

Project Tracy

Consumer insights and trends in relation to the purchase of red meat in key SE Asian markets

REPORT

INDONESIA



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Background, Objectives & Methodology

BACKGROUND: MLA is working with the Australian Department of Agriculture, Fisheries and Forestry on The National Agriculture Traceability Grants Program

As outlined in the brief, the grant's primary purpose is to:

1. Support the ongoing development, implementation and improvement of agricultural supply chain traceability systems and arrangements for Australian agricultural exports, and enable market access and premium pricing for such exports,
2. Promote and showcase Australian agricultural traceability and credentials in Southeast Asia markets to influence uptake of agricultural traceability systems and tools that support Australia's trade agenda,
3. Build trust in Brand Australia,
4. Build regional capability, business-to-business, through technical demonstration and information sharing and engagement to enable the uptake of efficient and transparent supply chain practices in a way that is verifiable and secure, including through access to information relevant to supply chain traceability (including market intelligence and research into emerging trends) and online tools that provide research and modelling on consumer trends and commercial trading partner requirements.

With respect to MLA's project mandate in the context of the grant program's intention this is informed by the project's title: **Showcasing Australian Red Meat Integrity Systems & Credentials in Southeast Asia**



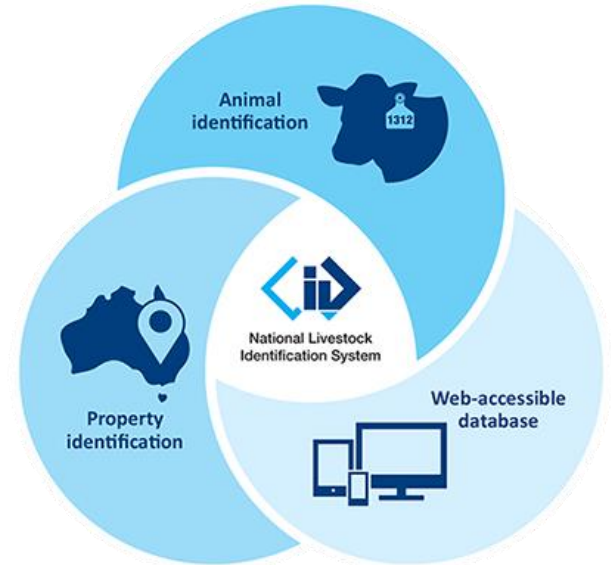
The Australian red meat industry has developed a red meat traceability system that can track all Australian red meat from birth to slaughter

The National Livestock Identification System (NLIS) is able to identify and trace cattle, sheep and goats throughout the lifespan

NLIS reflects Australia's commitment to biosecurity and food safety and provides a competitive advantage in a global market. It combines 3 elements to enable the lifetime traceability of animals:

1. All livestock are identified by a visual or electronic eartag/device.
2. All physical locations are identified by means of a Property Identification Code (PIC)
3. All livestock location data and movements are recorded in a central database

The trust placed in the Australian Red Meat sector stems from these integrity systems, which support our product's provenance and the value that arises from our commitment to animal welfare, food safety, environmental stewardship—including sustainability—and biosecurity credentials.



Source: <https://www.integritysystems.com.au/identification--traceability/national-livestock-identification-system/>

Research & Business Objectives

The overall objective is to identify drivers of consideration and trust for the Australian Red Meat (Beef, Lamb, Goat) in the context of traceability, provenance, food safety and sustainability credentials

- 1 Red meat purchase decision making
- 2 Understanding trust and quality for consumers
- 3 Importance of traceability
- 4 Perceptions towards Australian red meat

Business Objectives:

To promote and showcase Australia's red meat traceability and integrity credentials to drive greater trade between Australia and SEA. This project aims to gain a deeper understanding of how consumers perceive Australian traceability, provenance, food safety and sustainability credentials, and to leverage this knowledge to drive demand, grow preference for Australian red meat across Southeast Asia and willingness to pay a premium.

Research findings will benefit SEA and Australian businesses where results can be used to inform marketing messaging and strategies, business investment decisions to lead to competitive advantage and price premium; as well as feed into red meat industry R&D activities

Online Consumer Focus Groups were conducted in 7 key Southeast Asian markets

A total of 4 groups in each market

Respondent profile:

- Main grocery buyers, regular consumers/ purchasers of imported (including AU) beef and lamb – likely skew female
 - All to have purchased imported red meat (beef and/or lamb) mainly from modern retail but can also purchase from other retail channels - we recommend at least purchasing once per month
 - Please note, for Vietnam, as lamb consumption is lower, it was 100% beef consumers
- Income group / social class: Assume A/A+ or B+ in each market
- Age range: 18-49 years
- Ethnicity – across countries, we will mix ethnicity as per natural fallout.
 - For Malaysia specifically, we will ensure mix (Malay, Chinese, Indian) & conduct research in English



GROUP STRUCTURE: ONLINE FOCUS GROUP DISCUSSION (FGDs) – Each group will be 2 hours in length and will consist of 6 consumers	 Singapore (Singapore)	 Malaysia (KL)	 Philippines (Manila)	 Indonesia (Jakarta)	 Vietnam (HCMC)	 Thailand (Bangkok)	 Cambodia (Phenom Penh)
YOUNGER - 18-30 years (single/married, early career / 1 st jobber etc)	2 FGDs	2 FGDs	2 FGDs	2 FGDs	2 FGDs	2 FGDs	2 FGDs
OLDER 31 – 49 years (married with/without kids; mix working & housewife)	2 FGDs	2 FGDs	2 FGDs	2 FGDs	2 FGDs	2 FGDs	2 FGDs
DATES OF FOCUS GROUPS (2024)	25-26 Nov	22-23 Nov	21-22 Nov	21-22 Nov	18-19 Nov	25-26 Nov	19-20 Nov



RESEARCH FINDINGS



IMPORTED BEEF & LAMB CATEGORY UNDERSTANDING

Imported red meat spontaneous perceptions – Consumers perceive imported meat as superior compared to local meat

Australian beef, specifically, is well-known to Indonesian consumers due to its high availability, while lamb is primarily associated with Middle Eastern dishes (rather than country of origin).

- **Superior quality compared to local products**

- More tender, thus convenient to cook and satisfying to consume.
- High accessibility; can be found at nearby modern trade thus less hassle.

- **Familiar origin country**

- Consumers immediately mention countries of origin that they are aware of, such as Australia, New Zealand, Japan, and the US.

- **For lamb specifically, some consumers spontaneously associate it with the Middle East**

- This association stems from the familiarity with Middle Eastern dishes that are typically made with lamb, such as *Nasi Kebuli*, *Gulai*.



"Sangat mudah untuk membelinya, ga perlu ke pasar, ke supermarket atau toko daging ada, jadi sekalian jalan-jalan / It's very easy to buy, no need to go to the traditional market as supermarkets or butcher shops have it, so you can shop and stroll at the same time" - Older, Greater Jakarta

Beef consumption is quite frequent, with in-home consumption being more common than out-of-home consumption.



Beef offers a wider variety of cuts, allowing for various styles of dishes to be prepared and consumed

IN-HOME CONSUMPTION

- Tenderloin (*has dalam*) is a popular choice among consumers due to its suitability for various cooking methods (i.e., grilled, stir-fried). Other beef mentioned are:
 - Ribs are usually grilled.
 - Ground beef for meatballs or ingredients in sauces.
 - Mums with babies also include ground beef as the baby's complementary food ingredients.
 - Oxtail for soupy dishes.
 - Sliced beef for soupy or stir-fried dishes.
- Consumers typically consume beef in the household 2-3 times/week

"Apalagi saat MPASI, daging giling sering banget karena butuh dan mudah dicerna. Sisanya seperti tenderloin, kalau lagi mau digrill. / Especially during the weaning stage, minced meat is often used because it's nutritious and easy to digest. The rest, like tenderloin, is used when I want to grill it." - Younger, Greater Jakarta



OUT OF HOME CONSUMPTION

- When dining out, consumers opt to go to a restaurant that specializes in meat dishes, such as a steakhouse or all-you-can-eat restaurant with shabu-shabu and grilling beef options.
 - For steak, consumers would order tenderloin, sirloin, or striploin. While sliced beef is preferred for soupy dishes like Shabu-shabu.
- In general, consumers would eat out at least once or twice a month, typically on weekends.
- Examples of restaurants mentioned: Abuba, Holycow, Gyukaku, Shabu Hachi.



