



Community Sentiment Research

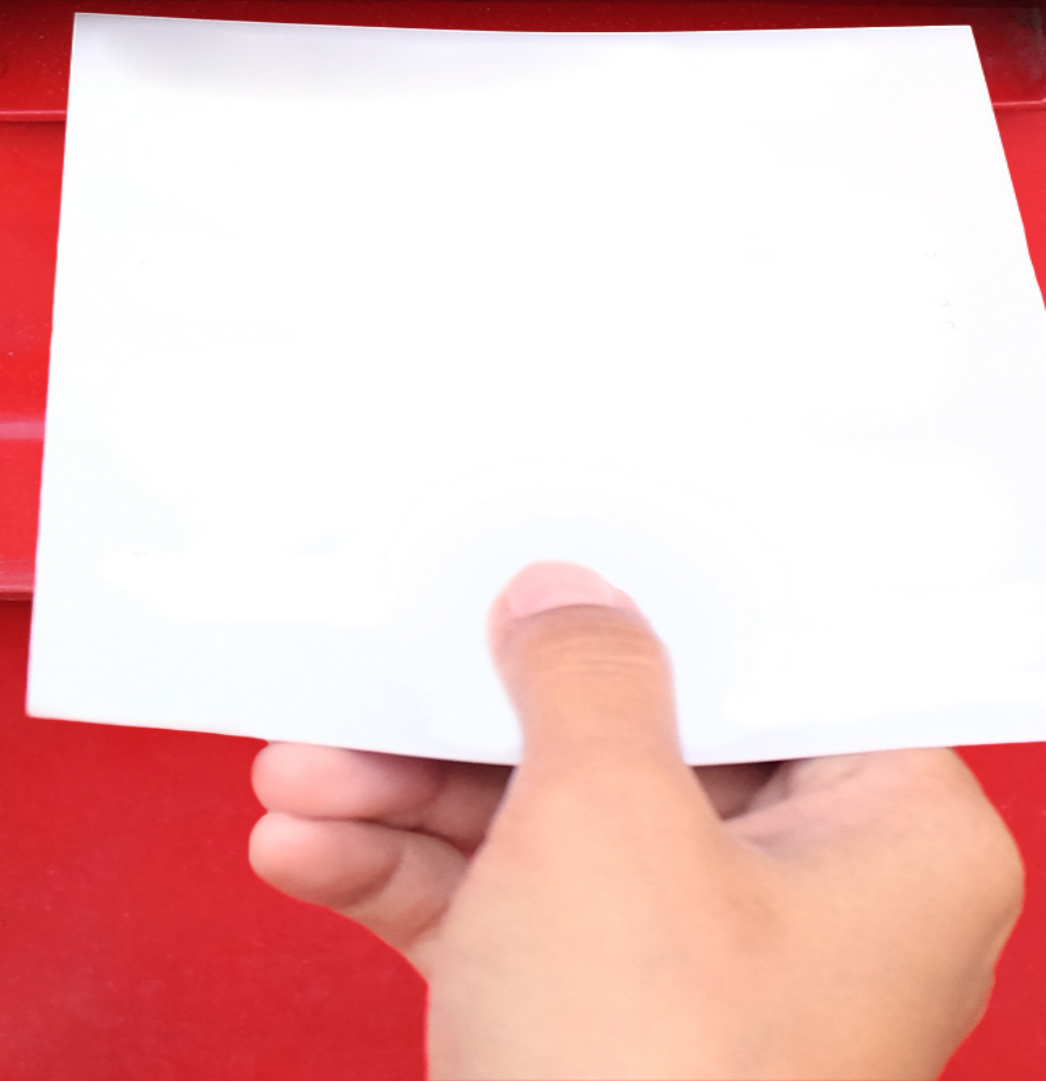
Exploring reactions to a potential stamp price increase

KPMG Customer Intelligence

July 2022

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[kpmg.com.au](https://www.kpmg.com.au)



Disclaimer

Inherent Limitations

This report has been prepared as outlined in the Approach Section. The services provided in connection with this engagement comprise an advisory engagement, which is not subject to assurance or other standards issued by the Australian Auditing and Assurance Standards Board and, consequently no opinions or conclusions intended to convey assurance have been expressed.

The findings in this report are based on a quantitative study and the reported results reflect a perception of Australia Post but only to the extent of the sample surveyed, being approved representative sample of the Australia population. Any projection to the wider population is subject to the level of bias in the method of sample selection (95% confidence rating, 5% sample error).

No warranty of completeness, accuracy or reliability is given in relation to the statements and representations made by, and the information and documentation provided by, Australia Post personnel consulted as part of the process.

KPMG has indicated within this report the sources of the information provided. We have not sought to independently verify those sources unless otherwise noted within the report.

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The findings in this report have been formed on the above basis.

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Core Research Objectives

The key objectives this research looked to address were:

Undertake independent research to understand community sentiment with regards to letter services, and assess reaction to a potential stamp price increase, and the possible impacts on Australia Post's reputation



Determine the community's current knowledge of stamp prices, and their sentiment towards these prices



Understand the impact of potential stamp price increase on community sentiment, perceptions of Australia Post reputation, and key reasons for support or opposition



Understand key differences in attitudes amongst key community cohorts (e.g. businesses, concession card holders, regional areas, specific demographics)



Test key Australia Post communication messages that most effectively contextualise and impact community perceptions from stamp price increase, and the differing impact on degrees of support

Research Approach

A comprehensive 15 minute online survey was designed, covering behaviours, awareness and attitudes towards Australia Post and a potential stamp price increase. The sample was designed to be a nationally representative sample of the views of the Australian community. A robust sample of n=2,078 consumers was collected (aligned to 2016 Census data), with an additional sample of n=246 business owners. The survey fieldwork was conducted from the 8th – 23rd June 2022.

Comprehensive Survey:

- KPMG designed a comprehensive 15 minute online survey, that covered:
 - Demographics
 - Current behaviour and knowledge
 - Awareness of current stamp prices
 - Reactions to a potential price change and impact on perceptions of Australia Post
 - Contextualising and positioning of potential increase
 - Further profiling
- The sample collected was made up of 16+ year olds who were currently living in Australia
- The sample was designed to be nationally representative, using interlocking quotas set on age, gender and state; and stratified by income to be reflective of SES as per 2016 census data
- An additional sample of n=246 businesses were collected in addition to the n=2,078 nationally representative consumers
- The sample was sourced from Dynata, an accredited Australian research panel.

Nationally Representative Sample:

To ensure the data was representative of the National population, weighting was applied to age, gender, socio-economic status and location to be reflective of 2016 Census data.

		Weighting	Sample Achieved
Gender	Male	49%	948
	Female	51%	1130
Age	16 – 24	16%	151
	25 – 34	18%	380
	35 – 44	17%	458
	45 – 54	16%	333
	55 – 64	14%	465
	65+	19%	291
State	NSW	32%	529
	ACT	2%	52
	VIC	26%	520
	QLD	20%	403
	SA	7%	273
	WA	10%	215
	TAS	2%	81
	NT	1%	5
Income	Under \$49,999	22%	587
	\$50,000 - \$99,999	38%	649
	\$100,000 - \$149,999	24%	419
	\$150,000 - \$199,999	13%	241
	\$200,000 or more	3%	87
Total Consumer sample:			2078
Additional Business sample:			246

Cross Section of Australia Post Utilisation:

The sample has a cross section of Australia Post utilisation frequency and this is aligned with Australia Post's understanding of utilisation of services.

