

Project Tracy

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

MALAYSIA



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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:



2. All physical locations are identified by means of a Property Identification Code (PIC)



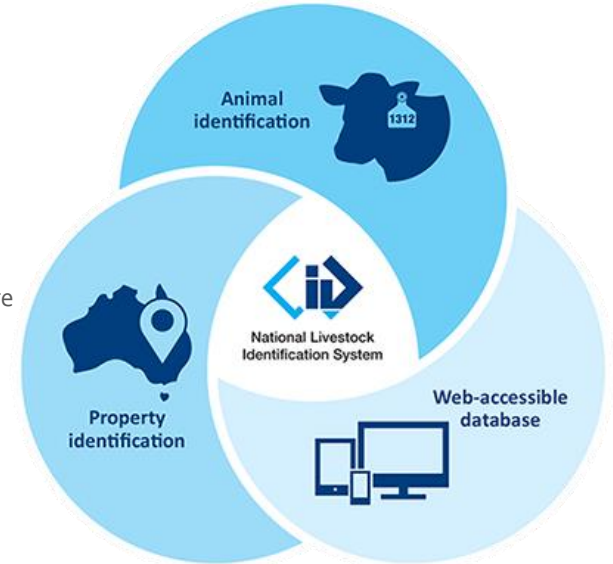
The trust placed in the Australian Red Meat sector stems from these integrity systems, which support our product's provenance and the value that arises from our commitment to animal welfare, food safety, environmental stewardship—including sustainability—and biosecurity credentials.



1. All livestock are identified by a visual or electronic eartag/device.



3. All livestock location data and movements are recorded in a central database



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

While Australia is generally recognized as a reliable trading partner, efforts to communicate credentials at both B2B and B2C levels have been insufficient

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

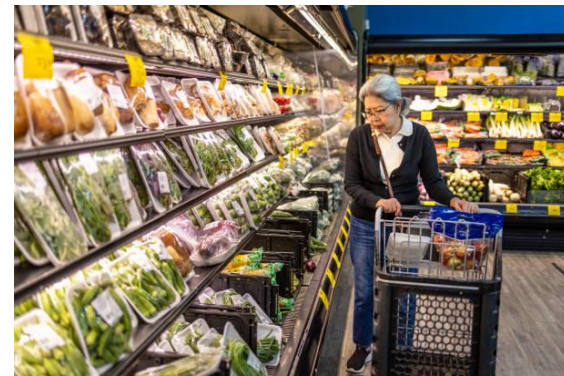
Online Consumer Focus Groups were conducted in 7 key Southeast Asian markets



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



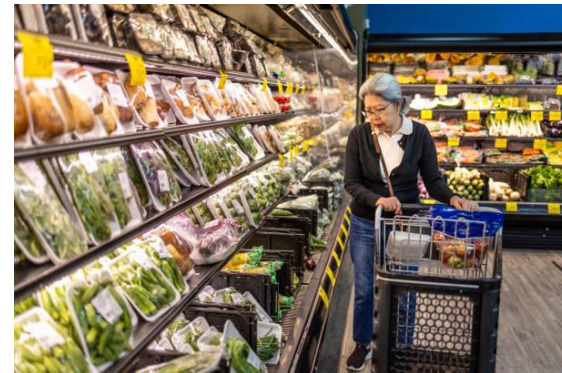
| GROUP STRUCTURE: ONLINE FOCUS GROUP DISCUSSION (FGDs) – Each group will be 2 hours in length and will consist of 6 consumers |  Singapore (Singapore) |  Malaysia (KL) |  Philippines (Manila) |  Indonesia (Jakarta) |  Vietnam (HCMC) |  Thailand (Bangkok) |  Cambodia (Phenom Penh) |
|---|--|--|---|--|---|---|---|
| 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 |

Respondent profile - Malaysia



A total of 4 groups in Malaysia on 22-23 November 2024

- Female only
- Age group: 18-49 years old
 - Younger segment: 18-30 years old. Single/ Married, Early career/ 1st jobber
 - Older segment: 31-49 years old
- Married with/without kids; mixed working & housewife
- Social Class: A/A+ or B+ in each market
- Decision maker & main grocery buyer in the purchase of imported meat or consumption of meals that contained imported red meat (beef, lamb)
- All to have purchased imported red meat (beef and/or lamb) mainly from modern retail but can also purchase from other retail channels - at least purchasing once per month or once per 2 months
- Non rejector of imported red meat consumption in the future
- Do not work in the food industry
- Ethnicity – each group had 2-3 Malay, 2 Chinese and 1-2 Indian (only purchasing lamb)





RESEARCH FINDINGS

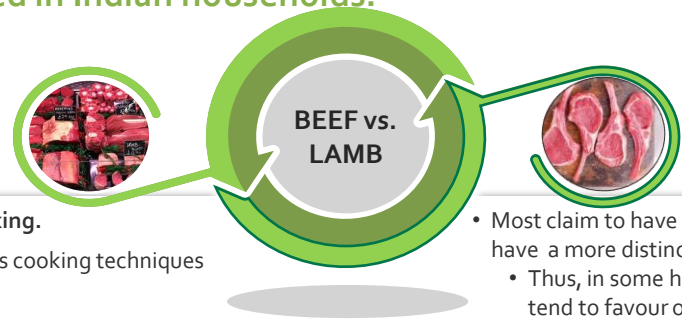


IMPORTED BEEF & LAMB CATEGORY UNDERSTANDING



Imported beef vs. lamb spontaneous perceptions – beef is more versatile than lamb.

Beef is more commonly consumed in Malaysian and Chinese households as it is considered more versatile to prepare, while lamb is consumed less frequently, as many consumers feel less familiar with how to prepare it. Lamb is primarily featured in Indian households.



IMPORTED BEEF

- **Seen as versatile and suitable for everyday cooking.**
 - Versatile preparation; can be applied to various cooking techniques i.e., stews, soup, stir-fries, curries, and steak.
 - Naturally tender, especially in certain cuts (i.e., tenderloin); thus, takes less time in cooking.
 - Readily available at nearby modern trade.
- **Family-oriented - liked by all family members**
 - Provides tasty flavour
 - High in protein; a nutritious option.
- Lamb prices are considered higher than beef; thus beef is preferred the beef (skew to some older).

"I typically go with beef because I think there are many more things to cook with beef and it's easier to handle." – Younger, KL

IMPORTED LAMB

- Most claim to have less knowledge about cooking lamb. Also claim to have a more distinct taste and smell compared to other meats.
 - Thus, in some households, only adults may enjoy lamb, while children tend to favour other meats less often.
- Imported lamb is better quality than local (perceived by some)
 - Imported lamb is thought to have a shorter cooking time to achieve the right texture than the local ones (a few in the older segment)
 - **HOWEVER**, imported lamb considered less tasty than local (some older segment)
- **Consider special/ occasional choices only;** usually higher in price.
 - Chosen for more festive occasions i.e, Indian cultural festival, Eid Al-Fitr, birthday party.
- **Local lamb prices are higher than imported ones** (skew to some older)

"Occasionally, if we have birthdays or anything, we actually order the lamb leg and grill and put it in the oven as well.." – Older, KL



General Beef Usage (1/2) – Beef is consumed very often, around at least once or twice a week for most

Australian beef is the most commonly purchased by Malaysian consumers, as it is considered more accessible and reasonably priced. However, when dining out, consumers tend not to have a strong preference.

IN-HOME CONSUMPTION

- Beef consumed typically is frozen Australian beef over other types (more accessible, highly available with an affordable price)
 - Slices, minced beef, or patty beef are the most purchased for daily cooking, compared to cuts like a rib-eye, sirloin, and tenderloin, or beef shank (thigh).
 - Bought in the particular format; already packed. Yet, some cut it themselves into cubes.
- Amount to purchase:
 - 2-3 cuts OR enough for one meal, to prevent spoilage
 - 200-300 g per person OR 1-2 kg for family meals.
- Beef is consumed 2-3 times a week on average, while a few consume once a week or 1-2 times a month
 - A few do not eat beef; religious-based (Indian culture)

“Then for beef wise, normally, I buy those slices so that I can put in a soup. When I cook noodles, I can put it in so that my kids can eat and sometimes I buy some steak if I feel like making a Western dinner” – Older, KL



OUT OF HOME CONSUMPTION

- Most consumed are typically beef slices and steak.
 - Most are unable to identify the country of origin of the meat and do not appear to be concerned about it
- Amount consumed usually follows as per restaurant servings, for example:
 - Beef steaks; individual consumption or larger servings for sharing.
 - Hot pot and BBQ style; no amount specifically mentioned, usually for sharing.
- Beef is often consumed more regularly; approximately once or twice a week.