"Anak-anak saya juga suka all you can eat, dagingnya ada yang dibakar, ada yang direbus. / My kids also enjoy all-you-can-eat, where the meat is both grilled and boiled" – Older, Greater Jakarta

Beef Usage Influences in the Household – Mum would be the main figure to decide beef consumption in the household.



Furthermore, they also cater to the family's needs and requests in regards of cuts and menu choice.

IN-HOME CONSUMPTION

- For married consumers, **mothers** are the main decision-makers, driven by their roles as primary cooks and nutritional gatekeepers. When deciding food repertoire, mums would take into consideration of others:
 - **Children** – by providing beef, mums would like to ensure a nutritious diet for the kids. Moreover, the kids themselves often request their preferred beef dish.
 - **Spouse** – once in a while, the husbands would ask for certain beef dishes.
 - **Family members** – during the visit from family members, mums would prepare beef dishes that are favored by the family members.
- While single consumers are the sole decision-makers for their in-home beef consumption, though often they also cater to requests from the family members living in the household.

OUT OF HOME CONSUMPTION

- Although parents are the main decision-makers in choosing dining-out destinations, their choices are based on their kids' preferences.

"Saya sebagai chef di rumah, biasanya pilih protein berdasarkan gizi untuk anak, jadi biasanya ada beef, seafood, beragamlah. / I, as the chef at home, usually choose protein based on the nutrition for my kids, so we typically have beef, seafood, and a variety of others." – Older, Greater Jakarta



"Daripada olahan ayam, anak-anak saya suka olahan daging sapi. Pikiran mereka otomatis gini oh kalau di luar, makannya daging. / Rather than chicken dishes, my kids prefer beef. It's as if their mindset automatically goes, 'Oh, when we're eating out, it's beef.'" – Older, Greater Jakarta

Types of dishes: Imported Beef – Versatility becomes main feature of imported beef, as it can be used in a wide variety of dishes.



It spans from traditional local flavors to global culinary styles.

LOCAL DISHES

INTERNATIONAL DISHES

DAILY BEEF DISHES



Meatballs



Iga bakar



Sop buntut



Sop sayur



Teriyaki Beef



Yakiniku Beef



Spaghetti



Lasagna

SPECIAL BEEF DISHES FOR SPECIAL EVENTS



Semur



Rendang

"Semur... Momennya kalau untuk lebaran, dan acara keluarga. Arisan keluarga. / Semur... It's a dish typically enjoyed during Eid and family events, like family gatherings/family's kitty party". – Younger, Greater Jakarta



Steak



Tomyum



Shabu-shabu

"Apalagi anak ada 3. Yang pertama, bawa bekel sekolah biasanya spaghetti isinya daging. Terus anak ke-3 lagi MPASI saya kasih daging giling. Apalagi saya lagi menyusui, booster untuk ASI itu daging. Suami saya sudah hafal banget, setiap 1 minggu 1 kali makannya harus steak / I have three kids. The first one usually brings spaghetti with beef for school. Then, for my third child who's starting solid food, I give him minced meat. Since I'm breastfeeding, meat is also a booster for my milk supply. My husband knows this well; every week, at least once, we must have steak for dinner" – Older segment, Greater Jakarta

Overall, lamb consumption is less often, both for in-home consumption and when dining out.



The strong, distinct aroma of lamb can be unappealing, which makes it less favored by family members. Moreover, if not cooked properly, it can become tough and lose its tenderness.

IN-HOME CONSUMPTION

- Consumers mostly consume **lamb thigh** (*paha domba*) at home because of their tender characteristics; some also consumed lamb chop & ribs.
- Cooking lamb is more prone to get chewy and gamey smell, thus, consumers tend to serve lamb dishes only when requested.
 - Usually by their spouse or for festivities (i.e., family visiting their household).
- Therefore, during the cooking process, consumers are often helped by the husband or mother to ensure the meat is cooked properly.

"Biasanya dibantu in suami kalau masak domba karena untuk bikin lamb chop, saya kurang berani, karena takut jadi bau atau jadi alot. / I usually get help from my husband when cooking lamb because I'm not confident in making lamb chops. I'm afraid it will smell bad or become tough." - Older, Greater Jakarta



OUT OF HOME CONSUMPTION

- When eating out, the dish is mostly made from **lamb ribs**.
- Lamb is consumed less frequently outside the home compared to beef because it is mostly available at specific restaurants, such as Middle Eastern establishments (i.e., once a month at most).
- Example of restaurants: Aljazeera, Sate Domba Afrika H. Ismail





"Kalau di Kelapa Gading, ada warung pak Haji Ismail jual daging domba bakar, itu terkenal. Enak banget, jadi dagingnya gak alot, gak bau. / In Kelapa Gading, there's a stall called Pak Haji Ismail that sells grilled lamb, and it's quite famous. It's really delicious, and the meat is tender and doesn't have a strong smell." - Older, Greater Jakarta



Types of dishes: Imported Lamb – the variety of dishes that can be made with lamb is much more limited compared to beef

Consumers often opt for simpler lamb recipes due to limited knowledge in preparation and a reluctance to try more complex dishes.

	LOCAL DISHES	INTERNATIONAL DISHES
DAILY LAMB DISHES	 <p>Grilled lamb</p>  <p>Satay</p>	No mention
SPECIAL LAMB DISHES FOR SPECIAL EVENTS	 <p>Gulai</p>  <p>Tongseng</p> <p><i>"Aku gak berani ngolahnya kalau Domba, paling dibakar sama mentega / I'm not brave enough to cook lamb; I usually just grill it with butter." – Younger, Greater Jakarta</i></p>	 <p>Kebuli</p> <p><i>"Kalau Domba lebih simple olahannya karena aku masih newbie di permasakan takut gagal, jadi untuk Domba yang penting ada rasa enaknyanya. / Lamb is simpler to prepare because I'm still a newbie in cooking and I'm afraid of failing. So, for lamb, what's important is that it tastes good." – Younger, Greater Jakarta</i></p>

Imported meat (for in-home consumption) is highly available in various locations, with supermarkets and butcher shops being the most common places to purchase it.



During shopping, efficiency (proximity), knowledgeable staff in-store, and promotions become top considerations



"Kita lebih banyak belinya di toko daging/swalayan, karena sudah jelas dari membuka toko sudah melewati proses perizinan yang panjang jadi kualitasnya lebih terjamin, terus juga masa penyimpanannya, suhu lebih terjaga. Jadi kualitas dagingnya tetep aman. / We buy more from butcher shops/supermarkets because it's clear that the store has gone through a long licensing process, so the quality is more guaranteed. Additionally, the storage duration and temperature are better controlled, ensuring the meat's quality remains safe." - Older, Greater Jakarta

1

SUPERMARKET

- ✓ Convenience of purchasing imported red meat while doing their regular grocery shopping.
- ✓ Consumers prefer to see the meat options firsthand, to assess their freshness based on visual cues.
- ✓ Helpful in-store staff that can provide information, answer questions and offer recommendations.
- Examples: AEON, Ranch Market, Grand Lucky, Farmer's Market.

