

Project Tracy

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

PHILIPPINES REPORT



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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)



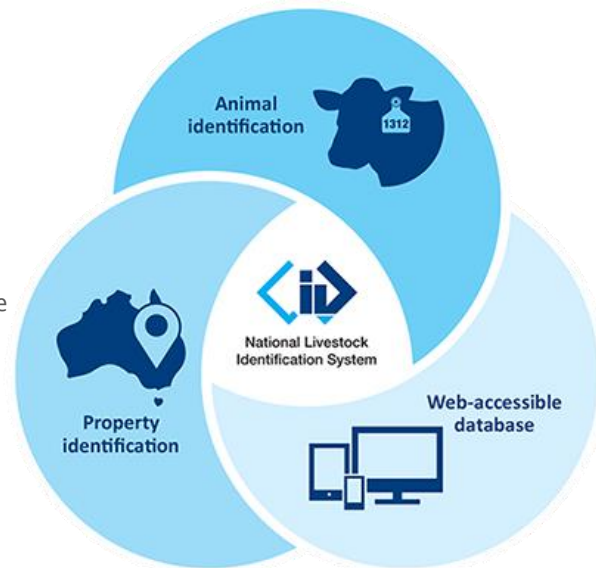
The trust placed in the Australian Red Meat sector stems from these integrity systems, which support our product's provenance and the value that arises from our commitment to animal welfare, food safety, environmental stewardship—including sustainability—and biosecurity credentials.



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/>

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

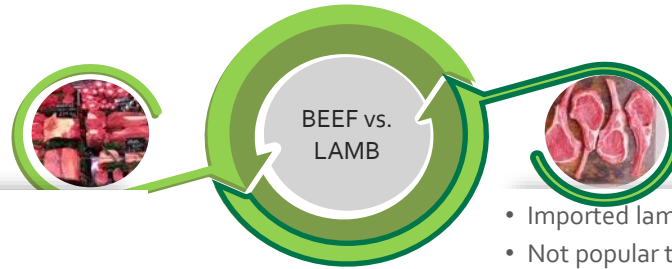


IMPORTED BEEF & LAMB CATEGORY UNDERSTANDING

Imported beef is significantly more popular than imported lamb – both are considered premium, higher-priced alternatives to locally sourced meats



Imported beef has a stronger presence in household kitchens, being more commonly prepared at home.



IMPORTED BEEF

- Imported beef means good quality meat
 - Expected to be more tender, tasty
 - Has good marbling
 - Pricier than local beef
- Best for steaks, usually for special occasions or mini-wins, weekly family dates
 - Spontaneously, Filipinos think of rib-eye steak for imported beef

"Pag imported beef, yan talaga yung for steaks sa family namin, usually pag weekend yan" / "Imported beef is for steaks, usually for special moments like a date night with family" (Younger, Manila)

IMPORTED LAMB

- Imported lamb is expensive
- Not popular to most Filipinos. Acceptable among those with a more adventurous palette, and those well travelled ones (e.g. worked and travelled in Dubai, interested in Mediterranean cuisine)
- Perceived to be difficult to cook, prepare as most are not knowledgeable so; fear of messing up an 'expensive meat'
- Best to be eaten out of home from specialised restaurants (e.g. mediterranean food) - more knowledgeable and equipped to prepare lamb dishes
- Spontaneously, Filipinos think of lamb chops (in home) or lamb kebab, roasted lamb, lamb burger (out of home)

"Minsan yung lamb pag nag request, mas mandalas siya sa labas kasi mahirap siya prepare sa house" / "Sometimes we have lamb when it's requested, but we usually prefer to have it in restaurants, it is more challenging to prepare lamb at home" (Older, Manila)

Beef is an essential part for a Filipino meal, especially local beef.



Local beef is typically used in traditional Filipino soupy and saucy dishes; while imported beef, is reserved for higher-end dishes like steaks or featured in restaurants serving foreign cuisines (Korean or American). Filipinos typically eat beef at least once a week at home, and at least twice a month outside the home.

IN-HOME CONSUMPTION

- The purchaser usually decides on the meat to be consumed, but as steaks are popular with dads & teens/ working adult children), they can also request
- When consuming imported beef, usually steaks are the main way of preparing. A few would consume steaks at least once a week, others at least once or twice a month depending on budget and occasion (e.g. celebration in the family, simple date night for young couple, a special dinner to celebrate small wins for the week)
 - Prepared by simple grilling, salt and pepper, other would add butter and garlic
- Local beef is used for Filipino dishes, at least once a week consumption
 - Mostly soupy dishes such as "Nilagang Baka", "Caldereta, etc.)



"Pagkunwari ginalangan ko masyado sa work this week, feeling ko deserve ko mag Steak!" / "When I feel I worked hard this week, I think I deserve a steak!" (Younger, Manila)



OUT OF HOME CONSUMPTION

- Spontaneously out of home imported is associated with Korean, Japanese, American restaurants. Local beef is associated with Filipino restaurants
- Multiple family members can influence the choice of restaurant – kids or adults
- Beef is consumed out of home at least twice a month out of home, depending on occasion
- Unlimited beef for Korean restaurants, steaks for American
- Imported beef for grilling, steaks, soupy dishes for Filipino beef viands
- Example of restaurants: Korean, Japanese, American restaurants, Filipino restaurants, Eat all you can restaurants



"Pag nag crave kami ng Korean, ayan beef din yan" / "When our family craves for Korean food, we also have beef" (Older, Manila)



Types of dishes: Imported Beef



Local beef dishes are typically consumed on a weekly, with soupy dishes more to weekends, particularly Sundays, when the family is usually complete. Imported beef, on the other hand, is generally reserved for special occasions—often in the form of steaks or grilled dishes—where the quality of the meat is considered particularly important.