“I usually eat my beef in a hot pot kind of style, so I usually opt for Sukiya or BBQ town.” – Younger, KL

General Beef Usage (2/2) – Those cooking tend to be the main decision makers for beef purchase



Both the menu choices at home and when dining out depend on personal preferences and occasional family requests.

IN-HOME CONSUMPTION

- Those who are responsible for cooking as primary decision makers i.e., wife, daughter, and mum.
 - Mother plays a significant role in influencing the decision; specifically for a younger living with their parents.
 - Young couples tend to decide together.
 - Family's request can also occur e.g. a husband is a gym-goer and thus needs higher protein.
- Type of dish: Curry, stew, soup, stir-fry, grilled, steak.
- Beef treatments:
 - Beef is typically frozen and stored in the fridge before cooking
 - Some cuts are cut to cubes i.e., sirloin.

OUT OF HOME CONSUMPTION

- The menu choices out of home are determined by personal preference or according to a family member's request.
 - The menu choice is usually based on the desired style (grilled, stir-fried), dish country (Japanese, Western, etc.), and budget.
 - Some older people prefer dining at familiar, trusted restaurants - *a go-to place*; less exploration of restaurants and menus.
- Visited restaurants:
 - Japanese: Kuro Yakiniku.
 - Western: TGI Friday
 - Steakhouses: Honest Butcher, Grub, Emily Steakhouse.
- Menu order:
 - Slices: Beef pho (Vietnamese), beef stir-fry (Thai), Sukiyaki/ Shabu-shabu or Yakiniku, and BBQ (Japanese).
 - Steak style; varies in the style of cooking (rare to well done)

"I make the decision and of course, because my husband is a gym goer and he requires more protein intake, so he was pacified most of the time." – Older, KL



"... and for beef, Korean, Vietnamese, my girl loves pho, the beef pho. We go there quite a fair bit and some of the Thai food they will have options for stir fries with beef slices as well." – Older, KL



Types of dishes: Imported Beef – considered very versatile

Beef is suitable for both daily and special occasions. It works well with both local and international cuisines

LOCAL DISHES

DAILY BEEF DISHES



Curry (Malaysian/Indian style)



Black pepper beef



Grilled beef



Beef Noodle



Nasi Goreng/ Fried rice



Mee Goreng

SPECIAL BEEF DISHES FOR SPECIAL EVENTS/ OCCASIONAL



Beef stew



Beef soup



Beef Rendang

INTERNATIONAL DISHES



Meatball beefs



Burger



Spaghetti Bolognese



Steak



Cottage Pie

"For me, usually I kind of just grill my meat or if I'm in the mood for something special, I'll make some kind of a soup to go with." – Younger segment, Malaysia

"Mostly nowadays I like to make like meatballs or sometimes spaghetti Bolognese and steak." – Younger, Malaysia

General Lamb Usage – Lamb is consumed less often, mostly once a month or less



Lamb chops are the preferred choice for both at-home and out-of-home consumption

IN-HOME CONSUMPTION

- Lamb is consumed primarily as frozen lamb chops, shoulder, and lamb thigh/ shank or leg.
 - It can be cut into cubes or eaten as it is (steak cut)
- Less frequently consumed, at most once a month or every 2-3 months (monthly to biweekly), or may occur less.
- Amount to consume: around 220 g OR 2-3 lamb chops per person
- Most buy Australian lamb (highly available and perceived as better quality); a few buy New Zealand lamb too (skewed to younger).
- The one who's responsible for cooking also decides the menu i.e., wife, and husband (a few feel that the husband cooks better lamb)
 - Request open occasionally from spouses, or other family members living under the same roof.
- Type of Dish: grilled, pan-fried, curry, stews.

OUT OF HOME CONSUMPTION

- For lamb consumption out of home, lamb chops and lamb racks are the most frequently chosen.
 - Typically consumed as individual portions or can be shared among family members during family meals or such special occasions i.e., Eid Al Fitr (festive days).
- Less frequently consumed than beef; consumption occurs around once a month or every few months for some
- Menu choices are based on personal preference or a family member; usually based on country style i.e., Middle Eastern, Indian, or Western.
 - Typical menus are Lamb Chops (grilled or roasted), Lamb Curry, Lamb Rack, and Steak (less common).
- Visited restaurant:
 - YaHala (Middle Eastern), Passage Thru (Indian), Hotel restaurant (specifically for lamb racks)

"If I'm making a dry roast or curry, then I'll prefer the thigh. So, I'll have chopped it into cubes. Cube sizes, only the meat part." – Older, Malaysia



"...because my dad loves lamb chops and lamb racks as well so sometimes, we go to the hotels to actually have them." – Older, Malaysia



Types of dishes: Imported Lamb has more limited menus

Consumers perceived to have less knowledge in handling lamb. Lamb is often considered more distinct in flavour and may require more careful handling in cooking to ensure tenderness.

LOCAL DISHES

DAILY BEEF DISHES



Grilled lamb



Pan-fried lamb



Black pepper lamb

INTERNATIONAL DISHES



Shepherd pie



Grilled lamb chop

SPECIAL BEEF DISHES FOR SPECIAL EVENTS/ OCCASIONAL



Lamb Stew



Lamb curry



Lamb Steak

"We only consume lamb, like we cook lamb at home and mostly it's grilling. I grill a lot because it's much more, I mean like lesser oil consumption when you grill it, right? And during festive, then we do curry and those kinds of things." – Younger, Malaysia

"Occasionally, if we have birthdays or anything, we order the lamb leg and grill and put it in the oven as well." – Older, Malaysia

Imported meat purchase habits (for in-home) – Consumers prioritize easy access, product freshness, and store cleanliness.



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Consumers typically prefer modern trade supermarkets for their convenience, while a few opt for specialized meat shops to purchase meat. When it comes to imported meat, shoppers often consider multiple stores, but the final decision is primarily influenced by factors such as convenience (with preference for locations near their homes or workplaces), product quality (including hygiene standards and separate areas for halal meat), and pricing.



"It depends, sometimes Village grocer, or sometimes Giant grocer, I've gone to AEON as well, so it all depends. It depends on where we are at that time" – Older, Malaysia

1

Jaya Grocer

- ✓ Wide range for both beef and lamb; local and imported product – Australia has the highest availability.
- ✓ Known for offering premium-quality meats; suitable for higher-end cuts or specialty meats.
- ✓ Quality exceeds AEON
- ✓ Can order online; convenient.
- ✗ More expensive than other supermarkets

2

AEON

- ✓ Provides more variety in beef and lamb options
- ✓ Offers both local and imported beef options
- ✓ Has separate halal and regular meat section

3

Village Grocer

- ✓ Good quality of meat
- ✓ More beef varieties than lamb

4

Other Modern trade such as: Lulu Hypermart, Giant, Lotus and QRA.

5

Meat Specialist such as Pok Brothers and TPL (only mentioned by a few)

- ✓ Has a very broad meat variety.
- ✓ Provides online ordering; less hassle and can simply pick up the order
- ✓ Occasionally used for beef with specific cuts/ volume – usually for specific events for bulky order (skewed to Pok Brother)

Key information consumers seek for red meat – Country of Origin of meat is important for in-home consumption but less so for out-of-home



The origin of the meat is important for in-home consumption, as it often serves as a quality indicator. However, it is less important for out-of-home dining, as long as the overall dining experience meets expectations.

IN-HOME CONSUMPTION

- **Meat cut**; to ensure the desired type and quality of meat for specific recipes or cooking methods.
- **Packing date or Best Before date**; to assess the freshness and ensure the meat is within a safe consumption period as well as to avoid waste
- **Price and promotion**; finding a good deal to fit within the shopping budget.
- **Origin of the meat**; to ensure the meat comes from a trusted or preferred source (e.g., Australian beef) – defines the quality.
- **Weight of the meat**; to determine the quantity being purchased, prevent overbuying - Buy prepackaged for 1-2 meal times (220g/ meals) or 1-2 kg of meat, depending on the type of dish.
- **Halal certification is important for Muslims**, especially for imported meat, as it provides assurance
- **Leanness and fattiness of the meat**; based on personal preference/cooking needs (a few older).
- **Feeding practices**; to ensure the meat comes from a healthy, sustainable source and meets personal preferences for quality (e.g., organic, grass-fed) (a few younger segments, for beef) – deemed to understand from a claim on the label.
- **Recipe**; to understand the technique & cooking time



OUT OF HOME CONSUMPTION

- **Meat cut** (e.g. lamb Chop, lamb shoulder, sirloin); to expect the taste and texture of the dish.
- **Price**; to suit their budget and to see the meat quality i.e., unusually low prices may indicate low quality.
- **Freshness of the meat**; prefer freshly prepared meals rather than frozen meat, ensures quality, taste, and safety.
- **Restaurant reputation**; high ratings and high traffic often correlate with better meat quality.
- The origin of the meat is important for a few consumers, especially when it comes to **Wagyu**, as it is associated with higher quality and higher prices.
 - For most participants, **the origin of the meat is less important** for out of home consumption, with the focus being more on the flavour of the dish.