2

MEATSHOP

- ✓ Wider selection of cuts and varieties, often the seasoning is already included.
- ✓ Knowledgeable in-store staff, perceived to be more expert on red meat
- ✗ Specific for meat; making it less convenient when need to buy other groceries as well.
- Examples: Indoguna, Toko Daging Nusantara

3

ONLINE SHOP

- ✓ No need to make a trip to the shop making it efficient, furthermore, sometimes promos are offered on the online platform.
- ✗ However, mums could not observe and feel the quality before the purchase thus making it more prone to getting lower than expected quality.
- Online shop is sought after for urgent purchases (i.e., needed for the day's dishes).
- Examples: Astro, Shopee (nearest store from home), Raisa AEON

Consumers often look for the country of origin when buying meat for home consumption, but it's less of a concern when dining out.



Knowing the origin of a product often reflects its quality, impacting the eating experience. However, when eating out, consumers generally trust that the quality is assured, so they don't feel the need to inquire about its origin.

IN-HOME CONSUMPTION

- For in-home red meat consumption, consumers would look for information, such as:
 - Quality indicators to help consumers pick the meat.
 - Product information to ensure the meat's freshness and quality (i.e., halal certificate, production & expired date, origin country, feeding practices).
 - The country of origin often indicates the quality of the meat i.e., Australian and New Zealand beef are perceived as leaner with less fat; local meat tends to be tougher and requires longer cooking, whereas imported meat is generally more tender and softer.
 - Grain-fed meat is often perceived as juicier compared to grass-fed (few).
 - Recipes and tips for cooking meat, including guidance on selecting the best cut for each dish.
- Consumers would find those aspects from:
 1. **Butcher/in-store staff** – In-depth product knowledge about the product quality and origin and the ability to show product recommendations.
 2. **Product packaging/labelling** – Evidence that the product is certified and has undergone standardized processes.
 3. **Other experiences** (i.e., mum & friends) – Learning from real experience about the cooking process and the result.
 4. **Social media** (i.e., YouTube, Instagram, TikTok) – Provides various information needed with detailed explanations, such as quality indicators and cooking guidance.
 - Some consumers recall @dimsthemeatguy on Instagram & TikTok.



OUT OF HOME CONSUMPTION

- Before dining out, consumers would look for the following:
 - Restaurants' reputation and credibility to ensure the overall quality and expertise in handling red meat.
 - Menu recommendation i.e., best-selling menu, cooking method.
 - Pricing and promotion; to know which restaurant offer money value menu (flavourful yet within budget).
- In getting those information, consumers would get them from:
 1. **Other's experience** – Real experience makes it credible.
 2. **Social media** (i.e., TikTok, Instagram) – Trendy and viral restaurants spark curiosity to try.
 3. **Menu book** – To know the cut and origin country.
 4. **Waitress** – For any clarification needed (i.e., origin country, cuts, best-selling menu recommendation).

"Kalau saya beli di AEON ada stiker lengkap dengan informasinya, termasuk pakan rumput/biji-bijian tertulis / *When I buy at AEON, there is a sticker with complete information, including details about the grass or grain feed.*" - Older, Greater Jakarta

"Aku lihat review tiktok, biasanya banyak blogger yang share konten apa yang lain hype, kalau dagingnya katanya empuk, juicy, dan ada diskon, pasti jadi lebih tertarik. / *I see reviews on TikTok, and usually, many bloggers share content about what's trending. If the meat is described as tender, juicy, and there's a discount, it definitely makes me more interested.*" - Younger, Greater Jakarta

Purchase Decision Factors (Beef) – Country origin plays a crucial role as a consideration for in-home consumption



Meat origin for out-of-home consumption is only a consideration for a few people, as the general tendency is to trust chefs and restaurants to provide credible dishes with the best quality.

IN-HOME CONSUMPTION

1

Country of origin/imported

- Consumers may form perceptions about the beef's quality upon knowing its origin country (i.e., fat content, tenderness).

2

Quality

- Quality translates to ease of cooking and how tender the beef when consumed.
- Consumers would also judge the product's freshness through visual cues (colour, aroma).

3

Cut & intended use

- Depends on the planned repertoire to prepare, as each family members have different preference towards fat content.

4

Product label

- Gives assurance the product has gone through stringent and standard procedures.
- The production and expiration dates also helps consumers in planning when to cook the beef.

Rank by level of importance

OUT OF HOME CONSUMPTION

1

Restaurant reputation & credibility

- Through the abundance of good reviews and word of mouth, the restaurant is expected to serve tasty dishes made of good quality ingredients.
- Typically, a credible restaurant would be transparent of the meat use i.e., disclose origin country and would not serve *meltique* meat.

2

Variety of dishes

- By having variety of dishes, different preferences among family members can be catered.

3

Country of origin (few)

- Certain countries are associated with specific types of beef; for example, Japan is renowned for Wagyu.



Purchase Decision Factors (Lamb) – The country of origin is not a concern for lamb as long as it is imported, and it does not factor into decisions when dining out.

Imported lamb is often perceived as having higher quality compared to local lamb.

IN-HOME CONSUMPTION

- 1 **Imported meat**
 - With the expectation of more tender meat, consumers opt for imported lamb than local produce.
- 2 **Quality**
 - Consumers seek for fresh lamb to cook at home. The freshness is typically determined from the visual cues i.e., pink meat colour, no overly strong aroma.
- 3 **Tenderness**
 - Lamb with more marbling and fat is usually more tender, making it more pleasant to consume.
- 4 **Ease to cook**
 - Not as expert in cooking lamb resulting consumers to opt for cuts that are easier to get tender with lower possibility of getting chewy.



OUT OF HOME CONSUMPTION

- 1 **Well-cooked dish**
 - For a satisfactory eating experience, consumers look for lamb dishes that are tender with no strong odour.
- 2 **Lamb specialty restaurant**
 - Notorious for being prone to chewy texture and gamey smell, consumers prefer to go to restaurants specialized in lamb dishes for their safe option.
- 3 **Good reviews**
 - To ensure the lamb is flavorful and properly cooked, consumers tend to choose restaurants with good reviews as a safe option.



Willingness to pay a premium – Meat quality, including freshness and the overall sensorial experience, plays a crucial role.

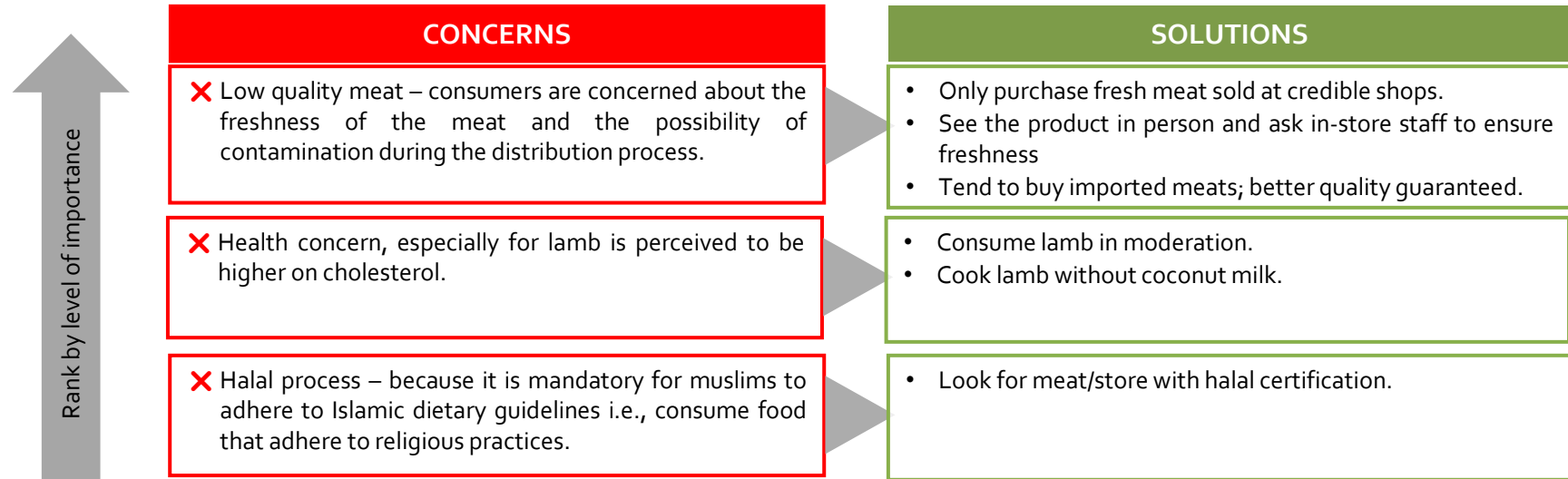
The country of origin is primarily a consideration for beef rather than lamb, as it conveys a sense of quality. For lamb, the focus is more on the meat product itself.

