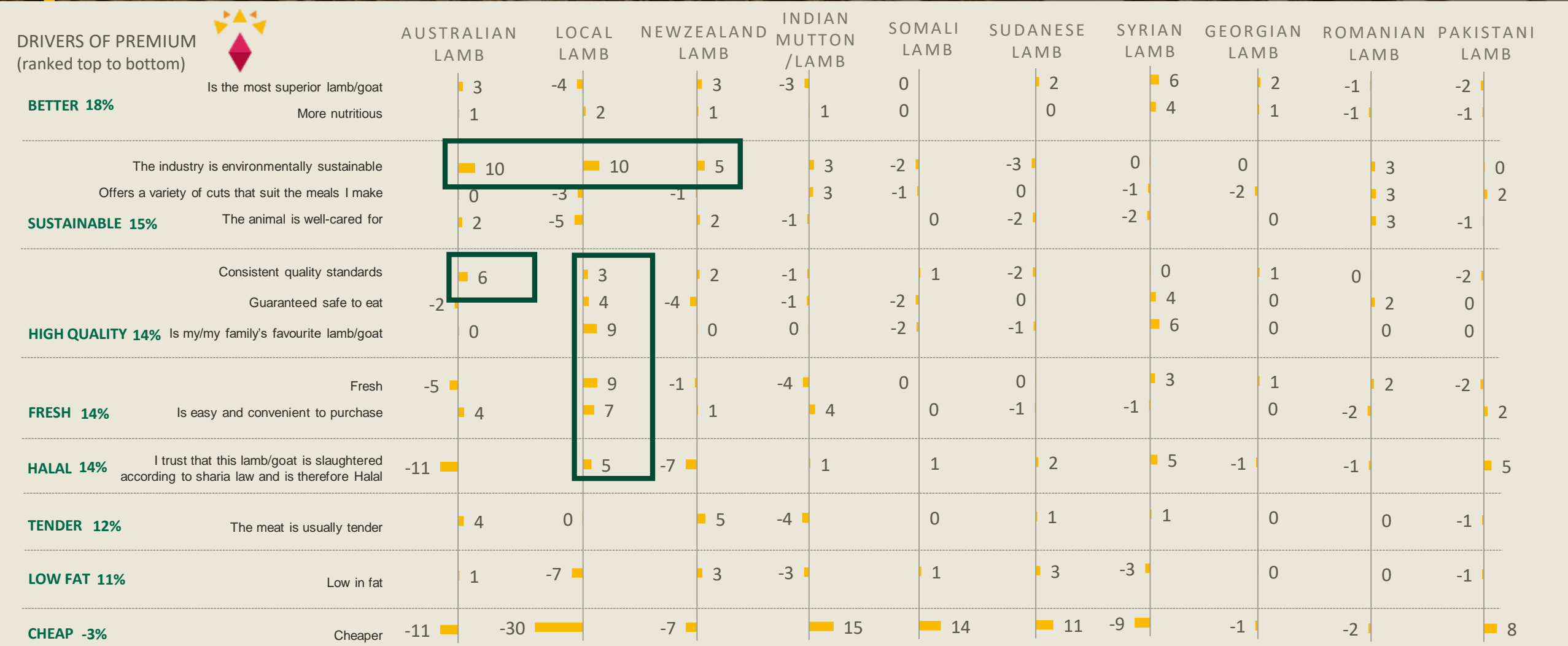
CHEAP 1%

Cheaper





DRIVERS OF PREMIUM – Better and Sustainable drive perceptions of premium for lamb, followed by High Quality. 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.