Australia Post Frequency of Interaction (Consumers):

	High (Weekly)	Moderately High (Monthly)	Moderate (Quarterly)	Low (Every six months or less)
Receive parcels	14%	23%	16%	8%
Receive letters	40%	13%	3%	2%
Send parcels	9%	11%	15%	13%
Send letters	13%	12%	12%	9%
Visit Post Office	10%	10%	7%	7%
Visit website	10%	12%	10%	6%
Combined Post Office and Website Visitation	19%	23%	17%	11%



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IMPACT OF POSITIONING MESSAGING

Executive Summary

KPMG conducted quantitative research to understand community reaction to a potential stamp price increase. An online survey was conducted between 8th – 23rd June 2022. The survey was a comprehensive 15 minute survey, with a robust nationally representative sample of n=2,078 consumers, and n=246 businesses, to gather the views of the Australian 16 years+ community (sample proportions are in accordance with 2016 Census data).

There is confusion amongst consumers as to the cost of stamps and mail delivery times from Australia Post

There are varying levels of expectations amongst consumers for delivery times for both letters and parcels, with consumers unsure what to expect from Australia Post.

Only one quarter (25%) of the consumers surveyed are aware that the current price of a single domestic standard stamp is \$1.10. Those who are aware of the stamp price are statistically more likely to be aged 55+ (49% aware), Retirees/Pre-Retirees (42% aware), and have bought stamps (37% aware) or sent letters (32% aware) in the past 12 months.

Who buys stamps?

Those who buy stamps are statistically more likely to be older, and hold a pensioner card. Those who buy stamps are significantly more likely to have more positive perceptions of Australia Post on trust and recommendation.

Two thirds of consumers (67%) say they expect stamp prices to increase in the next 12 months

When presented with a 10 cent increase, initial reactions (without any positioning messaging) are mixed. Once introduced to the actual price of the stamp and the 10 cent increase, 38% of consumers say they would support the idea of a 10 cent increase, with a further 32% feeling neutrally, and 28% opposing the increase. Initial claimed support is lower amongst older age groups, and those with lower socio-economic status.

Reasons for support and opposition

When asked why the 38% supported the increase, verbatim feedback suggested a comfort with the size of the increase, and an understanding of the current inflationary economic context businesses are operating in.

When asked why the 28% oppose the increase, consumers commented that the cost of a stamp is already high, and that the cost of living is too high.

The contextualising positioning messages help to build support and make consumers feel more positive about an increase

All contextualising messages were found to make the majority of consumers feel more positive about the potential price increase (ranging from 69% more positive to 57% more positive).

The three most positively received messages emphasised Australia Post's community commitment to service all communities across the country:

- Australia Post is committed to maintaining a large network of Post Offices across the country that is accessible to all communities (69% more positive)
- Australia Post will be able to keep Post Offices open, and posties employed (67% more positive)
- Australia Post will continue to provide access to services across the country (65% more positive)

The positioning statements are effective in building support amongst consumers and businesses

After seeing the positioning messages, survey participants were again asked about their level of support for a price increase. There was a significant increase in support of consumers (from 38% to 56% in total support) and in support of businesses (from 34% to 59%). These results suggest the majority of consumers (82% support/neutral) and businesses (81% support/neutral) are unlikely to oppose an increase at this point in time.

However there is still potential for an impact on Australia Post's corporate reputation

Survey participants again rated Australia Post on three corporate reputation measures to understand the potential reputational impact might occur if Australia Post was to increase the single stamp price. There was a small, and not significant, decrease in positive ratings on all three aspects of Australia Post's corporate reputation, so while messaging does shift support positively, there is still a potential for reputational risk.

Consumers and Businesses have a few key behavioural differences, but are similar in attitudes and expectations

Consumers and businesses have different levels of utilisation of Australia Post's services, with businesses more likely to send a higher number of letters, and have a higher frequency of buying stamps.

DIFFERENCES AMONGST CONSUMERS:

BEHAVIOURALLY:

- On average amongst those who do send letters, send fewer letters per year (average of 15 per year)
- Significantly lower frequency of buying stamps (only 12% weekly) and sending letters (27% weekly)

ATTITUDINALLY:

- More likely to have higher perceptions of Australia Post's reputation, significantly for affiliation

DIFFERENCES AMONGST BUSINESSES:

BEHAVIOURALLY:

- On average amongst those who do send letters, send more letters per year (average of 68 per year)
- Significantly more likely to have a higher frequency of buying stamps (21% weekly) and sending letters (42% weekly)

ATTITUDINALLY:

- More likely to feel neutrally towards Australia Post's reputation, significantly more so for affiliation

SIMILARITIES BETWEEN CONSUMERS AND BUSINESSES:

- Both consumers and businesses feel similarly towards the role of Australian businesses in providing local jobs, the benefit of Australian businesses making profit, and the importance of Australian businesses being self-sufficient
 - Similar levels of satisfaction with Australia Post's services
- Two thirds of each consumers (67%) and businesses (71%) say they expect stamp prices to increase in the next 12 months
 - Similar awareness levels of the current stamp price (consumers 25% aware, businesses 28% aware)
 - Similar expectations surrounding delivery times of both letters and parcels

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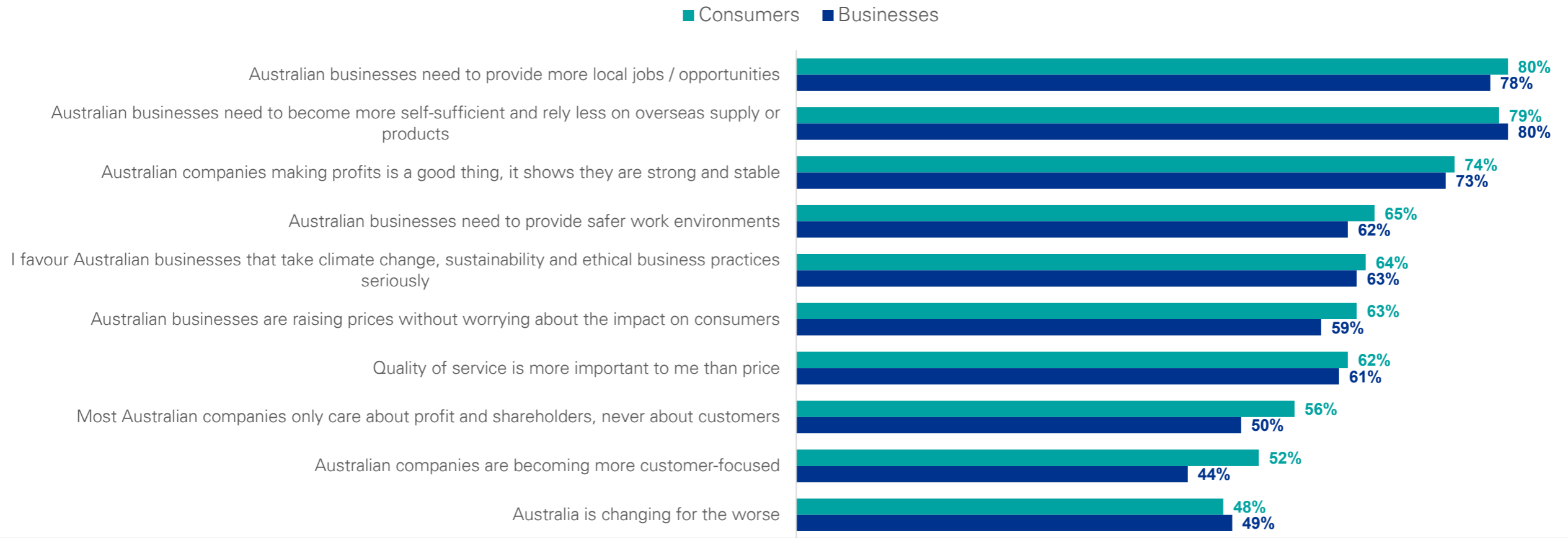
IMPACT OF POSITIONING MESSAGING

