

# Project Tracy

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

## SINGAPORE REPORT



13 December 2024

PT. Illuminate Research Asia – Arkadia Green Park, Tower F, 2nd Floor;  
Jl. TB Simatupang No. 88; Jakarta Selatan 12520, Indonesia

Illuminate Asia Consultancy Pte Ltd - 17 Phillip Street,  
#05-01 Grand Building, 048695, Singapore

[info@illuminateasia.com](mailto:info@illuminateasia.com)

[www.illuminateasia.com](http://www.illuminateasia.com)

A member of



**illuminate**  
Strategic Insights Consultancy



# Background, Objectives & Methodology

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

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

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

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



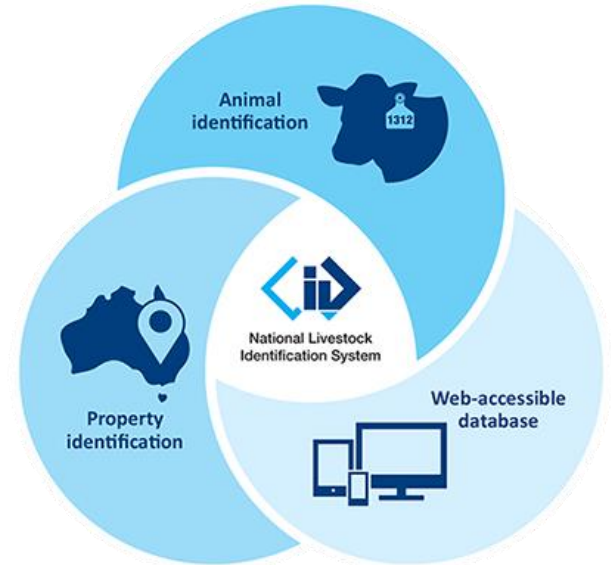
# The Australian red meat industry has developed a red meat traceability system that can track all Australian red meat from birth to slaughter

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

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

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

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



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

# Research & Business Objectives

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

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

Business Objectives:

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

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

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

A total of 4 groups in each market

## Respondent profile:

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



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



# RESEARCH FINDINGS

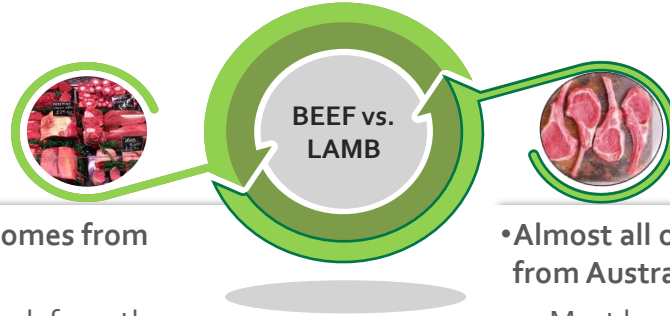


# IMPORTED BEEF & LAMB CATEGORY UNDERSTANDING

# Imported beef vs. lamb spontaneous perceptions – The Best Beef comes from Japan while there are limited choices for Lamb



Customers believe that beef and lamb in Singapore are all imported. They have no experience with local goat meat



IMPORTED BEEF

- Most of their experience with Beef comes from Japan, Australia and New Zealand
  - Most buy fresh or frozen thawed lamb from the above countries while frozen also includes Brazil
  - Korea, Turkey and Malaysia are also beef sources
- Origin of the beef from local markets is generally unknown unless 'flagged'
- Good quality beef is more flavourful and is found more from specialist butchers
- Quality comes from the marbling and is different between 'Japanese and the US / Australia kind of quality'

*"Mostly Australian for Steak. Then for hotpot is like Japan" (Younger, Singapore)*

- Almost all of their experience with Lamb comes from Australia and New Zealand
  - Most buy fresh or frozen thawed lamb from the above countries while frozen also includes Brazil
  - Malaysia is also a lamb source
- Origin of the lamb from local markets is generally unknown unless 'flagged'
- Difficult to find quality lamb which is deemed as those without the pungent aroma
- Packaging date is an indication of quality

*"So far I typically just buy from Australia, maybe rare occasion, the lamb shank and lamb rack from New Zealand" (Older, Singapore)*

IMPORTED LAMB

Most of those in this social class buy from supermarkets or butchers where the country of origin is mostly labelled. The Malays have a higher tendency to buy from local markets where the country of origin is not always clear

# General Beef Usage – Regular Staple for Middle to High Social Class Households and Muslim Households



Beef, though costlier than other meats, is a staple for middle to high social class households. And, as Muslim households have one less meat to use, beef is regular fare as well. Beef is easily available to buy for in-home consumption and for eating out

## IN-HOME CONSUMPTION

- Most associated with beef steaks, minced beef, thin beef slices, beef slab (for cutting) and beef cubes
- Kids, Spouse/partner, Mother, Father and Siblings have some influence and request sometimes, less so for older folks like grandparents. Good for low iron, growing kids, great tasting
- As often as five times a week for beef lovers, esp. younger
- Spaghetti Bolognese, various cuts of Beef steaks (Sirloin, Tenderloin, Ribeye, Tomahawk etc.), Beef burger, Beef Rendang or Curry (Mostly in Malay Households) Beef Stir Fry, Hot pot, Beef Noodle Soup (Mostly in Chinese Households)
- Simple salt and pepper, pan fried or oven-grilled, stewed with vegetables, cooked with Asian spices, curry paste etc.



*"My child is 3, so he's actually a growing toddler, so he requires a lot of red meat and he kind of likes red meat"* (Older, Singapore)

*"Usually a lot of minced beef, like shepherd's pie or spaghetti, that kind of thing. There's also the shabu-shabu stuff. Then also the occasional steak and stir-fry and stew"* (Younger, Singapore)



## OUT OF HOME CONSUMPTION

- Most associated with steaks, Japanese beef dishes, beef noodles or beef soup or food court / hawker centre / coffee shop Nasi Padang beef (Rice + Dish stalls), Western stalls
- Kids, spouse/partner also suggest where to eat out for beef
- Consumed 2X a month for restaurant beef, once a week for eating at hawker centres, coffeeshops or food court
- Various cuts of Beef steak (Sirloin, Tenderloin, Ribeye, Tomahawk), Beef burger, Beef Rendang or Curry, Hot pot, Beef Noodle Soup
- Low end to high end: Any Western Stalls (est. US\$6 per steak), Some Chinese Stalls or Muslim Rice Stalls to Food Court Pepper Lunch, Ashton, Jack's Place, Swensens to very upmarket Atico (est. US\$150 per pax)



*"I don't really cook lamb or mutton, more of beef, for example, like mince beef, bulgogi, shabu-shabu, that kind of cuisine"* (Younger, Singapore)

*"For common weekend fare, I typically stick to the more affordable range, like Pepper Lunch - they still have a good selection and it's comfort food. For special occasions, then it's the quality"* (Older, Singapore)



# Types of dishes: Beef has a place in 'local' or 'Asian' dishes as well as in more internationally known dishes



Singapore being such a melting pot of cultures, it is common to enjoy Japanese Shabu Shabu, Korean or Vietnamese beef noodles, Malay-styled beef dishes or Chinese beef stir fry as part of the daily 'local', Singaporean beef repertoire

## LOCAL DISHES

DAILY BEEF DISHES



Chinese Beef Stir Fry / Korean Beef Bulgogi



Malay Beef Curry



Malay Beef Rendang



Chinese Hot Pot or Japanese Shabu Shabu

*"For my family, we mostly do Chinese cooking, so stir fry, not really the steak kind. We'll buy those thinner cuts of meat or maybe just a chunk and then slice it the thin kind for hot pot"* (Younger, Singapore)