LOCAL DISHES

DAILY BEEF DISHES



Nilagang Baka



Sinigang



Pares



Beef Tapa

INTERNATIONAL DISHES



Beef Burger**



Beef Kebab**

**Note: May not be consumed daily,
but more affordable vs. steaks, Korean beef

SPECIAL BEEF
DISHES FOR SPECIAL
EVENTS



Caldereta



Bulalo



Kare-kare

"Lagi kaming may beef sa bahay.. parang comfort food na namin yung sabaw" / "We always have beef soup at home, it's our comfort food" (Younger, Manila)



Steak



Korean Beef



Wagyu Beef

"Usually steal din talaga pag international beef sa restaurants" / "We usually eat steaks as well for international beef" (Older, Manila)

General Lamb Usage – Lamb is not familiar, most are unfamiliar with how to prepare it



Among those who do cook lamb, simple grilling is the preferred method. Lamb is consumed more in specialty restaurants, such as those offering Mediterranean cuisine (e.g. kebabs) or establishments with unique offerings (e.g. lamb burgers)

IN-HOME CONSUMPTION

- Decision to have lamb is usually coming more from the Dad, male partners, older working children
- Lamb is seldomly prepared at home – a few times every quarter
- Grilled lamb chops, Lamb Caldereta are the most common
- Most will make a simple grilled recipe, not all are fond of preparing lamb at home as the meat itself is perceived to be complex to prepare (e.g. it is more expensive – hence, there's a fear of messing it up. Low knowledge – how to make it tender – perceived lamb has a gummy texture, and might have a different taste and smell
 - One mum experienced cooking lamb in a Filipino dish, in replacement of beef — Lamb Caldereta as requested by her husband, to try something different, not just grilling



"Nagtrabaho kasi kami sa Duva nun, kaya pag nag crave kami tapos may available lamb, dun siya napalaluto" / "We used to work in Dubai, so when we had cravings, that's when we usually cook lamb" (Younger, Manila)



OUT OF HOME CONSUMPTION

- Older family members, well travelled partners, food explorers are the main influencers who choose lamb out of home
- Lamb is consumed out of home only once in a while, e.g. once every quarter
 - But there were some who have not yet tried lamb at all due to unfamiliarity "Unsure of what to expect, not yet ready to experiment on lamb"
- Lamb is mostly eaten in Mediterranean restaurants or some burger restaurants
- Type of dish: Grilled, roasted lamb, Lamb Kebab, Lamb burger
- Example of restaurants: Mister Kebab, Brother's Burger, Viking's eat all you can restaurant



"We do not know how to cook lamb, so we just often go to reputable restaurants for lamb because they know better than us" (Older, Manila)



Imported Lamb – Consumers can only name a handful of lamb dishes



And very few have attempted to incorporate it into traditional local recipes.

LOCAL DISHES

DAILY BEEF DISHES

SPECIAL BEEF DISHES FOR SPECIAL EVENTS



Lamb Caldereta

"Na-try na namin to cook it as Calderera instead of beef" / "We tried cooking lamb as Caldereta, in replacement of beef". (Older, Manila)

INTERNATIONAL DISHES



Lamb Burger



Lamb Kebab

***Note: May not be consumed daily, but more affordable vs. Grilled lamb chops*



Grilled Lamb

"Grill lang talaga, hindi mo rin alam how to cook it, baka masayang lang" / "We usually grill it, since the lamb is expensive you we do not experiment on it so much, we go for true and test" (Young, Manila)

Imported meat purchase habits (for in-home) – Shoppers prefer large chain supermarkets for in-person purchase (they can directly inspect the quality)



Promotions and deals are also a strong draw, particularly for budget-conscious mothers and single working adults, family breadwinners.



"Alam ko na kung saan yung magandana meat sa S&R kaya dun ako, gusto ko rin yung nakkita at nahahawakan ko yung meat para pwede ko i-inspect" / "I know where to go to S&R, I am familiar with the place, and I like it that I can check the meat before purchasing" (Older, Manila)

*"S&R and Landers often have good deals and promos!"
(Younger, Manila)*

1

MEMBERSHIP STORES — S&R and Landers

- ✓ Trust in store – known companies, big establishments, go-to retailer for imported products
- ✓ Accessible, convenient and comfortable shopping – multiple locations, AC, spacious, lots of parking
- ✓ Deals and promos available
- ✓ Can personally inspect meat, more reassuring
- ✗ One should know where to get the good meat through experience, few claims that some discounted shelves offer lower priced meats at lesser quality.
- Information from signage (e.g. promo deals), labels on packs, staff on floor (e.g. offer free taste)

2

Other large local grocery brands — Rustan's Marketplace, Robinsons, SM

- ✓ Trust in store – known companies, big brands, go-to for daily shopping needs, groceries
- ✓ Accessible, convenient and comfortable shopping – multiple locations, AC
- ✓ Can personally inspect meat, more reassuring
- ✗ Limited stock of imported meat products, so few deals on imported goods
- Information from signage (e.g. promo deals), labels on packs, staff on floor (e.g. offer free taste)

3

A few tried purchasing from online resellers via Instagram, Facebook

- ✓ Convenient shopping, mostly discovered during lockdown
- ✓ Offers some promos
- ✗ But cannot inspect or choose the meat, so it results in inconsistent quality once delivered (mostly not as good as advertised)
- Seen on social media (Facebook, Instagram, Tiktok) - e.g. Sellers post about meat products for sale

Sources of information: Most information sought at the point of purchase (e.g. signage, packaging, personnel)



More information is typically sought for in-home consumption, as the majority rely on restaurants to ensure the quality of the meat in their offerings. Information about meats for out-of-home consumption usually becomes relevant for pricier items, such as expensive steaks.

IN-HOME CONSUMPTION

- **Country of origin** will determine the dish application - e.g. Filipino dishes for local meat, usually International dishes (steak) for imported meat
 - For a few, specific country of origin (e.g. USA, Australia)
- **Available parts / cuts, sizes**
- **Price and deals** of frozen meats
- **Sample dishes and recipes**
- **Main sources of information (in order of impact)**
 1. Instore / on-shelf signage – Imported or local meat, COO, deals
 2. Stickers on pack to check product details – parts/cut, price, COO
 3. Sellers on the ground – e.g. date of delivery to determine 'freshness' – ideally newly delivered – e.g. latest yesterday delivery
 4. For recipes: Family, friends, online: Youtube, Tiktok



OUT OF HOME CONSUMPTION

- Only a few check type of meat — especially relevant for steaks to justify price (e.g. USA, Wagyu, Angus, etc.)
- **Main sources of information (in order of impact)**
 1. Listed out on the menu – to check if the steak is USDA, Angus, Wagyu
 2. Recommendation from restaurant staff – details about the dish – how it was cooked, other ingredients put in, particularly relevant for lamb dishes which most are unfamiliar with



"I usually check if its imported or local, may mga nakalagay naman na sings, or yung sa mismong pack naman niya naka-indicate, may mga flags din ng countries" - "I usually check if it's imported or local — there are signs all over the place, also on the packaging, there are sticker flags as well to indicate their country of origin". (Older, Manila)

"Hindi na ako usually nagtatanong pag nasa restaurant, kasi I trust naman that they know what they are serving, unless it's steak and it's expensive — ayun usually nakalagay na yung kung USDA, Wagyu para you know what you are paying for" / "I do not usually check when I am in a restaurant already, because I trust them that they check the quality of what they serve. Unless it's steak and it's expensive — they usually indicate if USDA, Wagyu so you now what you are paying for". (Younger, Manila)

Purchase Decision Factors – The decision-making process for in-home Beef consumption is more intricate compared to out-of-home consumption



For in-home, quality of meat is the most critical factor to be evaluated when making their choice. For out of home, consumers largely rely on the quality assurance processes implemented by restaurants.