General consumer and business sentiment is aligned in a desire to provide more local jobs and in businesses being more self-sufficient

However sentiment is mixed right now, with almost half thinking Australia is 'changing for the worse' and 2-in-3 feeling Australian businesses are raising prices without worrying about the impact on consumers.

Attitudes towards Australian businesses: Amongst Consumers and Businesses

% Agree + Strongly Agree



Q6.1 How strongly do you agree or disagree with the following? Base: Consumers n=2,078; Businesses n=246

Current perceptions of Australia Post's corporate reputation are primarily positive or neutral amongst consumers and businesses

Consumers have consistent views of Australia Post across recommendation, affiliation and trust, with small levels of negativity. Businesses have similar views to consumers, however are more likely to feel neutrally about 'a company I feel positively towards' where consumers are more likely to rate positively (8-10).

Corporate Reputation Measures: Benchmark

Measures rated on a scale from Negative (0) to Positive (10)

Consumers:

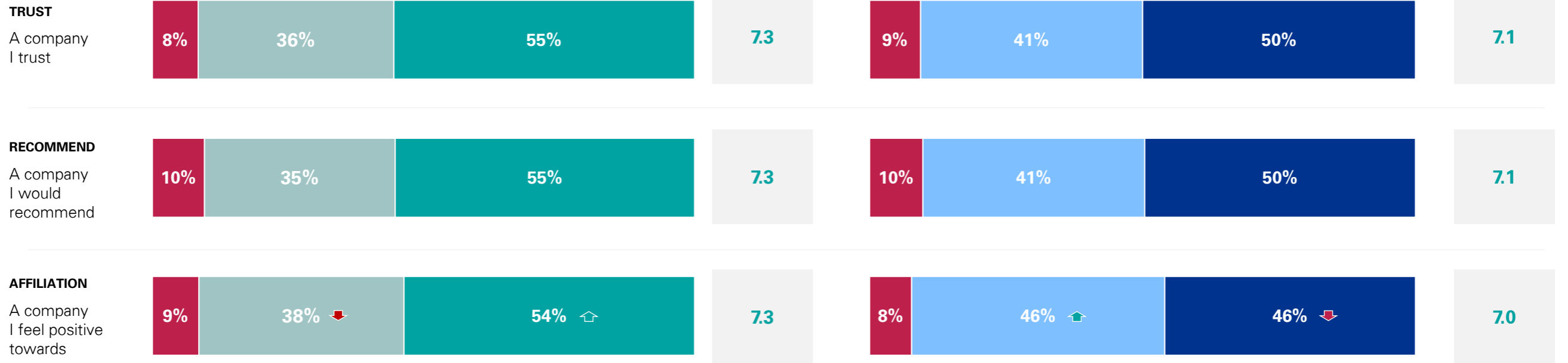
■ Negative (0-4) ■ Neutral (5-7) ■ Positive (8-10)

Mean Score (out of 10):

Businesses:

■ Negative (0-4) ■ Neutral (5-7) ■ Positive (8-10)

Mean Score (out of 10):



KEY ↑ = positive significant difference (95% CI) ↓ = negative significant difference (95% CI)

Q2.1. How would you rate Australia Post on the following...? Base: Consumers n=2,078, Businesses n=246

Among those who send letters, on average, consumers claim to send 1-2 and businesses claim to send 5-6 letters per month

Both groups have similar levels of satisfaction – with those who send more letters more satisfied with the experience.

Average number of letters sent per year

Satisfaction with sending letters

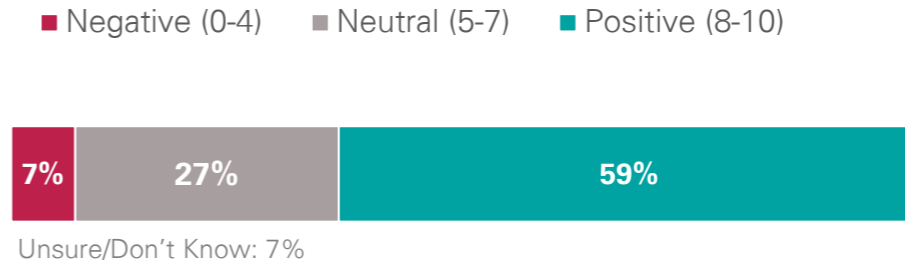
Measures rated on a scale from Negative (0) to Positive (10)

Consumers:

Amongst the **57%** of consumers who buy stamps or send letters:



15 Letters sent per person on average per year are for personal reasons

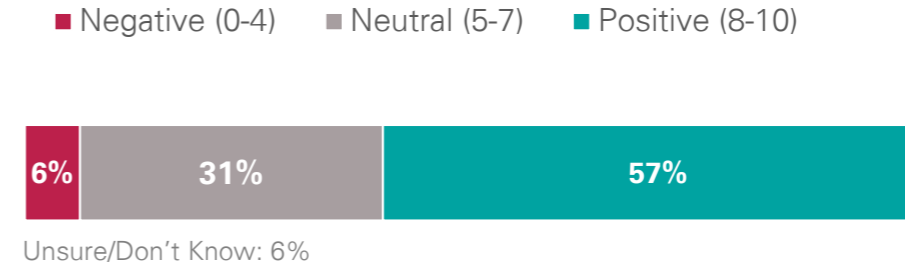


Businesses:

Amongst the **41%** of businesses who buy stamps or send letters:



68 Letters sent per person on average per year are for business reasons



Q2.4A On average, how many standard letters/cards do you send per year for personal reasons? Base: Consumers n=1,177

Q2.4B On average, how many standard letters/cards do you send per year for your business / role at work? Base: Businesses n=102

Q2.5 Thinking about your experiences with Australia Post, how satisfied are you with the following.. Sending letters. Base Consumers: n=2,078, Businesses n=246

Consumers who have bought stamps in the past 12 months have a different demographic profile to those who have not

Those who have bought stamps in the past 12 months are significantly more likely to be older, and feel more positively towards Australia Post.



