effie Awards Australia

2026

# Case Study




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**Agencies**
Dig

**Client**
Australian Pork

**Title**
How Australian Pork turned the tables on market share

**Category**
B11c. Insight & Strategic Thinking - campaigns $5-20 million

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**Q1. EXECUTIVE SUMMARY & WHY DOES THIS CASE DESERVE AN AWARD?**

> ***"The essence of strategy is choosing what not to do."***
> - Michael Porter, Harvard Business School

Fresh pork had a fundamental problem. It wasn't that it was disliked. It wasn't expensive. It simply wasn't there - weak in the minds of Australian families when they considered that vital question: what should we have for dinner?

With a declining share of fresh meat volume, Australian Pork was losing the battle for mental availability across everyday meal consideration points.

Grounded in Ehrenberg-Bass Category Entry Point theory, the insight was simple but transformative: Shoppers have a repertoire of key meals they think of for the midweek or weekend occasion, and the strongest-to-mind protein for each meal wins the lion's share of the volume consumed. So in order to grow pork's volume share of fresh meat and seafood, we needed to grow pork's association with Australia's most popular everyday meals.

And rather than spread resources thinly across multiple meal occasions, the strategy made a considered, disciplined call: go deep on one 'hero meal' at a time, with focused and integrated communications all the way through the funnel. Chapter One: Stir Fry - one of Australia's most popular everyday meals, with high openness to substituting-in pork, and the lowest rational barriers. Chapter Two and Three meals would only follow once key milestones for stir fry had been achieved.

The results have been profound. From campaign launch in March 2025 through to March 2026, not only has the campaign turned the tables on an enduring decline in volume share, at a 11.4% low point, it has reversed it into significant growth, lifting to 11.6%. The more focused advertising platform earned a System1 testing record for the brand, with a 4.4 star rating (in the top 4% of all Australian ads), and pork's first-to-mind for stir fry (lead indicator) strengthened from 7% to 9% of grocery buyers.

This is the first chapter of a compelling long-term share growth story. The platform is built, the assets are compounding, and the strategy to 12% volume share by 2030 is delivering the goods.





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**Q2. WHAT WAS THE STRATEGIC COMMUNICATIONS CHALLENGE?**

## PORK. A CHALLENGER BEING EATEN INTO BY THE FRESH MEAT GOLIATHS.

Fresh pork is a smaller player with a modest communications budget in one of Australia's most competitive grocery categories. Its 11.4% volume share of fresh meat was dwarfed by chicken at 44.1% and beef at 27% - together commanding nearly three-quarters of the category. Pork occupied a distant, shrinking third - with volume share in decline for two years running [^1,^2].

## WITHOUT A HERO MEAL, PORK HAD NO PLACE TO GROW FROM.

Unlike the other major proteins, pork had no everyday meal it could call its own. Beef is synonymous with grilled steak, and strong in stir fry. Lamb has the BBQ chop. Chicken is associated with anything and everything. Pork? A long tail across many dishes, but owning none of them decisively.

The top three meals cooked at home are Grilled/BBQ with sides (14.5%), Roast with sides (8%), and Stir Fry (7%). These three occasions account for a disproportionate share of total fresh meat volume. Pork's first-to-mind score for each (% of grocery buyers) tells the whole story:

| Occasion | Pork 1st mention [^3] | Pork share of meal [^4] |
|---|---|---|
| Stir Fry | 7% | 28% |
| Roast | 22% | 32% |
| Grilled/BBQ | 7% | 23% |

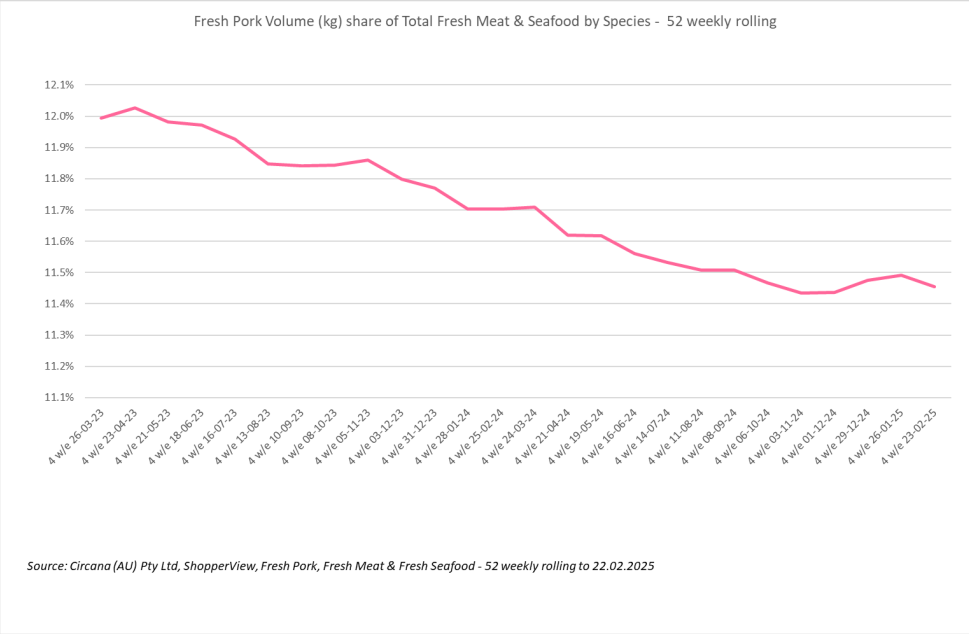
The gap between top-of-mind share and actual meal share illustrates the slow start pork has before a shopper reaches the store and encounters other factors like ranging, pricing and specials[^5]. If the slow mental start could be made stronger, with stir fry the prime opportunity, then these 'physical availability' factors (many of them positive for pork) would have bigger numbers of primed buyers to convert from.

## AGAINST A HEADWIND OF COST-OF-LIVING PRESSURE.

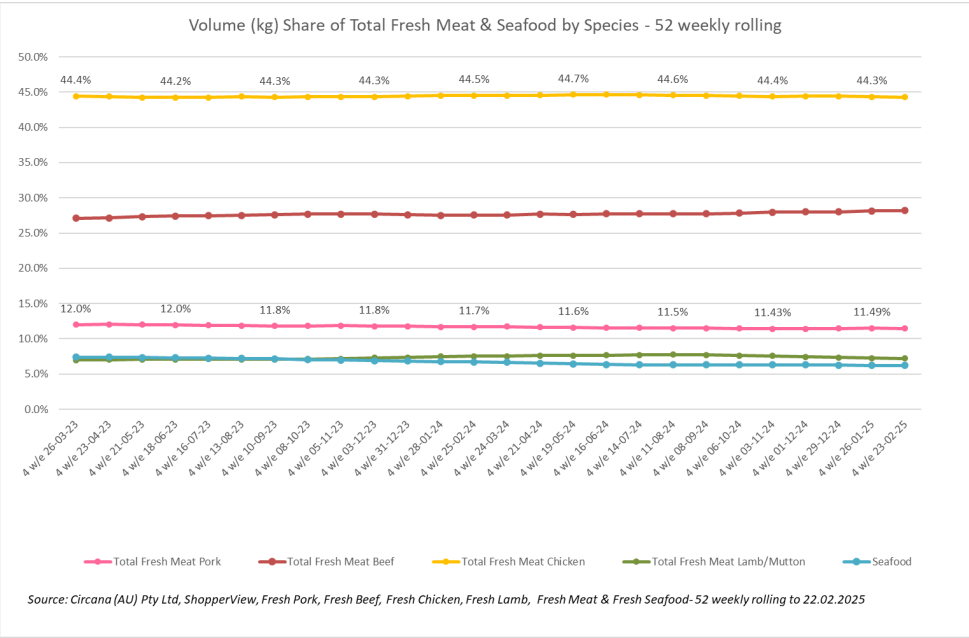
The cost-of-living crisis gripping Australia in 2025 made this harder. When household budgets tighten, consumers default to familiar, cheaper, low-risk options[^6]. For protein, that means chicken. The structural gravity of the market was pulling consumers away from experimentation. Pork needed to find its way onto the shopper meal planning before the shop. Not with logic. With desire.