IN-HOME CONSUMPTION

1

Quality of meat is the priority

- Reddish meat appearance (not greyish in colour)
- Good marbling, other prefers leaner meat
- Good cut – most prefer rib-eye, just the right size (not too big or too small), quantity per pack for value / deals
- Properly packed – frozen with clear plastic and labels

2

Price and special deals as indicated in signages and packaging stickers to ensure value for money — especially relevant to mums and breadwinner single adults

3

- A few mention **Country of Origin (COO)**
- Most are willing to pay more for USA, Australia, Japan beef

*"Para sa akin, basta maganda ang quality ng mats, kahit saan pa ya, okay na sa akin"
"For me as long as the meat is good quality, regardless of the country, I am okay!"
(Older, Manila)*

"Bias kami sa USDA kaya kapag nakita namin ito, okay na sa amin" / "We have a biased for USDA, so once we see it, that's okay with us!" (Younger, Manila)

OUT OF HOME CONSUMPTION

1

- Chosen cuisine and cravings of the family
- Usual influencers are people they are with, kids, partners, older parents, friends, etc.

2

Availability of beef dishes in the menu

3

****Not all are concerned of COO, except for expensive dishes like Steaks which some restaurants market as USDA, Wagyu, etc.**

Rank by level of importance

*"Hindi na kami nag-check kasi we trust na yung restaurants may process naman sila to ensure the quality of their meat, depends na lang on what we want to eat, our cravings for that day"
"We do not usually check the beef in restaurants, we just trust that they have a process for ensuring the quality of their meat... we just choose food depends on our craving, the cuisine we want to eat for that day". (Older, Manila)*

Purchase Decision Factors (Lamb) – Consumers have limited knowledge about how to choose lamb, often selecting it same as beef



Key considerations for in-home purchases include availability, price, and promotions. Meanwhile, consumers tend to rely on restaurants to ensure the quality of meat in their lamb dishes

IN-HOME CONSUMPTION

- 1 • **Quality of lamb meat**
 - Pinkish-brown color
 - No foul smell
- 2 • **Availability**
 - Price and deals
- 3 A few would look for **Country of Origin** - US and Australia

"Basta okay ang quality, okay na ako dun.. Hindi ko rin alam paano i-assess ang lamb, I check it like beef lang. Ang problem sa lamb, availability kaya pag meron at okay ang price at quality, bumibili ako"/ "As long as the quality is good, that's okay already! I honestly do not know how to assess lamb — I check it similarly on how I check beef meat. The problem with lamb is availability... so when I see one and the price and quality are okay, I buy it!" (Younger, Manila)

Rank by level of importance

OUT OF HOME CONSUMPTION

- 1 **Name of restaurant** offering the lamb
- 2 **Availability of dishes** in the menu

"Hindi na ako nag-check, basta kilala ko yung restaurant, I trust them na, for sure mas alam nila yun kaysa sa amin!" / "I do not check what kind of lamb they serve... as long as I know the restaurant, I trust them already, they know better than us for sure!" (Older, Manila)

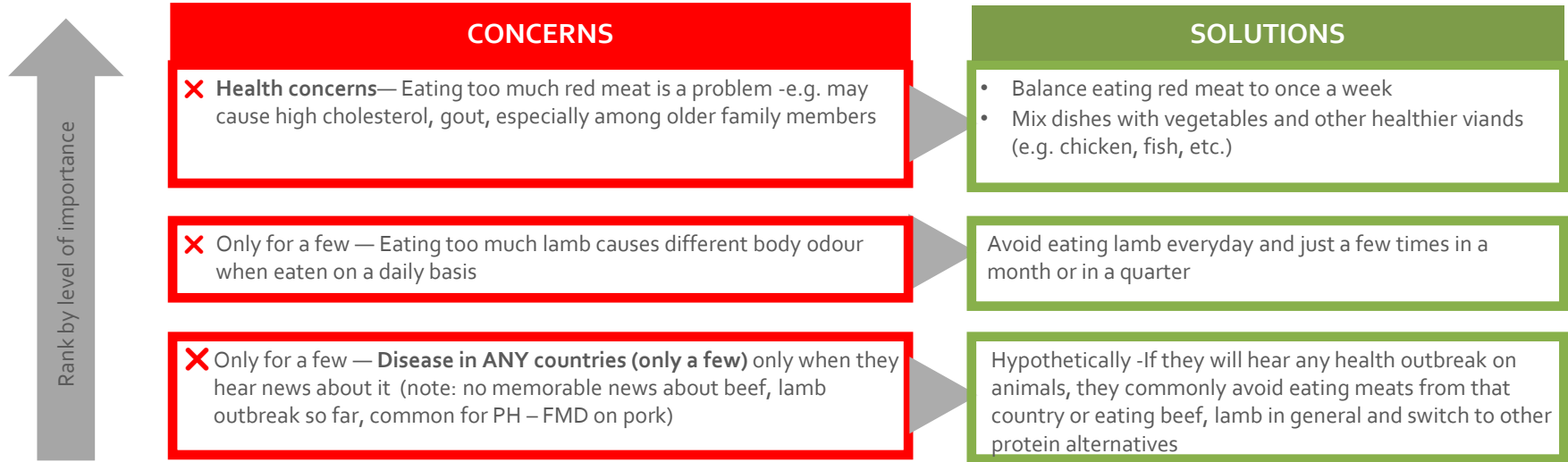
"Para sa lamb, may mga restaurants na nag-o-offer ng lamb dishes, kadalasan hindi nila nilalagyan ng stickers ang kanilang menu, di tulad sa steaks... at okay lang naman iyon sa amin" / "For Lamb, there are restaurants who offer lamb dishes, they do not usually place stickers on their menu like in steaks... and that is okay for us". (Younger, Manila)

As long as the quality of lamb is good (e.g. pinkish-brown color, no smell) and the price is right, consumers are willing to pay for it. The reputation of the restaurant also helps justify the higher cost of lamb dishes. However, only a few consumers consider the country of origin (COO) important for lamb

Concerns about red meat consumption – Only a few consumers expressed concerns on consuming red meat, primarily related to health issues.