## INTERNATIONAL DISHES



Beef Burger



Spaghetti Bolognese



Sirloin or Tenderloin Steak



Beef Stew

*"So for steak, beef wise, I will put in an oven 1st and then set it on a cast iron. So usually it's rib eye, sometimes tomahawk"* (Older, Singapore)

SPECIAL BEEF DISHES FOR SPECIAL EVENTS



Malay Beef Rendang / Festival Food



Malay Beef Curry / Festival Food



Chinese New Year Hot Pot or Steamboat



Chinese Beef Ribs

*"I do stir fry beef with garlic ginger. Simple, simple. Then if my mum does the cooking, she does the heavy dishes like beef curry"* (Older, Singapore)



Tomahawk



Ribeye Steak



Beef Burger



Beef Stew

*"Sometimes if I want to splurge, then like tenderloin, or like sometimes even cheaper like strip loin"* (Younger, Singapore)

Beef dishes in Singapore are not limited to it's population of local Chinese, Malay or Indian styled dishes only. It includes mainland Chinese, Japanese, Korean, Indonesian, Vietnamese, Italian, European, American and many others as well

# General Lamb Usage – Less used in most Chinese households but more use in Non-Chinese households



For Muslims, together with beef, lamb or mutton is one of the main meats they use and especially for Indian households which typically do not use beef, lamb is the probably the only red meat widely available for them in Singapore

## IN-HOME CONSUMPTION

- Most associated with lamb chops, shank, slab or cubes
- Kids, spouse/partner, mother, father and siblings have some influence but generally less use of lamb at home compared to beef and in Chinese households, where more so than not Chinese find lamb or mutton to be pungent or too gamey
- Consumed as often as three times a week for lamb lovers, especially in Muslim and Indian households (Indians mostly do not eat beef) and as seldom as once in 3 months
- Grilled lamb chops, Lamb stew, Lamb curries, Shepard's Pie, Lamb Shank
- Simple salt and pepper, herbs and spices, grilled, stewed, slow cook, baked



*"Lamb chops are not very easy to cook so I don't cook that often. They're also very oily so if you pan fry it, the oil splatter is very difficult to wash. I have no maid so I have to wash myself"* (Older, Singapore)

*"For lamb occasionally, for example, lamb chop, maybe mutton is kambing soup in the Muslim store"* (Younger, Singapore)



## OUT OF HOME CONSUMPTION

- Lamb chop, curries, lamb or mutton soups, lamb with rice
- Most associated with lamb chops, lamb curries, lamb or mutton soups or lamb shank available from food court / hawker centre / coffee shop Western stalls
- Kids, spouse/partner also suggest where to eat out for lamb
- Consumed around once a month for restaurant lamb, once a week for hawker, coffee shop or food court lamb (non-Chinese households); but less often for Chinese households
- Lamb chops, stew, curries, Rendang, Lamb Shank Briyani
- Low end to high end: Any Western Stall (est. US\$10 for lamb chops), Indian or Muslim Stall (est. US\$6 for lamb briyani) to Ashton, Jack's Place or Swensens (est. US\$20 for lamb chops)



*"Lamb is the younger one, so usually that one is more tender and the smell is not that strong. Whereas mutton, because it's older sheep so it's more firm. My mother-in-law will usually use it for curry, because it absorbs flavour better"* (Younger, Singapore)

*"Mutton soup from hawker centre, but if you go to Aston or Swenson, that one will be more like the steak cut"* (Older, Singapore)



**illuminate** When talking about lamb, mutton is also included, especially mutton soup, a cheap and common hawker dish. Some say mutton is older lamb and some think it might be goat



# Lamb dishes are more limited and less commonly used or available in and out of the home

Lamb dishes in Singapore are typically more 'Western' styled dishes such as lamb chops or steaks or otherwise the 'local' or 'Asian' versions would be more Indian or Malay styled dishes such as lamb curries, lamb/mutton brianis or soups

## LOCAL DISHES



Indian Lamb Biryani



Indian Lamb Curry



Malay Mutton Soup Kambing



Chinese Herbal Mutton Soup

*"For lamb, I do buy lamb chops occasionally so it's like also cooking them in a steak kind of like cooking method. And also the occasional lamb or mutton soup"* (Younger, Singapore)

## INTERNATIONAL DISHES



Lamb Chops



Lamb Stew



Shepard's Pie



Lamb Shank

*"For lamb will be lamb shank and this will be done on BBQ occasions. I choose a smaller piece, like less than the palm size type. BBQ the lamb shank is tasting a lot better than I grill or pan fry it"* (Older, Singapore)

DAILY BEEF DISHES



Indian Lamb Curry



Indian Lamb Dry Curry (Methi Gosht)

*"Lamb shank or stir fried beef, I buy from the wet market but maybe if it's like rendang or curry, then you can get frozen from supermarket"* (Older, Singapore)

SPECIAL BEEF DISHES FOR SPECIAL EVENTS



Lamb Chops



Lamb Shank

*"I rarely cook lamb and I mean, I never try cooking lamb, but I eat outside, I buy Western food"* (Younger, Singapore)

# Imported Meat Purchase Habits (in-home) – Many channels for purchasing with wide price points and quality range



Meat has 'off-the-beaten-track' channels such as Facebook groups or Private Meat Clubs to provide alternative sources



*"I think for me and my mum, generally, our perception is QB Food House will be better quality or have more cuts because they specialize in meat. So we find it more trustworthy, in terms of the quality of the meat" (Younger, Singapore)*

1

## SUPERMARKET (mid range) – Low to high end; Sheng Siong, Giant, NTUC Fairprice, Fairprice Finest, Cold Storage, Don Don Donki

- ✓ Convenience (near home or office, easy to access, on-the-way / along one's route)
- ✓ Freshness (hygienically sealed and packed, bright coloured meat)
- ✓ Variety of formats (fresh, frozen thawed or frozen), cuts (minced, cubed, steak etc.)
- ✓ Price is usually affordable, reasonable. Quality is trustworthy, reliable
- ✗ Sometimes particular types are not available eg. wanting fresh mince but only frozen mince available
- Source of info: At the store, posters and labels or online, on the website

2

## SPECIALIST BUTCHERY (high end) – Culina, Foodie Market, Swiss Butchery, QB Food House, Little Famrs, The Food Cellar, Cut Butchery

- ✓ For special occasions, a reason to splurge (birthdays, anniversaries) or just plain want to indulge
- ✓ Premium or speciality cuts such as wagyu, ribeyes or tomahawks, branded such as Stanbroke beef
- ✗ Pricey but tasty and premium quality
- Source of info: At the store, posters and labels, speaking to butcher and staff or online

3

## WET MARKETS AND GROUP BUYS (low cost)

- ✓ **Wet Markets** - For festival or traditional food or for recipes passed down from generations and not able to identify how to buy the meat in the supermarket. Known by dish names or native names that the butchers will know how to prepare and cut. Always fresh.
- ✗ Country of Origin mostly unknown
- Source of info: At the market stall speaking to the butcher though sometimes there are flags for the meat
- ✓ **Group Buys** – For cheap deals and mostly via Whatsapp or Facebook Food Groups
- ✗ Mostly lots of unknowns but is well priced and can sometimes seem 'dodgy'

# Sources of information – For in-home use, information is through sighting the product instore (or the label)



For out of home consumption, they are mainly driven by reviews of particular dishes. If further information is needed, they will ask the store/restaurant staff. For in-home consumption, not many like to buy online, they prefer to see / touch before buying