"I'll see what kind of meat they have and then before I buy, also I will check their labels, where they're imported from and what is their pricing and something like that." – Older, Malaysia

For in-home consumption, product label is the main source of information for red meat. While for out of home, information sought prior to visit



For meat consumed at home, product labels and staff at the store are key. In contrast, when dining out, most people seek information about the restaurant online and rely on the menu and waitstaff for details on-site.

IN-HOME CONSUMPTION

- **Product label on the meat;** quick-to-read and reliable details related to meat information i.e., the cut, the origin, the date, the weight, and the halal logo.
- **Shelf labels in the supermarket;** immediate and highly visible meat information, mostly for price and promotion.
- **In-store staff;** direct information, able to provide product details when unable to see from the label i.e., the origin, the meat cut, or the date.
- **Rely on mum's experience** i.e., the preferred origin, the fat content, the recipe.
- **Supermarket website or social media i.e., TikTok, Facebook;** promotion and additional information/ viral trend/ recipes related to meat
- **Recipe suggestions;** inspiration for recipes leading to meat origin awareness, usually found online.



OUT OF HOME CONSUMPTION

Source of information before going to the restaurant:

- Social media e.g., Google, YouTube; reviews and recommendations
- Word of Mouth; personal recommendation and review on the taste and quality of the meat

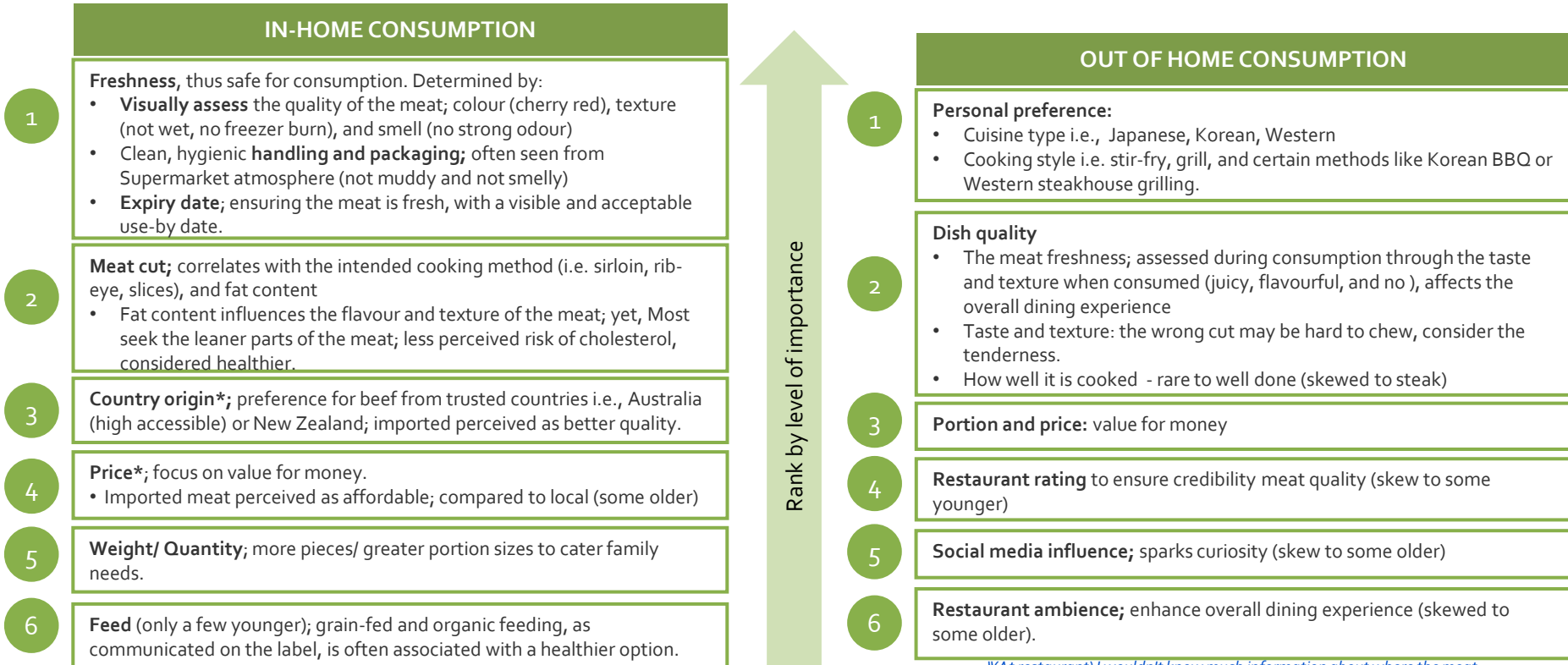
Information received inside the restaurant from:

- Menu; provide information related to the dishes.
- Waitstaff; provide insights that are not provided in the menu
- Restaurant counter e.g., visible meat display/storage, butcher counter

Purchase Decision Factors (Beef) – Freshness is the most important factor for in-home consumption



The Country of Origin is an important consideration primarily for in-home consumption, as it can define the quality and type of meat. However, when dining out of home, the focus shifts more to the flavour, freshness, and cooking style rather than the source of the meat.



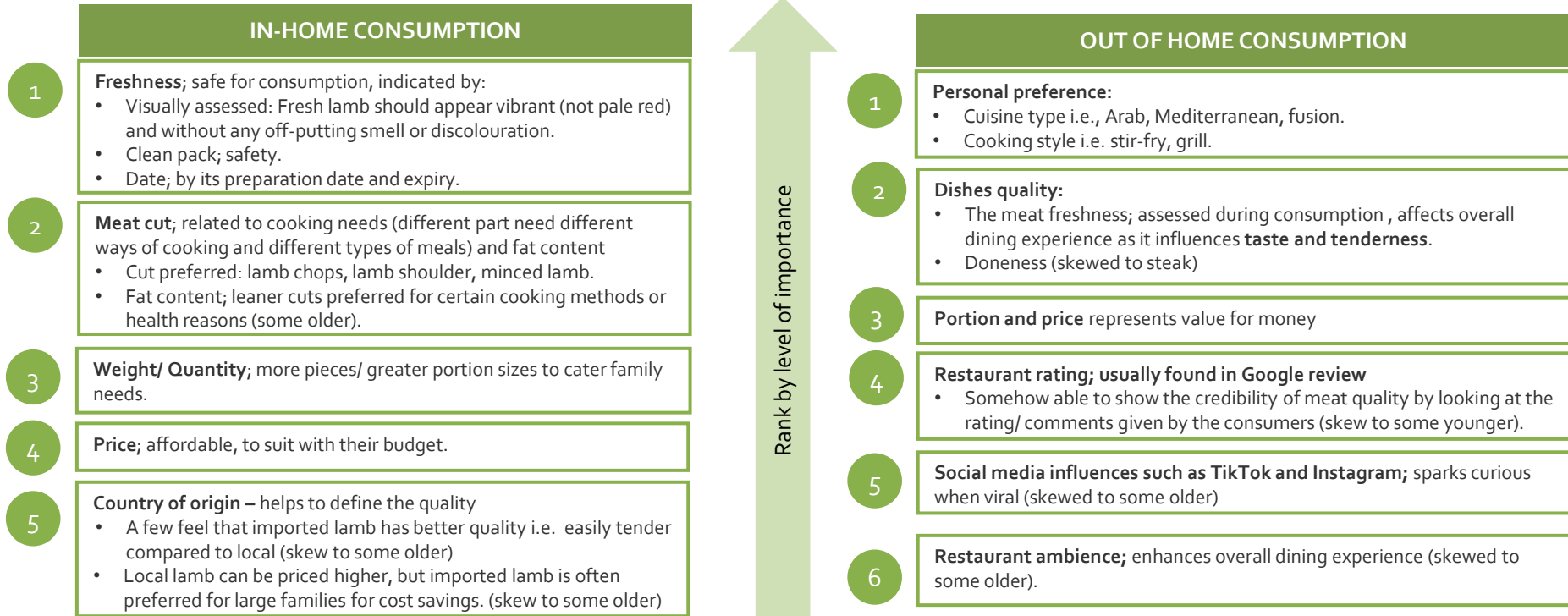
*Younger consumers prioritize price over country of origin due to their purchasing power, while older consumers prioritize country of origin before price.