Some raised concerns about the potential effects of eating too much lamb on the body. Other possible issues typically arise during outbreaks of animal health diseases in the countries of origin



"Yung sa health lang pag masyadong napapadala ang red meat" / "Concern is just on the health... too much red meat is also bad" (Older, Manila)

"Napakain kami ng lamb halos everyday before, napansin namin nagkaron kami ng amoy sa body, kaya lessen na lang namin" / "We had an everyday craving for lamb before and we noticed our body smelled differently! So what we did now, we lessen and control consumption". (Older, Manila)

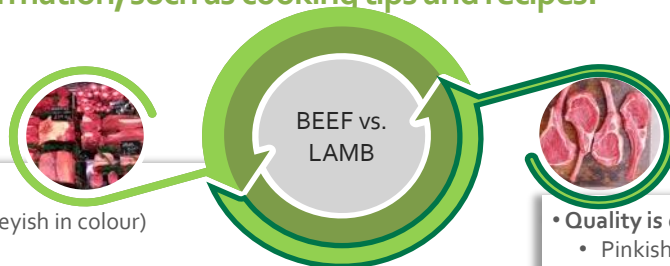


Understanding Quality, Trust & Traceability

Definitions of Quality – The quality of meat is largely determined by its appearance during inspection on the shelf



Sources of information include details provided at the point of sale, while some consumers also turn to online sources for additional information, such as cooking tips and recipes.



• Quality is defined by:

- Properly packed; reddish meat appearance (not greyish in colour)
- Good marbling, other prefers leaner meat
- Good cut – most prefers rib-eye, just the right size (not too big or too small), quantity per pack for value / deals
- Properly packed – frozen with clear plastic and labels

• Quality is very important because it can make or break a special dish and can also make a break a special moment with loves ones or friends

- Practical: Easy to cook – easy to get it tender at a shorter time, ensures quality meal, ensures no wastage of expensive meat
- Emotional: Peace of mind, worry-free, enjoyable meal

• Information sources:

- Information placed at point of purchase are enough — e.g. signages, stickers on pack, grocery personnels
- Labels from restaurants for steaks
- Tech-savvy consumers may also seek information from online sources such as Youtube, Tiktok for recipes, cooking tips, etc.

BEEF vs.
LAMB



"Minsan ka na nga lang mag steak, so dapat quality meat talaga yung bibilhin mo para di sayang ang pera at maging happy ka" / "I only eat steaks occasionally so I have to ensure the quality of meaty so I'll be happy with the dish and I am sure it's worth my money"
(Younger, Manila)

• Quality is defined by:

- Pinkish-brown colour
- No foul smell

• Quality lamb ensures dish will be cooked well and family will be satisfied

- Practical: Easy to cook / to make it tender, ensures quality meal, ensures expensive meat cost won't get wasted
- Emotional: Peace of mind, worry-free, enjoyable meal

• Information sources:

- Information placed at point of purchase are enough — e.g. signages, stickers on pack, grocery personnels
- Information asked from restaurant personnel — e.g. way of cooking, ingredients, etc.
- Tech-savvy consumers may also seek information from online sources such as Youtube, Tiktok for recipes, cooking tips, etc.

Definition of Trust – Most rely heavily on source of purchase (large retailers) to ensure the quality of meat



Additionally, many consumers trust specific country providers, such as the US, Japan, and Australia, particularly for beef offerings.



- **Overview:** An imported meat can be trusted when it is sold in a trusted retailer (e.g. S&R, Landers) because shoppers believe that big retailers conduct their own quality checks to ensure that they are selling good quality meats
 - When it is well packed, looks clean and tidy
 - When it is at par with their expectations on right tenderness, taste, once cooked at home
 - A few trust meat that came from known country providers - US, Japan, Australia
- **Trust is very important as it ensures quality and value for money**
 - Emotional: Worry-free, peace of mind, assured value for money
 - Practical: Easy to cook, no wastage, liked and consumed by the family
 - Interest to pay premium – Yes for meat with special use — e.g. Steaks

"As long as trusted ang source mo, kung saan mo sila binili, alam mo na quality yung meat na mabibili mo"/
"As long as I bought it from a trusted source, I know the meat I will buy is good quality already" (Older, Manila)

"For me, as long as from Australia, okay talaga kasi I know it's grass-fed, it's leaner, sweeter, okay ang experience ko sa Australian beef"/ *"For me, as long as it is from Australia, I know it is good quality, it's grass-fed, the beef tastes sweeter, it's leaner, my experience is okay!"* (Older, Manila)

"In our family, we like to buy US for beef and Lamb, we trust US products - tried and tested, kasi yun din naman ang laging available"/ *"For our family, we trust US brands for beef and lamb, because its tried and tested for us, and it's always available"* (Younger, Manila)

For Filipinos, trust and quality go hand in hand—when you trust your source of meat, you are assured of its quality as well.

Sources of Information about Trust – sources varies from in-store signages, labels on packs, restaurants, online information and personal experiences from own circles



Most shoppers rely on information from trusted sources such as stores, packaging, personal recommendations, and credible online content creators. However, some express doubts about the reliability of information from online resellers



Source	Information Received	Recalled Information	Credibility
In-store signage and on pack	<ul style="list-style-type: none"> Country of origin, Meat grading (Japan, US) – USDA, Angus, Wagyu, Kobe Grass-fed meat (AUS) Organic (AUS) 	<ul style="list-style-type: none"> USDA grading of meat for the US, Different Japanese regions for different types of meat Australia's meat are grass-fed, more organic 	High credibility , no question on in-store signs and pack labels
Online contents in Titok, Youtube, Instagram, FB	<ul style="list-style-type: none"> Shows appearance of quality meat, recommended recipes, cooking techniques How cows are well taken care of in different regions Japan and in Australia (short video clips, documentary) Deals and promos from resellers 	<ul style="list-style-type: none"> Appearance of meat should be reddish, no foul smell Adding salt and pepper for steaks to bring out the taste of meat Japan's cows are relaxed before slaughtering, Australia's cows are in vast greenery, grass-fed 	<ul style="list-style-type: none"> Usually high credibility – especially among content creators they trust (no recall on specific names but also appreciate documentary-like, feature, short clips) Mid-low credibility on resellers, particularly among a few who had bad experiences on buying imported meats online
Word of Mouth (Friends/Family)	Quality of meat they have tried from restaurants and other countries they visited, or lived in for a long time	<ul style="list-style-type: none"> Japan meats are the best, Australia has a good quality control; strict rules on beef and lamb 	High credibility on recommendation from people they trust within their circle
Packaging Labels & stamps	Country's Certification Labels / stamps on pack	<ul style="list-style-type: none"> Country of origin Grass-fed, organic labelling 	High credibility , no question as long as purchased from stores they trust, frequently visited
Restaurant	Beef menu promotions (e.g. USDA steaks, Angus, Wagyu, Kobe beef)	Quality beef to justify price in the menu	High credibility , usually do not question information from restaurants

Trust - US, Japan, and Australia are the top 3 most trusted COO



The US is known for its USDA grading system, while Japan and Australia are recognized for their impressive methods of caring for their animals.