## IN-HOME CONSUMPTION

- 1<sup>st</sup> step in information gathering - sighting the product, by format or cut. From here customers register if the product appears fresh, and is hygienically packaged and has correct fat content or marbling.
- Other information sought:
  - Packed or Best Before Dates,
  - Price relative to Weight or Size
  - #3 Country of Origin
- Main sources of information:
  - The product label almost always provides all the information they want / need
  - The butcher or store staff who are expected to supplement what is not found on the label
- Muslim customers will always start by checking they are in the Halal section before they make any selection



## OUT OF HOME CONSUMPTION

- 1<sup>st</sup> touchpoint – when they hear about particularly interesting or tasty dishes (from family, friends, media/social media)
  - Once this is ascertained, as long as it is on the menu, they ask few other questions (and they should also not be put off by the store look or ambience etc).
- Consumers rely on the menu for cut, weight, country of origin or ask the staff if they need to know anything else or ask them for recommendations
- Some use Google, Food Blogger Reviews, Tik Tok or ratings to have an idea before deciding to dine in
- Fundamentally, consumers are not necessarily looking for positive information but rather if there is any evidence of negative information or experiences

*"I need the price, the place that is from, the best, the expiry date, the packaging date probably. I also see that the weight, how much is it. Also, I won't just see the packaging, I also see the meat itself"* (Younger, Singapore)

*"Either I just Google for their stores and look through their menus, what kind of Wagyu beef they are bringing, whether is it halal, Australian or Japanese Wagyu or I just go up to the restaurant and open their menus"* (Younger, Singapore)

# Purchase Decision Factors (Beef) – Freshness and Quality for in-home use and Store Reputation for out of home use



Customers are more particular when it comes to buying raw beef; they consider multiple elements ranging from visual checks to gathering written factual information before they make their purchase. When it comes to dining out, without being able to personally inspect the beef most of the time, they lean on the reputation of the venue and experiences from others to decide

## IN-HOME CONSUMPTION

- 1 • **Freshness** as directly impacts health and the body and a higher price paid compared to other meats
  - Determined by the colour of the meat (bright red is ideal; brown or grey is not fresh) & packaged/use by dates also referred to - practices are taught by mothers
- 2 • **Quality** for the optimum enjoyment and satisfaction of the price paid for the desired dish and overall experience
  - Determined by the marbling distribution and patterns, the percentage of the fat content. Health conscious prefer leaner beef and some enjoy more fat for taste
- 3 • **Country of Origin** is considered for a general sense of food safety, reliability and trustworthiness based on past experiences. Some countries are thought to have higher food and hygiene standards than others.
  - However, not knowing COO is not always a deal breaker

*"So quality at home mainly prioritise freshness so it translates to probably better health benefits. Fresher meat is where it still retains the nutrients that myself and my family members consume"* (Younger, Singapore)

Rank by level of importance

## OUT OF HOME CONSUMPTION

- 1 • **Positive Google Reviews, Food Reviews and ratings on YouTube Shorts or Tik Tok** to decide if both the quality of food and dining experience might be good or sub-par (middle range and up restaurants).
  - Otherwise rely on trial and error of experience (especially lower end hawker or coffeeshop fare)
- 2 • **Positive Word of Mouth from Friends and Family** (understanding it can be subjective)
  - At least they know one person who thought it was good, as a form of reassurance
- 3 • **Expectations on a combination of Price, Ambience, Value, Menu** aids in decision making.
  - When the establishment is pricey, or when the ambience is upmarket and the offering is high value - there are higher expectations of quality meat used

*"I will go on Google reviews. I will look for different restaurants and then go look through the different reviews, see whether there is a good review of the restaurant, what type of meat they have? Is it dry aged? Do they have wagyu? Do they have Black Angus? What type of meat? What is their speciality before deciding going to eat at that restaurant and of course price as well"* (Older, Singapore)



# Purchase Decision Factors (Lamb) – Cut of the Lamb for in-home use.

## Restaurant ambiance & reputation for out of home use

Lamb is not as frequently consumed as beef and hence tends to be a special dish or a special moment dish. It is also not as easily available in the fresh format, hence the cut of lamb take precedence in decision making. Lamb is consumed out of home more than in the home. This tends to be more casual dining where not so much thought goes into deciding

### IN-HOME CONSUMPTION

- 1 • **Cut of Meat** - lamb dishes are more limited and specific to a dish or intended cooking style.
  - Mostly lamb chops and lamb cubes or lamb pieces are used and occasionally lamb shank or minced lamb
- 2 • **Quality, determined by the amount of fat content** (need sufficient fat to ensure good taste) - for the optimum enjoyment and satisfaction of the price paid for the desired dish and overall experience.
- 3 • **Freshness** – determined by the packed date, expiry date, general appearance and to some extent Country of Origin
  - More frozen lamb is bought than 'fresh' lamb. When frozen is used, 'freshness' is not so clearly visible by looking at the meat. New Zealand and Australia are both deemed to have more reliable frozen meat than others such as Brazil

Rank by level of importance

### OUT OF HOME CONSUMPTION

- 1 • **Craving for Lamb or Mutton** (including rainy or cold weather conditions) is the main trigger for wanting to consume outside of the home (usually is lamb not cooked at home)
  - These instances tend to be in the low-end hawker or coffee shop where one does not really think so much about the freshness or quality of meat but rather the style of dish or taste. Hawker / coffee shop is mostly accepted as having sufficient quality standards
- 2 • If the desire is towards 'Western'-styled dining (far less frequent), the then same factors as beef apply; Reviews, Word-of-Mouth and a Combination of Price, Ambience, Value, Menu. The establishment in question comes first and either beef or lamb can be chosen

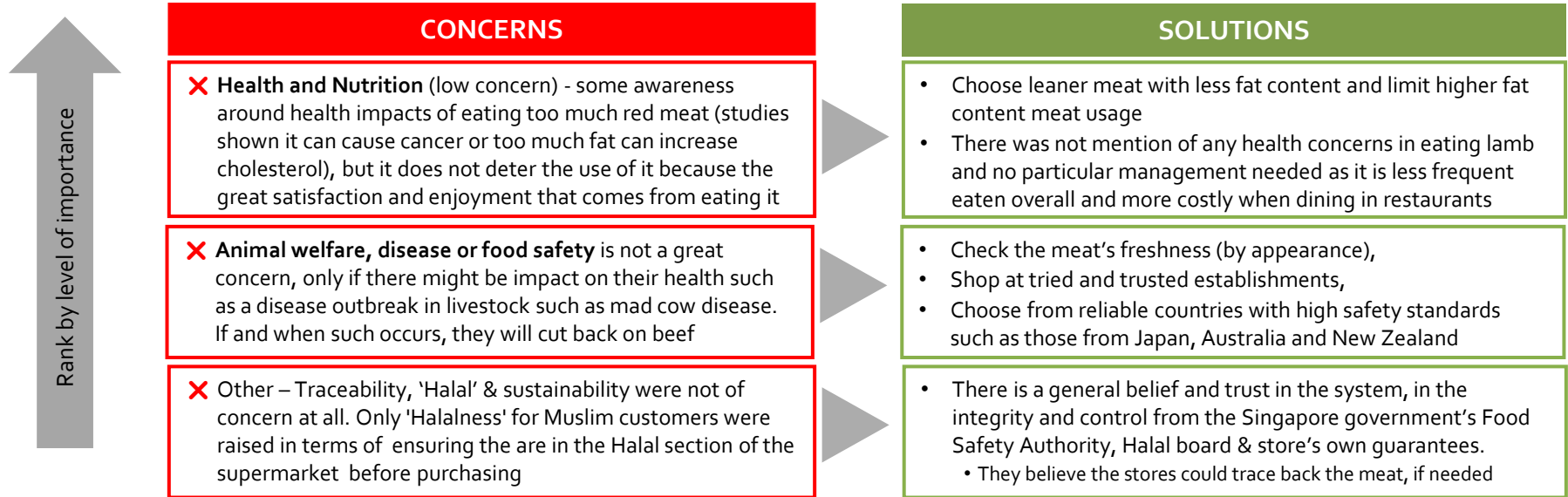
*"Lamb is the cut of the meat because for BBQ cannot be too thick, cannot be too thin. And because lamb shank tends to come with more fat if you do not specify so I have to specify that, for my lamb shank, I want to have less fat on the lining"* (Older, Singapore)