Sources:
^1 - *Circana (AU) Pty Ltd, ShopperView, Fresh Pork, 52 weekly rolling to 22.03.2026*
^2- *Circana (AU) Pty Ltd, ShopperView, Fresh Pork, Fresh Beef, Fresh Chicken, Fresh Lamb, Fresh Seafood & Fresh Meat - 52 weekly rolling to 22.03.2026*
^3 - *Kantar U&A, 2022, Pork Share of Repertoire.*
^4 - Protein 1st mention by top 3 meals - *Australian Pork Brand and Advertising Tracking, Wave 83, March 2025, Thrive Research*
^5 - Pre-store & In-store shopper intention, Blackmarket Shopper Research, 2023
^6 - *Binet & Field, IPA & Kantar Research, 2022*

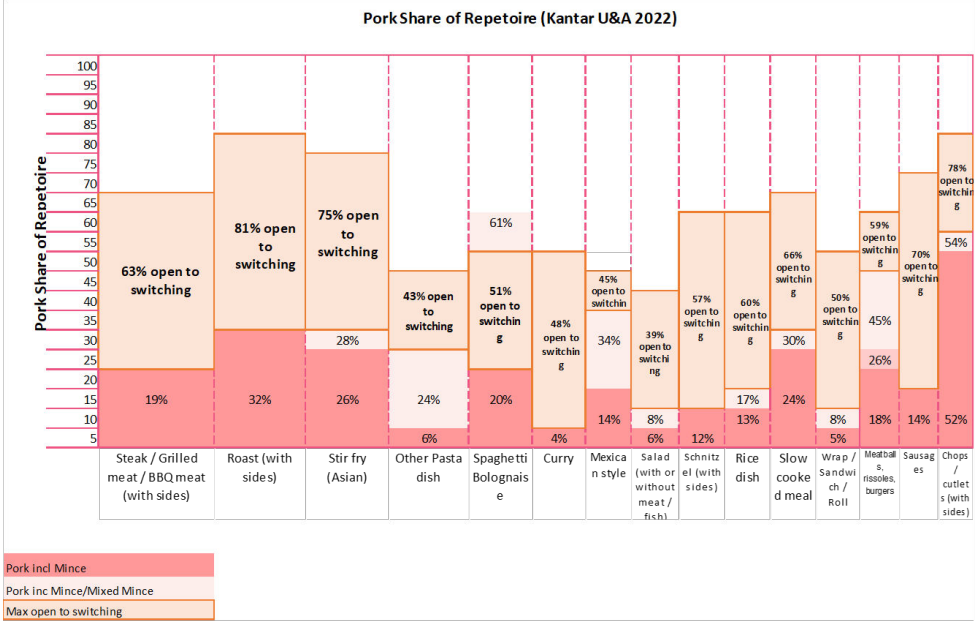

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*Source: Circana (AU) Pty Ltd, ShopperView, Fresh Pork, Fresh Meat & Fresh Seafood - 52 weekly rolling to 22.02.2025*

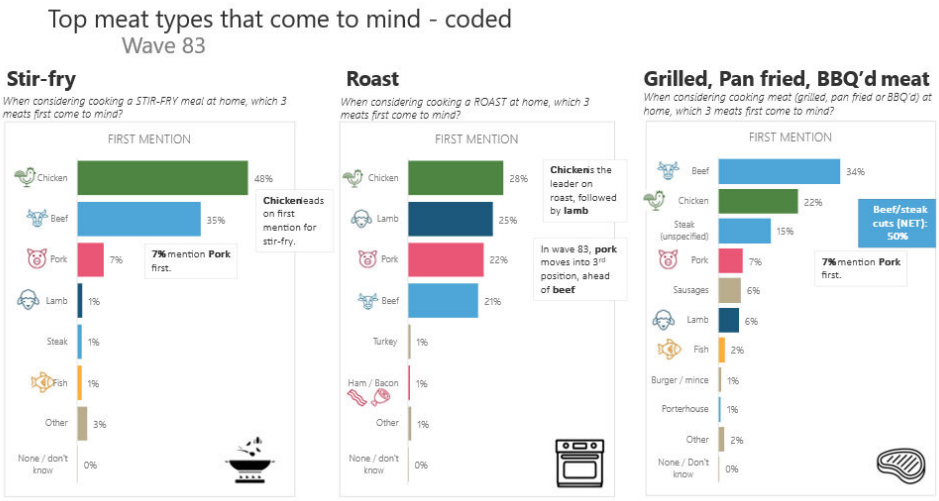


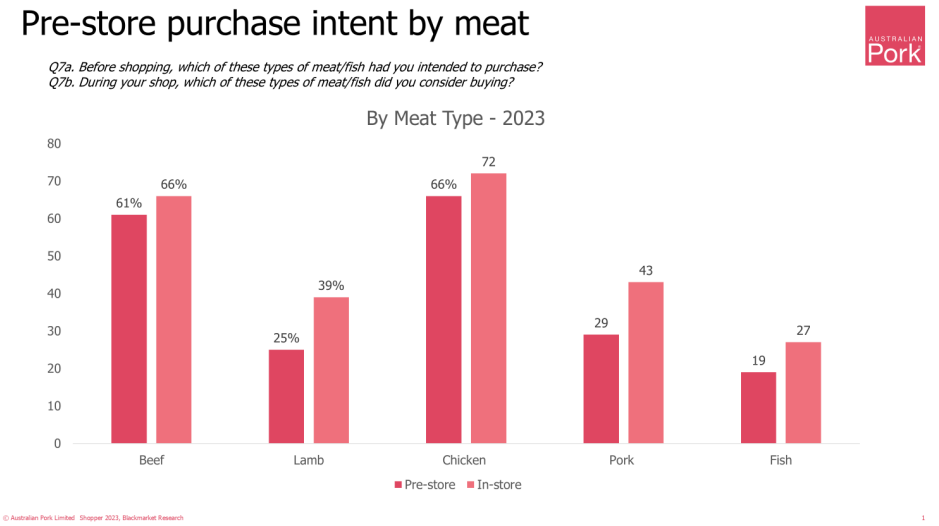

*Source: Circana (AU) Pty Ltd, ShopperView, Fresh Pork, Fresh Beef, Fresh Chicken, Fresh Lamb, Fresh Meat & Fresh Seafood- 52 weekly rolling to 22.02.2025*





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**Q3. WHAT WERE YOUR OBJECTIVES? State specific goals.**

## BUSINESS OBJECTIVES

Australian Pork Limited does not own or sell pork products. It cannot set prices or control supply chains. Its advertising can only be judged on its ability to generate volume demand. For this reason volume share (moving annual total, MAT) is the most important business metric.

| Objective | From (March 25) | Target (End FY26) |
|---|---|---|
| Fresh pork retail volume share of fresh meat & seafood | 11.4% | 11.5% |

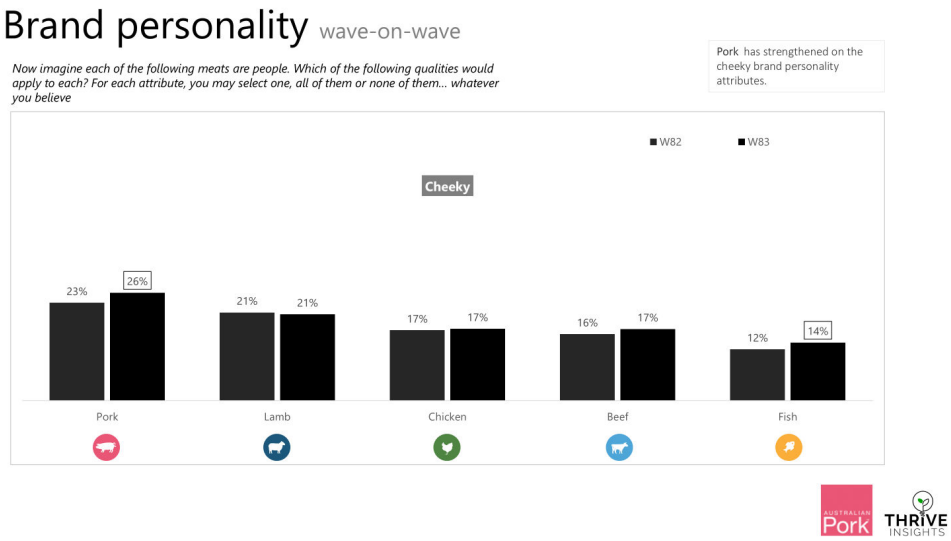

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## COMMUNICATIONS OBJECTIVES