HIGH



UNITED STATES

- USA has a known grading system (USDA), also widely available in established membership stores and big supermarkets. Also seen in stickers of some restaurant menu for steaks
- Most trusted for both beef and lamb

JAPAN

- Trusted for Beef - For Kobe, Wagyu meats, known on impressive ways to take care of their animals and tenderness of meat, also features in Japanese and steak restaurants . N associations with lamb

AUSTRALIA

- Known for being grass-fed, organic, animals are also well taken cared of.
- Some have seen documentaries on how animals are taken care of in massive grass lands
- Trusted for both beef and lamb – seen in store for both

NEW ZEALAND

- Mostly associated with lamb (but some seen beef in grocery store too)
- NZ is also perceived to take care of animal welfare, similar to AU.

BRAZIL

- Seen offered in some big retailers, priced lower than other imported meats (e.g. US, Japan, and Australia). Acceptable quality among those who have tried it.

CANADA

- Known as a first world country. Have seen by some in supermarkets, have not yet been tried by most since there's preference for US, Japan, Australia beef

LOW

Traceability – The concept of traceability is fairly new to Filipinos



When probed, it generates only lukewarm interest. Only a few younger consumers view it as necessary, as they are concerned with ensuring the welfare of the animals whose meat they are purchasing. Meanwhile, the majority believe that safety and quality standards are already ensured by their trusted major retailers, making traceability merely a nice-to-know feature for end-users.



"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"

SPONTANEOUS:

- Most consumers are not aware of this concept
- Just a handful of younger consumers relate it with how the animals were taken cared of – some have seen short clips, documentaries online on Japanese beef and Australian farms

PROMPTED AWARENES:

When prompted, consumers noted that none of the brands, stores they have encountered are communicating about traceability

- **Comprehension:** They understand it as the journey of meat from the farm to slaughter house to store. It will tell consumers if the animals are grass-fed, synthetically fed (pellets)
- **Importance:** Most feel that the idea is nice to know but not really essential to their decision making since they are confident that their trusted retailers and restaurants have done their jobs in ensuring the quality of meats they are offering to their customers
- **Communication Medium & Messaging** – Expect information at point of sales or online – possibly in social media for the younger market – Tiktok, Youtube, Instagram
 - Some would see it as a QR code they can scan on point of sales or simply a sticker to signify that the meat they will be buying passed the quality assurance processing
 - The information can be made credible with a quality assurance seal, or perhaps a feature from a credible show, news outlet (documentary from Australia government, Netflix documentary on farms with good practices, food personality that they can view online)
 - Message should focus on the wellness of cows, safety of the processing plant, delivery to trusted retailers, up to end product usage – tender delicious steak served to family.
 - Tone should be friendly, informative, casual, experiential, similar to food documentaries

"Gusto ko rin siyang malaman para alam mo na okay yung meat na kinakain mo, okay yung pagpapalaki sa kanila, safe yung animals, safe ka rin" / "I also want to know that so I will be assured that the animals are well taken cared of, if they are safe, then I know I am safe as well"
(Younger, Manila)

"Sa akin, hindi na yan kailangan kasi ang dami ko ng iniisip.. As long as trusted naman yung pinagbilhan ko... okay na yun.. Okay lang siya na information pero kahit wala na" / "For me, I don't need that.. I have so many things to think about already, as long as I am buying it from a trusted source, that's enough, this is only a nice information to have.. But I can live without it" (Older, Manila)

Traceability is more as a nice-to-have added value, but not a must-have for everyone



Deep Dive into Country of Origin & Australian Beef & Lamb

COO is more important for beef, with USA, Japan & Australia the main options



For lamb, COO is less important, but the primary sources mentioned are the US, Australia, and New Zealand.



BEEF:

- COO is less important to value-seekers— those looking for a good deal (good price + good quality)
- COO is deemed more important among assurance seekers –those who wants make sure that their beef is tender and of good quality regardless of the cost “I want to make sure I am getting what I paid for”

SPONTANEOUS AWARENESS:

Highest awareness:



Lower awareness



“Basta USDA kahit mas mahal, we will go for that.” / “As long as it is USDA, even if it’s more expensive, we will go for that.” (Younger, Manila)



LAMB:

- COO is not so important for lamb as currently lamb meat is not as in demand, and sometimes not as available unlike beef

SPONTANEOUS AWARENESS:

Highest awareness



Very few mention of Turkey beef






“Hinli ko na tinitignan yung country sa lamb, pag available, bumibili kami” / “I do not usually check the country for lamb, if it’s available, we will purchase” (Older, Manila)

Spontaneous association of COO – Strong preference for USA, Japan, Australian beef