*"Like for Western places, they call it lamb. But for like those Indian Muslim shop, that kind, then they call it like mutton curry"* (Younger, Singapore)

# Overall there is not many concerns about beef or lamb consumption



Although limited, some concern on health impact of too much beef. Other concerns such as animal welfare, disease or food safety are concerns, not for the animal per se but only because it is believed to directly impact one's health by its consumption



*"Concern about eating too much red meat in general. Like I've read that eating too much red meat can lead to higher tendency of colorectal cancer. So I try to limit it to once a week"* (Older, Singapore)

*"I think for me it's if I see the supermarkets like Cold storage and NTUC - because they do market that there is this service standard, service quality in terms of their products and freshness of it. If you're unsatisfied, you can always go back. So to me for them to openly market and keep the assurance I think as sign of that they can be trusted"* (Younger, Singapore)



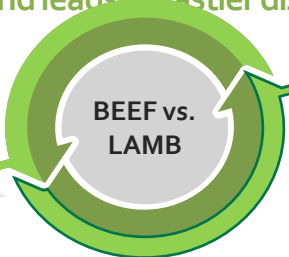
# Understanding Quality, Trust & Traceability



# Quality is defined in the Grade and Cut of Meat

For both beef & lamb, quality is important as it is the very element that gives taste to and enjoyment of the meat (satisfaction & contentment). Higher quality meat is easier to cook and leads to tastier dishes

## BEEF



## LAMB

- For beef, quality is important as it gives perception of getting value for money & being good for health
- Quality is mostly defined through visual inspection
  - The marbling patterns which also informs the fat content, more white means more fat. Some liked more fat, some prefer less fat
  - Bright red colour
  - Grass-fed or grain-fed; some found grass-fed to be better quality while others preferred grain-fed
  - The differences between Wagyu, Kobe, Stanbroke or Angus etc. Wagyu and Kobe are deemed to be top quality



- Lamb is priced higher than beef in Singapore across all merchant types. There is no expectation of a higher quality meat than beef because of its price
- They are willing to splurge or pay more for lamb and for better quality, defined by price or type of trade when they want to satisfy their cravings
- Quality is about the cut of meat, defined through visual inspection and label information
  - Bright red colour in thick, chunky cuts preferred
  - The fat and marrow that adds to the flavour of the dish. Some find this adds to quality, others did not

*"I think there's a differentiation between like the Japanese and the US/Australia kind of quality. It depends on what I want to cook. For example, if I want to cook something more Asian cuisine, then I would look for the Japanese one. Like steak, then I'll look for the American or the Australian ones"* (Younger, Singapore)

*"Yes, Quality is very important to me because eating lamb or beef steak is a form of enjoyment. Yeah, so if it's not good quality, then if you don't enjoy it, then I might as well don't want to eat it"* (Older, Singapore)

**illuminate** Quality is an expectation derived from surrounding elements such as place, visual freshness, hygienic packaging, price, value and past experience. Quality is not as important in casual dining (hawker centre) but more important in higher end restaurants. Quality has a direct relationship with Trustworthiness



# Trust is a sense of security in the meat, built over time through personal and shared experiences



As long as all the signs and signals are right, the tendency is to trust first, unless otherwise shown. i.e. Trust is almost treated as a given. We trust before we engage thus Trust does not attract a premium but Quality does



- Trust comes from good reputation, positive experiences, the absence of any negative media and a robust food ecosystem
  - Meat from reputable stores, from reputable countries is commonly seen is trustworthy
- Trust has high importance because it give peace of mind; gives a sense of security
  - **Emotional:** reassurance, a feeling of safety
  - **Practical:** will not harm their or their family's body in any way

*"Trust is food safety because we are putting all these food into our body. We don't want to fall sick from eating"*  
(Younger, Singapore)

*"Trust for me is basically how the beef is slaughtered, because for me, I have to go the halal way. So and how the beef is thawed because sometimes, you know, you can see at supermarket, sometimes the halal can be mixed with the I mean with the pork and such. So, for me, trust is how you keep it halal"* (Older, Singapore)

*"Trust is like knowing that it's safe and it passes the regulations, like food safety regulations"*  
(Younger, Singapore)

*"I think at the end of the day, wherever you buy from, a lot depends on your past experiences with them. So if you ever encounter a time whereby you buy something and it's not to the standard you were expecting for what you paid, then your trust goes down"* (Older, Singapore)

Source	Information Received	Recalled Information	Credibility
Singaporean government standards	Singaporeans Government implements high standards of management and control, which includes working with other countries that also meet those same high standards		High credibility
Retail outlet	Going to established retail channels & outlets that is well regarded across the longer term	Less specific information recall, but more longer term association	High credibility and trust in well-known retailers
Packaging Labels & stamps	<ul style="list-style-type: none"> <li>• Date of packaging and date of expiry</li> <li>• Country of origin</li> </ul>		High credibility

The higher the trust, the higher the expectations. – Singaporeans have high trust in their own Government standard setting for imported foods. They also trust well known retailers to ensure quality of the products they sell

# Trust in red meat - When a source is Trusted, the expectation is that the Quality will be good or high



Japan elicits the highest trust, followed by Australia



HIGH



**JAPAN**

Known for their honesty, integrity and high work standards. This

**AUSTRALIA**

Known for their high food safety standards and restrictions

**NEW ZEALAND**

Similar to Australia but also known for lush pastures, so seems more natural, can help to provide trust perceptions

**MALAYSIA**

Quite negative perceptions – Perception of the use of low technology farming (not very sophisticated), undernourished cattle, mad cow disease. - so lower trust overall

**UNITED STATES**

High propensity of livestock or food, mad cow disease

**ARGENTINA & BRAZIL**

Not much known, generally acceptable quality of frozen meat

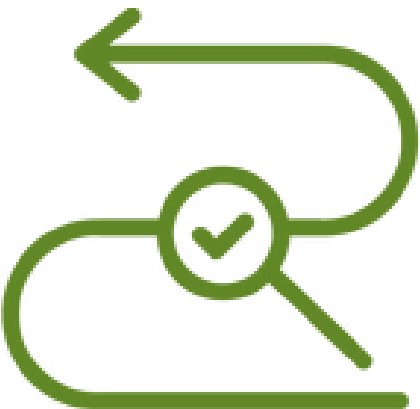
LOW

Countries with strong, positive associations (e.g. Japan or Australia for reliability) instill higher trust, leading consumers to believe in the consistent, high-quality beef they offer

# Traceability – Largely an unfamiliar concept with remote association to other product categories (e.g. wine, chicken, milk)



Participants do not associate traceability to meat production, and at most think of how it might point to the Country of Origin



*“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 are not very aware of traceability

- Generally, the understanding is a sense of being able to trace back to source origin
- Spontaneously, they link it to Farm to Table or Farm to Fork food concept –
- Tracing back to the chicken farm in chicken production
- Tracing vaccination batches in disease treatment