Shifting stir fry first-mention is the kind of rewiring of salience at a category entry point that takes significant time and effort to achieve. Seeing progress of this direct cognitive measure ultimately tells us if Chapter One of the strategy is working, with 9% (+2%pts) an ambitious target for year one.

| Objective | From (March 25) | Target (End FY26) |
|---|---|---|
| Stir fry first-mention (top-of-mind) | 7% | 9% |
| 'Cheeky' brand personality association | Rank #1 [^1] | Maintain Rank #1 |

Sources:
^1 - Brand Personality - *Australian Pork Brand and Advertising Tracking, Wave 83, March 2025, Thrive Research*




**Q4. WHAT WAS YOUR STRATEGY AND HOW DID YOU GET THERE?**

## THE EVIDENCE SAID: OWN A MEAL. ONE MEAL AT A TIME. AND THAT WAS THE STRATEGY.

Brands grow in direct proportion to their mental and physical availability at key category entry points (Byron Sharp, *How Brands Grow*, Ehrenberg-Bass Institute). For fresh protein, category entry points are driven through meal-occasion association. The strategic question was: which specific meals should pork own - and in what order?

A rigorous decision matrix was built across Australia's top 10 everyday meals, evaluating each against four criteria[^2]:

- **Volume opportunity** - absolute size and frequency of the occasion
- **Openness to substitution** - what proportion of shoppers would genuinely cook pork here?
- **Pork's "enticing twist"** - does pork deliver something meaningfully different in this occasion?
- **Ease** - how effortless is it for the consumer to substitute in pork?

Three meals emerged as the priority targets for pork's long-term plan [^2].


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## THE LONG GAME: THREE CHAPTERS. ONE BRAND.

The strategy was deliberately constructed as a sequenced, multi-year platform - not a one-off campaign. The goal: build one deep, powerful meal association at a time, compound the effectiveness of each, then expand to the next.

**Chapter One - Stir Fry, Launch: March 2025**

Stir-fry was the priority to lead with:

- 7% of all Australian meals cooked - high frequency, high volume [^1]
- 75% of consumers genuinely open to substituting-in pork [^1]
- **'Sticky'** pork stir fry is a distinctive association for pork in context of stir fry that pork can own. As well as being a powerful taste cue[^3].
- No meaningful rational barrier

**Chapter Two - Steak/Grilled with Sides,** heroing pork's juicy fillets, **and Chapter Three - Everyday Roast,** with pork's unique pork crackling, represent big opportunities for pork to increase volume share, and will follow once the stir fry objectives are achieved.

## BUILDING PORK'S DISTINCTIVE BRAND ASSETS (DBA): A STRATEGIC COMPETITIVE ADVANTAGE.

Australian Pork entered this campaign with a strong brand code, 'Get Some Pork On Your Fork', but a single asset isn't enough to drive salience. The strategy focused on building a broader, multi-sensory system to make pork more distinctive and memorable.

This was amplified by a clear market gap. Across Australia's major proteins, consistent distinctive brand asset investment is lacking - chicken and beef lack continuity, while lamb's strength is largely seasonal. No competitor has built a cohesive, multi-occasion asset system, leaving a DBA vacuum that pork is now moving to fill.

Sources:
^1 - *Kantar U&A, 2022, Pork Share of Repertoire [from previous question].*
^2 - *Kantar U&A, 2022, Pork Share of Repertoire (Analysis).*
^3 - *Stir Fry, Qualitative Research Groups 2025, Pulse Research*

### Which hero meals?

| Most Popular Meals (most recently cooked*) | Pork Share of Meal | Open to sub. in Pork | Elevation / Cheeky Twist Factor of Pork | Quick & Easy or Slower | MARKETING PRIORITY? |
|---|---|---|---|---|---|
| **1. Grilled with sides (14.5%)** | 23% | **60%** | Beef stronghold***; Wagyu, Sirloin etc tiers | Pork grilled, quick & easy mid-week | **GRILLED** (price advantage) |
| 2. **Roast with sides (8%)** | 32% | **81%** | Unique crackling Unique pulled pork | Roast pork w/crackling, slower weekend | **ROAST** (weekend / Xmas) |
| | | | | Pulled pork, slower, not as special | Ready meal/QSR |
| 3. **Stir-Fry (7%)** | 26-28%** | **75%** | Multiple cuts incl. mince Authentic Asian w/pork | Stir-Fry w/pork, quick & easy mid-week | **STIR FRY** |
| 4. Pasta - not Spag Bol (7%) | 6-24%** | 43% | Authentic Italian bolognese w/pork mince | Bolognese w/pork mince – quick & easy mid-week | Mince's price advantage vs beef |
| 5. Spag Bol (5%) | 20-61%** | 51% | | | |
| 6. Curry (4%) | 4% | 48% | | | |
| 7. Mexican (4%) | 14-34%** | 45% | Authentic Mexican; tacos, pulled pork | Tacos with pork mince – quick, easy | Ready meal/ QSR |
| | | | | Pulled pork – slower, not as special | |
| 8. Salad (4%) | 6-8%** | 39% | | | |
| 9. Schnitzel with sides (4%) | 12% | 57% | | | |

© Australian Pork Limited *n=3,000, Kantar U&A 2022; **including mixed mince; ***For Steak with sides, "meat felt like" came first as the reported decider 80% of the time.

**Q5. HOW WAS YOUR STRATEGY BROUGHT TO LIFE?**

## A TRUTH TO POWER EVERY CREATIVE CHAPTER.

**Pork Positioning:**
*Australian Pork brings an enticing twist to everyday meals.*

Pork is not conventional, it's an alternative - an enticing twist that changes the experience and outcome of the meal occasion.

**Audience truth:**
*Every family has its drama.*

To build enduring relevance, the strategy anchored in a universal insight: the chaos of family mealtimes. Competing preferences, time pressure, and hunger-fuelled tension make dinner more than a functional task it's a social moment to navigate. This truth creates a consistent platform for Australian Pork's cheeky tone.

**The creative platform:**
*Australian Pork brings Unexpected Desire that lightens the drama of family mealtime.*

Pork is a challenger - it is an **unexpected** choice, and that is an opportunity to disrupt in a way only Pork can.

With **desire**, building off Pork's cheeky, entertaining heritage, brought to life in a way that's in tune with modern day families and values.

## CHAPTER ONE: STIR FRY.

**THE FAMILY DRAMA: THE WITCHING HOUR.**

Set in the 5–7pm "witching hour" - identified by 77% of Australian parents as the most difficult mealtime - this is peak household chaos: tired parents, manic kids, no time, no headspace [^1]. It's the most relevant context for stir fry.

**UNEXPECTED DESIRE. PERSONIFIED.**

Rather than focusing on product or recipe, pork is personified: the man of the house transforms into a calm, confident figure in a pink suit. He doesn't explain pork - he is pork. Preparing a sticky pork stir fry, he becomes an unexpected, desirable twist that cuts through the chaos. The drama softens, and the sense of desire lingers beyond the moment.