More Likely to have bought stamps in the past 12 months

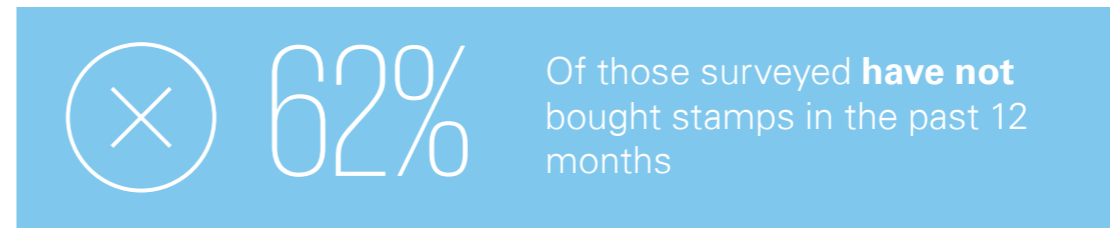
Significant skews compared to the total %

DEMOGRAPHICALLY:

- Aged 55+ (62% bought stamps)
- Retirees/Pre-Retirees (63% bought stamps)
- Hold a Pensioner Concession Card (51% bought stamps)

ATTITUDINALLY:

- Feel positively (rated 8-10) towards Australia Post on recommendation (64% positive), affiliation (63% positive), and trust (65% positive)
- More likely to think stamp price will go up in next 12 months (74%)



More Likely to have not bought stamps in the past 12 months

Significant skews compared to the total %

DEMOGRAPHICALLY:

- Aged 16-34 (80% not bought stamps)
- Young, 'Single Income No Kids/Dual Income No Kids' (SINK/DINK) (80% not bought stamps)

ATTITUDINALLY:

- Feel neutrally (rated 5-7) towards Australia Post on recommendation (41% neutral), affiliation (44% neutral), and trust (42% neutral)
- More likely to think stamp price will stay the same/decrease in the next 12 months (66%)

Q2.2A And, in the past 12 months, what are the types of things you have done through Australia Post for personal reasons? Base: Consumers n=2,078

There are varying levels of expectations amongst consumers for delivery times of both letters and parcels

Consumers have stronger expectations for the delivery time of letters than parcels to capital cities (both in the same state and another state), however views are varied suggesting consumers aren't sure what to expect from Australia Post in delivery time performance.

Expectations for delivery times

Standard mail delivery expectations by delivery location

Same City:

	Letters	Parcels
Next day delivery	31%	25%
2-3 business days	39%	39%
3-4 business days	19%	16%
4-5 business days	7%	10%
5-7 business days	3%	6%
More than 7 business days	-	4%

Expectations for same city are c. next day or 2-3 business days for parcels or letters.

Same state:

	Letters	Parcels
Next day delivery	12%	10%
2-3 business days	44%	39%
3-4 business days	27%	25%
4-5 business days	13%	15%
5-7 business days	4%	6%
More than 7 business days	-	4%

Expectations for same state are c. 2-4 business days for parcels or letters.

Another capital city

	Letters	Parcels
Next day delivery	5%	5%
2-3 business days	32%	27%
3-4 business days	34%	28%
4-5 business days	21%	20%
5-7 business days	8%	11%
More than 7 business days	-	8%

Expectations for another capital state are c. 2-5 business days for parcels or letters.

Outside a capital city in another state

	Letters	Parcels
Next day delivery	4%	3%
2-3 business days	23%	23%
3-4 business days	34%	26%
4-5 business days	26%	25%
5-7 business days	12%	15%
More than 7 business days	-	9%

Expectations for outside another capital city are c. 2-5 business days for parcels or letters.

Q2.6A When posting a standard letter/card, how long do you expect the delivery time to be when sending in/to this location? If you are unsure please provide your best estimate. Base: Consumers n=2,078

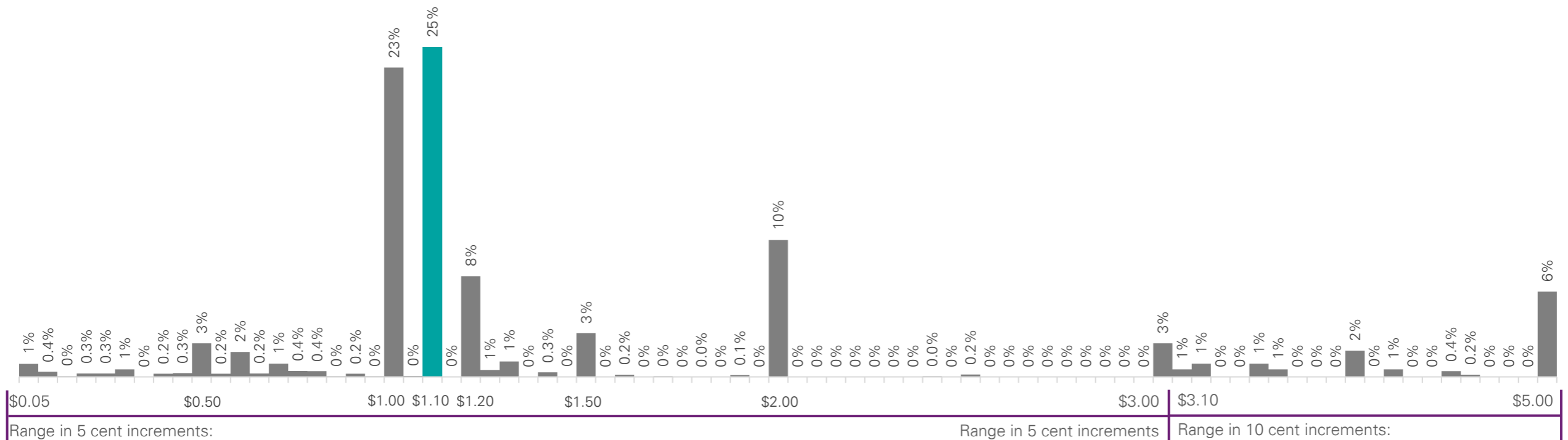
Q2.6B When posting a standard parcel or satchel, how long do you expect the delivery time to be when sending in/to this location? If you are unsure please provide your best estimate. Base: Consumers n=2,078

One quarter (25%) of consumers know the price of a single stamp to send a standard letter is \$1.10

Only a quarter of consumers correctly identify \$1.10 as the current stamp price. 23% believe the current stamp price is still \$1, and 42% believe the cost of a stamp is higher than \$1.10.

Awareness of the current price of single stamp for letter

Average claimed price of stamp to send a standard letter (between 5c and \$5):



Q2.7 How much do you think the following types of stamps cost to purchase? Single domestic stamp. Base: Consumers n=2,078

There are differences between those who are aware of a standard domestic single stamp price and those who are not

Those who are aware of the current stamp price of \$1.10 are more likely to be older, and more engaged with stamp buying, as they frequently buy stamps or send letters.