• PROMPTED AWARENESS:- Once we show them the description, there is a higher overall awareness - linked to wine (tracing back to the vineyard in wine production) or milk (tracing the journey of raw material)

- COMPREHENSION: To have a historical account of the meat’s processing
- IMPORTANCE: It is important but accepted that customers may not be privy to such details but when needed, they expect the stores to be able to trace back to the source
- COMMUNICATION MEDIUM & MESSAGING:
  - Sticker or label on meat packaging,
  - Posters in supermarket section or butcher stores,
  - TV screen in-store with video explanation of process,
  - QR Code to find out more if interested,
  - Tik Tok videos or influencer / KOL ‘visit to source’ stories or videos

*“What I know is red wine. They have a QR code for the premium red wine that you buy. And then you can know where it’s a source and how it’s been treated and how it’s been prevented. All this is all there, the information”* (Older, Singapore)

*“I think if there’s some sort of virus going on like swine flu or wherever, then traceability is quite important. So, if there’s nothing, then it’s not”* (Younger, Singapore)

*“Traceability means the history of the country, how they set the animals - you will know what they feed, if air is clean or whether the animals are able to walk around freely”* (Younger, Singapore)

*“I think P&G as part of their ESG initiative, they’ve been making some video series about how some of their products are made and how it reaches from the raw material stage all the way to our kitchens, these kind of things”* (Younger, Singapore)

Traceability provides a peace of mind and a sense of safety; but customers do not expect to have access to such details - it is only for those who might be interested (but becomes more important in instance of a meat disease outbreak)



## Deep Dive into Country of Origin & Australian Beef & Lamb

# The Country of Origin is Important to know, but not essential in meat buying decisions



While some countries' meat is not desired (China or India), the freshness of appearance and store reputation is more critical when it comes to meat purchasing and eating, especially given that most of the time in casual fare the origin is unknown



## BEEF:

- The meat's fresh appearance or expectations of a good class restaurant forms the main basis for decision making on quality – COO less critical
  - But it is important for a few who have a trusted relationship with some countries such as Australia or New Zealand
- Even beef from lesser-known countries (e.g. Brazil) is acceptable for certain dishes where the meat quality is not so key to the enjoyment – e.g. stews or meat in pasta sauce.
- In restaurants, the responsibility is placed on the restaurant quality, not depending on the country of origin

## Highest awareness: Japan



## Lowest awareness: Argentina



"Just go for the normal countries - Australia, New Zealand, Japan, these are the common countries that sell beef" (Younger, Singapore)

"I will still buy because in wet markets, you have the liberty of looking at the meats, if it looks fresh, it looks nice, then I'll just buy it. I don't care of the origin at all" (Older, Singapore)



## LAMB:

- Only 2 primary sources of lamb available – Australia & New Zealand
  - Occasionally one might come across a frozen variant from Brazil and that might be chosen for its price and purpose
- Lamb is more common in casual dining than eating at home or eating at restaurants thus there is little or no thought as to where the meat comes from.
  - As the dishes can cost as low as \$6 USD, there is no expectation of great quality meat, but great tasting and assumed safe for consumption.

## Highest awareness: Australia and New Zealand neck and neck



## Lowest awareness: n/a

"Usually lamb, not a lot of difference in terms of the country of origin - its either Australia or New Zealand, at least for Singapore so far" (Older, Singapore)


"Country of Origin is not really important for me, unless it's like somewhere dodgy, but I don't think we have those here" (Younger, Singapore)

# Spontaneous association of COO – Japan holds the strongest positive association overall



The Singaporean mindset is that the way the country is governed or managed, as depicted in the media, informs them of the positive and negative perceptions of the meat imported – a logical and dispassionate association rather than emotional

Rank by level of preference overall

COUNTRY	ASSOCIATIONS:	Differences for Beef vs Lamb
 <b>JAPAN</b>	<ul style="list-style-type: none"> <li>• <b>Wagyu, Kobe Beef that is Premium and Top Quality</b></li> <li>✓ Delicious, melt-in-mouth, high integrity, high standards</li> <li>✗ Pricey</li> <li>• <b>Communications recalled</b> – Cows that are massaged and listen to music living a stress-free life</li> </ul>	<ul style="list-style-type: none"> <li>• Only known for Beef</li> </ul>
 <b>NEW ZEALAND</b>	<ul style="list-style-type: none"> <li>• <b>Quality meats of Superior Quality</b></li> <li>✓ Grass fed, free range, natural, safe and strict</li> <li>✗ None</li> <li>• <b>Communications recalled</b> - More cattle than human, vast green land, fresh air, high milk supplier</li> </ul>	<ul style="list-style-type: none"> <li>• Beef and Lamb are comparable</li> <li>• Best quality lamb in Singapore is from New Zealand</li> </ul>
 <b>AUSTRALIA</b>	<ul style="list-style-type: none"> <li>• <b>Quality meats that are reliable and Trustworthy</b></li> <li>✓ Safe and strict, wide variety, established Halal system</li> <li>✓ Guaranteed and assured to be good, most familiar</li> <li>✗ None</li> <li>• <b>Communications recalled</b> – Safety, Hygiene, Wagyu</li> <li>• Australia is known for strict border policies and controls.</li> </ul>	<ul style="list-style-type: none"> <li>• Beef and Lamb are comparable</li> </ul>

*"Actually, for the country of origin, sometimes I may be prepared to pay more because let's say I have to choose between frozen beef from Brazil versus frozen beef from Australia. There is really a price premium. These are more the day-to-day choice when it comes to that cost difference" - (Older, Singapore)*





*"I think because of a perception that, most people might say, the best beef come from Kobe in Japan, this kind of thing. So that's not really a very logical reason why. It's just based on what we heard, what I heard. And also maybe the news, because some countries have a lot of food safety issues, right? So I wouldn't want to buy things from there. More worried about it" (Younger, Singapore)*

# COO – The lesser known a country, the lesser the positive perception even without negative media



On the whole, not much is known about Brazil or Argentina. There are limited experiences from a few individuals. There is no mention of any USA meat use but due to the negative media, there is awareness and negative associations with USA meat

Rank by level of preference overall

COUNTRY	ASSOCIATIONS:	Differences for Beef vs Lamb
 <b>MALAYSIA</b>	<ul style="list-style-type: none"> <li>• Safe to eat, Acceptable Quality, Halal guarantee</li> <li>✓ Fresh option available from market</li> <li>✓ Reasonably priced, specific cuts available</li> <li>✗ Perception of under-nourished cattle</li> <li>• Communications recalled – Nothing specific</li> </ul>	<ul style="list-style-type: none"> <li>• Beef and Lamb are comparable</li> </ul>
 <b>UNITED STATES</b>	<ul style="list-style-type: none"> <li>• Black Angus, prime ribs, mad cow disease, E coli, USDA ratings, confined spaces, animal cruelty</li> <li>✓ Supposedly quality cut meat</li> <li>✗ Dubious quality, untrustworthy</li> <li>• Communications recalled – Disorganised country gives the impression of low standards, mad cow disease (still remembered)</li> </ul>	<ul style="list-style-type: none"> <li>• Only known for Beef, not much known about Lamb, if any</li> </ul>
 <b>BRAZIL</b>	<ul style="list-style-type: none"> <li>• Sold frozen, acceptable quality</li> <li>✓ Economically priced, good for stews or in sauces</li> <li>✗ Not as palatable, texture not as appealing</li> <li>• Communications recalled - None</li> </ul>	<ul style="list-style-type: none"> <li>• Only known for Beef, not much known about Lamb, if any</li> </ul>
 <b>ARGENTINA</b>	<ul style="list-style-type: none"> <li>• Seen before in supermarkets, sold in restaurants</li> <li>• Can be delicious, if more fresh perhaps</li> <li>✓ Not enough is known</li> <li>✗ Hard, dry and chewy, not much marbling</li> <li>• Communications recalled – None</li> </ul>	<ul style="list-style-type: none"> <li>• Only known for Beef, not much known about Lamb, if any</li> </ul>