**CRAFTED FOR THE RIGHT SIDE OF THE BRAIN.**

Research by Orlando Wood and System1 demonstrates that right-brain advertising features consistently drive both greater creative attention and emotional response, and directly correlate with commercial growth over time.[^2]

The Stir Fry execution delivered against the highest-performing right-brain features simultaneously:

- **Characters with agency** - Our protagonist, a man in a pink suit, cooking pork. The pink suit will become the distinctive pork personification Australians will remember, and recognise in Chapter Two and Three.
- **Dialogue** - Authentic, honest and cheeky - Pork through and through.
- **Scene unfolding** - A coherent narrative arc: the chaos of the witching hour, resolved with a cheeky pork stir-fry.
- **Implicit, unspoken communication** - The knowing look. The humour that lands because everyone's lived it.
- **Music with melody** - Distinctive pork strum of desire. The kind of sonic signature that travels beyond the screen and compounds across chapters.


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## A FULL-FUNNEL APPROACH: FROM FAME TO FORK.

### BUILDING FAME: INSTIGATING DESIRE AT EVERY TOUCHPOINT

Big brand impact: The hero film asset built relevance of pork stir fry with the witching hour emotive story-telling. In OOH the iconic Australian Pork tagline, was given an enticing twist - "*Get Some Pork On Your Wok*" - a direct, cheeky provocation to the stir fry category, executed in a fresh art direction that made pork impossible to ignore.

Retailer proximity & commute: The message became focused on dialling up the meal occasion and taste cues, specifically calling out 'sticky pork stir fry'.

### FEEDING DESIRE: INFLUENCERS AND CONTENT BUILDING CONSIDERATION OF PORK IN ASSOCIATION WITH STIR FRY.

Australian Pork partnered with Vincent Yeow Lim (@dimsimlim), "The Wolf of Wok Street," whose 2M Instagram and 2.3M TikTok followers, combined with his authentic connection to Asian home cooking, made him a highly credible voice for pork stir fry.

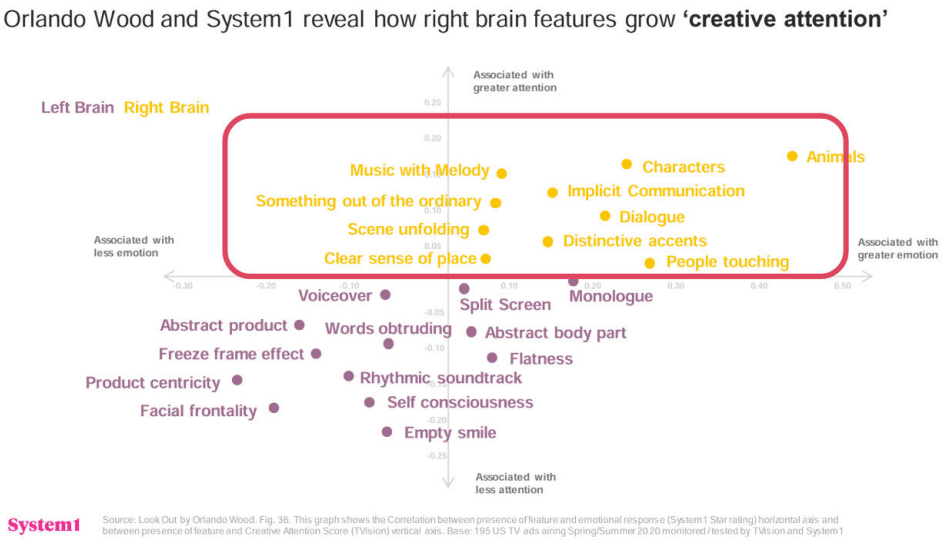
To drive salience year-round, the brand also teamed chef Colin Fassnidge with My Nonna Fina (@mynonnafina), who reaches 969K Instagram followers and a deeply engaged audience of Australians who value traditional home cooking.

Digital partnerships extended reach further, including with Taste.com.au, where 'sticky pork stir fry' was hard-coded to appear as a trending recipe on the homepage and as the 1st recipe search result in context of key words 'stir fry'. This was a 1st for any brand partnership with Taste.com.au.

### CONVERTING DESIRE: A NEW PORK CUT, CUT-OUT FOR THE STIR-FRY OCCASION.

Strategy without physical availability is incomplete. Therefore, Australian Pork partnered with major retailers to collaborate; sharing their plans along with the insights that underpinned the strategy. From these insights and Australian Pork's commitment to the campaign, a new cut was launched by major retailer, Coles: Pork Stir Fry Strips - a ready-to-wok, thinly sliced fresh pork product designed specifically to eliminate the last remaining friction point for the stir-fry substitution decision.

Sources:
^1- Parents At Work / UNICEF Australia, *National Working Families Survey 2024*, n=6,200+ Australian parents.
^2 - *Building branded attention through right-brain features, System 1 & Orlando Wood, 2024*



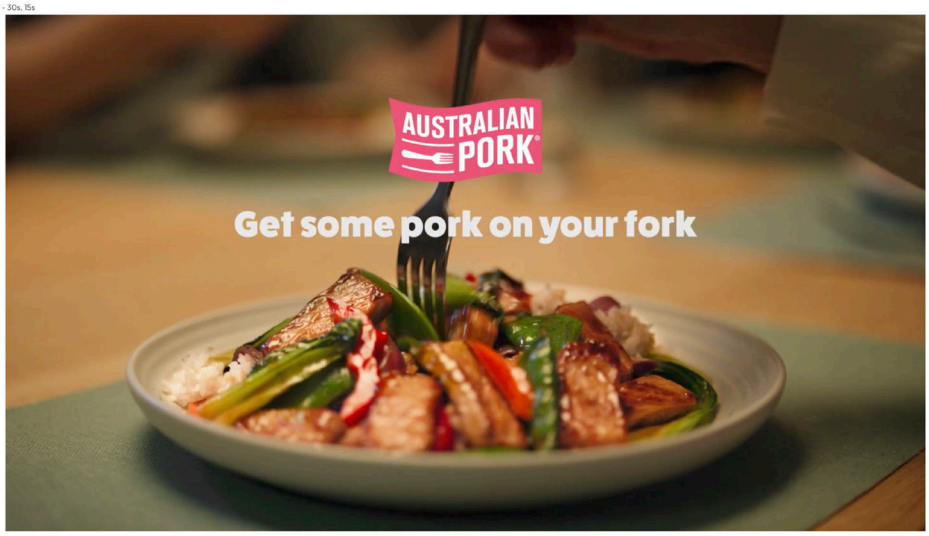


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TVC - 30s, 15s



TVC - 30s, 15s




LARGE FORMAT OOH





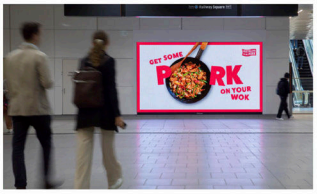
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LARGE FORMAT OOH



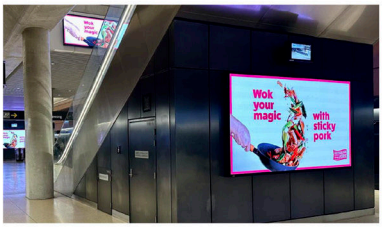







SOOH, DOOH & RETAIL OOH






SOCIAL INFLUENCERS



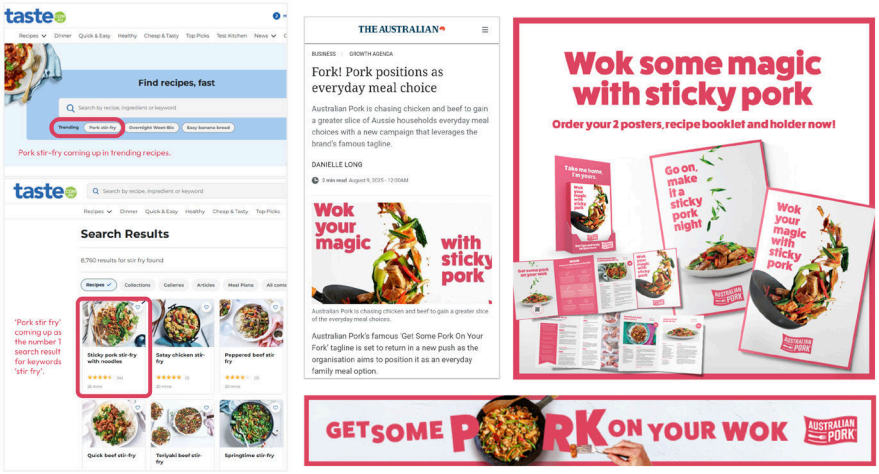


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SOCIAL INFLUENCERS




DIGITAL VIDEO, DISPLAY, TASTE.COM.AU, PRESS, BUTCHERS




STIR FRY CUT – AND ON PACK








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**Q6. HOW DO YOU KNOW THAT YOUR CAMPAIGN WAS SUCCESSFUL?**

## BUSINESS RESULTS

**VOLUME SHARE GROWTH - WHO SAID PIGS CAN'T FLY?:** Share grew from 11.4% in March 2025 to 11.6% in March 2026, reversing 2 years of decline[^1, ^2].