LAMB DRIVERS TO POWER & PREMIUM



POWER



PREMIUM

1. BETTER	20%	1. BETTER	18%
2. HIGH QUALITY	16%	2. SUSTAINABLE	15%
3. SUSTAINABLE	14%	3. HIGH QUALITY	14%
4. FRESH	13%	4. FRESH	14%
5. LOW FAT	12%	5. HALAL	14%
6. HALAL	12%	6. TENDER	12%
7. TENDER	12%	7. LOW FAT	11%
8. CHEAP	1%	8. CHEAP	-3%

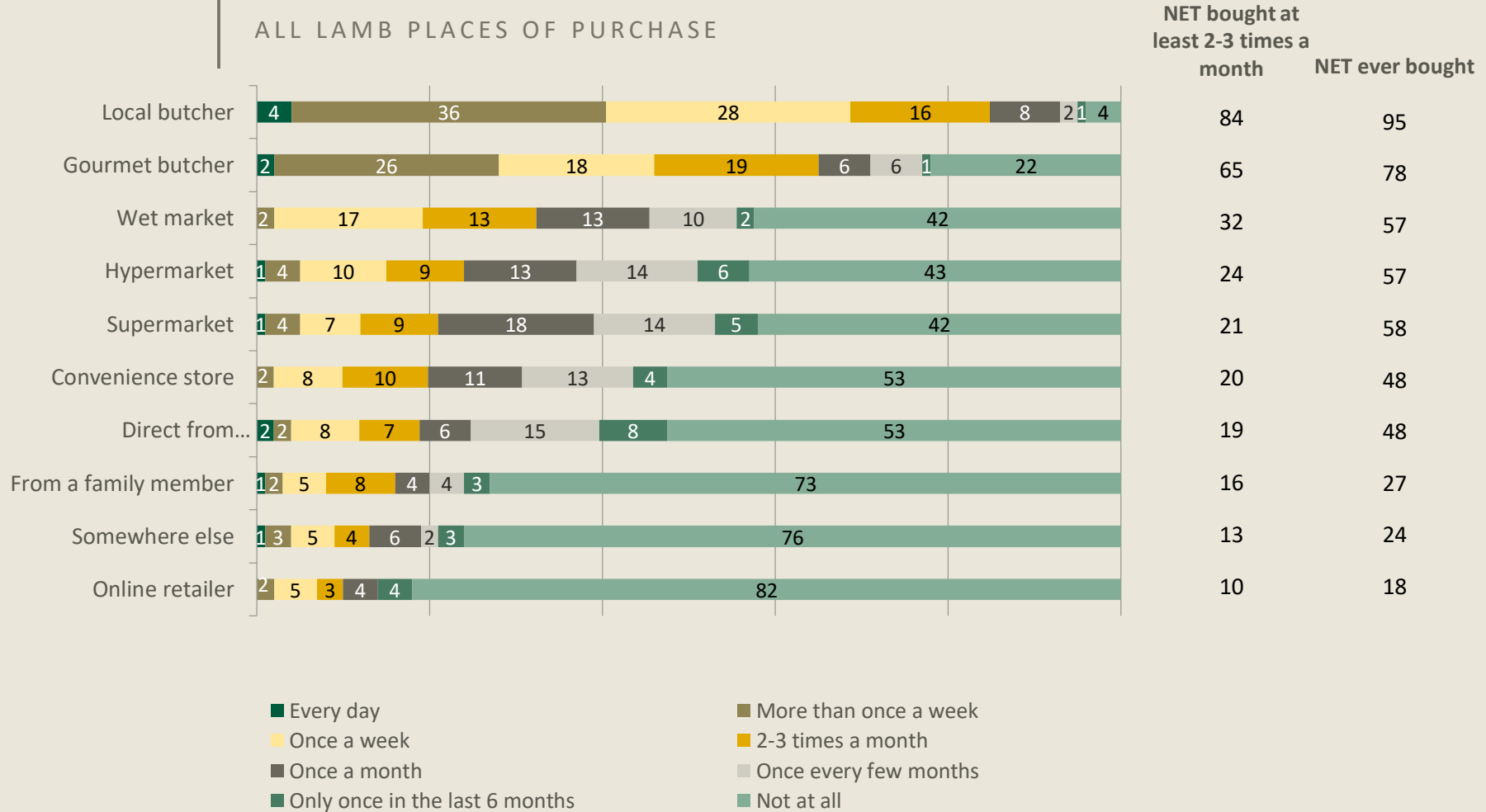
POINT OF PURCHASE





LAMB PLACES OF PURCHASE

ALL LAMB PLACES OF PURCHASE



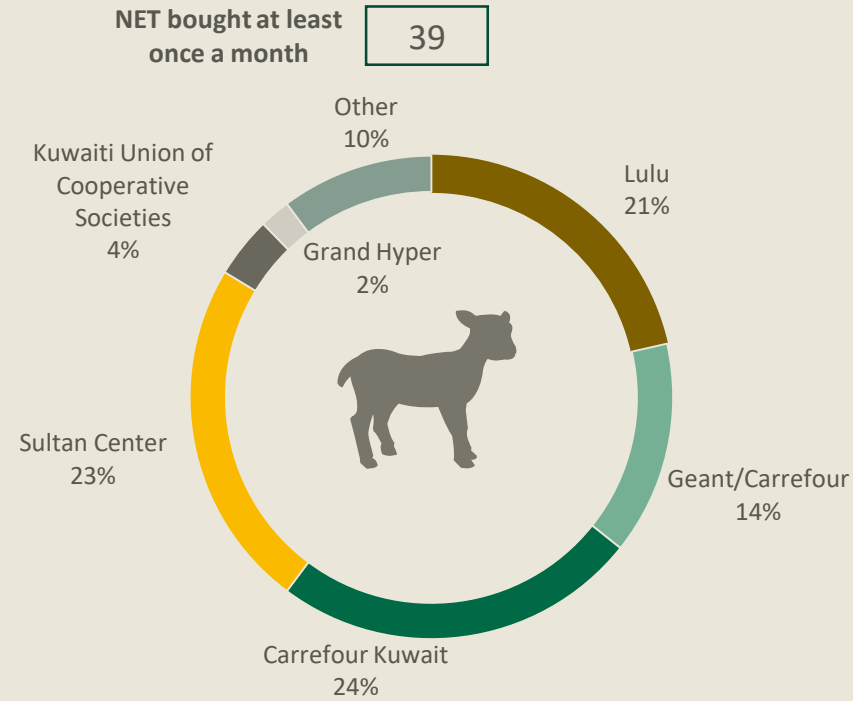
The local butcher, gourmet butcher, Hypermarket and convenience store are the most frequented places for lamb purchase.