"(At restaurant) I wouldn't know much information about where the meat comes from, the details of it, only the price... We don't know where is it from and quite to be honest I'm not bothered either." – Older, Malaysia

For lamb, freshness is the also most important factor for in-home consumption



The Country of Origin tends to be less significant when purchasing lamb, especially for out-of-home consumption. Only for some older segments, imported lamb is viewed as more affordable and easier to tenderise, which makes it a more attractive option.





Willingness to Pay a Premium – Consumers are willing to pay more depending on the type of meat, cuts, and country of origin for in home consumption

For beef, consumers are willing to pay a premium for high-quality cuts like Wagyu or Kobe and premium country of origin such as Japan, while for lamb, consumers prioritize specific cuts only.

BEEF

Type of Meat:

- Wagyu and Kobe are considered premium options due to their high-quality marbling and tenderness.

Premium Cuts:

- Premium cuts for beef include T-bone, rib-eye, and sirloin
- These cuts are preferred over more basic cuts such as cubes or minced beef.

Country of Origin:

- Japan is regarded as the source of premium beef (Wagyu and Kobe).
- Australian and New Zealand beef are considered to be of high quality. Still, consumers are less willing to pay a premium for them compared to Japanese beef, as they have become regular consumption items and are thus perceived as less premium.



LAMB

Premium Cuts:

- Specific cuts like rib and lamb shank are considered more premium and are priced 20-30% higher than other cuts.

Country of origin (only applied for a few Older segment)

- Local lamb is considered more flavourful than imported lamb, yet pricier.

"Usually for like lamb, it's either shoulder, or the thigh... if it's premium, then I would say the lamb shank. Yeah, the shank size, that's where the premium about 20 to 30 percent would be increased." – Older, Malaysia

"I never bought like premium lamb before, it's just I usually buy the chops, the shoulder part and just for grilling purposes. Such thing as premium lamb, I have no idea. All I know is that the local one is more expensive than the imported ones." – Older, Malaysia

APPLIED FOR BOTH MEAT

- Exclusive packaging, such as wood packaging, offers higher quality than plastic packaging.; yet, less priority.



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- Premium cuts for beef include T-bone, rib-eye, and sirloin
- These cuts are preferred over more basic cuts such as cubes or minced beef.

Country of Origin:

- Japan is regarded as the source of premium beef (Wagyu and Kobe).
- Australian and New Zealand beef are considered good quality, but consumers are less willing to pay a premium:
 - Australian beef is their usual go-to meat type within an affordable price range, so they are less willing to pay higher prices unless it's for Wagyu beef type.
 - Some others perceive it as the highest premium option, thus consider the price to be the maximum already.

LAMB

Premium Cuts:

- Specific cuts like rib and lamb shank are considered more premium and are priced 20-30% higher than other cuts.

Country of Origin:

- Skewed to some older, locally produced lamb is considered more expensive than imported lamb and thus used during festive only, perceived to be tastier than Australian lamb.

"Usually for like lamb, it's either shoulder or the thigh... if it's premium, then I would say the lamb shank. Yeah, the shank size, that's where the premium about 20 to 30 percent would be increased." – Older, KL

"I never bought like a premium lamb before, it's just I usually buy the chops, the shoulder part, and just for grilling purposes. Such a thing as premium lamb, I have no idea. All I know is that the local one is more expensive than the imported ones." – Older, KL

"So, if let's say it's Australian beef but then it did not mention that it's from wagyu type or what, so probably I'm not willing to pay for a high price for that, but if let's say that mentioned it's wagyu beef, I know that the beef texture will be much softer, so for that, I'm probably willing to pay more premium." – Older, KL

"If you want to get the bigger parts like a sirloin or if it's a fancy line, then maybe I look at the parts." – Older, KL



Willingness to Pay a Premium – Country of origin is not the main factor for out-of-home consumption

Special cuts of meat and external factors such as viral trends, reputation, and ambiance can significantly enhance the willingness to pay a premium

BEEF

Type of meat

- Unique offerings such as special cuts of beef (e.g., Tomahawk)

High-end cuisine, Restaurant reputation:

- **Michelin Star Restaurants:** Fine dining establishments, particularly Michelin-starred ones, elevate expectations and justify higher prices.
- Great ambiance enhances experience.

Viral trends: - Sparks curiosity; yet less priority.

"A Michelin 5 star, all these type of things. If you have special stuff like the Tomahawk and all that, this would definitely be more than 30 to 40%." – Older, KL

LAMB

Sophisticated dining experience; ambiance

- Dining in upscale Arabic or Mediterranean restaurants is associated with higher prices (a few)

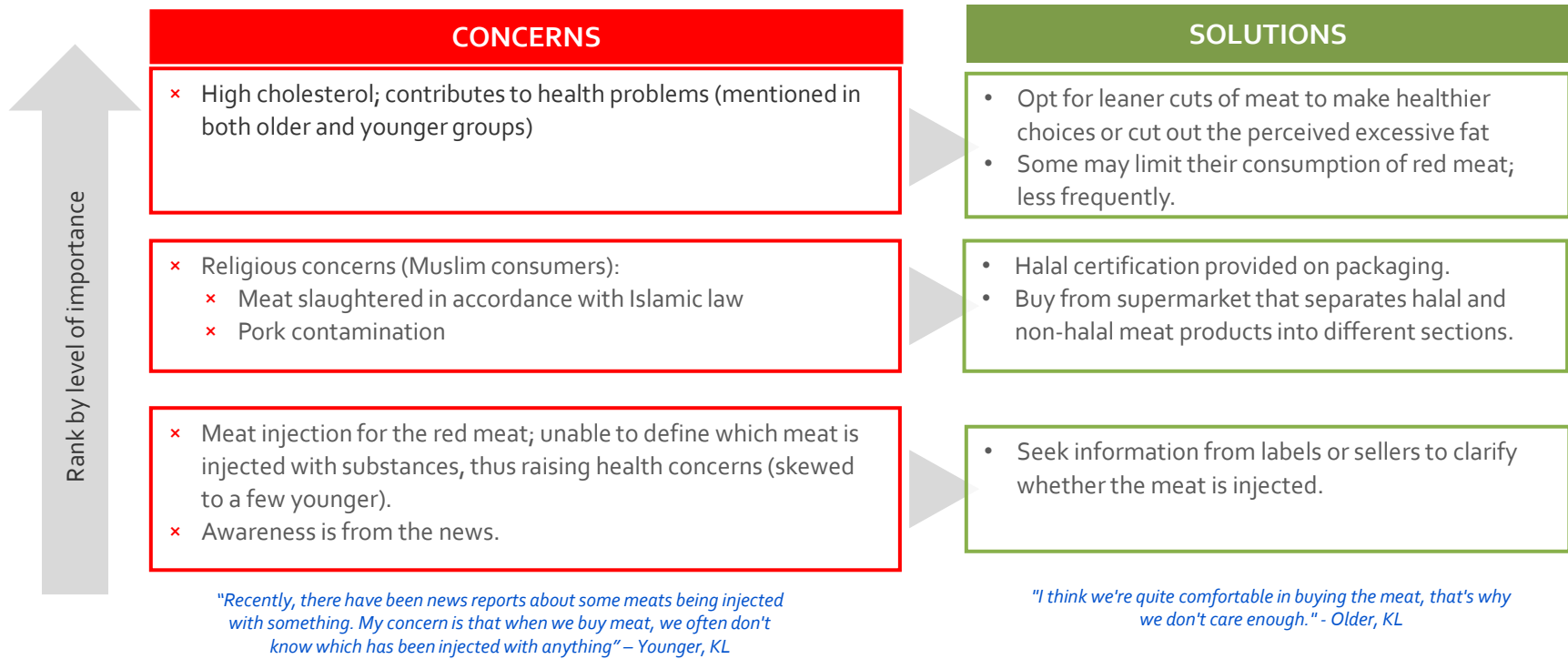


"I think the ambiance plays a part because normally we want to go out of the house, we want a different environment, different, you know, the ambiance that we're looking for." – Older, KL



High trust in quality leads to fewer concern about red meat consumption.

