

Project Tracy

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

REPORT

THAILAND



13 December 2024

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Background, Objectives & Methodology

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

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

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

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



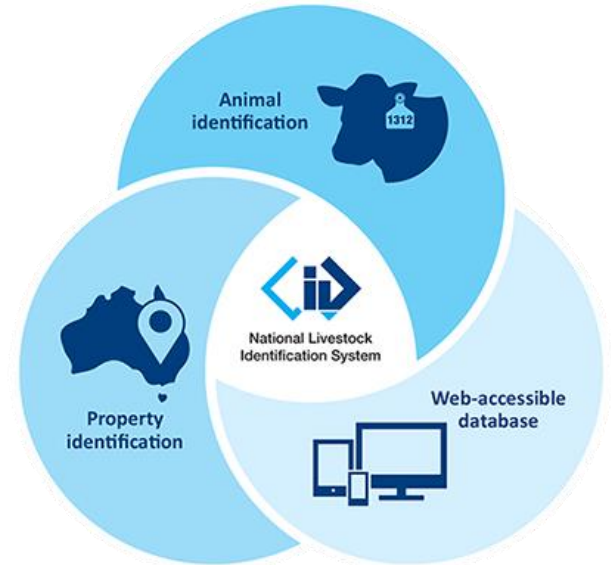
The Australian red meat industry has developed a red meat traceability system that can track all Australian red meat from birth to slaughter

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

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

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

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



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

Research & Business Objectives

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

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

Business Objectives:

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

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

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



A total of 4 groups in each market - in Thailand on 25 – 26 November 2024

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



Detailed Respondent profile per group:

Group 1	Gender	Age	SEC	Purchase imported meat
Respondent 1	Female	25	A	Australia / Japan / New Zealand Tops Market / Gourmet Market
Respondent 2	Female	30	A+	Australia / Japan Villa Market / Food land / Gourmet Market
Respondent 3	Female	23	A	Japan / Australia Gourmet Market / Foodland
Respondent 4	Female	29	A+	Australia / Japan / USA Villa Market, Tops Market
Respondent 5	Male	24	A	Japan / New Zealand Gourmet Market / Foodland
Respondent 6	Male	24	A+	Japan / Australia / New Zealand Gourmet Market / Donki

Group 2	Gender	Age	SEC	Purchase imported meat
Respondent 1	Female	39	A	Australia / USA Gourmet Market
Respondent 2	Female	42	A+	Australia / Japan Tops Market / Donki
Respondent 3	Female	46	A	New Zealand / Brasil / Australia Gourmet Market
Respondent 4	Female	31	A+	Australia / Japan Gourmet Market
Respondent 5	Male	45	A	Australia Foodland
Respondent 6	Male	37	A+	Australia / Japan / Argentina Gourmet Market / Foodland

Group 3	Gender	Age	SEC	Purchase imported meat
Respondent 1	Female	30	A	Australia / Japan Tops Market / Donki / Gourmet Market
Respondent 2	Female	27	A+	Australia / Japan / New Zealand Foodland / Tops Market / Gourmet Market
Respondent 3	Female	29	A	Australia / Japan Tops Market / Villa Market / Gourmet Market
Respondent 4	Female	24	A+	Australia Tops Market
Respondent 5	Male	25	A	Australia Tops Market / Gourmet Market
Respondent 6	Male	28	A+	Australia / Japan Tops Market / Gourmet Market

Group 4	Gender	Age	SEC	Purchase imported meat
Respondent 1	Female	37	A	Australia / Japan / USA / Argentina Gourmet Market, Villa Market
Respondent 2	Female	31	A+	New Zealand / Australia Villa Market, Foodland, Makro
Respondent 3	Female	43	A	Australia / Japan / USA / France Gourmet Market, Villa Market
Respondent 4	Female	32	A+	New Zealand / Australia / Japan Tops, Gourmet, Go Wholesale
Respondent 5	Male	42	A	Australia Villa Market
Respondent 6	Male	40	A+	Australia / Japan / Argentina Gourmet Market / Tops



RESEARCH FINDINGS

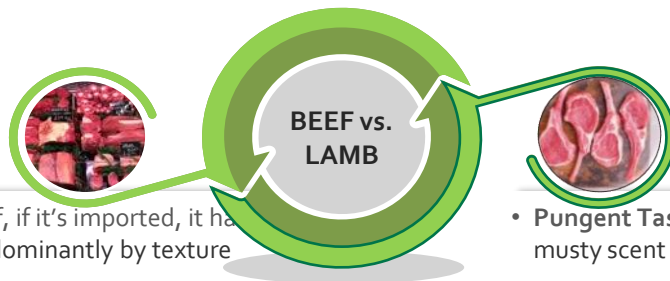


IMPORTED BEEF & LAMB CATEGORY UNDERSTANDING

Beef is more frequently consumed, but lamb is only consumed 1-3 times per year (& only by a few)



Imported beef is widely associated with premium quality, driving a sense of indulgence. In contrast, imported lamb is less popular, with many respondents finding its flavor too pungent