Profile of those aware of standard domestic stamp prices



More Likely to believe the cost of a stamp is less than \$1.10

Significant skews compared to the total %

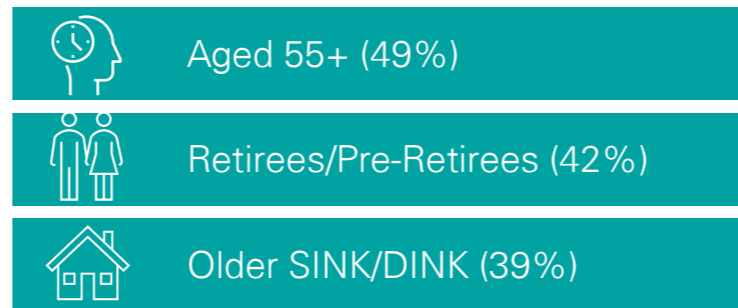
DEMOGRAPHICALLY:



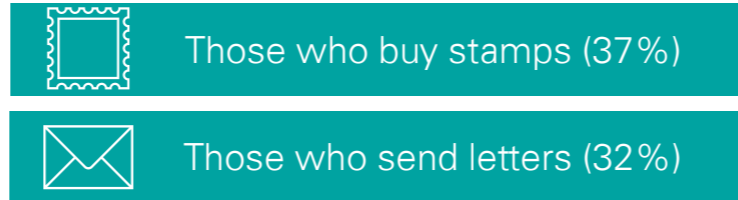
More Likely to be aware of the correct stamp price

Significant skews compared to the total %

DEMOGRAPHICALLY:



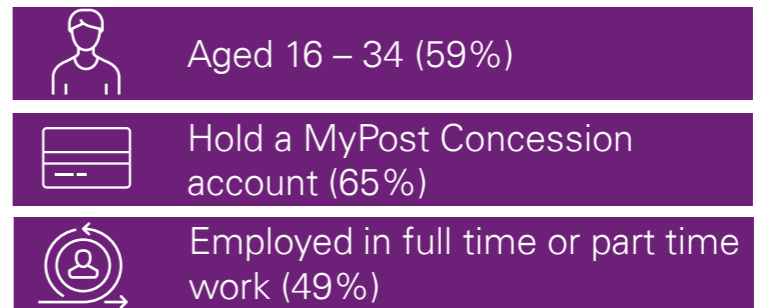
BEHAVIOURALLY:



More Likely to believe the cost of a stamp is more than \$1.10

Significant skews compared to the total %

DEMOGRAPHICALLY:



BEHAVIOURALLY:



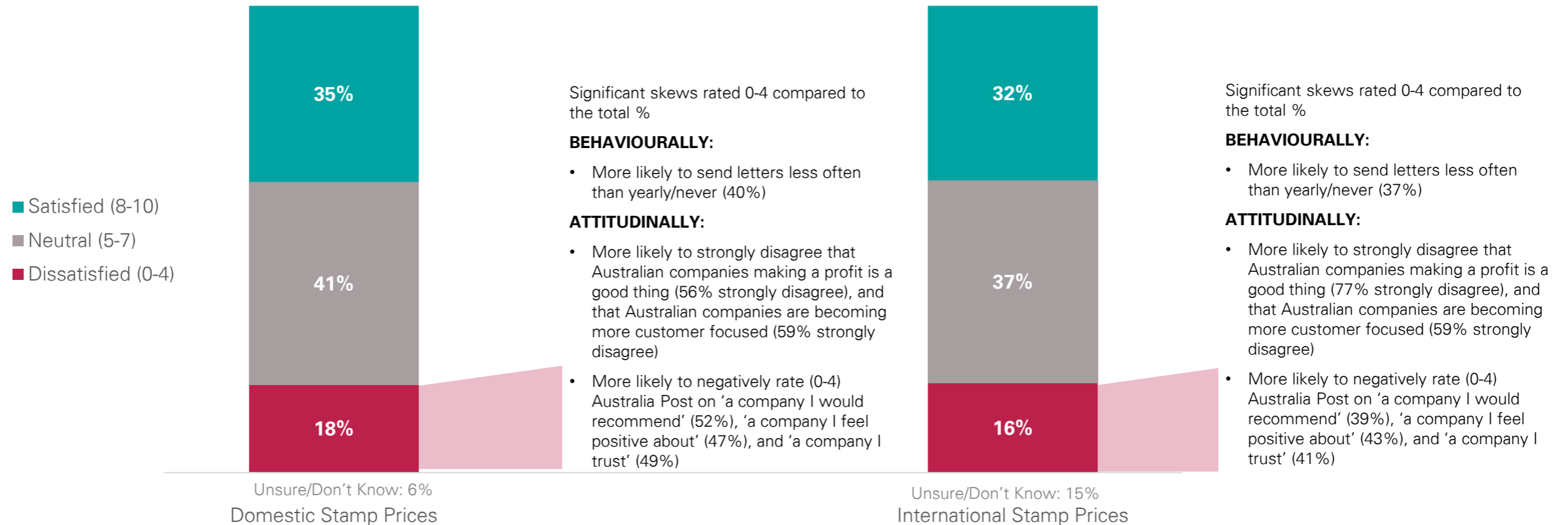
Q2.7 How much do you think the following types of stamps cost to purchase? Single domestic stamp. Base: Consumers n=2,078

Four in five consumers say they are satisfied or neutral towards the price of domestic and international stamps – but a notable minority claiming to be dissatisfied

Dissatisfaction with domestic and international stamp prices is higher amongst those who rate Australia Post more negatively on corporate reputation measures.

Current satisfaction with stamp prices (but not yet informed of stamp price):

Satisfaction with the price of stamps (rated 0-10):



Q2.8 And how satisfied are you with the cost of the following: Base: Consumers n=2,078

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Two thirds of the consumers surveyed (67%) say they **expect stamp prices will increase** in the next 12 months.

This is significantly higher amongst older Australians (55+), those who buy stamps and send letters, as well as those who are aware of the correct stamp price. A quarter (26%) believe the price will stay the same or decrease, which tends to be younger age groups, and those unaware of the current stamp price.



Initially, **38% of consumers and 34% of businesses say they would support** the idea of a 10 cent increase, with a further 32% feeling neutrally.

Levels of opposition sit at 28% for consumers and 30% for businesses. There are weaker levels of support amongst females, those with lower socioeconomic status, those aware of the current price, and those dissatisfied with the current domestic and international stamp prices.



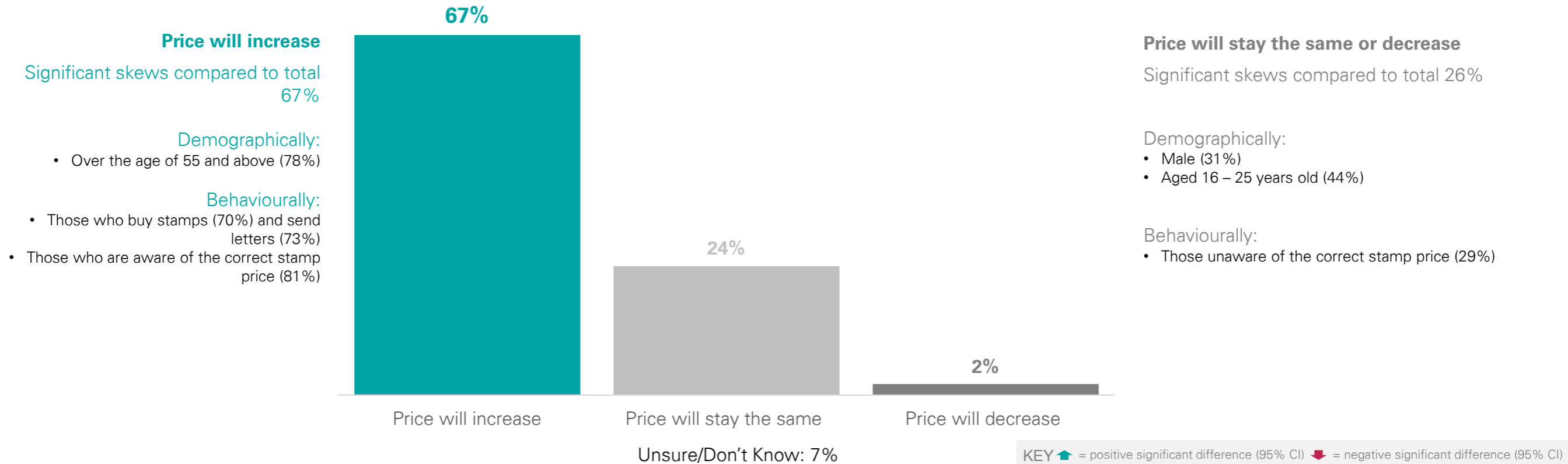
Satisfaction with the size of the increase, and an understanding of current economic factors are the main reasons for support.