	BEEF	LAMB
IN-HOME CONSUMPTION	Guaranteed product quality; fresh meat – defined by the flavorful taste, tender texture of the meat, and the desired aftertaste that is juicy.	
	<p>Country of Origin: (Only a few younger)</p> <ul style="list-style-type: none"> The country of origin may increase the price, as some countries are perceived to have better quality control i.e., Japan, Australia, New Zealand, US are better at processing red meat than local (more hygiene, no foul practices such as water-injected cattle). Imported meat is perceived to have better cleanliness of the farm and the well-being of the livestock. 	<p><i>"Kalau Domba kayanya asal negara ga begitu aku pikirin. Yang penting kualitas kesegarannya. / For lamb, it seems like the country of origin is not something I really think about. The important thing is the freshness quality."</i> – Younger, Greater Jakarta</p>
	<p>Marinated Meat (only a few Older) Marinated meat offers an experience similar to dining at a restaurant, enhancing the overall eating experience.</p>	<p><i>"Kalau aku pengennya sih, dagingnya udah sekalian di marinasi. Jadi kita gak perlu repot bumbuin, pengennya langsung dipanggang aja. Supaya rasanya sama dengan restaurant. / What I prefer is for the meat to already be marinated, so we don't have to bother with seasoning. I just want to grill it right away, so the taste is the same as in a restaurant."</i> – Older, Greater Jakarta</p>
OUT-OF HOME CONSUMPTION	Guaranteed product quality is characterized by a flavorful taste, tender meat texture, and a juicy aftertaste, often exceeding the expectations of in-home consumption.	
	A great ambience and food presentation is also important to enhance the overall dining experience.	



Meat hygiene, cholesterol levels, and halal certification are important concerns for consumers when it comes to red meat.

As consumers tend to prioritize the quality of the meat they purchase, they often seek out credible stores that sell imported beef, as these shops are perceived to offer higher standards of hygiene and better assurance regarding halal certification.



"Kalau daging luar kan beku, meski di label sudah ada tanggalnya. Cuma di perjalanannya kita gak tahu berapa lama, saya cuman takut dari beku lalu gak beku, beku lagi, gak beku lagi. Jadi kita gak bisa tahu apa yang dibelakangnya apakah dagingnya masih ok atau sudah rusak. / Imported meat is frozen, even though the label has a date on it. However, during transportation, we don't know how long it has been, and I'm just concerned about it being frozen, then thawed, frozen again, then thawed again. So, we can't know what's behind it, whether the meat is still okay or has already spoiled" – Younger, Greater Jakarta



Understanding Quality, Trust & Traceability

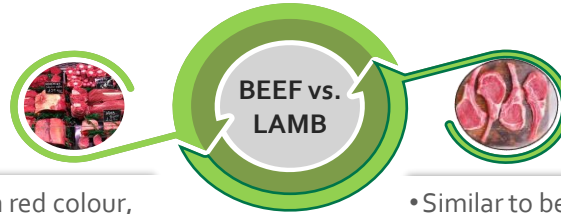
Definitions of Quality – Sensorial attributes and origin country become main cues in determining quality



Quality provides satisfaction and peace of mind to consumers

BEEF

- In determining beef quality, consumers look at the **sensorial attributes** (fresh red colour, bouncy, no strong odour), **ease of cooking** (quick to get tender), and **packaging** (sealed, with product information on the label).
- Aside from the tangible aspects, **country of origin** plays a role in shaping perceptions of beef quality. Associating the country with superior quality standards through advanced farming practices.
- Providing high-quality beef to the family is believed to support the **family's nutrition needs** (thus will also support the child's growth), **minimizing the food safety risk**, **elevating the eating experience** due to the tenderness, and **greater convenience** for mums due to the quicker cooking process.
 - Providing a nutritious and safe product gives pride and peace of mind to these consumers.
- Aside from **getting information** from the internet, due to the years of experience, consumers also ask their mother's opinion in determining beef quality.
 - While in the store, consumers would ask the in-store staff/butchers to give beef recommendations (best cut for certain dishes, and recommendations for fresh beef)



LAMB

- Similar to beef, consumers rely on **sensorial attributes** (i.e., pinkish meat colour, no gamey smell 'prengus') and **country of origin** to judge the quality.
- For lamb, the quality affects the **eating experience** i.e., tender when chewed and no disturbing aroma.
- In-store staff becomes the consumers' source of information in helping find high-quality lamb, such as recommending tender cuts.



"Kalau kualitas daging (sapi) jelek, pasti ga enak dimakan, susah diolah, ngaruh ke rasa dan baunya juga." / "If the quality of the beef is poor, it definitely won't be enjoyable to eat, difficult to cook, and it will affect the taste and smell as well.." (Younger, Greater Jakarta)

"Pas beli kota tanya ke penjual yang mana (daging domba) yang empuk supaya enak dimakannya. Kalau keras kan capek ngunyahnya." / "When buying, we ask the seller which lamb is tender so it's enjoyable to eat. If it's tough, it's tiring to chew.." (Older, Greater Jakarta)

Definition of Trust – ultimately, consumers define trust as their assurance for safety of the meat

Credible labelling and trustworthy retailers can build trust for consumers



- To consumers, trust is about the **safety of the product**, ensuring the purchased and consumed meat would not harm/risk the consumers.
 - Labels on the packaging (i.e., halal, country of origin, production date, etc.) are important in creating a trustworthy product perception. It indicates the product has gone through a certification process that makes it trustworthy.
 - Reliable retailers such as those with many customers to ensure product quality and reliability. Furthermore, bigger shops can be accountable for the products sold (i.e., will process complaints accordingly).
- It is important to purchase and consume trusted red meat, similar to quality, mums would like to ensure all the family members are given a good quality product that is safe to consume (i.e., no contamination, standardized process), ensuring no impact on health.
 - Thus, consumers are willing to pay an extra 20%-30% in exchange for trusted red meat.
- In relation to trust, consumers obtain information from various sources, such as:
 1. In-store experience, especially the transparent **staff/butchers** about the product's freshness whenever asked.
 2. **Product packaging & label** showing the production & expiration date, origin country, and halal certification. Thus, letting consumers know the product's quality and freshness.
 3. **Online search results**, especially from credible sources (i.e., CNN) to obtain information about trusted red meat judged by the quality.
 4. Through **social media accounts** on Instagram and YouTube (i.e., authoritative roles such as nutritionist and chef), consumers are exposed to information about the stringent process that imported red meat has to go through that makes them trustworthy.

"tempat seperti supermarket pasti menjaga kualitasnya. kalau misal ada suara sumbang dikit pasti akan berpengaruh. Apakah akan repeat order atau ga. Kalau sekali orang makan (dagingnya) ga enak, pasti cepet nyebar beritanya" / "Places like supermarkets definitely maintain their quality. If there's even a slight issue, it will surely have an impact. Whether customers will place repeat orders or not. If someone eats the meat and it's not good, the news will spread quickly." (Older, Greater Jakarta)

"Daging yang terpercaya itu penting banget karena akan masuk ke tubuh kita, apalagi disajikan ke orang/keluarga. Gak mungkin kita kasih daging yang kurang bagus (...) kalau mereka sakit, kita harus bertanggung jawab" / "Trusted meat is really important because it will go into our bodies, especially when served to others/family. We can't possibly give them bad meat (...) if they get sick, we have to be responsible." (Younger, Greater Jakarta)

Rank of Trustworthiness – Australia is rank favourably in terms of the trustworthiness



The superior ranking comes from firsthand experiences with high product's quality and positive associations with other quality farm products.