Consumers generally have fewer concerns about red meat consumption, with the primary considerations being health and halal requirements.





Understanding Quality, Trust & Traceability

Definitions of Quality – Freshness, clean packaging, and country of origin define a good quality meat



Australia, New Zealand, and Japan are consistently mentioned when it comes to high quality beef

• Quality is defined by:

- Freshness based on light meat colour (cherry red), texture, packaging date, absence of unpleasant odours or freezer burn due to prolonged freezing
- Clean packaging and presentation reflects hygiene standards, i.e. lack of visible blood in the packaging
- Country of origin (Australia, New Zealand, and Japan)
- Specific cuts (rib eye, tenderloin, cubes), marbling, and balanced fat content for different dish preparations i.e. tougher cut for rendang, rib eye/tenderloin for steak
- Reputation of the sellers and the brand – trusting established grocers like Jaya Grocer



• Quality is important for beef due to:

- **Practical:** High-quality beef ensures better cooking outcomes, such as tenderness, ease of preparation, and suitability for specific dishes reduce effort and time in preparation as high-quality beef is naturally more tender, requiring less marinating or slow cooking to achieve desired texture.
- **Emotional:** enhances satisfaction and trust, offering indulgence, peace of mind, and value for special occasions or family meals.

• Information is mostly sought from:

- Packaging labels and visible freshness indicators (e.g. colour, packaging date, halal) are considered the most important and credible, as they provide direct and reliable information at the point of purchase.
- Recommendations from trusted friends, family, or sellers

"Look at the texture. If it's like the frozen meat is too long, then you can see that it's dried out of freezer burn." Older, KL

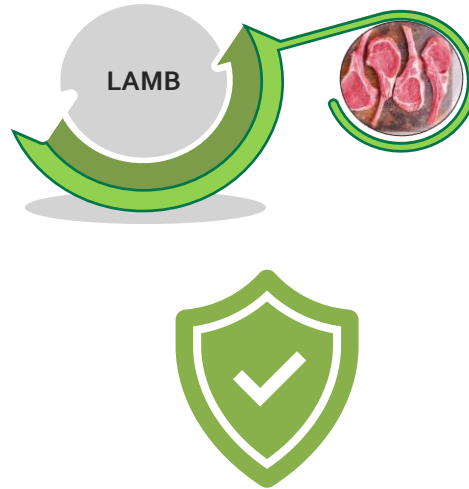
Definitions of Quality – The definition of quality for lamb is quite similar with beef



Consumers prefer lamb cuts like shank, shoulder or thigh as it is versatile and suitable for different type of dishes

• Quality is defined by:

- Freshness based on colour, absence of unpleasant odours, and hygienic packaging and packing/used by dates
- Country of origin of lamb; from Australia and New Zealand
- Preferred cuts like shank, shoulder, or thigh ensure tenderness, versatility, and suitability for specific dishes
- Balanced fat levels, with a preference for leaner options because excess fat in lamb is perceived as unhealthy and the smell is stronger
- Clean packaging (hygienic, free of blood, leaks or visible contamination) and display play a role in reinforcing perceived quality



• Quality is important for beef due to:

- **Practical:** High-quality lamb ensures tender, flavourful results, making cooking easier and suitable for a variety of dishes while reducing preparation issues. Poor quality lamb can be tough with strong odour, which takes more time to prepare and cook.
- **Emotional:** Quality lamb enhances dining satisfaction and trust, adding value to special occasions and creating a sense of care for family meals.

• Information is mostly sought from:

- Packaging label indicates freshness, halal, and country of origin.
- Recommendations from friends, family, and grocers

"Lamb leg and shoulder are my go-to because they are easier to cook and suit various dishes." (Older, KL).

Definition of Trust – Trust is about confidence in the safety, quality and authenticity of meat through visible & verifiable attributes such as past experience, hygienic packaging, freshness indicators & certifications



It provides peace of mind knowing that the meat is safe – consumers are willing to pay 10-30% premium for trusted meat

- **Overview:** Trust is confidence in the safety, quality, and authenticity of meat, established through clear labelling, reliable sourcing, hygienic packaging, and consistent positive experiences.
 - Meat is trustworthy if it's from a well-known & consistent seller, visibly fresh from the meat colour and packaging cleanliness, labelled with accurate information on origin, and certifications (halal & country of origin certifications)
- **How important is trust?**
 - **Emotional:** Trust provides peace of mind, satisfaction, and confidence, ensuring meat is safe, high-quality, and suitable for personal or family consumption, especially during special occasions or for maintaining health standards.
 - This ensures peace of mind that the family is consuming safe and high-quality meat, reducing the stress about food safety risks. It also adds confidence that the family is receiving the best meat for satisfaction and enjoyment of the meal.
 - **Practical:** Trust reduces risks of poor quality, contamination, or spoilage, streamlining the purchasing process because of the consistency of the meat quality that reduces the time to choose and compare, and ensuring reliable health and cooking outcomes, saving time and effort.
- **Willingness to pay premium:** Most claim to be willing to pay 10-30% more for trusted meat, associating higher costs with guaranteed quality, hygiene, and reputable sourcing

"Trusting the product means the way that they claim their product should be the same as what they serve. What is claimed on the label should be the same with the actual product" - Younger, KL

"We know how clean the grocers are... when we buy here, we get the quality and all that." - Older, KL





Sources of Information about Trust – Word-of-mouth and store/brand reputation are highly credible information about trustworthiness of meat

While social media is important for promotions and cooking tips, it is less credible because it is seen as promotional and biased



| Source | Information Received | Recalled Information | Credibility |
|--------------------------------|---|--|--|
| Personal Experience | Texture, flavour, cooking outcomes, and product consistency. | Positive/negative experiences shape trust perceptions | Most credible; based on direct outcomes. |
| Supermarkets/Store Reputation | Hygiene, freshness, consistent quality, labelling, and sourcing transparency. | Trusted stores like Jaya Grocer are linked to quality and reliability. | Highly credible; trusted for consistent standards. |
| Word of Mouth (Friends/Family) | Trusted brands, cuts, and stores based on others' experiences. | Specific store/brand names and advice from trusted individuals. | Highly credible; trusted due to personal connections. |
| Packaging Labels | Origin, freshness, feed type (e.g., grass-fed), Halal certification, expiry date. | Freshness indicators like preparation/expiry dates and certifications. | Moderately to highly credible; depends on brand trust. |
| Social Media / Advertisements | Promotions, cooking tips, insights about origins or cuts. | Quick details on promotions and recipes. | Least credible; seen as promotional and less reliable. |

"For me, I trust on the label because usually we see the texture of the meat and also we check the label. So let's say if I did not trust the label, then how would I purchase?" - Younger, KL

Trustworthiness of country of origin – Japan, Australia and New Zealand are highly trustworthy country of origin



These countries have a strong reputation in terms of high-quality standards and practices



HIGH



JAPAN

Recognised for premium beef like Wagyu with high marbling, meticulous quality standards, and strong meat culture.

AUSTRALIA

Known for stringent quality standards from past experience & reputation, grass-fed livestock, premiumness claim in the packaging, and strong export reputation for meat

NEW ZEALAND

Similar to Australia, associated with organic farming practices, fresh tender meat, and strict quality controls.

UNITED STATES

Trusted in premium contexts (e.g., steakhouses), but lacks consistent association with everyday quality meat.

MALAYSIA

Familiar local brands are trusted, but concerns about hygienic packaging, and mislabelling of buffalo sold as beef reduces trust

INDIA/ PAKISTAN

Common issues include mixing of Indian buffalo meat with local beef and inconsistent hygiene from the way the meat is handled in wet market, which stems from personal experience and exposure to news about Indian meat.

LOW

"I think it's the overall reputation of the country, like we all have very good, we all know Japanese, they do their work properly and they are always, you know, they hold the integrity, they have very strong integrity in their work." - Younger, KL

"Actually you say you buy beef, but it's actually kerbau or buffalo. Then the meal will be tough." Older, KL

Other Country of Origins:
Canada, Brazil and Argentina were mentioned by some; however, there are very limited exposure and high unfamiliarity with these countries.