Amongst both businesses and consumers, those who support the increase are satisfied with the size of the 10 cent increase, and both groups recognise the current inflationary environment businesses are operating in. Among those that oppose the increase, key reasons given include the perception that stamps are already expensive and that the cost of living is already too high. The cost of stamps currently being too high is the leading reason for opposition amongst those aware of the stamp price.

Two thirds of consumers (67%) expect that the price of a domestic stamp will increase in the next 12 months

Older Australians and those who regularly buy stamps and send letters say they are expecting the stamp price to increase in the next 12 months. Younger Australians, and those who are not aware of the current stamp price say they are more likely to believe the price of a stamp will stay the same or decrease.

Expectations of stamp prices in next 12 months



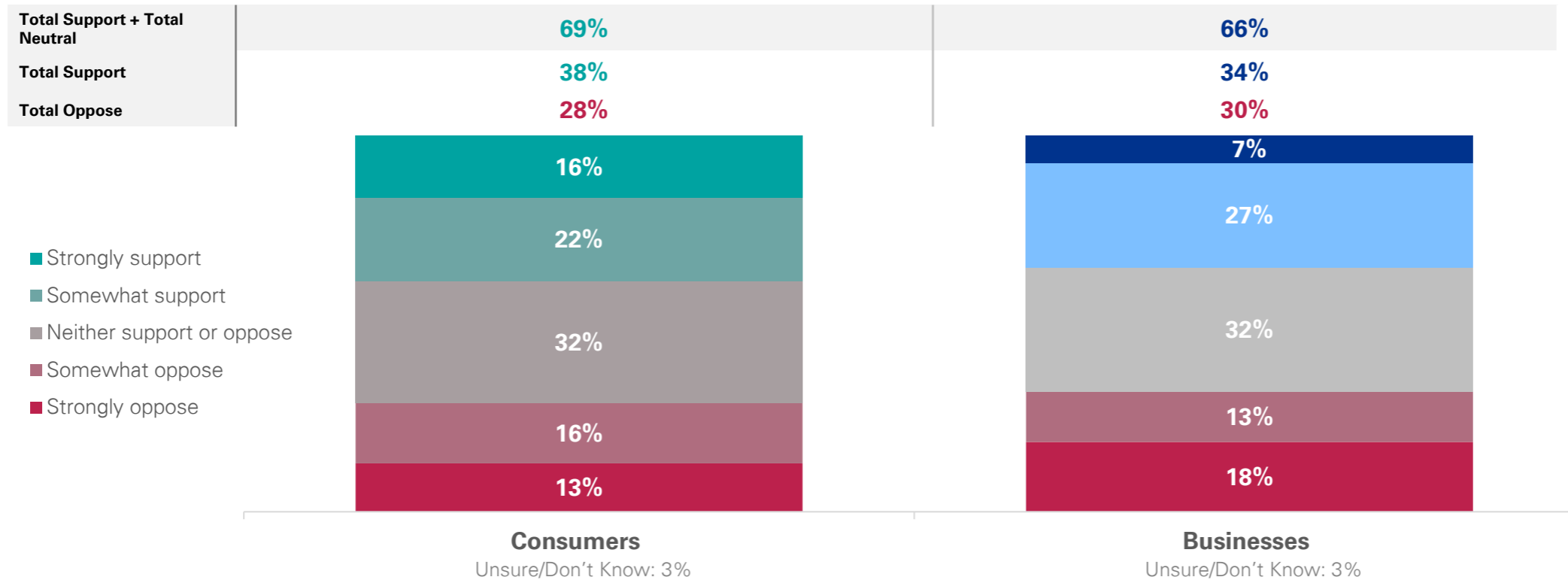
Q2.9 In the next 12 months, what do you expect will occur to the price of domestic stamps to send a standard letter/card? Base: Consumers n=2,078

Without positioning messages, two thirds (69%) of survey respondents are either supportive or neutral of the price rise

A baseline level of support for a potential price increase to \$1.20 was captured, before any positioning messages were shown around the reasons for the increase. Across the total community, more than two thirds say they were in support or neutral to a potential price increase (69% of consumers, and 66% of businesses) and less than a third of consumers (28%) and businesses (30%) were in opposition.

Level of support of a price increase (without any positioning support)

5 point support scale rating (1) to (5)



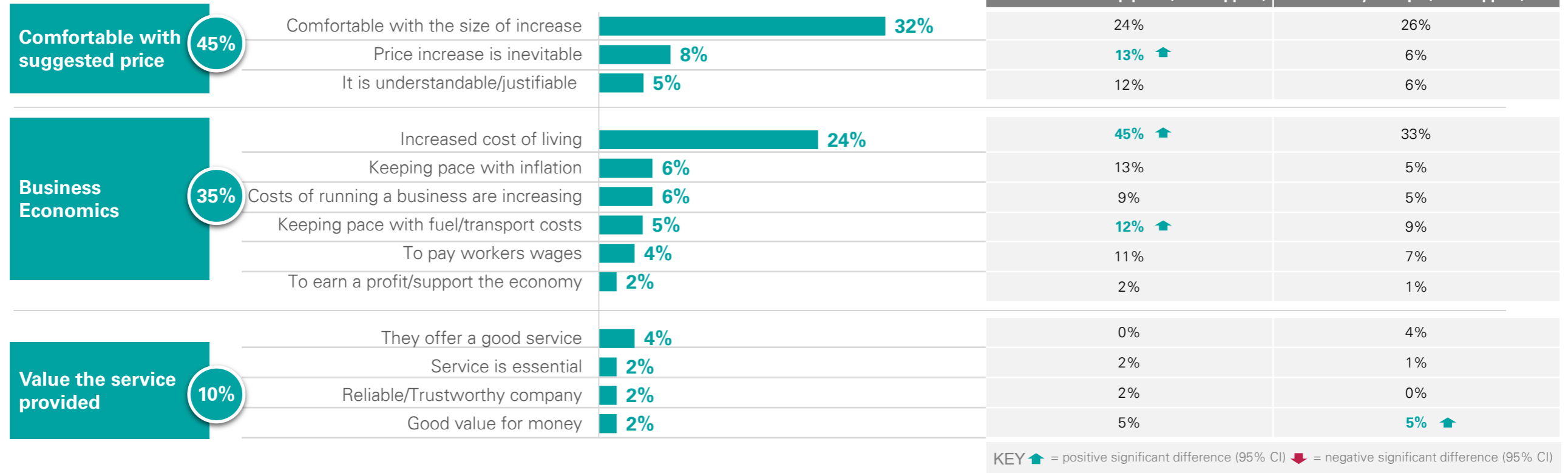
Australia Post is considering increasing the price of domestic stamps for standard letters by 10c in the next 12 months. This would mean the price of stamps (for standard letters/cards) will increase from \$1.10 to \$1.20. There will be no change to the price of Concession Stamps and the stamps used for Seasonal greeting cards. If this change was to occur, how would you rate your level of support for this? Base: Consumers n=2,078, Businesses n=246

Among consumers who support the increase, comfort with the size of the increase is the main reason for support

The key reasons for support amongst consumers are comfort with the suggested price (specifically the size of the increase), and a pragmatic understanding of business economics, with the community understanding the increased cost of living, inflation and business costs are all impacting Australia Post.