Some preference for US, Australia, New Zealand for lamb

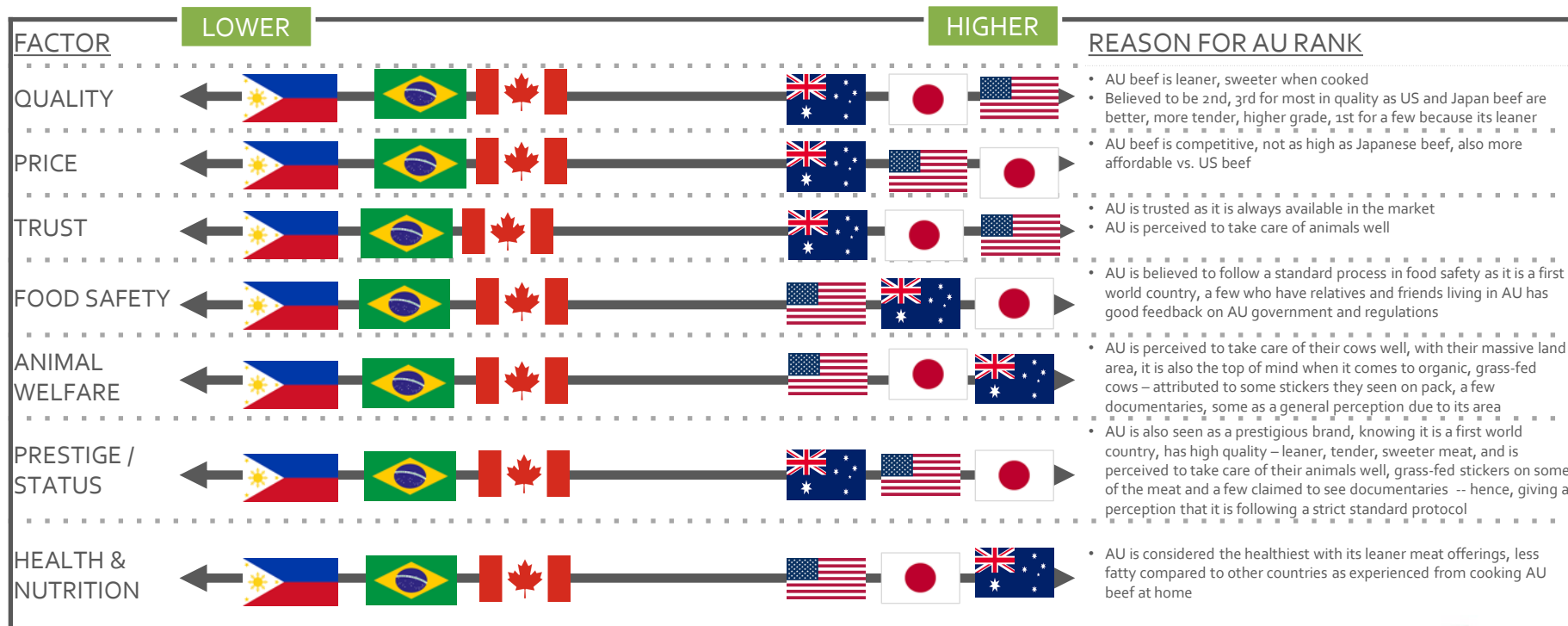
Rank by level of preference overall

COUNTRY	ASSOCIATIONS:	Differences for Beef vs Lamb
 USA	<ul style="list-style-type: none"> ✓ High availability ✓ Can be sure of the quality, as US meat has better marbling, USDA grading ✓ Good meat, tender when cooked ✗ A few mentioned cows maybe synthetically-fed (not organic, grass-fed) which may cause a few to rethink about US beef when mentioned (very few, low effect) • Generally, US products are considered one of the best 	<ul style="list-style-type: none"> • Expected quality for US and Beef and US Lamb to be the same
 JAPAN	<ul style="list-style-type: none"> ✓ Popular for Wagyu and Kobe beef ✓ Expensive but worth the price ✓ Melts in the mouth goodness – extremely tender ✗ Pricier than others • Communication on good quality of Japanese meat, how Japanese take care of their cows to produce Wagyu and Kobe meat 	<ul style="list-style-type: none"> • Japan is known for quality beef only (not lamb)
 AUSTRALIA	<ul style="list-style-type: none"> ✓ Organic meat, grass—fed cows and lamb seen in meat stickers and documentaries ✓ Leaner meat, sweeter meat, tender meat vs. USA, Brazil beef ✓ Australian meats are considered good as cows and lambs are perceived to be well taken cared of – in a vast green environment, grass-fed as seen on some documentaries ✗ A few mentioned grassy-taste 	<ul style="list-style-type: none"> • Australia is known for both quality beef and lamb
 BRAZIL	<ul style="list-style-type: none"> ✓ Cheaper than other imported beef ✗ Very limited information, perceived to be not as high quality as others due to price difference 	<ul style="list-style-type: none"> • Brazil is known for cheaper beef pricing versus other countries
 NEW ZEALAND	<ul style="list-style-type: none"> ✓ Organic meat, gras—fed lambs ✗ Has very limited information 	<ul style="list-style-type: none"> • New Zealand known mainly for lamb, not so much for beef

Overview: Comparison of Countries on key factors (Beef) – Australian is considered on the top 3 across various metrics for beef



Australian beef is considered premium beef but is more reasonable priced vs. US and Japan beef



Overview: Comparison of Countries on key factors (Lamb) – Australia is also highly regarded



Similarly, Australia lamb is considered premium alongside other available lamb meat.



Note that the lamb category itself is already considered premium to begin with.

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



BEEF

"Japanese beef talaga ang the best kasi it melts in your mouth pero sobrang expensive" / "Japanese beef is the best because it melts in your mouth but is too expensive" (Younger, Manila)

"Na-try ko na yung Brazil kasi naka-promo siya, for me okay naman siya parang same lang with others" / "I have tried Brazilian meat kasi it's on promo, and it seems to be the same as others". (Younger, Manila)

"Pag beef, we go for Australia kasi mas leaner siya compared sa iba, we like it better and sweeter din sa taste" / "For our family, we like Australian meat because it is leaner compared to other beef and also sweeter in taste" (Older, Manila)

"Pag Australia kasi alamm mo na grass-fed siya pag sa US baka hindi, pero okay lang kaya baka mas flavorful yung US" / "I know for Australia, their cows are grass-fed, for US I am not sure but then maybe that is the reason why they are more flavourful" (Younger, Manila)

"Gusto ko US talaga kasi dun kami sanay and so far okay ang experience namin with US beef" / "I like US beef because I am used to it and so far, our experience with US beef is okay" (Older, Manila)

LAMB

"Usuallu for lamb, we just get what is available... sa amin kasi medyo bihira siya" / "Usually for Lamb, we only get what is available, it is not always available in our area". (Younger, Manila)

"Pareho with beef, I think we also use US lamb" / "Same with beef, we also use US lamb" (Younger, Manila)

"Depende kung anong available, pero parang ang nakikita ko lagi.. Australia or New Zealand lamb" / "Depends on what is available but what I frequently see is Australia and New Zealand lamb" (Older, Manila)

"Sa labas kami usually nag-lamb kasi mahirap siya lutuin, we trust na lang the restaurant serving it" / "We usually eat lamb in restaurants, we just trust the restaurant serving us lamb, we do not check for which country" (Older, Manila)

"Australia — grass-fed ang lamb, same as beef" / "For me for Australia, lamb is also grass-fed same as beef" (Younger, Manila)

Australia on Trust & Quality – Australia is trusted for its high-quality meat



Many believe that the country has established strong quality standards, and based on experience, its beef and lamb consistently meet expectations—being leaner, tender, and even sweeter.