*Caution : Low base



LAMB MOST COMMON PLACES OF PURCHASE

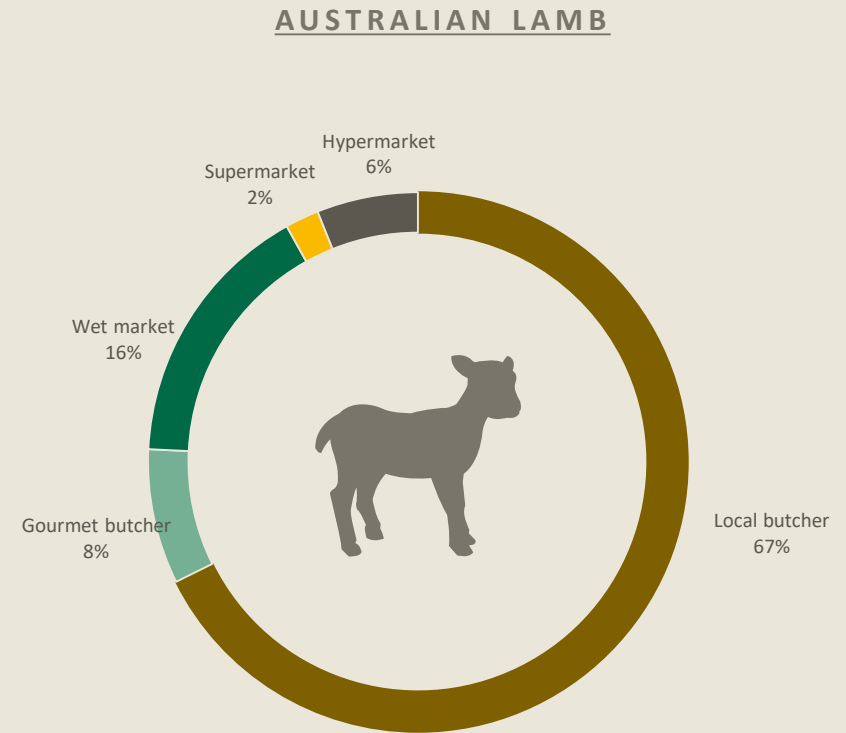
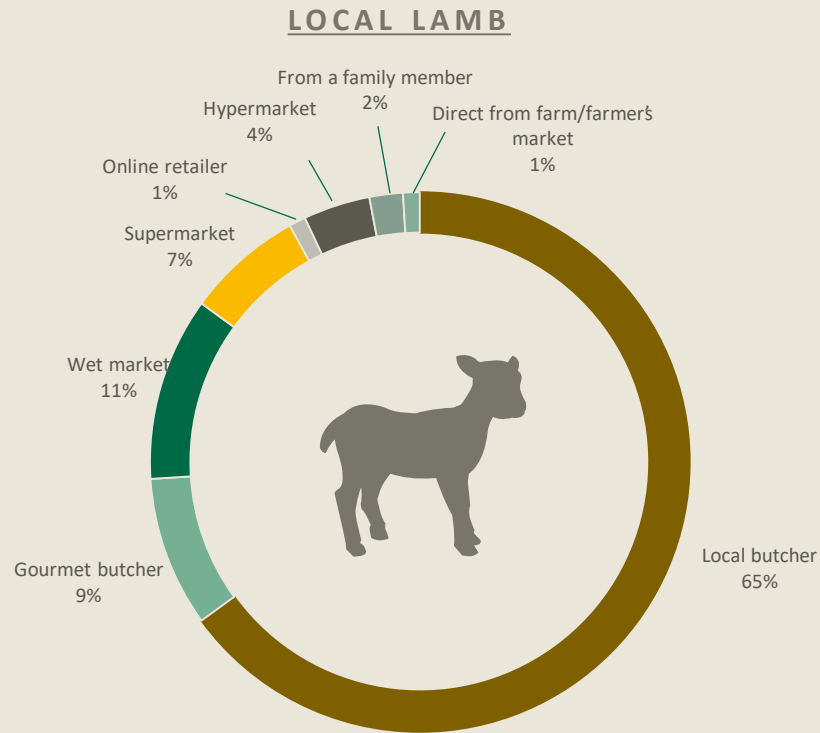
SUPERMARKET