Reasons for support: amongst the 38% of consumers

Coded and themed open feedback on reasons for supporting a price increase



It is important to note that this question was asked before any 'positioning messages' were shown.

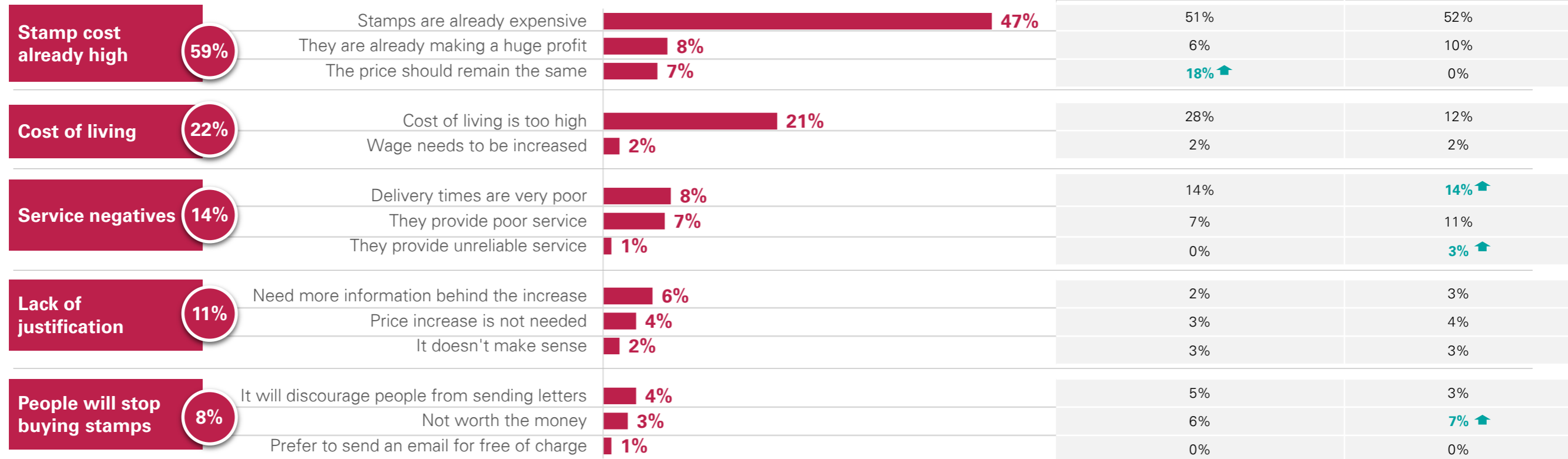
Q3.2A Why do you feel this way? What makes you want to support this? Base: Consumers n=665

The main reason for opposition amongst consumers is the perception that stamps are already expensive, and that the cost of living is already too high

Six in ten (59%) believe the cost of a stamp is already high. One in five (22%) say they oppose the increase because of the cost of living challenges they are already facing, and 14% mention service negatives. One in ten (11%) say there is a lack of justification for an increase – positioning messaging may be helpful for this group.

Reasons for opposition: amongst the 28% of consumers

Coded and themed open feedback on reasons for supporting a price increase



KEY ↑ = positive significant difference (95% CI) ↓ = negative significant difference (95% CI)

It is important to note that this question was asked before any “positioning messages” were shown.

Q3.2A Why do you feel this way? What makes you not want to entirely support this? Base: Consumers n=630

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Section Summary:



Positioning messages **significantly increased support** of a stamp price increase amongst both consumers and businesses.

On seeing positioning messages, levels of community support increased across all segments. There was a significant increase in consumer support (from 31% to 56% in total support) as well as a significant decrease in opposition (38% to 16% in total opposition). The results suggest the majority of consumers (82% support/neutral) are unlikely to oppose an increase if messages are well communicated.



All messaging was received positively by consumers and businesses, with **community-focused messaging** driving the most positivity.

Messaging of maintaining and investing in a large network of Post Offices, keeping Post Offices open, and providing services across the country were the relatively most positively received messages, as well as confirming concessional card holders would not be impacted. There were no messages that did not land well.



A price increase could have a **small impact** on Australia Post's **reputation**, with perceptions of Australia Post more likely to be impacted among businesses.

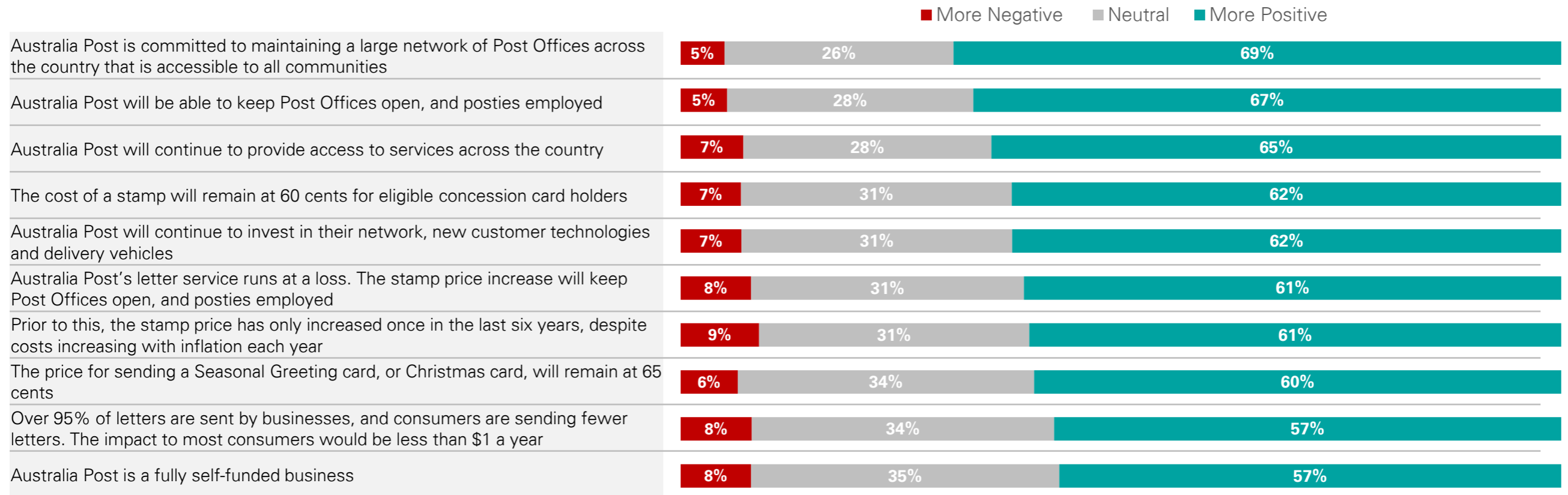
There was a very small decrease in Australia Post corporate reputation measures after making participants aware of a potential price increase. With consumers, the shift was from those moving from positive to neutral, however amongst businesses, there was a shift from neutral to negative.