- **TRUST** – Australian beef & lamb is highly trustworthy:
 - Perception that Australian beef and lamb are well taken care of in massive lot areas, grass-fed, organic, etc. – coming from the idea that AU is a first world country, some claimed to saw documentaries, video clips on how animals are taken care of in AU, a few have family and friends in AU who attest to the government's quality standards
 - Also being a first world country, consumers have a perception that they follow high quality standards for their meat products
 - Some recall communication from stickers on pack claiming that Australian meat is grass-fed
 - Also in general, Australia is considered good with animals as seen in videos relating to the country
- **QUALITY** – Good quality meats are leaner, not as fatty, taste sweeter as preferred for beef. Currently consumers do not have any no bad experiences with Australian beef and lamb and see them as high quality
 - Perception is driven by current experience with Australian beef and lamb
 - No communication for the quality of meat, as best, a few have seen stickers communicating that Australian beef is grass-fed

"Basta pag imported beef, kumuha ako Australian and US kasi tested ko na yan na maganda ang meat, malabot sa steak" / "When I buy imported beef, my go to is Australia and US because I have tested them already, my steaks are tender" (Older, Manila)

"Australian beef and Wagyu cubes malambot at malasa kaya sila yung preference ko talaga" / "Australian beef and Wagyu cubes are tender and tasty that's why they are our priority: (Older, Manila)

"?Kasi for me, minsan ka na lang mag steak, dapat yung the best na, kaya nag search din ako sa Tiktok, yung ang sabi US and Australian beef" / "You seldom eat steak, so better buy the best already... I also searched in Tiktok and they said Australia and US are the best". (Younger, Manila)

"Si Australia may sailing batas yah dun on how they handle their meats kaya I know trusted and quality sila" / "I feel Australia has established its own laws that's why I know their meat an be trusted and of good quality". (Younger, Manila)

Aussie Beef & Lamb Labelling – The logo is new to our Filipino respondents



Consumers notice that the logo resembles the map of Australia, along with mountains and grassy areas. The dates on the label, combined with the 'Australian Inspected' seal, serve as additional selling points by assuring shoppers that the Australian meat is freshly packed and has undergone a rigorous quality assurance protocol.



BONELESS BEEF
PRODUCT OF AUSTRALIA
YG STRIPLOIN
GRAIN FED YOUNG BEEF
WEIGHT RANGE 4kg - 5kg
IWIVAC 6PC KEEP REFRIGERATED

ANY MEAT WORKS Co
LONG FLAT ROAD
ANYTOWN NSW
32307



(01) 9 931671012345 3 (3101) 000202 (13) 140110 (21) 41457354

SLAUGHTERED ON: 16-APR-2014
PACKED ON: 17-APR-2014 17:26
BEST BEFORE: 29-MAY-2014
26.2kg 57.8lb
NET WEIGHT Carton ID 41457354

AUSTRALIA 9999 AUSTRALIA EST. NO. 9999

- There is no recall of this logo
- **Comprehension** – The label is seen to be presenting Australia — with mountains and grass like features — indicating that the animals are in-deed grass-fed
 - It also is understood to look like a map of Australia
- **Impact on decision making** - Information included may affect their decision:
 - Slaughter on date, packed on date, best before dates — assures quality and freshness of meat
 - Some liked the Australia inspected — means it went through a standard quality check
 - What about “aussie beef & lamb” itself – is that reassuring or interesting?

"Ako base sa visual para syang nasa mountain na madaming grass parang ayon nga pasok nga nag grass-fed para sa Australian brand so feeling ko ano sya okay sya mahal sya" / "Based on the visual, it's like a mountain, so many grass, so it is just right to assume that they are grass-fed, this makes Australian meat look expensive" (Younger, Manila)

"Yung logo parang map siya ng Australia" / "The logo looks like the map of Australia" (Older, Manila)

"Gusto ko yung may mga dates siya so alam ko na fresh talaha kasi parka-slaughter, pack agad" / "I liked it that they put dates on it, it means that the meat is fresh and good quality since after slaughtering, they packed it immediately" (Older, Manila)

The logo appears to have less impact. What stands out more are the dates and the "Australian Inspected" label on the packaging.



Australia's Red Meat Integrity System – Interesting, new concept. But most feel it is not necessary and would not have a strong impact on purchase



At best, it should provide brief, concise, and precise information to capture attention and highlight traceability.

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.

AUSTRALIAN BEEF LAMB mla

“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, consumers find it interesting, but might be give too much information (information overload!)
- Level of interest is generally lukewarm – “something nice to have but not a must have!”
 - ✓ Appreciated for the effort of doing the traceability as they want to ensure the consumers that their meats an be trusted
 - ✓ It shows commitment of the company to trust their brand
 - ✗ However, the integrity system shows too much information and thus, overwhelming.
- Information needed to assure trust and quality include:
 - (a) wellness of animals, well taken care of, free from any diseases,
 - (b) showing of clean, modern facilities where meat are being processes and pack,
 - (c) meat passed all quality standards needed – maybe shown via stickers on pack, dates of processing, etc.
- Credibility – Given that it is Australia, it is seen as credible, no question on credibility
- Impact on decision making - Generally low impact on decision making, as most feel that the information is nice to know (but not essential to know) — especially for mums who are too busy to think about traceability
 - Consumers are looking for brief, concise information (e.g. a quality seal / label)
 - Might be useful information for a new brand — but this information is not so important in general
 - At best, some shoppers would like to see communications on the status of the animals (e.g. in spacious areas, eating grass) to assure shoppers that they will be purchasing good quality meat
 - Show clean slaughter house, quality assurance on cooling and packing of goods before reaching the market to assure customers that safety and quality standards are met

"Masyado maraming information na sa akin hindi ko naman na iniisip, massado na akong busy para dyan :"/ "It gave too much information that I am not even thinking about, I am too busy for that" (Older, Manila)

"Honesty, all these won't matter to me... as long as the meats are good in quality and the price is okay, I will buy it regardless of having this traceability system" (Younger, Manila)

"I appreciate the effort kasi parang gusto nila sabihin na okay talaga sila, may system sila, pero baka hindi na kailangan pakita lahat, like yung sa first lang where the cows are tapos integrity of their packing system, the in between Hindi na"/ "I appreciate the effort because they really want to win your trust because. They have a system, but maybe you do not need to show all, like just show that the cows are well taken cared of, the cooling and packing are done correctly, that is okay, not too much of in between — those information are too lengthy" (Older, Manila)

Communication Recommendations – The current traceability system sparks interest and curiosity mainly due to its novelty



The primary focus for consumers is to assess the quality of the meat based on appearance, taste, and tenderness when cooked. At most, consumers are interested in knowing how the animals are cared for and the cleanliness of the processing and packing facilities.