BEEF

LAMB

<u>COUNTRY</u>	<u>REASONS</u>
AUSTRALIA	<ul style="list-style-type: none"> • High familiarity with the beef product and beef's quality from personal experience. • Further reinforced by the strong reputation of good feed quality and high-quality farm produce.
NEW ZEALAND	<ul style="list-style-type: none"> • Good feed quality results in good-quality beef. • Overall similar to Australia, however, consumers are more familiar with Australian beef.
JAPAN	<ul style="list-style-type: none"> • The country is known for advanced technology, consumers perceive advanced technology also utilized for the farming & butcher process.
US	<ul style="list-style-type: none"> • Tender and juicy beef that is always delivered from US beef makes it trustworthy. • However, the far shipping distance creates freshness concerns for a few consumers.
BRAZIL	<ul style="list-style-type: none"> • Less familiar, however still favourable and trusted due to the nature of superior quality perception of imported beef. • Similar to the US, freshness concerns also arise due to the far shipping distance.
INDONESIA	<ul style="list-style-type: none"> • More frequent exposure to bad farming & butcher process results in lower trust to local beef products.

Rank by level of preference overall

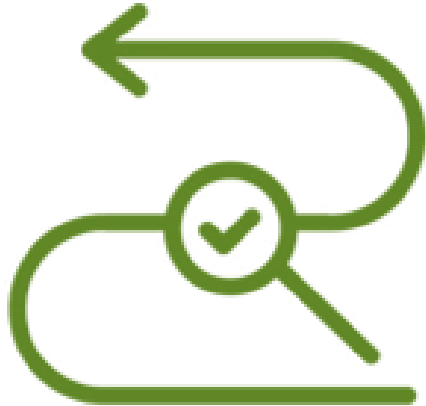
<u>COUNTRY</u>	<u>REASONS</u>
AUSTRALIA & NEW ZEALAND	<ul style="list-style-type: none"> • The high quality of beef coming from Australia and New Zealand creates the perception of the same high quality for the lamb.
ARAB	<ul style="list-style-type: none"> • Middle Eastern dishes, commonly made with lamb as the main ingredient, shape consumers' perception of lamb as high-quality and trustworthy.
INDONESIA	<ul style="list-style-type: none"> • Similar reason with beef, the bad practices create a general perception of the farming process in Indonesia.

Personal consumption experience & generalized perception towards the country contribute to trust perception

Traceability – Initially, consumers show low awareness of the term



Once prompted, traceability can provide further assurance of red meat's reliability through process transparency. Thus, making the product more trustworthy



SPONTANEOUS:

- At the spontaneous level, most consumers **are not familiar with traceability**. Only a few younger consumers have heard of it:
 - Comprehension differs among consumers, one understood it as information of origin country and farm while others took it as tracking production process by scanning a barcode
 - Social media presence (TikTok) and Supermarkets become the source of awareness.

PROMPTED: Once prompted, some consumers reported having heard the information briefly from milk ads (informing country of origin and the production process).

- Consumers understand the system will inform about red meat processing, including how the cattle are treated, and every step until the meat is distributed and stored. To them, this transparency **enhances trustworthiness**.
- Consumers are interested in learning about **the cattle feed and the meat butchering process** to ensure the quality and cleanliness of the procedures.
 - Specifically, Muslim consumers would want to have assurance the process is done according to their religious practices.
- To communicate the traceability system, social media (TikTok & Instagram) and supermarket displays would increase awareness as both are consumers' sources of information for red meat.
 - Video format would make the information credible, showing the realistic process.

PROMPTED: *“Traceability is the ability to trace and track meat products from their source animal from growth and feeding, slaughter, processing, and distribution, to the point of sale or consumption, in a comprehensive manner”.*

“Selama ini kita percaya aja kalau daging di supermarket itu asalnya dari Australia, tapi ini kita jadi tahu asal muasalnya, bagaimana ditreatnya.” / “All this time, I’ve just trusted that the meat in supermarkets comes from Australia, but now I can know its origins and how it’s treated..” (Older, Greater Jakarta)

“Menjadikan aku lebih yakin untuk beli karena mereka sendiri sudah seterbuaka itu informasinya..” / “It makes me more confident to buy because they have made the information so transparent..” (Younger, Greater Jakarta)



Deep Dive into Country of Origin & Australian Beef & Lamb

Awareness & importance of COO – Overall, consumers are aware of the origin country from the written product information



Due to the higher frequency of beef consumption, consumers are more aware of the quality differences between countries, making the origin of the beef more important.



BEEF:

- When purchasing their beef, consumers are aware of the origin country from the label on the packaging and shelves.
- Consumers expect superior quality (compared to local) when they know the country of origin. This knowledge boosts their confidence in the quality and safety of the beef they provide for their families.
 - By knowing the country, consumers can expect the quality of the meat (tenderness, fat content) they will get.

Highest awareness:



Lower awareness



"Kalau di luar negeri sapi sangat terawat dan dijaga. Kalau local saya lihat dagingnya gampang gak fresh, dan berubah warna. Warnanya gak secerah yang import.."/ "Abroad, cattle are well cared for and maintained. But for local meat, I notice that it easily loses freshness and changes color. The color is not as vibrant as imported meat.." (Older, Greater Jakarta)



LAMB:

- Similar to beef, consumers become aware of the origin country of lamb through the label on the product.
- However, due to the lower frequency of consuming lamb, consumers pay less attention to the country of origin as typically they would only look for tender and less odour meat.

Highest awareness:



Lower awareness:






"Tidak terlalu concern ke asal negaranya. Karena kita melihat ke keempukan dan cara ngolahnya.."/ "I'm not too concerned about the country of origin because we focus on the tenderness and how easy it is to cook." (Younger, Greater Jakarta)



Spontaneous association of COO – Australia and New Zealand are superior for both beef and lamb due to positive associations towards other cow-derived products (milk, cheese)

Meanwhile, Japan stands out for specific type of beef

Rank by level of preference overall

COUNTRY	ASSOCIATIONS:	Any differences for Beef vs Lamb
 AUSTRALIA	<ul style="list-style-type: none"> Australia is known for its high-quality livestock products, such as meat, milk, and cheese. Overall, consumers have consistently had positive experiences with Australian red meat. ✓ High familiarity with easy access to the products due to their availability at supermarkets and meat shops. ✓ The feed is high quality, farmers pay attention to the cattle's wellbeing; resulting in tender and not too fatty meat. 	<ul style="list-style-type: none"> For lamb, the subtle meat aroma is appreciated.
 NEW ZEALAND	<ul style="list-style-type: none"> New Zealand red meat is perceived as favourably as Australia due to the similar perception of farming country. ✓ Similar to Australia, New Zealand farmers are perceived to take good care of their cattle which results in tender meat. ✗ However, the price is higher than Australia red meat. 	n/a
 JAPAN	<ul style="list-style-type: none"> Japan is known for its specific type of beef such as wagyu and saikoro, consumers are also familiar with the beef grade level. ✓ Tender and juicy meat with natural umami flavour, thus does not require a lot of seasoning. ✗ The Japanese red meat price is known for the high price. 	n/a

"Kalau Australia itu pakannya terjamin, dagingnya juga empuk.. Itu sudah masuk ke mindset kita." / "In Australia, the feed is guaranteed, and the meat is tender. That's already ingrained in our mindset." (Older, Greater Jakarta)





"Jepang itu penghasil wagyu A5, paling banyak levelnya. Yang katanya bener-bener lumer, lembut, panggangnya sebentar. Daging jepang gak perlu banyak bumbu. Pakai butter aja udah enak." / "Japan produces A5 Wagyu, also other level varieties. It's said to be incredibly tender and melts in your mouth, needing only a short grilling time. Japanese beef doesn't require much seasoning—just butter is enough to make it delicious.." (Younger, Greater Jakarta)