| Business Objective | Launch (March 25) | Target FY26 | Result (March 26) |
|---|---|---|---|
| Fresh pork volume share of fresh meat & seafood | 11.4% | 11.5% | **11.6%** |

**A turnaround of 3,450 tonnes of Fresh Pork, valued at $47.5M***

*Based on current sales price of fresh pork. Volume has been calculated as 0.3% share of Fresh Meat & Seafood – 0.2% of incremental share plus 0.1% that would have been lost, based on the forecast of the share trend downwards continuing.

**PORK also experienced a 30.0% YOY growth in diced / stir fry cut[^3].**
Significantly ahead of chicken (14.7%) and beef (7.1%) and diced / stir fry cuts.

## COMMUNICATIONS RESULTS

**Stir fry first-mention:** achieving the objective to move from 7% to 9% is powerful validation the strategy is working, as Pork grows its mental availability at this key category entry point.[^4]

**Cheeky:** Shifting from 26% to 29% (YTD) is further validation the advertising is building the distinctive emotional associations.[^5]

| Communications Objective | March 25 | Target (End FY26) | Result (March 26) |
|---|---|---|---|
| Stir fry first-mention (pork) | 7% | 9% | **9%** |
| Cheeky brand personality (pork) | Rank #1 (26%) | Maintain Rank #1 | **Rank #1 (29%)** |

## TOP 4% OF ADS RESEARCHED ON SYSTEM 1 IN AUSTRALIA

**4.4 STARS - 30s Stir Fry TVC**
**4.1 STARS - 15s Stir Fry TVC**

The independent ad testing from System 1 further supported the impact of the campaign. The 30s Stir Fry TVC scored 4.4 stars (Top 4% of Australian ads) on System 1's Star Rating vs 2.4-star category norm[^8]. And the hard-working 15s TVC achieved 4.1 Stars[^9]. Star ratings being the measure of predicting advertising's influence on long-term growth. Further supporting the quality and impact of the advertising.

## HUGE INCREASE IN AUSTRALIANS SEARCHING 'PORK STIR FRY'

Google Search:**'pork stir fry' search up 50%**, **'stir fry pork' up 30%** (Jul 2025 - Mar 2026) [^11]
Taste.com.au: '**pork stir fry' search up 289%, 'sticky pork stir fry' up 559%** (Aug 2025 - Mar 2026) [^12]


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## GROWTH IN CORE BRAND ATTRIBUTES

On brand attributes, pork has strengthened most versus the market for **'used in everyday meals'** from **34% agreement to 38% agreement.** Used in Everyday meals is the strongest driver (attribute with the highest correlation) of purchase intention[^6] and also the second strongest driver of preference.

## DISTINCTIVE BRAND ASSET RECOGNITION & AWARENESS

One of the most significant results of the campaign is the rapid emergence of the pink suit as a Distinctive Brand Asset - proof that the advertising is not merely driving short-term response, but building long-term mental structures. And also of note, the Australian Pork Pink rose from 48% to 63% [^10].

| Asset / Metric | March 25 | March 26 | Significance |
|---|---|---|---|
| Pink suit - brand attribution | 54% | **79%** | +25pp - exceptional velocity. |
| Pink colour - brand linkage to pork | 48% | **63%** | +15pp - Getting close to Hero territory. |

Sources:

^1 - *Circana (AU) Pty Ltd, ShopperView, Fresh Pork, - 52 weekly rolling to 22.03.2026*

*^2 - Circana (AU) Pty Ltd, ShopperView, Fresh Pork, Fresh Beef, Fresh Chicken, Fresh Lamb, Fresh Seafood & Fresh Meat - 52 weekly rolling to 22.03.2026*

*^3 - Circana (AU) Pty Ltd, ShopperView, Diced / Stir Fry Cut, Fresh meat - 52 weekly rolling to 22.03.2026*

^4 - Stir Fry First Mention - *Australian Pork Brand and Advertising Tracking, Wave 87, March 2026, Thrive Research*

^5 - Brand Personality - *Australian Pork Brand and Advertising Tracking, Wave 87, March 2026, Thrive Research*

^6 - Driver Analysis - *Australian Pork Brand and Advertising Tracking, Wave 87, March 2026, Thrive Research*

^7 - Attributes shifts - *Australian Pork Brand and Advertising Tracking, Wave 87, March 2026, Thrive Research*

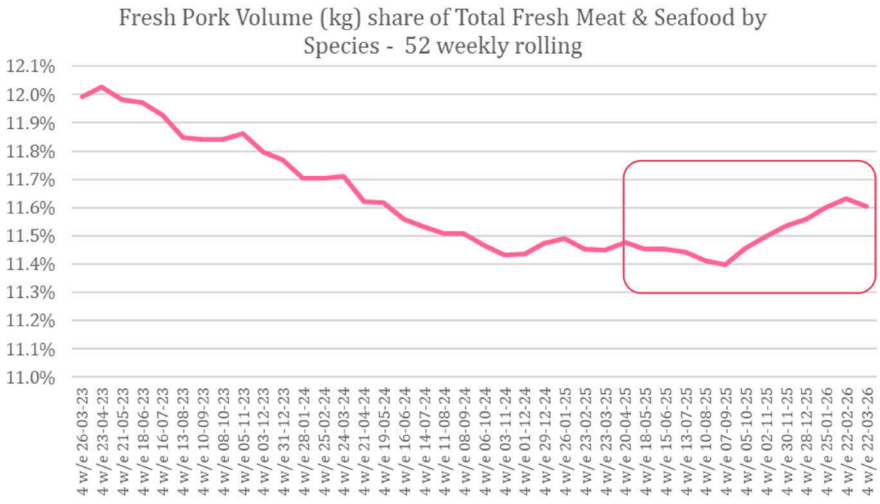
^8 - *Australian Pork - Stir Fry 30s ad research, System 1, 2nd March 2026*

^9 - *Australian Pork - Stir Fry 30s ad research, System 1, 10th February 2026*

^10 - Distinctive Brand Assets - *Australian Pork Brand and Advertising Tracking, Wave 87, March 2026, Thrive Research*