The contextualising positioning messages help to build support and make consumers feel more positive about an increase

Community-focused messaging, reassuring Australia Post will be able to maintain a large network, keeping post offices open, and providing services for the whole country are received most positively.

Impact of contextualising statements: Amongst consumers

The proportion who feel more Negative (a lot/little) to Positive (a lot/a little)



Q3.3 As a result of this price change, there are a number of things Australia Post will be able to maintain... Base: Consumers n=2,078

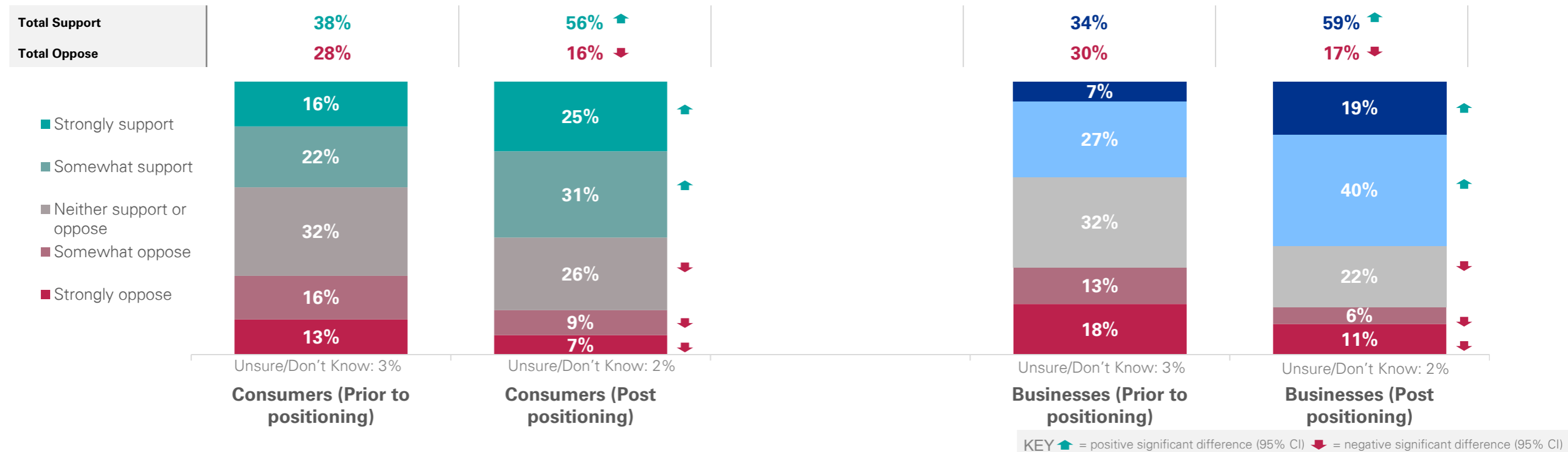
Q3.4 Here is some information Australia Post could share with the community around its business... Base Consumers n=2,078

Positioning messages significantly increase support of the increase amongst both consumers and businesses

After seeing the positioning messages, survey participants were again asked about their level of support for a price increase. There was a significant increase in consumer support (from 38% to 56% in total support) as well as a significant decrease in opposition (28% to 16% in total opposition). The results suggest the majority of consumers (82% support/neutral) are unlikely to oppose an increase. Similarly with businesses, support significantly increased (from 34% to 59%), with only 17% remaining in opposition.

Level of support with and without positioning support

The proportion who Support (strongly/somewhat) and Oppose (strongly/somewhat)

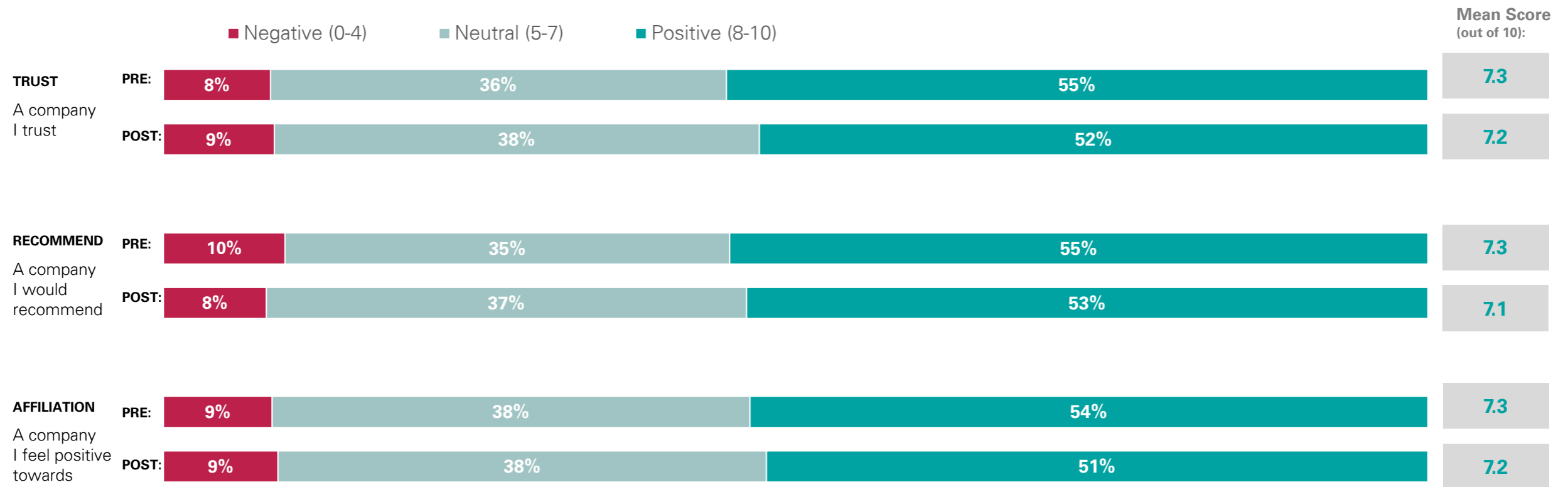


Q4.1 Now that you have heard more about the reason for Australia Post considerations for increasing the price of stamps for standard letters by 10 cents in the next 12 months, how would you now rate your level of support? Base: Consumers n=2,078, Businesses n=246

There was no significant impact on corporate reputation measures in this survey, after positioning statements

Australia Post was **again** rated on three corporate reputation measures to understand the potential reputational impact might occur if Australia Post was to increase the single stamp price. Australia Post still rated well on all three measures but there was a small decrease in positive ratings, which impacted the average scores.

Reputation Post Measure: Amongst Consumers



Q2.1. How would you rate Australia Post on the following...? Base: Consumers n=2,078
 Q4.2 How would you rate Australia Post on the following...? Base: Consumers n=2,078



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