Spontaneous association of COO – US beef is identical with steak dishes, while Brazilian beef has affordable image



Strongly associated with positive experiences in consuming Middle Eastern dishes, Arab is perceived to produce good-quality lamb

Rank by level of preference overall

COUNTRY	ASSOCIATIONS:	Any differences for Beef vs Lamb
 US	<ul style="list-style-type: none"> • US red meat is usually cooked for steak dishes. ✓ Due to the fatter cow in the US, the beef is juicier and fattier; few mentioned easier to marinate due to the high fat content. ✗ However, some consumers view it less favorably, perceiving it as less healthy. ✗ The far distance also raise concern about the freshness of the meat due to longer time taken to deliver the product to Indonesia. 	<ul style="list-style-type: none"> • The lamb meat is however chewier than Australian lamb meat.
 ARAB	<ul style="list-style-type: none"> • Perceived to be a lamb-specialty country, especially considering Middle Eastern restaurants mainly sell lamb dishes. ✓ From experience of consuming Middle Eastern dishes, lamb meat has a high-fat content that makes it juicy. ✗ But consumers rarely see Arabian lamb meat sold at purchase channels. 	<ul style="list-style-type: none"> • A few consumers perceived Arabian lamb to have better quality lamb than Australia (more tender).
 BRAZIL	<ul style="list-style-type: none"> • Only become familiar with the meat product through Mexican dishes, such as Brazilian BBQ and tortillas. ✓ Cheaper price than US beef. ✗ Less familiar due to low exposure at purchase channels – would only find the meat when eating out. ✗ Concern of freshness due to far travel distance. 	n/a
 INDONESIA	<ul style="list-style-type: none"> • Easiest access to locally produced red meat, as it is widely sold. ✓ Suitable for slow-cooked dishes as the meat doesn't easily fall apart. ✗ However, The extra effort needed to make the meat tender is seen as less time-efficient for daily cooking. ✗ Frequent exposure to poor farming practices has led consumers to question the quality. 	<ul style="list-style-type: none"> • Noticeable and prominent gamey smell for lamb which consumers dislike.

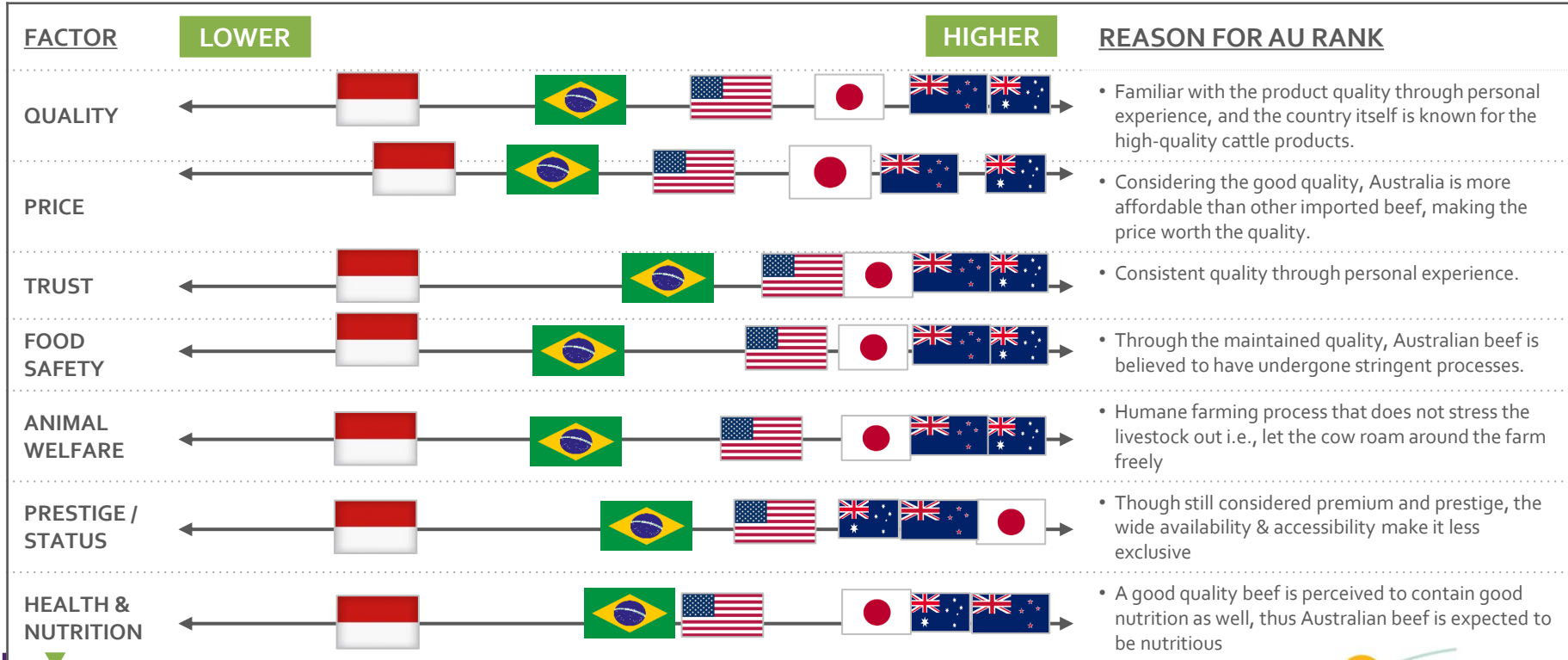
"Di US itu ada proses penggemukan, sehingga lemaknya banyak dan bumbu marinasi pun cepat meresap."
/ "In the US, there is a fattening process, which results in a higher fat content, allowing marinades to absorb quickly into the meat."
 (Younger, Greater Jakarta)

"Lemak domba Arab itu lebih banyak, buat aku positif karena aku suka."
"The fat in Arab lamb is higher, which I see as a positive because I like it.."
 (Younger, Greater Jakarta)



Overview: Comparison of Countries on key factors (Beef) – In most factors, Australia is placed first along with New Zealand

The consistent quality experienced by consumers creates a superior perception, including the safety, animal welfare, and nutrition