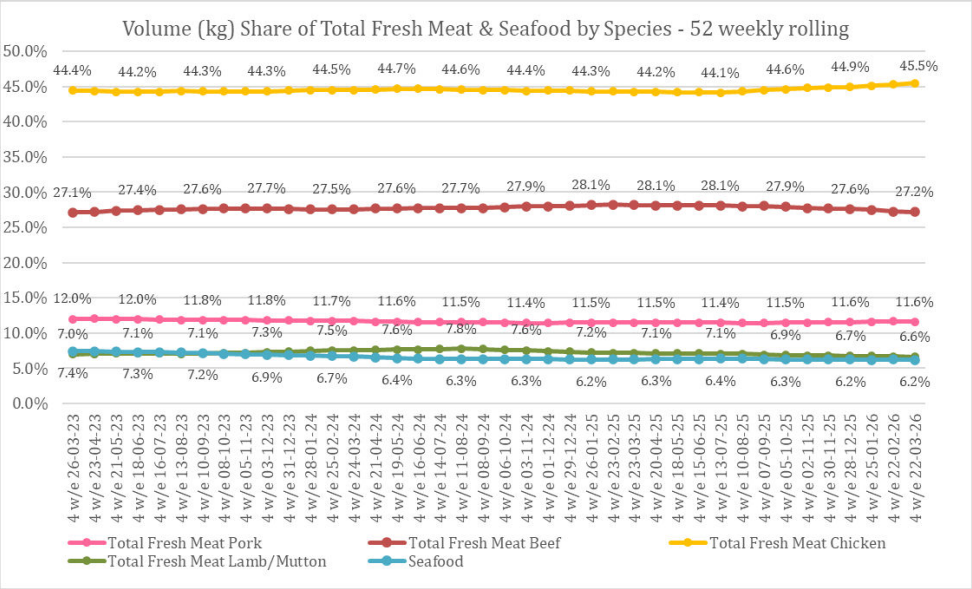
*^11 - Google Trends*

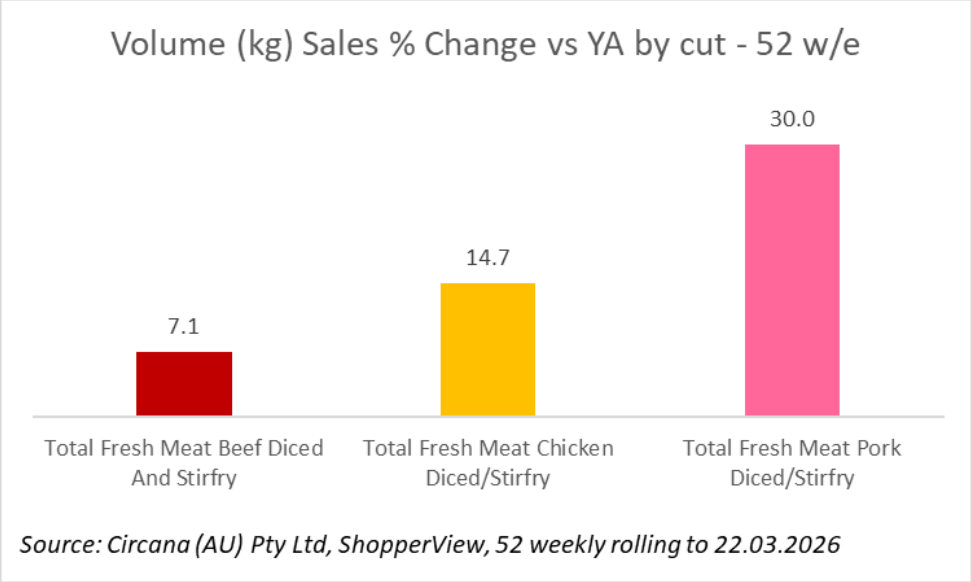
*^12 - Taste.com.au search results*



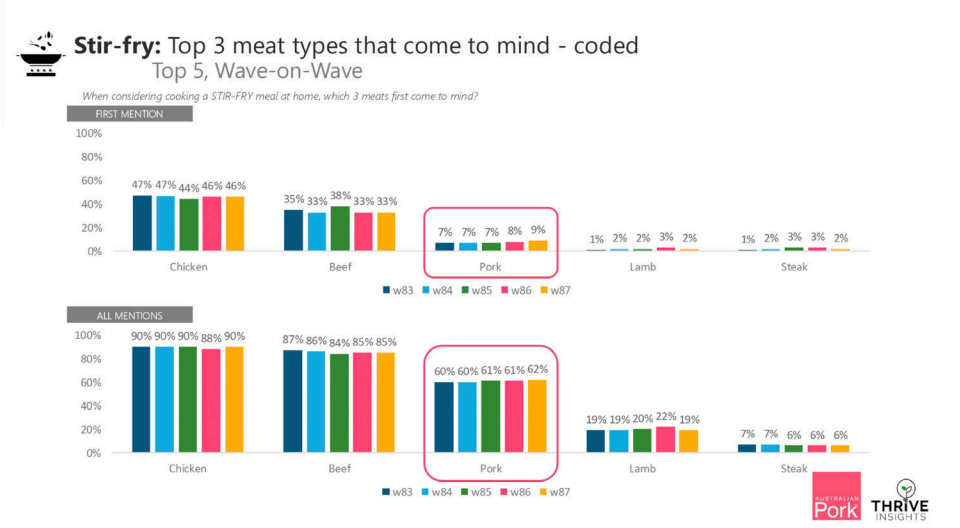


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*Source: Circana (AU) Pty Ltd, ShopperView, 52 weekly rolling to 22.03.2026*

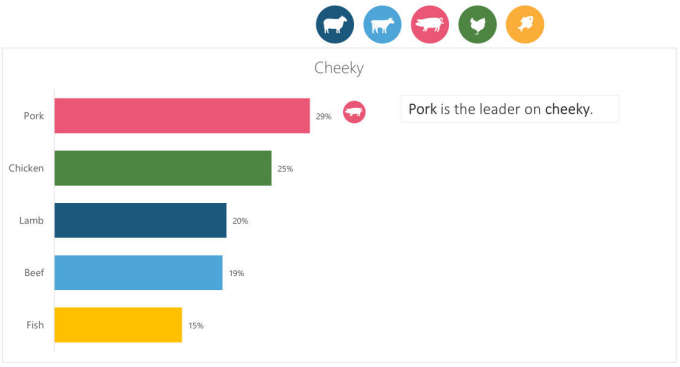




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# Brand personality – ranked wave 87 by attribute

*Now imagine each of the following meats are people. Which of the following qualities would apply to each? For each attribute, you may select one, all of them or none of them... whatever you believe*

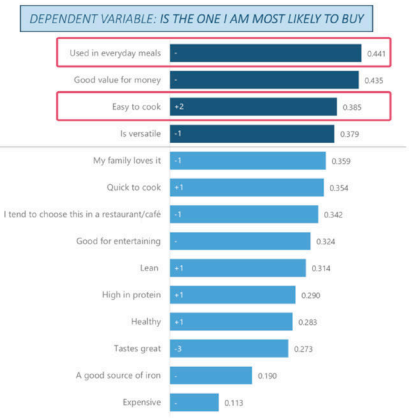



80

# Driver analysis
Wave 87



*Key drivers*




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***Asked once per year attributes asked in Wave 86 (last asked in W81):*** *Fresh, Is usually great quality, Australian grown & produced, Australia sets higher safety and welfare standards*
***Removed in Wave 81:*** *Good for midweek dinners, is usually tender and kids love it; Removed in Wave 78: Low in fat; Removed in Wave 75: Should serve 2-3 times per week / Good for steaks / I really like the flavour*

# Attribute shifts
All meats

*Medium term shift*
*Since wave 83 – Mar 2025*

*Attributes meat has improved on relative to the market.*

*Attributes meat has maintained a similar position in relative to competitors.*

*Attributes competitors have improved on relative to this meat.*

Our competitors have lifted most on *health / good for you, my family loves it* and *good value for money* since wave 83, while **Pork** has lifted most on used in everyday meals, easy to cook, high in protein and tend to choose in restaurant/ café.

| PORK | LAMB | BEEF | CHICKEN | FISH |
|---|---|---|---|---|
| Used in everyday meals | A good source of iron | Healthy / good for you | Good for entertaining | Versatile |
| Easy to cook | Healthy / good for you | Expensive | Expensive | Good value for money |
| High in protein | Easy to cook | Lean | Tend to choose in restaurant/cafe | My family loves it |
| Tend to choose in restaurant/cafe | Lean | My family loves it | Quick to cook | Good for entertaining |
| Quick to cook | High in protein | High in protein | Lean | Tastes great |
| Good for entertaining | Tastes great | Quick to cook | A good source of iron | Used in everyday meals |
| Expensive | Versatile | A good source of iron | Tastes great | A good source of iron |
| Versatile | Used in everyday meals | Good value for money | My family loves it | Easy to cook |
| Lean | Tend to choose in restaurant/cafe | Tend to choose in restaurant/cafe | Easy to cook | Healthy / good for you |
| A good source of iron | Quick to cook | Tastes great | Versatile | High in protein |
| Tastes great | Expensive | Easy to cook | Used in everyday meals | Quick to cook |
| Good value for money | Good value for money | Versatile | High in protein | Tend to choose in restaurant/cafe |
| My family loves it | My family loves it | Good for entertaining | Good value for money | Lean |
| Healthy / good for you | Good for entertaining | Used in everyday meals | Healthy / good for you | Expensive |