*"I think for me, I don't really prioritise it (Country of Origin), but at the back of my mind, I do know that the country origin will translate to the environment; where that cow was raised, how was it fed, is it grass fed? So, in terms of the feeds, because that will eventually boil down to the quality of the meat that you'll be consuming as consumers right at the end of the food chain. So, it's important to know. And that would give me better assurance that I'm consuming, better quality beef." (Younger, Singapore)*

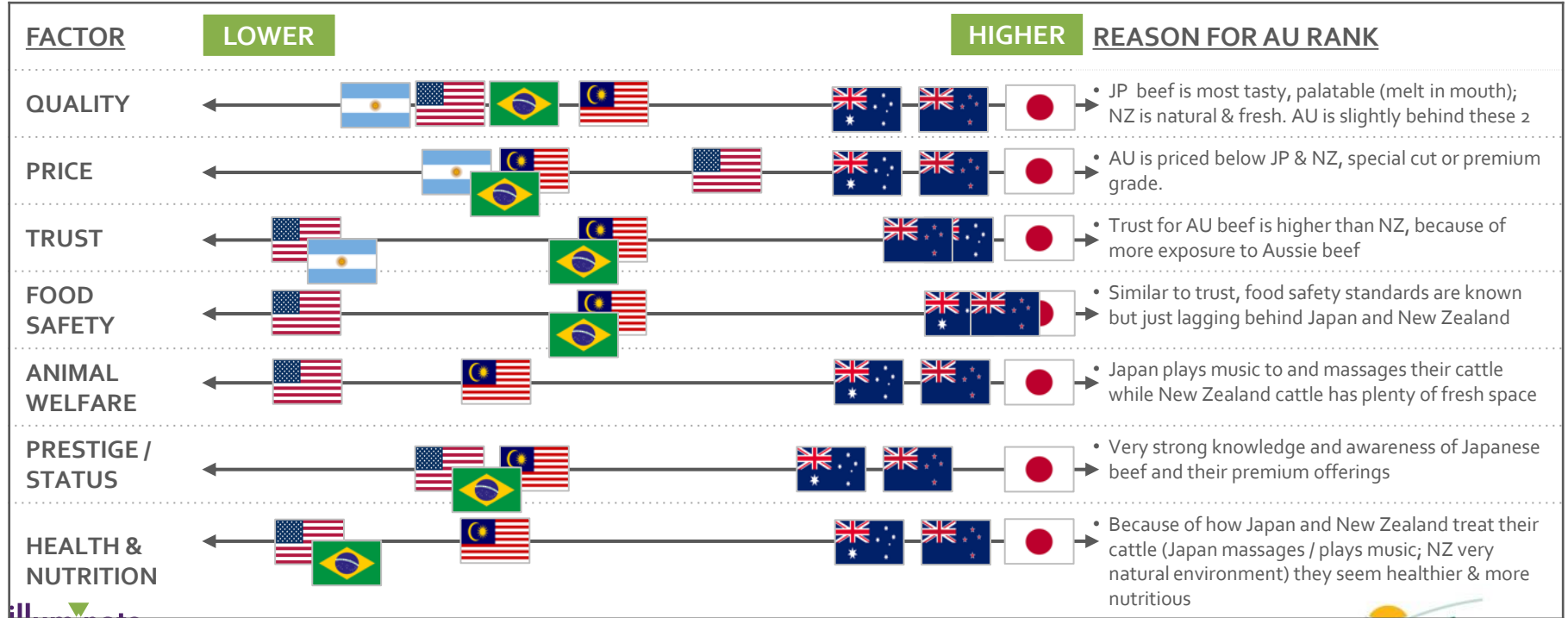
*"I'm not sure (for Argentina) because even for quality wise are they, high quality where they are at the cattle farms where they are being raised? I have no idea whether they are really of that high quality." (Older, Singapore)*

Bad press lingers and though they may not exist in Singapore, the broad view is that meat from China, India and Mexico are also dubious because of the association of low integrity and standards through the decades. On the other hand, meats that have low awareness like from Brazil and Argentina can still be accepted, if sold by reputable stores and as long as there has been no negative media or associations

# Availability, Quality and High Standards differentiate beef country of origin



When meat is more easily available, more is known about it as more people experience it and become familiar with it. High usage without incidence gives rise to a more positive perception and word of mouth. There are hundreds of Japanese food stalls and restaurants in Singapore but barely any Australian food establishments. High price also adds to Premium perception



Australian Beef is considered good quality, always assured and taste guaranteed but not necessarily premium overall



# Lamb – Fundamentally a choice between two countries only & New Zealand is generally ranked higher than Australia

There is some mention of possibly having seen or know of frozen lamb from Brazil or lamb from Malaysia but not certain experience other than having bought and used lamb from Australia and New Zealand only

FACTOR	LOWER	HIGHER	REASON FOR AU RANK
QUALITY	←	 	<ul style="list-style-type: none"> <li>• The 2 countries are strongly associated, they are often mentioned and compared together.</li> <li>• There is a general sense that New Zealand meat is more superior than Australia's (though one or two find Australia to be #1 for them). The reason for the slight superiority includes:               <ul style="list-style-type: none"> <li>• New Zealand is known to have many livestock (more than human inhabitants) and seems more remote with lots of space beneficial for the animals, the overall impression is that meat from New Zealand is higher quality.</li> <li>• NZ is also known for being very strict and particular about the importation of any organic material and is a known worldwide exporter of</li> <li>• It is also generally more costly to buy New Zealand lamb than Australian lamb</li> </ul> </li> </ul>
PRICE	←	 	
TRUST	←	 	
FOOD SAFETY	←	 	
ANIMAL WELFARE	←	 	
PRESTIGE / STATUS	←	 	
HEALTH & NUTRITION	←	 	

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



## BEEF

"I think New Zealand probably is also a very fresh kind of a feel, very grass fed. And United States, I think its grain fed, maybe juicy, rich in flavour." (Younger, Singapore)

"Australian beef has more options, even for the same type you get options in terms of like grass fed, grain fed or organic and different price point associated with it" (Older, Singapore)

"I will associate US beef to the angus beef cut and the mincemeat kind that you use in burgers - very famous American food. It also kind of reminds me of mass production. I don't know if the cows are like taken care properly or anything like how we usually think for Japan. But because in the US there's always a lot of news about like animal cruelty or the production of things are like going awry, that kind of problems" (Younger, Singapore)

"The standards in the country (differ). Sometimes you see that online, the slaughterhouse very ..... like in Singapore it's stainless steel, very clean. But over there, is more like something I don't know. I think Australia, New Zealand is OK at the farmhouse. But Malaysia I am scared they use wooden top (to cut the meat)" (Older, Singapore)

"The Japanese quality and grading. They're very strict about it. They have the label or the grades and all the A5 and the Kobe and what not. For Japan it feels like very premium, luxurious" (Younger, Singapore)

"Let's say they like more medium well to well done. Then I will have to choose the beef from New Zealand, be it sirloin or ribeye because for this type of cooking style or cooking doneness, I find that apart from New Zealand, the rest are more chewy or more difficult to bite. So, New Zealand beef is actually more suited for doing beef to higher doneness level" (Older, Singapore)