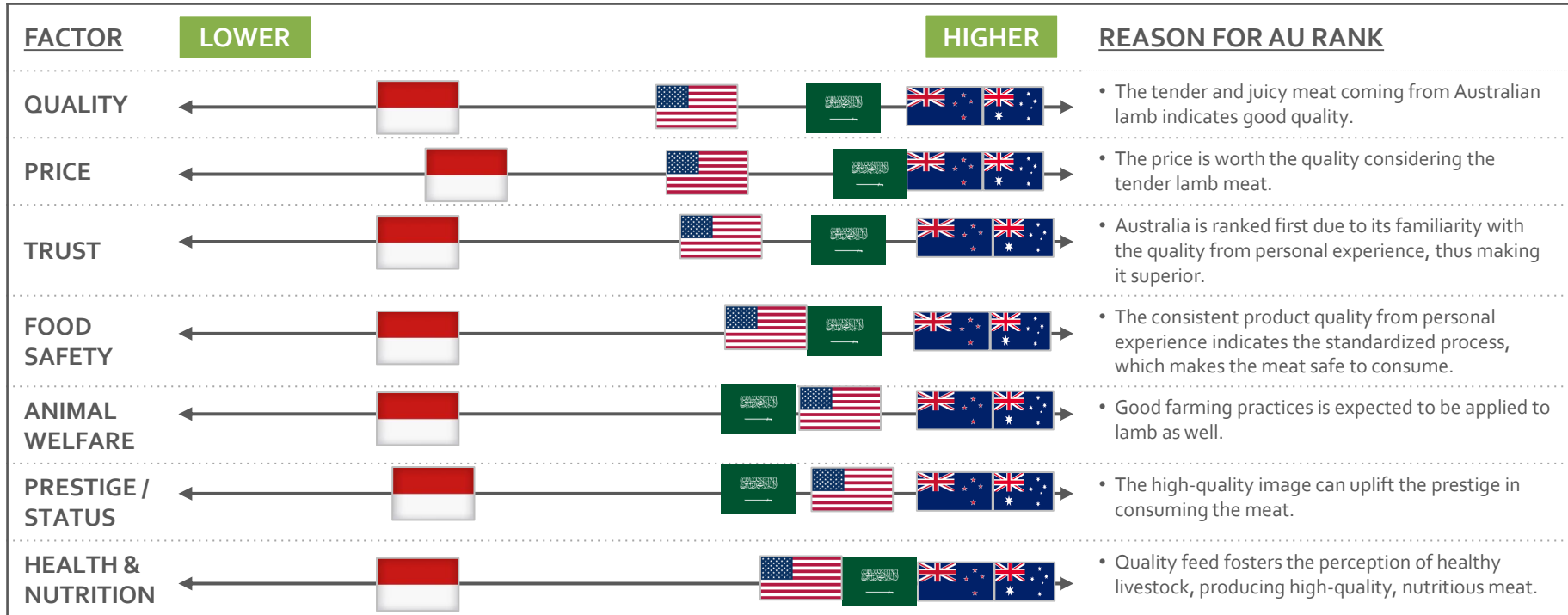


Thus, Australian beef is considered premium with the good qualities offered

Overview: Comparison of Countries on key factors (Lamb) – Similar to beef, Australia and New Zealand are ranked high



Familiarity with Australian lamb contributes to its high ranking across various aspects. Additionally, the positive perception of Australian beef influences opinions about lamb, as the farming and butchering processes are considered similar.



Overview: Comparison of Countries on key factors (Beef vs Lamb) – Consumer Verbatims



BEEF

"Kita sudah umum dengan kualitas sapihnya, baik itu susu, keju, atau dagingnya, sudah tertanam di benak saya itu sapi Australia." / *"We're already familiar with the quality of their cattle, whether it's milk, cheese, or meat—it's ingrained in my mind that it's Australian cattle."* (Older, Greater Jakarta)

"Jepang itu dagingnya lebih juicy dan empuk tapi mahal banget." / *"Japanese beef is juicier and very tender, however they are very pricey."* (Younger, Greater Jakarta)

"Kalau untuk daging local, kualitas dagingnya keras/alot, masak harus lama supaya empuk. Kalau beli di pasar banyak lalat.." / *"For local meat, the quality tends to be tough, requiring longer cooking to make it tender. If you buy it at the market, there are often many flies around.."* (Younger, Greater Jakarta)

"New Zealand mengelola sapihnya dengan baik, pakan dan pengembalaannya yang terbaik." / *"New Zealand manages its cattle well, providing the best feed and grazing practices.."* (Older, Greater Jakarta)

"Daging dari US itu menurut saya agak kurang sehat karena lebih berlemak." / *"For me personally, US beef is less healthy due to the high fat content."* (Older, Greater Jakarta)

"Jarak yang jauh (untuk distribusi ke Indonesia) mungkin ngaruh (ke kesegaran) karena sudah melalui beberapa kali proses pembekuan (..) Brazil jaraknya jauh." / *"The long distance (for distribution to Indonesia) might affect the freshness because it goes through several freezing processes (...) Brazil is far away.."* (Younger, Greater Jakarta)

LAMB

"Kita asumsinya kalau daging sapi dari Aussie lebih empuk ya, jadi kita terapkan juga untuk daging domba." / *"We assume that beef from Australia is more tender, so we apply the same expectation to lamb.."* (Older, Greater Jakarta)

"Daging domba arab unggul karena yang sering mengolah daging domba itu dari Arab, biasanya Domba selalu ready. Seakan itu menjadi ciri khas mereka.." / *"Arabian lamb is considered superior because lamb is commonly prepared in Arab cuisine, where it is always readily available. It has become a distinctive hallmark of their culture."* (Younger, Greater Jakarta)

"Aku coba masak dengan daging domba Australia, Kalau dibandingkan, yang domba US lebih alot atau memang kualitas daging yang aku beli kurang bagus, atau gimana, kurang tahu juga sih.." / *"I tried cooking with Australian lamb. Compared to that, US lamb feels tougher—though I'm not sure if it's due to the quality of the meat I bought or something else.."* (Younger, Greater Jakarta)

"Daging domba Indonesia itu dagingnya dikit dan keras. Butuh extra bumbu karena lebih bau." / *"Indonesian lamb has less meat and tends to be chewy. It also requires extra seasoning because of its stronger smell."* (Younger, Greater Jakarta)

Australia on Trust & Quality – Consumers perceive Australia to produce superior quality of red meat



The superior perception comes from positive association with other farm products (i.e., milk & cheese) and personal experience in consuming Australia's red meat



- Since trust and quality are interrelated, the experience of seeing consistent quality of processed cattle products from Australia (milk, cheese) makes Australian beef equally trusted.
- Consumers experience the quality of Australian red meat both during cooking and eating, as the meat:
 - Tenderizes faster when cooked compared to local meat
 - Is easier to chew due to its tenderness compared to local meat
- In addition, Australian beef is often used as the main ingredient in dishes at restaurants, making consumers more familiar with its quality.
 - Moreover, restaurants are expected to only choose premium food ingredients. To consumers, this further validates the quality.
- Perceptions of trust and quality are also shaped by information about the farming process that sometimes appears on YouTube Shorts and Instagram Reels, however, consumers cannot recall any specific accounts.
 - Although they can't recall details, the content of the videos is mostly about the standardized hygiene process and advanced technology utilized.

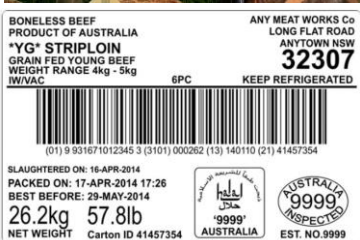
"Australia itu sumber sapi paling bagus, susu sapi terbaik itu di Australia, susunya aja sudah terbaik, apalagi dagingnya." / "Australia is the best source of cattle; the best dairy products come from Australia. If the milk is already top-notch, the meat must be the same." (Younger, Greater Jakarta)

"Kalau daging Australia itu lebih empuk jadi lebih enak untuk dimasak daily" / "Australian beef is more tender, making it better suited for daily cooking.." (Older, Greater Jakarta)

Aussie Beef & Lamb Labelling – Some awareness of the label in market, helping to promote Australian origin



The label clearly states the country of origin, which enhances trustworthiness to the nature of Australia's high credibility among consumers



- In terms of label awareness, some consumers reported to have seen the label on meat products they see at the supermarket.
 - 1 consumer recognises the continent image and reports they have seen the label on YouTube ads, in which the ads show the process behind red meat production in Australia, and the ads also highlight that Australian cows and lambs are anthrax-free.
- The label clearly indicates that the product originates from Australia, enhancing its credibility due to the positive perception of Australia and the high quality of its farm produce.
- Furthermore, the label also contains some information that assures consumers, such as:
 - Halal label ensures the process is aligned with Muslim religious practices.
 - Production date to indicate the product's freshness.
- With the credibility coming from the label, consumers are more assured in purchasing the product.