Traceability has low spontaneous awareness – many are unaware of its relevance to meat

With such low awareness, traceability is not a key factor in purchase decisions



SPONTANEOUS:

- **General awareness:** Spontaneous awareness of meat traceability is generally low across all groups. Most have not considered the concept unless prompted.
 - While they have heard of the term “Traceability”, it is in the broader context like processed foods (barcode to trace products back to origins in case of quality issues), or online purchases (tracking the status of the product in delivery)
 - Most consumers rarely think about traceability, with many unaware of its relevance to meat.
 - Only one older consumers is aware with traceability for Australian beef, connecting it with safety as it can track batch number and QC.

"I think Australia, if I'm not mistaken, they actually have an identification system. So it makes it much more safer to consume imported meat from Australia. It's actually quite important as well. So I think that's the reason why Australian meats are much more safer to consume." - Older, KL



After prompted, consumers are able to comprehend the concept, although they see it more as a value-added feature instead of essential factor in purchasing decisions

Traceability communication should focus on visibility, transparency, and accessibility to resonate with consumers and build trust

"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".

PROMPTED AWARENESS

Awareness of traceability is limited across all groups, primarily tied to halal certification or premium meat contexts

- Younger groups tend to have limited awareness often tied to halal certification or occasional exposure through news or documentaries;
- Older groups have moderate awareness particularly in the context of premium meats (e.g. Japanese beef) or larger food/MNC companies with traceability practices like tagging and labelling



COMPREHENSION

Traceability is understood as tracking meat from origin to consumption, ensuring compliance, safety, and ethical treatment.

- Older groups see it as more useful for producers than for consumers as they feel that it is designed more for supply chain purpose – for some consumers, it's more as a nice-to-know

IMPORTANCE

- Traceability holds moderate to high importance for most, as it provides assurance of quality, safety, and ethical practices.
- However, it is often seen as a value-added feature rather than an essential factor in purchasing decisions, with reliance on existing trust mechanisms like halal certification or brand reputation.

"If there's some traceability to the meat, it makes us feel safer. We know where it's coming from" -Older, KL

COMMUNICATION MEDIUM

- Packaging and QR Codes – scanning the code to understand where the meat comes from
- In-Store Displays – leaflets, labelling & visual displays in the meat section, or use TV screens to display sourcing & processing steps
- Dedicated brand websites – i.e. store website or Australian beef brand website, only if they need to find additional information about the beef
- Social Media such as TikTok and Instagram

"I think packaging is one way...maybe you can put a QR code there. So when you're buying at that time, you can just scan and quickly do a read-up." - Older, KL

"Just good to know... It's just good to know." - Younger, KL

KEY MESSAGES IN COMMUNICATING TRACEABILITY

- Transparency - Showcase the full meat journey (feeding to processing) through videos, visuals, and clear labels.
- Certifications - Highlight halal and safety certifications, ensuring trust and compliance.
- Origin - Emphasise trusted countries with recognisable markers like flags or labels.
- Share relatable narratives about ethical practices and meat sourcing, i.e. from halal point of view of farmer's story

"It reassures me that it's safer to consume." - Younger, K:L



Deep Dive into Country of Origin & Australian Beef & Lamb

COO is important for both beef and lamb as it provides assurance for quality and trust



For beef, several countries are mentioned as the COO. However, for lamb, AU and NZ are the only countries mentioned



BEEF:

- COO is highly valued as it provides an assurance for trust & quality. Countries with reputation for halal practices are preferred.
- COO is more important for in-home consumption as consumers directly choose and evaluate quality through label & visible freshness, while for out-of-home they rely more on the restaurant's reputation rather than the COO

Highest awareness:



Lower awareness



LAMB:

- For lamb, the importance of the country of origin appears to follow similar patterns to beef, but with less frequent purchase / consumption
- Just like beef, COO for lamb is important particularly for in-home use, due to its association with quality and trustworthiness. Out-of-home, the focus shifts to the credibility of the dining establishment. Local lamb is mentioned mostly in the context of Eid-al-Adha holiday for Muslim consumers.

Highest awareness:



Lower awareness:



"It's because I think Australian beef looks fresher, they have better packaging, and the price point is not too high." - Younger, KL




"If I'm eating out, I don't ask where the lamb comes from. As long as it's well-cooked, I don't mind." - Older, KL

Overall: Australia is associated with fresh, good quality meat



For imported lamb, Australia and New Zealand are the only known country of origin

Rank by level of preference overall

| COUNTRY | ASSOCIATIONS: | Any differences for Beef vs Lamb |
|---|--|--|
|  AUSTRALIA | <ul style="list-style-type: none"> • Spontaneous associations – Fresh, bright colour, and trusted quality. • Overall – Regarded as a premium, reliable source of beef with good value for money ✓ Positives: consistently fresh, premium quality, hygienic & appealing packaging ✗ Negatives: more expensive than local meat, availability may be limited depending on location or retailer • Communications recalled – Labels and in-store visuals indicating “Australian beef”, use of the AU flag on packaging or meat sections. Consumers remember the “Australian beef” logo spontaneously. | <ul style="list-style-type: none"> • No differences for AU beef vs lamb |
|  JAPAN | <ul style="list-style-type: none"> • Spontaneous associations – Wagyu beef, high marbling, and premium quality • Overall – Recognised for exceptional taste and luxurious dining experiences in steak restaurants that offer premium Japanese wagyu beef ✓ Positives: Superior tenderness and flavour due to high marbling ✗ Negatives: Very high price, making it less accessible for everyday consumption. • Communications recalled - Wagyu branding and references to Japanese culinary excellence. | <ul style="list-style-type: none"> • Only known for beef, no mention of Japan for lamb |
|  NEW ZEALAND | <ul style="list-style-type: none"> • Spontaneous associations – Known for its clean, green image and natural farming practices through general perception of the country • Overall – Trusted for quality and halal compliance but less familiar and overshadowed by Australia in the local market. ✓ Positives: Reliable quality due to grass-fed livestock and consistent standards, mainly from experience and information on packaging/supermarket display ✗ Negatives: Perceived higher fat content based on experience in using NZ lamb vs. Aussie lamb; and lower market presence compared to Australia. • Communications recalled - Natural farming practices mentioned in labels and media coverage. | <ul style="list-style-type: none"> • NZ is more known for its lamb than beef – however, association for NZ beef is also quite positive. |

"The label for AU meat is quite heavy on visibility. They have quite a lot of information, like whether it's grain-fed and the slaughter date." - Younger, KL

"When I think about Wagyu, it's the best. You hear about it in cooking shows all the time, and it's just, you know, luxury meat" - Younger, KL



"New Zealand lamb is quite acceptable, but not as easy to find as Australian." - Older, KL



Malaysian meat is associated with freshness from wet markets, although the quality is less consistent

India is not the trusted country of origin due issues with trust and quality

Rank by level of preference overall

| COUNTRY | ASSOCIATIONS: | Any differences for Beef vs Lamb |
|---|---|--|
|  MALAYSIA | <ul style="list-style-type: none"> • Spontaneous associations – Freshness from wet markets, more traditional and less premium. • Overall – Less reliable and less consistent compared to imported meat ✓ Positives: Readily available and affordable, especially for everyday use. ✗ Negatives: Perceived as less tender, lower quality, and lacking the stringent standards, and strong odour for lamb • Communications recalled – Minimal recall of specific messaging, trust relies more on halal labelling and wet market freshness. | <ul style="list-style-type: none"> • Local lamb is perceived to have strong odour |
|  INDIA | <ul style="list-style-type: none"> • Spontaneous associations – India is associated with buffalo meat, which is perceived as cheap and of lower quality. • Overall – Indian meat is considered low quality and unsuitable for home cooking ✓ Positives: affordable and cheaper than options from other countries ✗ Negatives: Concerns about hygiene, trust in labelling, and perceived low quality overshadow its affordability due to news and experience about Indian meat. • Communications recalled - No specific communications were recalled, with perceptions shaped largely by past experiences and negative associations. | <ul style="list-style-type: none"> • Both are perceived as low quality |

"I always buy local beef from the wet market because it's fresh and they cut it in front of you." - Older, KL