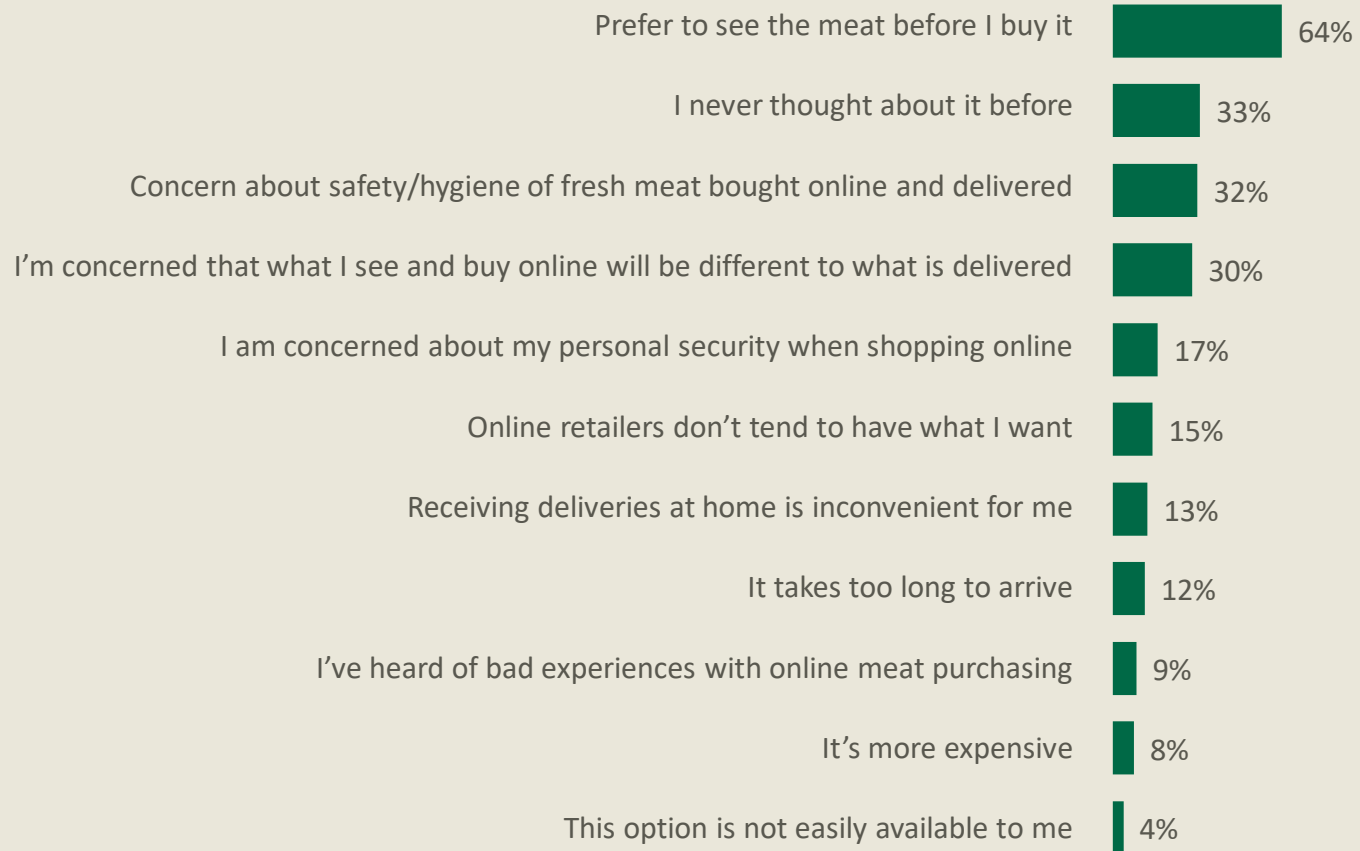
LAMB PLACES OF PURCHASE – BY COUNTRY OF ORIGIN

MAIN PLACE OF PURCHASE OF:



BARRIERS TO PURCHASING LAMB ONLINE

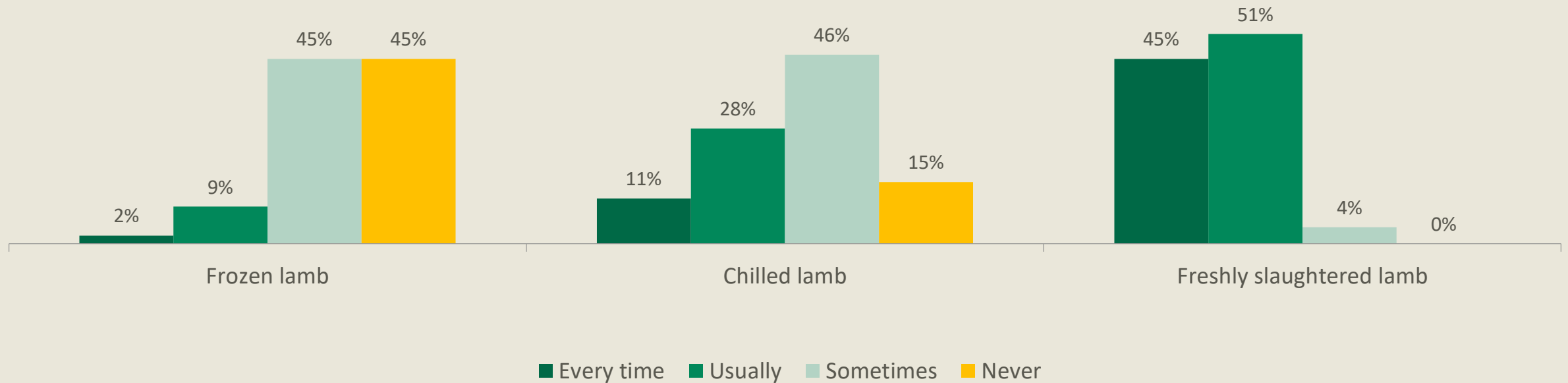
MAIN REASONS FOR NOT BUYING FROM AN ONLINE RETAILER





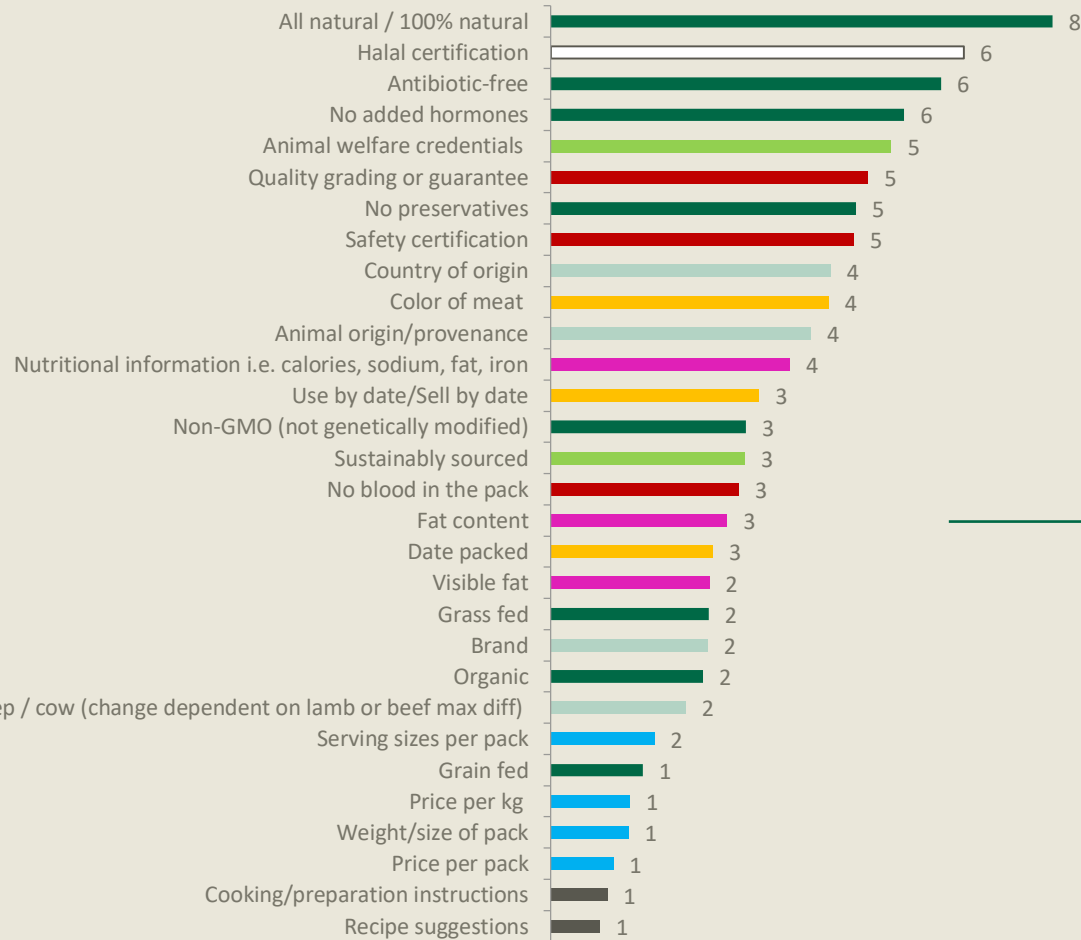
LAMB - COMPARING FROZEN, CHILLED AND FRESHLY SLAUGHTERED

HOW OFTEN YOU BUY THOSE TYPES OF LAMB



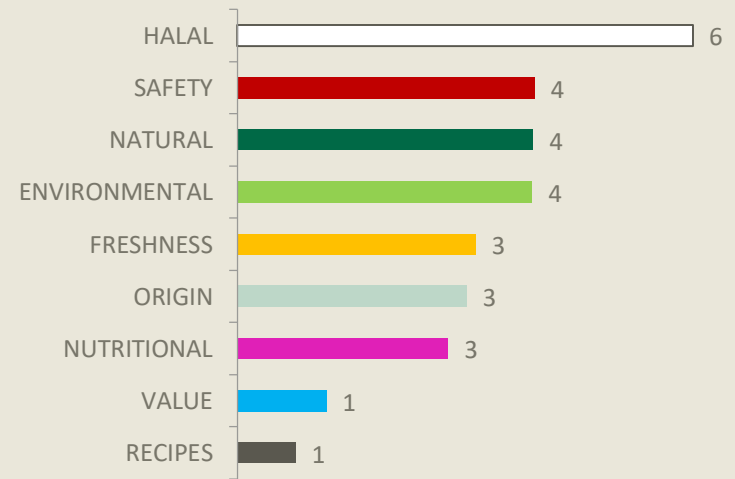
LAMB CLAIMS & THEMES IMPORTANCE – ON PACK OR AT SHELF

Claims – ranked by Relative Importance



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

Themes

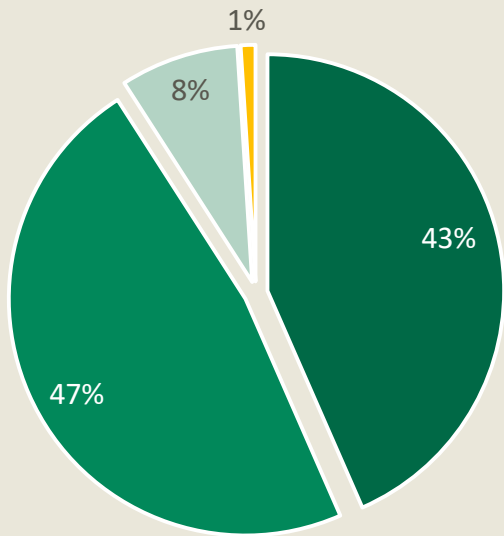


Base: Total (n=247)
 QMAX1 LAMB: Please indicate which one is the most likely, and which is the least likely to motivate you to choose / eat LAMB
 SCr1. Are you personally responsible for the cooking in your household, either mainly or equally with some other person?
 SCr2. How often do you generally 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
KUWAIT