## LAMB

"Brazil is assured. It's not only you get beef and lamb, chicken also, and labelled. You can find the same brand for both Cold Storage and NTUC. And I don't think this kind of supermarket take these products in easily (you have to pass their standards)." (Older, Singapore)

"Lamb is normally New Zealand, Australia as well. The one that mostly I purchase in NTUC, I saw New Zealand, for most of it" (Younger, Singapore)

"Usually lamb, not a lot of difference in terms of the country of origin - its either Australia or New Zealand, at least for Singapore" (Older, Singapore)

"Australia or New Zealand lamb is the same" (Younger, Singapore)

"For this lamb, I have tried at Atico above Ion, 55 level. They have this Argentinian restaurant. Very posh. Their lamb shank is much more better than their beef. But it cost \$300.00 for two" (Older, Singapore)

"Actually Brazilian meat, a lot of them are frozen meat. I have not, I personally I don't remember coming across chilled but I may be wrong. But they do have a lot of frozen meat and they are usually price point wise they are quite affordable. They even have lamb as well" (Older, Singapore)

# Australia on Trust & Quality – Australian meat is Guaranteed Trustworthy and Quality that consistently delivers



However, as we've seen Australian beef and lamb is still perceived somewhat lower than New Zealand and with Japan as the most trustworthy



- **TRUST** – Australian Beef and Lamb are very trustworthy. They have been established in Singapore for a long time and are in reputable supermarkets, specialist butcheries and high-end restaurants
  - They are commonly available
  - They have been tried and tested, they seldom fail; they are always fresh and taste good
  - The country has a high rule of law, it is very regulated and is known for her strict border policies and controls. Singaporeans are very exposed and familiar with Australia as some have visited the country and know about the country through news and the media
- **QUALITY** – Australian Beef and Lamb are known to be of good quality with some branded and premium variants available in high end butcheries and restaurants
  - Commonly used as a selling point in restaurant menus, where applicable. (By comparison, rare to see 'Brazil beef' or 'Malaysian lamb' in any menu)
  - The Quality perception comes with the high trust in the product and the reputable stores where more premium Australian beef and lamb can be bought

*"I think probably places like Australia or New Zealand, this kind of more scenic places, probably the quality is better as compared to American ones"* (Younger, Singapore)

*"Australian beef is assured, guaranteed of safety, freshness, hygiene, the food hygiene, how they handle the cows, how they slaughter them"* (Older, Singapore)

# Aussie Beef & Lamb Labelling - Most are not aware, do not recall or are not familiar with the Aussie Beef and Lamb logo



There are many, many brands of beef and lamb in Singapore that are not normally easy to recall. The association is more with the supermarket or store than the meat branding or logo.



- **Recall** – Only a handful of Singaporean consumers have seen it, and they recall seeing it in more specialist butcheries)
- **Comprehension** – Nothing particularly stands out other than a clear indicator that the product is Australian. The trust elements are derived from the label rather than the logo. The **positives** are that:
  - Slaughter date is new to the audience. They find this to be assuring of the quality of the meat
  - They also like having the combination of Slaughter date, Packed date and Best before date to give a sense of the freshness of the product
  - It is more information than needed and reflects the company's willingness to be transparent thereby demonstrating their confidence in the product's quality
- The **negatives** or less appealing elements were very individualistic (different people raise different points)
  - A general sense of too much and unnecessary information like carton numbers, IW/VAC - information that consumers do not understand or is useful or relevant to them
  - Confusion with conflicting weight range and nett weight in both kilos and pounds
  - 1 participant wondered what IW/VAC is and ventured it might be 'vacuum packed' (needs clearer label)
  - An expectation of the Halal logo to be green rather than lost in the sea of white and black
- **Impact on decision making** – the general extensiveness of the label information would be preferred because it demonstrates the confidence of the seller to be willing to share all these details

*"When I look for beef, I guess it's what I want, the price, the packaging. I like that it is very informative. I think I only need the price, the place that it is from, the best, the expiry date, the packaging date probably. But I think also I won't just see the packaging. I also see the meat itself"* (Younger, Singapore)

*"I think the slaughter date, pack date, best before is good. You know, the product is from where and it's good to know what does it feed on, but some of the parts, like logo, maybe some of the logos, does it need to be there? I'm not too sure, like the carton ID, does it need to be there?"* (Older, Singapore)

The label with the added details give more peace of mind to the buyer but it does not tilt the scales so much as the meat still has to look good visually. All things being even, if the difference in cost is <10%, customer may choose the one with the detailed label

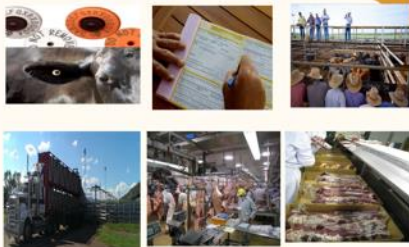
# Australia's Red Meat Integrity System – Good that customers have access to something that should already be in place



It's not a game changer, evoking an almost lack-lustre response. In spite of the global messaging of climate change, sustainability, transparency and such, meat lovers don't want to know so much that might impede their enjoyment

## AUSTRALIAN BEEF PRODUCTION IDENTIFICATION & TRACEABILITY – National Livestock Identification System

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



RESTRICTED. © Meat and Livestock Australia



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

- It's a good thing; it gives peace of mind and demonstrates transparency
- Interest – Overall it is appreciated, but does not elicit excitement (no 'wow' factor)
  - ✓ Detailed information as to the source of meat, how the meat was reared for consumption and how it passed various inspections
  - ✗ All elements are universally 'good' but raises the question of the necessity for this level of information and the trustworthiness of the information – whether what is printed on the label can be verified. As one participant said **"the information here can technically be tampered with also, like, how do I know how true it is that it's really traceable?"**. Hence one of the suggestion was to have government endorsement
- **Credibility** – The credibility of this leans on the due diligence of the Singaporean system to ensure its credibility and validity rather than lean on narrative of the system itself. People were not bowled over by the concept and thought that a traceability system ought to already be in place at a corporate responsibility level
- **Impact on decision making** – It will tilt the scales somewhat but not significantly. If Japanese beef is being compared with Australian beef, even with all this extensive information, customers might still choose Japanese beef but if pitting against Brazilian beef, Australian beef is likely to be chosen, possibly with or without the extensive label

*"It's one thing to say this cow or this lamb is from XYZ farm process through this plant blah blah blah and you detail the whole thing. But what happens when it's actually not from the system that they say that it is, but it's actually from another farm that had issues that quietly sold their stock to exploit that farm, that kind of thing?" (Older, Singapore)*

*"I think that is good because there's transparency. We also can build the trust, that we will know where it comes from, whether it's a reputable source. And sometimes they make claims whether it's grass fed or organic, you can also know whether it's true or not. It's good to know, good to have" (Younger, Singapore)*

# Communication Recommendations – Social Media KOL story telling through visits is deemed to be most effective



The best approach is to have influencers visit the places where the processes take place to showcase it through a series of social media posts such as Tik Tok. This will have the widest reaching effect.

- **Most important aspects to communicate:**

- The process as depicted in the stimulus material; that there is a trail and a historical record of the animal's lifespan. This is important as it demonstrates the fundamental point of traceability.
- There is no one process or aspect that is more significant than the other – every linking stage demonstrates a system of control and accountability
- No mention on the need to communicate around the benefit of traceability to the meat (quality etc) - as was found in other markets.