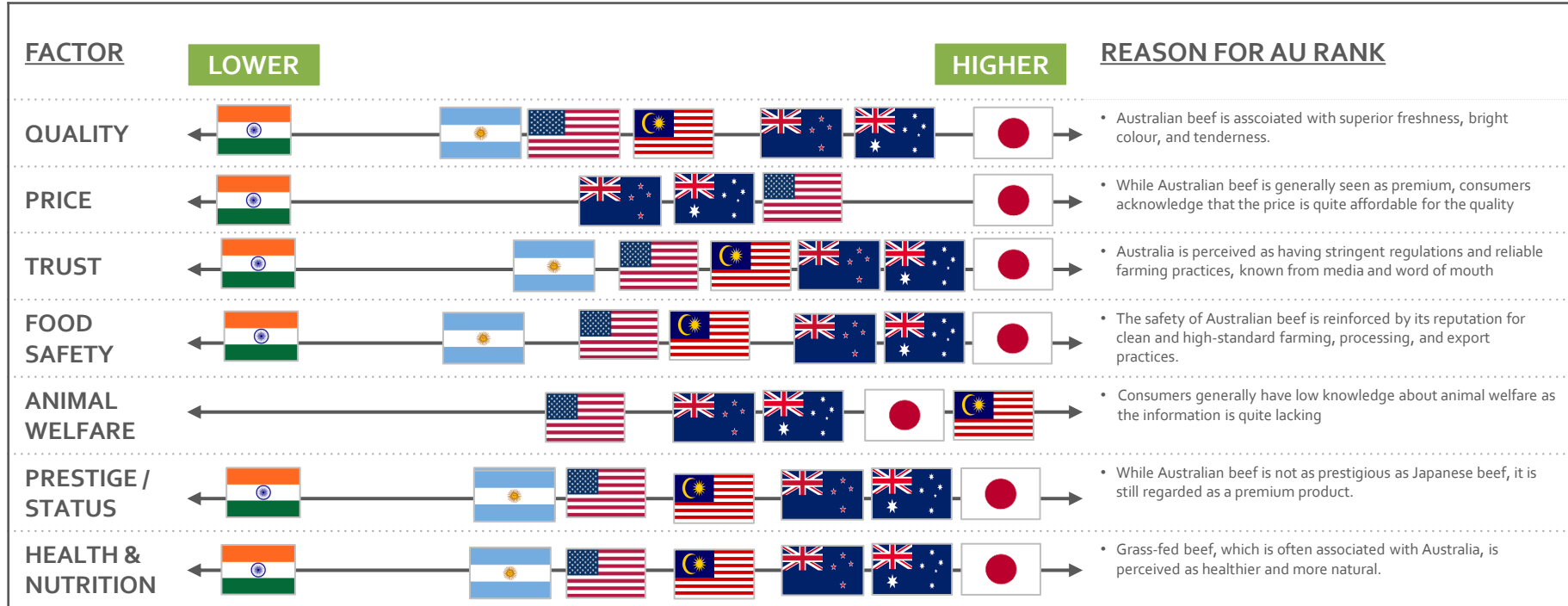
"Malaysian lamb is cheaper compared to imported meat, but the smell can be stronger." - Younger, KL

"The hygiene standards for meat from India aren't very reassuring." - Older, KL



For beef, Australia ranks behind Japan in all factors





















However, Australian beef is considered reasonably priced compared to Japanese, providing a balance of quality and affordability.



For lamb, fewer options overall, but Australia and New Zealand are considered very similar in all factors



Consumers are not aware of other sources of lamb, outside of Australia, New Zealand and Malaysia

| FACTOR | LOWER | | HIGHER | REASON FOR AU RANK | |
|--------------------|-------|---|---|--------------------|---|
| QUALITY | ← |  |   | → | <ul style="list-style-type: none"> Similar quality for AU and NZ lamb, but AU lamb is easier to find. |
| PRICE | ← |  |   | → | <ul style="list-style-type: none"> The price of lamb from AU & NZ is seen as comparable, reinforcing the perception that the products are of similar value |
| TRUST | ← |  |   | → | <ul style="list-style-type: none"> Both Australian and New Zealand lamb have a guaranteed quality, which contributes to a high level of trust in both |
| FOOD SAFETY | ← |  |   | → | |
| ANIMAL WELFARE | ← | |   | → | |
| PRESTIGE / STATUS | ← |  |   | → | |
| HEALTH & NUTRITION | ← |  |   | → | <ul style="list-style-type: none"> NZ lamb is perceived to be fattier, which is a negative characteristic for younger consumers seeking for lean meat |

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



BEEF

"(Australian beef) Probably because I've seen them around for quite a long time. You know, just seeing them frequently makes you think, I think food marketing contributes as well." (Younger, KL)

"Japanese beef always has good quality when dining out. We also associate Japan with cleanliness and integrity" (Younger, KL)

"Usually, for Malaysian beef, I... I took from my family house because we have that, the eve for like Idul Adha. So I just took from my family house, so I don't buy much Malaysian beef." (Younger, KL)

"I think of grass-fed for Australian and New Zealand for me." (Older, KL)

"US? All I can remember is beef for cheeseburger." (Older, KL)

"Local beef makes me think about local dishes, for example, beef rendang." (Older, KL)

LAMB

"(Local lamb), probably the smell is a bit stronger. Yeah, that's my experience" (Younger, KL)

"NZ lamb is happy, healthy, and then fat and juicy." (Older, KL)

"Indian mutton? They like to mix mutton and beef together, so they say it's mutton." (Older, KL)

"for New Zealand lamb, the price more or less similar to Australia." (Older, KL)

"NZ lamb has higher fat content. I prefer lamb without fat, so higher fat content is less preferred." (Younger, KL)

"Australian lamb is easy to get, frozen. It is also lesser smell compared to others." (Older, KL)

Australia on Trust & Quality – Australian meat is considered as both trustworthy and high-quality



Trust and quality are interrelated, as consistent quality of Australian meat has built strong trust among Malaysian consumers.

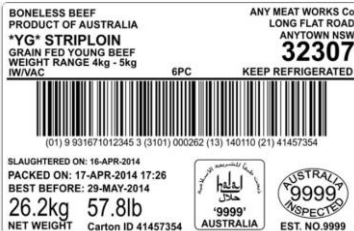


- **TRUST** – Australian beef and lamb are **highly trustworthy**
 - Primarily due to its consistent availability; strict quality standards known from personal experience, word of mouth from friends/family, and media; long standing reputation; halal compliance; and frequent labelling & marketing that reinforces trust
 - Consumers recalled information on trust through label information (origin stamps, feeding methods, packaging dates), visual cues (use of Australian flag and in-store sectioning of “Australian Beef/Lamb”, and marketing materials in supermarkets).
 - Australia’s reputation as a country with advanced agricultural practices reinforces trust, such as prohibitions on bringing foreign meats or certain food items into the country, which is seen as indicative of AU’s careful and advanced approach to agriculture.
- **QUALITY** – Australian beef and lamb are both perceived as **high-quality meats**, valued for their consistency, taste, and trustworthiness, though lamb is slightly less preferred due to concerns about higher fat content.
 - Good farming practices, as known from word-of-mouth and media, positive past experience, halal compliance, and country reputation drives this quality perception
 - Trust and Quality is hand-in-hand in the consumer’s perception – they deduct the messages through visual cues (Australian flag and in-store display & packaging) and labelling information that imply both trust and quality for Australian beef & lamb.



Aussie Beef & Lamb Labelling – Consumers are aware of this label, including its colours and design elements, mainly from supermarket display

The label is comprehensive, and the details are able to create trust over quality and traceability



- **Most Malaysian consumers have seen similar labels before**, particularly in food merchants and packaging in supermarkets. Colours and design elements were noted as familiar and easily recognisable.
- **Comprehension** – the label is comprehensive; it indicates the meat is from Australia, which implies better quality and traceability as it communicates details like grain-fed, slaughter date, and origin, helping consumers understand the product’s journey.
 - Elements of trust are found through information on the label about origin and handling, halal certification, slaughter and packed dates, and visibility of details like the manufacturer’s address and dates
- **Impact on decision making** – the label increases confidence and trust in purchasing the product.
 - Younger group even would choose meat with this label over one without it, and willing to pay more for meat with this label due to the confidence and assurance it provides.
 - For older groups, trust in the label adds assurance but does not justify a price increase with the presence of this label as they are already use and trust it.

"I'm already using this brand, right? You don't expect me to pay more because you give me more information because I already trust you, right?"
(Older, KL)

"If compared to one with this label and one without, I would just go for the one with this label." (Younger, KL)



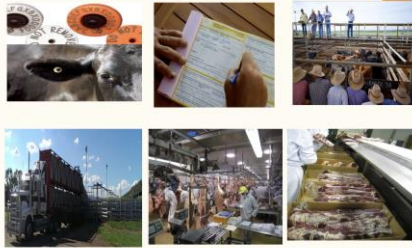
Australia's Red Meat Integrity System – While consumers react positively to this system, some feel that it is a nice-to-know instead of an important element for decision making



For loyal consumers, this system will not increase purchase frequency or create willingness to pay more. However, cautious or undecided buyers may be willing to switch to Australian meat because the information increase trust towards Australian beef

AUSTRALIAN BEEF PRODUCTION IDENTIFICATION & TRACEABILITY —National Livestock Identification System

- ✓ Apply Ear Tag
- ✓ Record Details
- ✓ Documentation (National Vendor Declaration)
- ✓ Saleyard
- ✓ 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.”