*Improving on Expensive = More Expensive.*

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***Removed in Wave 81:*** *Good for midweek dinners, is usually tender and kids love it*
***Asked once per year attributes asked in Wave 86:*** *Fresh, Is usually great quality, Australian grown & produced, Australia sets higher safety and welfare standards*


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NatRep Custom Sample
Not available

4.4

## Star Rating: **Strong**

Long-term market share growth based on ad's creative effectiveness, calculated by measuring emotional response to the ad.

| 1.0 | 2.0 | 3.0 | 4.0 | 5.0 |
|---|---|---|---|---|
| Low 31.5% of Ads | Modest 39.5% of Ads | Good 22.0% of Ads | Strong 5.9% of Ads | Exceptional 1.1% of Ads |

2.4 is the average for "**Australia TV**"



TV AD ROUGH CUT
Aus Pork 30 Online TVC
Australian Pork
31 sec. 2nd March 2026

System1

NatRep Survey

4.1

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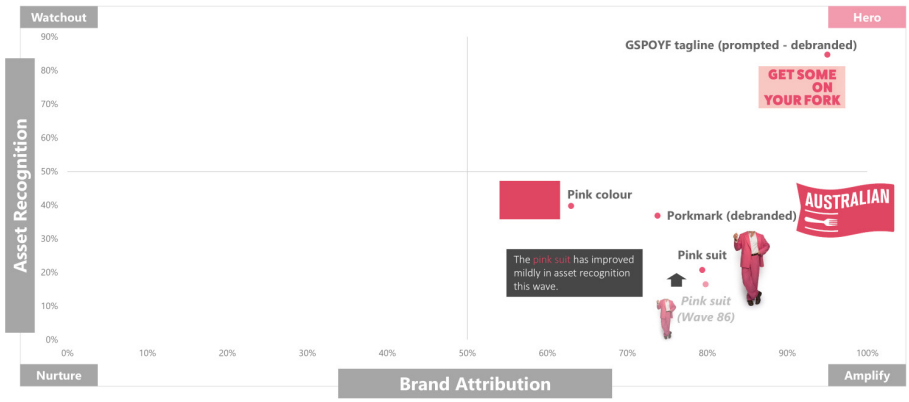
2.4 is the average for "**Australia TV**"



TV AD FINISHED FILM
Australian Pork - Stir Fry 15s TVC NRFF
Australian Pork
16 sec. 19th February 2026

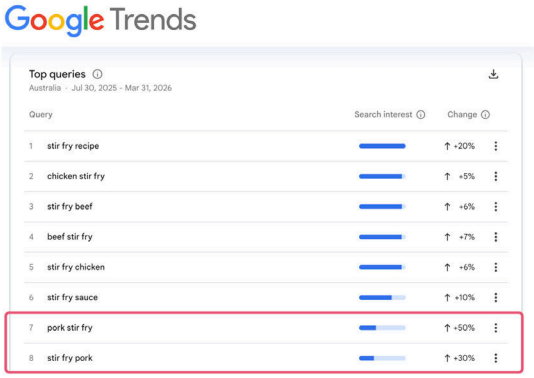
System1

## Distinctive Brand Assets Wave 87




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Google Search of Pork Stir Fry risen significantly.

taste.com.au

| SEARCH TERMS | 1st Aug 24 - 11th Mar 25 vs 1st Aug 25 - 11th Mar 26 |
|---|---|
| pork stir fry | 289.80% |
| sticky pork stir fry | 558.33% |
| crispy pork stir fry | 1369.23% |
| easy pork stir fry | 40.19% |
| ginger pork stir fry | 32.50% |
| easy pork stir fry recipe | 57.14% |
| sweet and sour pork stir fry | 16.00% |
| pork stir fry strips | 73.33% |
| quick chilli pork stir fry | 162.50% |
| sticky pork stir fry with noodles | 50.00% |
| chilli pork stir fry | 9.09% |
| ginger pork stir fry with snow peas | 83.33% |

Incredible growth in Taste.com.au searches for pork related stir fry.

**Q7. WAS THE CAMPAIGN A GOOD INVESTMENT?**

**APL'S CHARTER IS TO DRIVE VOLUME DEMAND FOR AUSTRALIAN PORK FARMERS.**

Australian Pork Limited markets and promotes Australian pork on behalf of its producer members. APL does not own or sell pork products. It cannot set prices or control supply chains. Its advertising can only be judged on its ability to generate volume demand for farmers. The truest measure of ROI is incremental volume demand multiplied by the farm gate price per kilogram.

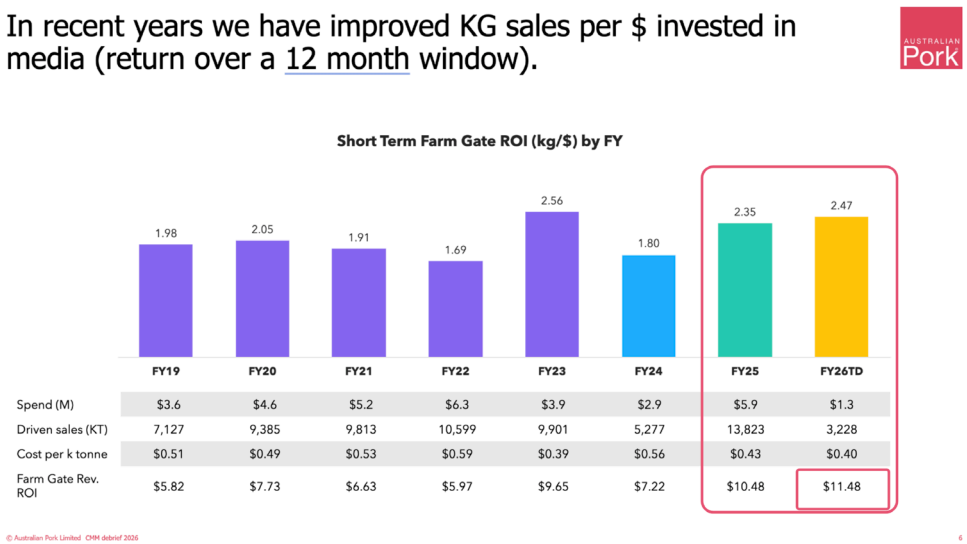
## TRANSFORMATIVE ROI PERFORMANCE.

| Measure | FY24 | FY25 | FY26 YTD |
|---|---|---|---|
| Farm Gate Revenue ROI | 7.22 | 10.48 | **11.48** |

**Analytic Partners (January 2026):**

Farm Gate Revenue ROI of 11.48 in FY26 YTD is the highest ever recorded for Australian Pork advertising - meaning every $1 invested in media is returning $11.48 in farm gate revenue for producers over a 12 month period[^1].

Sources:
^1 - *Analytic Partners, Australian Pork ROI Performance tracking, 2026*





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**Q8. DEMONSTRATE THAT THE RESULT WAS NOT DUE TO OTHER FACTORS**

5 factors that may be viewed to influence the result, that we can eliminate.