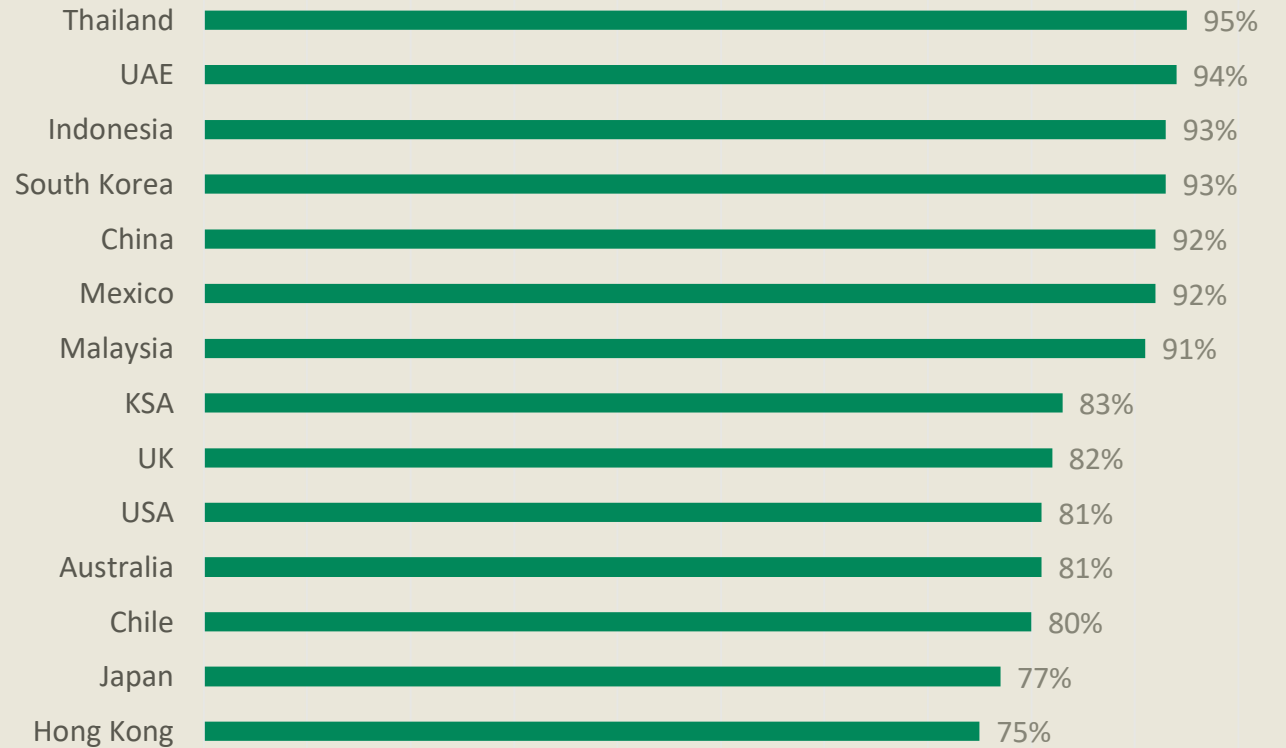
HOW IMPORTANT? 90% Top 2 Box



■ Very important
■ Not very important
■ Not sure
■ Somewhat important
■ Not at all important

2018

HOW IMPORTANT? (Top 2 Box)



- Beef is the most salient protein in Kuwait, followed by lamb. Beef and Chicken are the top proteins purchased in the past month, with Chicken winning on serves in the past 7 days.
- In terms of beef types, Kuwaiti people are most familiar with regular/conventional beef, followed by grass fed.
- Most Kuwaiti consumers claim to know the COO of their beef/lamb
- 'Easy Everyday' is the key driver of power and premium for Beef, with Australia owning the strength in tenderness and favourite. However, local beef dominates this space with key strengths in easy everyday with their main weakness being price. New Zealand is more known for nutrition and consistent quality.
- Kuwaiti consumers look at the colour of meat and the way/recency of slaughter as a symbol of its quality
- The most important areas Kuwaiti consumers look for on pack are being Halal certified, followed by claims around core themes of being safe, fresh and natural.
- Hypermarkets and local/gourmet butchers are key purchase channels for Australian Beef with Local butchers the most predominate for Australian Lamb.

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