“I think we’re already paying for the price that whatever they’re giving to us because it’s already implemented, right?.” (Older, KL)

“If I’m deciding between like two brands and if I see this then it’s very likely that I will just go with this thing.” (Younger, KL)

- **Spontaneously, consumers reacted positively**, appreciating the system's transparency, safety, and quality focus. While many find it reassuring, regular buyers feel it was less novel as they are already familiar with Australian meat.
- **Level of interest ranged from moderate to high** across groups, with younger consumers considering it more as a supportive than a key driver in decision-making and older consumers expressed stronger interest as it builds confidence in food safety and quality assurance
 - ✓ **Resonant elements:** Transparency and traceability as consumers are more convinced with the system in ensuring the quality of AU meat; safety and regulations; credibility; educational value from knowing the process of identification and traceability
 - ✗ **Less relevant elements:** Regular buyers feel the system is already part of the current product offerings, making it less relevant to their decision-making; extensive details might be overwhelming; too much effort if required to access the information (QR codes/visiting website) to trace details for regular purchases
 - ✗ There seems to be an assumption in some groups that the implementation of this system will result in price increase for AU beef.
- **Credibility** – The system was seen as highly credible by all groups due to its transparency, detailed processes, and Australia's reputation for high meat standards
- **Impact on decision making** – for loyal consumers, this information reinforced their trust and loyalty, although it did not strongly increase purchase frequency or create willingness to pay more.
 - However, this system could convince cautious or undecided consumers to prefer Australian meat, especially those seeking premium, traceable products.

Communication Recommendations – Highlighting transparency, halal, and safety as the message for traceability targeted at new buyers or cautious consumers



Product label and displays in supermarket should be the main medium to communicate traceability and integrity system

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

- **Most important aspects to communicate:**
 - **Transparency:** Tracking the full journey of the meat, from farm to packaging, builds trust by demonstrating safety, quality, and ethical reliability.
 - **Halal certification:** Highlighting Halal standards ensures the product meets religious and cultural requirements, reassuring Muslim consumers.
 - **Safety and Quality Assurance:** Strict regulations and certifications provide confidence in the meat’s consistent, high quality, reinforcing Australia’s reputation for premium standards.
 - **Freshness and timeliness:** Emphasising the close gap between slaughter and packaging reassures consumers about the product’s freshness and suitability for consumption.
 - **Sustainability and ethical practices:** Communicating efforts to reduce environmental impact and maintain animal welfare appeals to eco-conscious and socially responsible consumers.
- **Information sources** – consumers expect to see such information mainly through display at supermarket either on product labels, posters, or shelf displays. Social media platform also seen as effective channels to educate through **videos or influencer-led campaigns**.
 - Retailer website and QR codes also preferred for accessing deeper knowledge about traceability and ethical practices by scanning the QR code on the packaging to trace the origin of the meat.
- **Impact on purchase decision making:** For cautious buyers or new buyers, it can overcome hesitation, encourage trial and purchase. Meanwhile, regular buyers, It provides reassurance about quality and safety but does not necessarily alter their purchase habits to buy more or to pay more.



SUMMARY & WAY FORWARD

Freshness, quality, and ease of preparation are universal drivers for red meat purchases



Beef's versatility making it a staple for daily meals, while lamb's distinct flavour positions it as a choice for special occasions

1

Red meat purchase decision making

- Red meat purchase decisions are driven by **freshness, quality, and ease of preparation**, with consumers prioritising bright red meat colour, clean packaging, and expiry dates.
- **Beef is favoured** for its **versatility, minimal preparation needs, and suitability for daily meals**, while lamb is often reserved for special occasions such as Eid-Al-Adha due to its distinct flavour and cultural rituals.
- **Price and accessibility influence choices**, with beef seen as more affordable and widely available compared to lamb.
- **Cultural and dietary preferences** shape decisions, with beef fitting diverse dishes and lamb aligning with specific cuisines like Middle Eastern or festive menus.
- **In-home purchases** often consider the **country of origin as a quality marker**, while **out-of-home** decisions prioritise **dish quality and restaurant reputation** (rather than country of origin)
- **Health-conscious consumers opt for leaner cuts** options, ensuring trust and dietary alignment.

Quality and trust in red meat rely on freshness, cleanliness, and origin, with traceability seen as added reassurance, not essential



Consumers already trust Australian meat for its quality and safety, making traceability a reassuring but non-essential feature.

2

Understanding trust and quality for consumers

3

Importance of traceability

- **QUALITY:** Quality is defined by **freshness** (bright red meat colour, absence of odours), **clean packaging** (no blood or spillage of liquid), and the **country of origin**, with Australia and New Zealand consistently regarded as premium sources.
 - **High-quality meat ensures better cooking outcomes**, such as tenderness and versatility, while **enhancing satisfaction** and **creating trust** for family meals and special occasions.
 - **Packaging labels, recommendations from trusted sources, and visual cues** (e.g. freshness indicators such as the packing date/use by date) are critical for evaluating quality.
- **TRUST:** Trust is rooted in confidence about **safety, quality, and authenticity**, built through reputable sources, clear labelling, and hygienic packaging (free of blood, leaks or visible contamination)
 - Consumers associate trust with **peace of mind, reducing risks** and ensuring **reliable cooking and health outcomes**.
 - **Willingness to pay a 10-30% premium** reflects the importance of trust, particularly when it involves **consistent quality and halal compliance**.
- **Traceability:**
 - **Traceability awareness is low.** However, after receiving explanation about traceability, it is seen as a **value-added feature** rather than an essential purchase driver.
 - It **reassures consumers** about safety, quality, and ethical practices, but many rely on existing mechanisms like halal certification and brand reputation (rather than traceability).
 - Effective communication around traceability should focus on **transparency on the source of the meat, safety certifications such as halal and COO.**

Recommendation – Target new buyers and cautious consumers with messaging on transparency and safety, using QR codes, social media, and in-store displays.



MLA need to focus on new buyers because loyal users already trust Australian meat, making traceability a nice-to-know only

4

Perceptions towards Australian red meat

- **Key perceptions:** Australian red meat is seen as high-quality, fresh, and trustworthy, supported by strict standards, halal compliance, and reputable farming practices.
 - It is associated with premium status but is also considered good value for money compared to other premium sources like Japan.
 - Hygienic packaging, visible labelling of Australian Beef logo, and marketing reinforce trust and ease purchase decisions.
- **Reaction to Integrity**
 - Consumers appreciate the transparency, safety, and quality assurance provided by the Integrity System, finding it credible and aligned with Australia's reputation.
 - However, it is considered a "nice-to-have" rather than a key driver, as trust in Australian meat already exists among regular buyers. The information will be more impactful for new or cautious buyer who needs more convincing in choosing Australian meat.
 - Younger consumers see it as informative and supportive, while older consumers value its role in building confidence but do not consider it a game-changer.

Recommendation – Target new buyers and cautious consumers with messaging on transparency and safety, using QR codes, social media, and in-store displays.



MLA need to focus on new buyers because loyal users already trust Australian meat, making traceability a nice-to-know only

• RECOMMENDATIONS:

- **Who to target?** - new buyers and cautious consumers who are less familiar with Australian meat and need additional assurance about quality and safety.
- **Messaging** - Emphasise storytelling on transparency, safety, and ethical practices, showcasing the traceability system as a guarantee of the meat's journey from farm to table. Halal compliance and high-quality standards should be central to the communication.
 - The story can focus on the meat's journey by using farm-to-table narrative, showcasing the life of Australian cattle, starting with ethical farming practices, clean environments, and high-quality feed. Highlight the tracking process, from ear tagging to transportation and processing, ensuring safety and transparency. It can also highlight the cultural relevance such as how the system works to ensure food safety and halal compliance.
- **Medium** - The medium should include QR codes on packaging for instant access to traceability details linked to the specific met they are buying, storytelling in social media platforms of how the tracking works in finding out the meat's origin to engage younger audiences, and in-store displays with clear labelling, posters, and digital screens to educate walk-in shoppers. Influencer-led campaigns can further amplify awareness and credibility among potential new buyers.

Thank You

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