- **Information sources:**

- Using social media will provide the best reach and endorsements from the food ministry builds trust in the messaging
- At the supermarket or butchery, there should be banners or posters depicting this process
- There were suggestions of leaflets or brochures or QR codes to those who might be interested to know more about this process

- **Impact on purchase decision making:** Minimal impact because customers still want to see that the meat is fresh rather than traceable before they buy

*"I think social media is a very good way these days to spread awareness about traceability with Tiktok and YouTube. Maybe start off with some ministry talking about it and then maybe getting some, I don't know, maybe influencers or something like that to share about this. I think because this is something that is formal or official across the industry, it's better to start off with someone who is like the government to show credibility first for this information to be digested better by us like a commoner, right?" (Younger, Singapore)*

*"I think for me, it would be too troublesome to go and scan a QR code. To me if a label that is a decor sticking on the counter itself, I think it's good enough for me now" (Older, Singapore)*

Realistically, striking a balance between cost and impact, store displays would be most effective in reaching the target audience and providing the quickest way to understand that there is a traceable process to Australian meat



# SUMMARY & WAY FORWARD

# Summary – Meat Freshness is the overarching decider in purchasing and engagement with store and restaurant



Freshness is largely derived from the appearance of the raw meat in home use but clean and hygienic packaging also adds to the sense of freshness. In dining out situations, freshness is perceived by learning of other people's experience with the establishment and by the appearance of the establishment itself, being clean and welcoming

1

Red meat purchase decision making

- **Home Use**
  - **Convenient Store Locations** - Accessible enroute locations, Reputable Stores, Reasonable Price for Quality and Variety of Selection
  - **Meat Selection**
    - Meat Appearance; bright red cues for freshness.. Clean packaging without any traces of blood or leakage
    - Meat density; balance and healthy fat percentage, fat veins for quality
    - Meat cuts and cooking style intended for purpose
    - Mix of Price then Country of Origin or Country of Origin then Price
- **Dining Out**
  - **Restaurant Selection** - Positive Google Reviews, Food Blog, Word of Mouth and Recommendations; Menu Descriptions, menu information
  - **Meat Selection**
    - As they are not able to inspect the meat, they can only rely on the information and recommendations from the staff

There is generally high trust in food quality in Singapore due to governance and health and safety standards. Each channel has to compete with their own unique selling point to gain market share when 'freshness' can be delivered by many sources

# Summary – Quality builds Trust - which comes by experience with customers who make the first step to start a relationship



The customer initiates the process by which trust is built through the delivery of the promises and expectations that was understood and perceived by the customer when he first decided to engage. Through constant delivery of Quality, Trust is built.

2

Understanding trust and quality for consumers

3

Importance of traceability

- **QUALITY:** Is an exceptional experience where customers return to have more and tell their family, friends and relative about. Beef should melt in the mouth and be juicy and flavourful while lamb should be free of any pungent aroma and absorbs the cooking recipe and ingredients
- **TRUST:** Is taking the first step in believing that an exceptional experience can be obtained, followed by the continual belief that the exceptional experience that they experienced before can be obtained again by their repeated engagement.
  - For example, especially in the younger groups, having grown up eating beef and lamb from Australia and New Zealand, these are the sources they have always known, used and learnt from their parents
- **TRACEABILITY:**
  - They have heard of being able to trace the journey of wine production or chicken meat origin but do not know about the extent of traceability that is being suggested
  - Plays a small role in enhancing the trust that is largely built by experience and not by a system that just provides historical accountability without a real remedy when the need arises. When there is a disease outbreak or health of livestock concern, the ability to trace begs the response of 'so what?' as the problem would already occur.
  - It can provide to a small group a sense of security to nudge them to purchase but ultimately the ability to trace does not weigh heavily on the final decision to purchase or engage

# Summary – Australian meat is well regarded as good quality, trustable and reliable



Traceability seems less of an exciting idea in Singapore, as customers already expect that the meat they buy can be traced back to source by the merchants, if the need arises

4

Perceptions towards Australian red meat

- **Key perceptions:** Australian meat is good quality meat, trustable and reliable. One can consume it without any concerns or worry
  - Associated with having a safe and strict process, established Halal system
  - High familiarity for Australian meat – often seen in retail stores
- **Reaction to Integrity system:**
  - The standards, integrity and rigour towards Australian meat production is high.
  - Customers do not question it; the same as they do not question the standards, integrity and rigour towards Japanese and New Zealand meat. In fact, meat from Japan and New Zealand are more well regarded
  - For those who are already using Australian meat, it adds to their peace of mind and further assurance of the product.
  - For those who are using other meats from other countries, it will give them confidence to try Australian meat. However, as there are many, many brands and sources of Australian meat here, there will be a price limit for that potential switch

The angle is to communicate that the customers can now verify the information on the labels. The interface for this verification also has to demonstrate integrity and be believable in order to work so for example the interface page should be professional and not cartoonish or there should be say endorsement by the Australian government etc.

# Recommendation – Capitalise on any stage in the process that can enhance Freshness or Quality



For example, if at cooling stage the meat freshness or quality is enhanced depending on how or how long this occurs, this becomes an element that customers would be more interested in and more willing to pay a premium for. By simply giving customers privy to traceability does not add to the freshness or quality of meat

- **Most important to communicate:**
  - The narrative has to be about how Traceability adds to Freshness and Quality
  - Slaughter to Packed date is one area to capitalize on – not so much that there is a record of where or when the animal was slaughter and packed but that the duration between slaughter, packing and shipping demonstrates a level of freshness that can be verified by the traceability system
- **Messaging tone of voice & mode of communication**
  - The tone should be about enjoyment and satisfaction gained from fresh and quality meat and not a tone of cold process, order or system - "We know all about our cows from the time they are raised till they are ready so you know you're getting the best taste"

# Thank You

## ► Indonesia

Arkadia Green Park, Tower F, 2nd Floor Jl.  
TB Simatupang No. 88; Jakarta Selatan  
12520, Indonesia

## ► Singapore

17 Phillip Street, #05-01 Grand Building,  
Singapore 048695

Contact us: [info@illuminateasia.com](mailto:info@illuminateasia.com)



Illuminate Research Asia



@illuminateasia



@asia\_illuminate

A member of

PERPI

ESOMAR<sup>23</sup>  
Corporate



**illuminate**  
Strategic Insights Consultancy

# MLA disclaimer

All information contained within this presentation and supplied in connection with it, including any oral commentary and answers to questions, is supplied to recipients for information purposes only. No representation, warranty or other assurance is made as to the currency, fairness, accuracy or completeness of the information contained within this presentation or supplied in connection with it. The information contained within this presentation is in summary form only and is not, and does not purport to be, comprehensive or contain all information that any recipient may require or consider material.

Although all care has been taken in preparing this presentation, viewers of this presentation should not alter their position, or refrain from doing so, relying on this presentation, and should seek independent advice for their own situation. Any forward-looking statements made within this publication are not guarantees of future performance or results, and performance or results may vary from those expressed in, or implied by, any forward-looking statements. No representation, warranty or other assurance is given as to the fairness, accuracy, completeness, likelihood of achievement or reasonableness of forward-looking statements or related assumptions contained in the publication. Your use of, or reliance on, any content is entirely at your own risk and MLA, MDC and ISC (“MLA Group”) accept no liability for any losses or damages incurred by you as a result of that use or reliance.

The views or judgements expressed within this presentation are those of the author and not the MLA Group. These views and judgements do not reflect the views and judgments of the MLA Group, its employees or agents.

Full terms can be found here: [MLA Terms of Use](#). You may not copy, republish, download, transmit, communicate, or otherwise use this content in any way without the prior written consent of Meat & Livestock Australia Limited ABN 39 081 678 364. Any such enquiries should be directed to [info@mla.com.au](mailto:info@mla.com.au), or the Content Manager, PO Box 1961, North Sydney, NSW 2059.