## 1. PRICING DID NOT CAUSE PORK'S GROWTH. PORK GREW DESPITE ITS OWN PRICE RISING.

A detailed study by Analytic Partners has measured Pork's price elasticity in context of pork's price and competitor prices and the impact they have on Pork's sales volume. Pork has a price elasticity of 0.92 in context of it's own price, which means for every 1% increase or decrease in the price of pork, we can expect an increase/decrease in sales volume of 0.92%. [^1]

In regards to competitors, chicken price has the greatest impact on pork sales volume, with an elasticity of 0.34 - which means for 1% shift in the price of chicken, the impact on pork sales volume will be 0.34%. For both Beef, (0.17), and lamb (0.07), their price has a limited affect on pork sales volume. [^2]

For the quarter to the end of February 2026, **pork prices UP 2.7%, and chicken's prices are DOWN 2.1%** compared to the February quarter end 2025 [^2] . Chicken prices rose on average over the same period.

By that elasticity, **we would expect a pork volume decline of 3.19% decline.** Calculation: (2.7x0.92) + (2.1x0.34)

Instead, over that same period, **pork sales volume grew +3.1%! [^2]**

**Verdict: × ELIMINATED.**

## 2. COST OF LIVING DID NOT DRIVE PORK'S GROWTH. IT WAS A HEADWIND PORK OVERCAME.

The cost-of-living crisis gripping Australia in 2025 made Pork's job harder. When household budgets tighten, consumers default to familiar, cheaper, low-risk options[^2]. For protein, that means chicken. The structural gravity of the market was pulling consumers away from experimentation. And that means the shopper under budget stress reaches for the protein already in their mental plan.

Additionally, Australian Pork experienced a long-term, enduring volume share decline when interest rates in Australia were at their peak, and when cost-of-living pressure was at it's highest[^3] - despite Pork being cheaper on average price vs beef and lamb. Yet despite cost-of-living improving towards the end of the year in 2025 and early 2026, pork's achieved substantial growth.

**Verdict: × ELIMINATED.**

## 3. IMMIGRATION DID NOT EXPLAIN PORK'S GROWTH. IT IS A STRUCTURAL CONSTANT, NOT A CAMPAIGN-PERIOD CATALYST.

It might be assumed ethnic populations eat more pork vs other proteins as part of their consumption behaviour, and that Australia's high immigration levels would be the source of growth.

Firstly, Immigration is a relative, structural constant, and had this been a driver of growth we would not of seen a decline the two years prior to our campaign.

Secondly, growth does not move in bursts that align precisely with advertising flight dates. The volume share growth correlates in alignment with the campaign period.

Lastly, India is the top country (by a big margin) where migrants are the coming from. The vast majority of Indians do not consume pork due to religious and cultural beliefs. ~80% of the Indian population is Hindu, and do not consume pork[^5].

**Verdict: × ELIMINATED.**


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## 4. DISTRIBUTION DID NOT DRIVE PORK'S GROWTH. THE MODEL CONFIRMS IT WAS IMMATERIAL.

There were no meaningful changes in pork distribution that would explain the volume uplift.

Pork was already broadly available across Australia's major retail channels before the campaign launched. What changed was not where pork was stocked - it was how often consumers chose it. That is a salience and desire effect. Not a shelf effect.

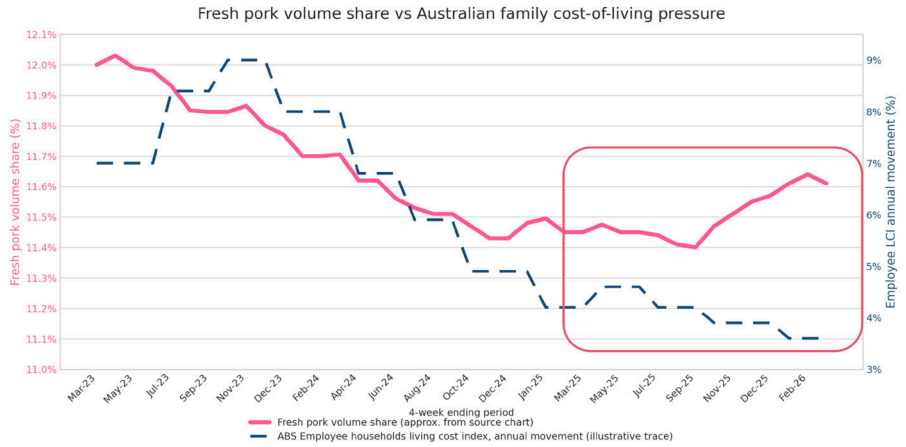
**Verdict: × ELIMINATED.**

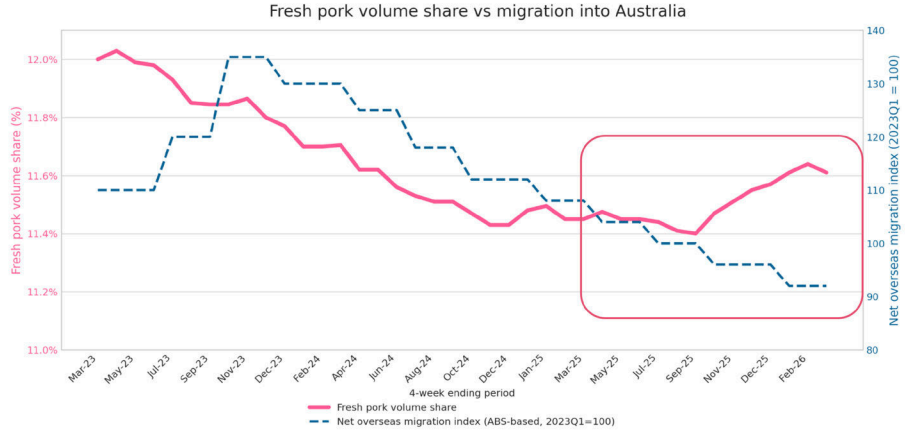
## 5. NO COMPETITOR STOCK ISSUES SENT SHOPPERS TO PORK.

There are no reports of competitor supply disruptions during March 2025 – March 2026. Chicken was fully stocked at Coles and Woolworths throughout the period. Beef was fully available. No competitor had availability issues that would have diverted shoppers toward pork involuntarily.

**Verdict: × ELIMINATED.**

*Sources:*
*^1 - Pork price elasticity, Analytics Partners, 2026*
*^2 - Circana (AU) Pty Ltd, ShopperView, Fresh Pork, Fresh Beef, Fresh Chicken, Fresh Lamb, Fresh Seafood & Fresh Meat - 52 weekly rolling QTR to 22.03.2026*
*^3 - Binet & Field, IPA & Kantar Research, 2022*
*^4 - Fresh pork volume (Circana) vs Cost-of-living pressure (ABS), March 2023 - March 2026*
*^5 - Fresh pork volume (Circana) vs Immigration levels index (ABS), March 2023 - March 2026*
*^6 - https://www.abs.gov.au/statistics/people/population/australias-population-country-birth/latest-release*





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**Q9. GIVE CONTEXT TO BUDGET IN COMPARISON TO COMPETITORS.**

Budget is about the same

**Q10. GIVE CONTEXT TO THE BRAND'S OVERALL BUDGET.**

Brand budget is about the same

**Q11. MEDIA BUDGET ELABORATION**

> Campaign Working media investment March 2025 - March 2026:
>
> $6,048,565.71 - Paid Media (TVC, BVOD, YoutTube, OOH, Digital Display, Social media, Radio, Retail).
>
> The Bulk of the investment kicking in with the TVC launch in August, where we can see a significant shift in volume share growth.
>
> $150,000 - Social Influencers

**Q12. DESCRIBE OWNED MEDIA ACTIVITY**

> The Stir Fry creative and stir-fry recipe content were deployed across owned channels - www.pork.com.au, social channels and YouTube - with editorial aligned to the campaign positioning and supporting discovery and purchase conversion throughout the campaign period.

**Q13. OUTLINE ANY SPONSORSHIPS**

> N/A

**Q14. OUTLINE COMMUNICATION TOUCHPOINTS**

| **Channel** |
| --- |
| Radio |
| Linear TV (30s, 15s) |
| BVOD / YouTube |
| OOH |
| Influencers |
| Digital Display |
| Paid social |
| Organic Social |
| Retail Display |
| POS / On pack |


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