"Label ini jadi bikin langsung tau kalau asalnya dari Australia, jadi terpercaya dan lebih yakin untuk beli."/
"This label immediately shows that it's from Australia, making it more trustworthy and increasing confidence to buy.." (Older, Greater Jakarta)

"Info ini cukup lengkap, ada logo halal, terus terinspeksi juga. Artinya sudah approved lah dari AUS bahwa daging ini aman untuk dikonsumsi.."/ *"This information is quite complete, with a halal logo and inspection details. It means it's already approved by Australia, ensuring the meat is safe for consumption.."* (Older, Greater Jakarta)

Clear information of origin country, halal certificate, and production date are important for consumers

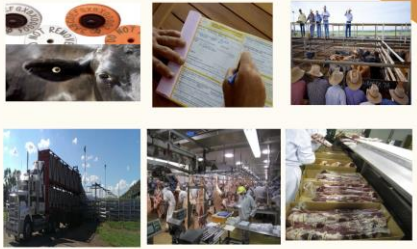
Australia's Red Meat Integrity System – Across groups, consumers express positive acceptance towards the idea




Having this integrity system further proves that Australia will maintain the quality of its farm produce as every process is tracked and recorded

AUSTRALIAN BEEF PRODUCTION IDENTIFICATION & TRACEABILITY
—National Livestock Identification System

- ✓ Apply Ear Tag
- ✓ Record Details
- ✓ Documentation (National Vendor Declaration)
- ✓ Sleyard
- ✓ Transport
- ✓ Observation
- ✓ Slaughtering
- ✓ Cooling
- ✓ Boning & portioning
- ✓ Packing



RESTRICTED. © Meat and Livestock Australia



“Here we have a description of Australia's Red Meat Integrity System. Once the animal is born, they have an ear tag put on them. This tag gets scanned by a scanner/device every time the animal is moved between properties or places, e.g. from farm to truck to saleyard, and the information gets updated into a centralised national database.”

- **Spontaneously**, the integrity system provides assurance of consistently high-quality products to consumers. It is seen as an advanced system that will increase trust in the product.
- Overall, there is strong interest in the proposed idea. While consumers may not always follow the process closely, it provides reassurance that the company is committed to maintaining quality, as they are confident enough to be transparent and share the process with the public.
 - ✓ Assurance of a hygiene and standardized process as the process would be transparent, creating the perception of high adherence to the protocol.
 - ✓ The ability to track the product in case of fatalities, such as poisoning or contamination, allows consumers to determine if their product might be affected.
- The existing positive perception of Australia's red meat production process makes this system trustworthy and credible
- Consistent with findings regarding quality, consumers prioritize providing a good quality product for the family and the integrity system can provide further assurance of the quality, making it preferable for purchase and consumption.

“(Dengan adanya integrity system) kita jadi lebih percaya. Untuk QC (quality control) ini OK banget. Jadi gak bakal ada daging yang lolos dari QC. Jadi terjamin kualitasnya. Kita terbebas dari daging-daging yang berpenyakit.” / “With the integrity system in place, we trust it more. The quality control (QC) is really good, so no meat will pass without QC. The quality is guaranteed, and we're free from meat that might be diseased..” (Younger, Greater Jakarta)

Australia's Red Meat Integrity System – Local stimulus



Below is the stimulus shown in Indonesia

**PRODUKSI DAGING SAPI AUSTRALIA
IDENTIFIKASI & KETERTELUSSURAN
–Sistem Identifikasi Ternak Nasional**

- ✓ Penggunaan tanda telinga 'ear tag'
- ✓ Merekam data
- ✓ Dokumentasi (deklarasi vendor nasional)
- ✓ Tempat jual ternak
- ✓ Transportasi
- ✓ Observasi
- ✓ Penyembelihan
- ✓ Pendinginan
- ✓ Pematangan daging
- ✓ Packing
- ✓ Label carton
- ✓ Retail modern

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Communication Recommendations



For communication, a comprehensive and transparent depiction of the process (i.e. from cattle treatment to meat distribution) is considered reassuring and credible

Expected communication around “Australian Red Meat Traceability & Integrity System”

- The communication should inform about the transparency of the whole journey, starting from the treatment of the cattle on the farm until the distribution to Indonesia.
 - Some consumers mention the importance of highlighting the slaughter and butcher process to give assurance of the halal process to Muslims.
- To make the information easy to digest, consumers expect video-form communication depicting the real situation and process. The realistic approach also adds credibility to the communication.

Communication channels:

- Consumers expect to find communication in the meat shops and supermarkets where they usually purchase imported red meat. Consumers tend to spend some time in front of the display, thus more likely to notice the communication.
 - A small monitor showing the example video of the process to give a glimpse of what information consumers can get through this integrity system
- For a wider reach, social media (Instagram, TikTok, YouTube) is preferred as the media to communicate the integrity system. Based on experience, these consumers also find out information about red meat on social media.

"Informasi ini akan bisa dipercaya kalau bisa kasih bukti yang mendukung, kaya video atau foto dan terbuka datanya di website, misal bagaimana journeynya hingga sampai ke Indonesia."/ / *"This information will be trusted if it can provide supporting evidence, such as videos or photos, and make the data available on a website, for example, showing the journey of the product until it reaches Indonesia.."* (Younger, Greater Jakarta)

A hand holding a glowing projector beam against a dark red background. The beam is bright and focused, illuminating the lens of a projector. The background is a deep, rich red, and the overall scene is dimly lit, emphasizing the light from the projector.

SUMMARY & WAY FORWARD

For in-home consumption, imported red meat become main choice for both beef and lamb



With consumers putting more attention on the origin country for beef as it will indicate good quality

1

Red meat purchase decision making

BEEF

- For **in-home consumption**, consumers place great importance on whether the beef is imported and its country of origin, as these factors reflect the expected quality. They particularly value the superior tenderness and ease of cooking that imported beef offers.
- For **out-of-home consumption**, the restaurant's reputation and credibility are the top considerations, with the expectation that dishes are made using high-quality ingredients, including the beef.

LAMB

- For **in-home consumption**, due to the lower frequency of consumption, consumers mainly focus on whether the lamb is imported rather than locally produced. They prefer tender meat that is easy to cook and does not have pungent aroma.
- For **out-of-home consumption**, consumers prefer places known for well-prepared dishes, as lamb is prone to a strong gamey smell and chewy texture. As a result, they tend to choose lamb-specialty restaurants.

Consumers assess red meat based on its tangible qualities and origin country, while trust is linked to safety and consistent quality



Traceability refers to the ability to track the production process, ensuring transparency.

2

Understanding trust and quality for consumers

QUALITY:

- In defining quality, consumers would assess meat based on **tangible aspects** such as **sensorial attributes** indicating the product's freshness, **ease of cooking**, and standardized packaging.
- Not only that, **the origin country** is also important in creating the perception of the product's quality, such as the stringent process behind it and the enjoyable eating experience that the product can deliver.

TRUST:

- Trust is defined by the **safety** of the consumed red meat, ensuring no possible harm/risk to the consumers. Thus, assurance of red meat quality is important because trust and quality are closely connected, with trust emerging from consistent quality.

TRACEABILITY:

- At the spontaneous level, low awareness of the term is observed. Once prompted, traceability receives positive acceptance through the **transparent process** making the product **more trustworthy**.

3

Importance of traceability



In general, consumers have positive attitudes towards Australian red meat, shaped by personal consumption experiences and exposure to information about good farming practices.

Moreover, the Integrity System is also viewed positively because it ensures transparency in the production process, thereby assuring standardized production quality.

4

Perceptions towards Australian red meat

- Overall, Australian red meat is **perceived favourably** due to **personal experience** of cooking and consuming the meat, its **association with other good quality processed cattle products** (milk & cheese), and **exposure to standardized farming & butcher process information**.

INTEGRATION SYSTEM

- After showing the integration system, consumers are **appealed to the idea** as it can **assure adherence to the standardized processes**. Thus, consumers expect a consistent quality as the process can be tracked.
- Consumers expect the integrity system to show the whole journey, starting from the cattle treatment to the product's distribution in Indonesia.
- Thus, to promote the integrity system, it is important to give a clear depiction of what kind of information is accessible.
 - Therefore, video-form communication showing the process can cater to this, giving realistic information that would increase the communication's credibility.
- It is worth considering to tap **social media** and **store presence** to communicate the integrity system:
 - Social media (Instagram Reels, YouTube Shorts, TikTok) – short videos showing the process, this will give an idea to consumers of what kind of information they can get through the integrity system.
 - Store presence – displaying the video about the type of information that can be tracked. (i.e., the monitor can be placed next to the meat display).

Thank You

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