- **Most important aspects to communicate:** Important to communicate that meat is safe, healthy & clean!
 - Meat is safe and clean — free from any diseases, processed in a clean area, properly packaged
 - Healthy — meat is leaner, animals are well taken cared for (e.g. in vast area, grass-fed)
 - Important dates are appreciated — slaughtered on, packed on, best before as this assures freshness
 - Company passed all quality standards in Australia shown via an 'official quality seal'
- **Information sources :** Information can be included online so consumers know about it before shopping.
 - Messages may include how the animals are taken care of, that they are free from any diseases, the processing areas are clean, well-packaged until it reaches the store,
 - Maybe in short video form so they would appreciate the 'quality assurance process'
 - May also be communicated briefly on in-store signages – "Have you checked beef?" and show AU beef is checked in all pertinent stages, list should be one liner, easy to understand
 - Possibly to use an intuitive logo / seal of approval, inspection unique for Australian meat products
- **Impact on purchase decision making:** Generally, not so impactful on purchase decision making — it's a nice to know information for most!
 - More confidence among those who are already purchasing Australian beef
 - May help non-COO loyalists to consider Australian beef more, particularly those who want to ensure safety and quality of meats, as long as prices are competitive

"Okay ito if makikita ko sa commercial or sa news item or documentary para ma-appreciate ko yung traceability, pero papanoorin ko siya one time lang." / "This might be more effective if I can watch this in commercials, see in news or in documentaries, I need to see it visually — what happens but I will only watch it one time" (Younger, Manila)

"Ang important sa akin safe, healthy and clean ang meats.. okay na ako dun.. hindi ko na kailangan ng marauding information" / "What is important for me is the meats I will be buying are safe, healthy and clean, I do not need so much information" (Older, Manila)d

"Sa akin kasi ang naappreciate ko diyan yung mga dates na nilagay nila eh.. yun okay na yun" / "For me, I appreciated the dates that they place, that's enough for me" (Older, Manila)



SUMMARY & WAY FORWARD

Filipino consumers plan the dish first, and imported meat mostly used for international dishes



The appearance of the meat plays a crucial role in decision-making. Only very few have preferred Country of Origin (although Australia is usually within the consideration set)

1

Red meat purchase decision making

- Purchase decisions for red meat are often influenced by the planned menu for the family. Imported meats are typically considered for international cuisines, especially for special occasions or personal celebrations.
 - Some consumers are also enticed to purchase beef and lamb when offered at a good price.
- The appearance of the meat plays a crucial role in decision-making, with quality being the top priority, particularly for beef. Key factors include:
 - Reddish meat appearance (not greyish)
 - Good marbling (though some prefer leaner cuts)
 - Proper cuts, size, and quantity per pack – most prefers rib-eye, just the right size (not too big or too small), quantity per pack for value deals
 - Properly packed frozen with clear plastic and labels
- For lamb, quality indicators include:
 - Pinkish-brown colour
 - No unpleasant odour
- Only a few consumers have a preferred country of origin (COO) for meat, with the US, Japan, and Australia being popular choices for beef, and the US, Australia, and New Zealand for lamb.

Quality of meats is often judged based on appearance



Majority prefer to inspect the meat themselves to justify price and quality. Some also trust COO to deliver quality. Traceability is still a new concept for meat in the PH.

2

Understanding trust and quality for consumers

3

Importance of traceability

- **QUALITY** is often judged by its appearance upon inspection (colour of the meat, marbling, cuts and size, no foul odour), its proven quality when cooked at home,
 - For some, the country of origin (such as the US, Japan, Australia, or New Zealand) is also highly impactful
- **TRUST:** For most consumers, purchasing from a reputable store or restaurant is sufficient to establish trust, as they rely on these establishments to conduct proper screening and quality checks.
 - Others also trust certain countries of origin, particularly those they have tried and tested before, including the US, Japan, Australia, and New Zealand.
- **TRACEABILITY** – Very few are aware of traceability for red meats as a concept
 - Seen as maybe nice to have but not yet a must have for purchasing meats.

High quality and trust in general for Australian meats



Australia is widely perceived as a country that prioritizes animal well-being. With its vast greenery, many believe that its meats are grass-fed and organic. Australian meat is also appreciated for being leaner and sweeter. However, the current integrity system, while innovative, is often considered too detailed for consumers to fully appreciate

4

Perceptions towards
Australian red meat

- **Key perceptions:** Australian red meat is generally perceived as high quality and trustworthy.
 - Many believe that the animals are well cared for, often visualizing vast, grassy fields and grass-fed livestock.
 - Consumer experiences are largely positive, particularly among those who seek leaner cuts that are still tender.
 - Some even describe the meat as having a sweeter taste.
- **Reaction to Integrity** - The majority view the integrity system as a new and innovative feature, though it is not yet seen as essential.
 - At most, consumers appreciate the inclusion of dates on the label, as well as information about the care of the animals and the cleanliness and safety of the processing and packaging facilities.
 - However, additional details are often seen as unnecessary and too lengthy to be effective in communication.

Recommendations



Best to focus communication on key processes of traceability / integrity system

- **Most important to communicate:**
 - **Creating a Campaign for the Meat Category:** Launching a campaign such as "Have You Checked Your Steak?" or "Have You Checked the Label?" could raise awareness among consumers about the key factors to consider when purchasing meat products. This would encourage them to be more mindful and informed in their buying decisions, potentially highlighting 'traceability' as an important consideration
 - **Highlight messages on:**
 - AU's commitment on the well-being of animals, ensuring it is grass-fed, free from any diseases
 - The effect of AU's system on the quality of meat – leaner (and sweeter) compared to other imported meats
 - Clean, well-maintained, modern processing and packing facilities – ensuring fresh meats in every pack!
- **Messaging needs to be relatable and engaging and informative**
 - A short video explaining the system in an interesting and fun way—similar to the approach of food vloggers like Erwan Heussaff—could be effective. This video could be shared on platforms like TikTok and Facebook, with a longer version available on YouTube.
 - **Visual Cues for Communication:** A seal or badge representing the integrity system, such as "Australia Inspected," could be displayed in stores. This would intuitively communicate to consumers that Australian meat adheres to a gold standard in quality assurance.
 - **Store-Specific Content:** A short video highlighting the store's commitment to quality could also be useful. Equipping sales staff with information about the integrity system will further help communicate its value to customers.
 - **Partner with Well-Known Steakhouses:** Collaborating with popular steakhouses and placing a unique seal on their meat offerings could increase awareness and relevance of the integrity system.

Thank You

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