IMPORTED BEEF

- **Higher Quality** - Compared to local Thai beef, if it's imported, it has to be a more **premium quality** – defined predominantly by texture (based on marbling), good taste, aromatic
- **Higher Indulgence** – Imported beef has better overall taste, aroma, and texture (e.g. marbled, dense and chewy but not sticky; soft but not high fat content, etc.)
- **Country of Origin (COO)** - Associates to a countries known for beef, each has a distinctive taste, texture :
 - **Japan:** Good marbling Wagyu that leads to soft texture that melts in their mouths
 - **AUS:** Good balance of fat to meat ratio, dense texture but not
- **Higher Price**, compared to local beef

"ถ้ามันอิมพอร์ตเข้ามามันต้องดีกว่า." / "It should be better because it's imported." (Younger, Bangkok)

"คิดถึงเนื้อออสเตรเลีย เป็นอย่างแรก." / "I think of Aussie beef as the first thing." (Older, Bangkok)

- **Pungent Taste & Smell** - Strong, 'gamey' taste; and gamey, musty scent
- **Difficult to cook with because:**
 - The nature of the meat itself makes it harder to cook to reduce the strong, musty taste and smell
 - Therefore, this high learning curve makes them choose not to cook it, therefore, not familiar on how to cook the meat properly

Important Note: Most respondents rarely consume lamb, and those who do mainly eat it Out of Home just 1-3 times per month or year. Therefore, LAMB sections will be cut out in this report.

"กลิ่นสาบมาก กลิ่นแรง." / "The smell and taste is very strong and musty." (Younger, Bangkok)

IMPORTED LAMB

There are a variety of beef dishes Thai consumers prepare at home

The preferred dishes influence the choice of beef to be used (Country of origin, cut type), with both imported and local beef in their repertoire.



IN-HOME CONSUMPTION

- Those who shop and cook are the main decision makers for purchase, as they design the menus and know what their family likes. There are a few scenarios where their family members or spouse occasionally request specific items for a specific dishes that they crave
- Beef is consumed n-home at least 2 times/month; but up to 2-3 times/ week
- Consumers purchase either the amount they need for 1 serve (e.g. 1-2 strip, cut) or bulk buy (e.g. buying different parts of beef at once; did not specify exact amount) that lasts for the whole week
- **Occasions –**
 - **Weekdays –** meals that are more simple to make; mostly are Thai, local dishes (e.g. Beef Krapao rice)
 - **Craving or self reward -** Simply when they are craving the taste of beef or it can be used as a self reward (after a long & tiring day / week)
 - **Special Occasions:** friends/family gathering, holiday (e.g. Xmas, New years, Public holidays). Western dishes such as steaks are mentioned most to be had during special occasions, as the dish is a beef-centric dish and more elevated where they'd pick a premium beef to be the star of the dish. Some mention to pair this with wine to enhance
- **Types of dish –** There is a tendency to use local beef to prepare local dishes (the herbs/spices would already dominate the beef); while imported beef is used for other Asian or Western dishes where the beef can be the star of the dish.
- **Treatments (how it's prepared)** depends on the dish. E.g. for steak, just use simple rubs or salt/pepper and cook in pan/oven/grill. For Asian dishes, preparation requires more spices, herbs, sauces



"จะกินตอนวันหยุด อายาก็เวลาอยู่กับมัน เพราะการทำอาหารกับเนื้อต้องใช้เวลา ค่อยๆ ทำ ค่อยๆ กิน." / "I like cooking beef when there's a holiday or a Friday so I can spend time with it, carefully cook it, and carefully eat it." (Younger, Bangkok)



"ทุกอาทิตย์ต้องมีทำเนื้อ จิบไวน์กับสามี." / "At least once a week we'll cook beef and sip wine with my husband" (Older, Bangkok)



"หนูชอบชานมากค่ะต้องกินทุกอาทิตย์ แล้วมันไม่ต้องเตรียมอะไรอะไรมากด้วย." / "I love Shabu, I need it every week, and it doesn't take much to prepare" (Older, Bangkok)

Out of home Beef Usage – Most select on the type of cuisine 1st, focusing on the taste / experience of the restaurant



Most do not select the restaurant based on type of beef

OUT OF HOME CONSUMPTION

- It may be individual or joint family decision on choice of restaurant. Choice is based on:
 - The uniqueness/ presentation of the dish created by the restaurant
 - Choosing a more premium choice or cut they've never tried as it should be a tastier occasion than cooking themselves (e.g. Japanese beef A5)
 - If in occasions they crave beef-centric dishes (e.g. Steak, Japanese BBQ) that's when they will think of which cut, or breed of beef they want to try.
- On average, Thais consume beef out of home around 1-2 times/week; but it can be up to 5 times per week. Serving amount depends on portion size dictated by the restaurant

Type of dish: In occasions that are a bit more special (e.g. anniversaries, birthdays, end of the month) some may choose imported beef with a grade that they have never tried (e.g. Japanese A5 Wagyu BBQ)

- **Local :** Thai-style BBQ, Isaan (Northeastern) style dish, Beef boat noodles,
- **Asian:** Shabu Hotpot, Japanese BBQ, Korean BBQ, Mala Shabu
- **Western:** Steak
- **Example of restaurants:** AKA, Sizzler, Pepper Lunch, Chok chai Farm, Momo Paradise, Hai Di Lao, street food restaurants



"ถ้าทานนอกบ้านอยากทานดีๆ หน่อย เช่น วากิวญี่ปุ่น." / "If I eat out I do want something more special, like Japanese Wagyu." (Younger, Bangkok)



"เวลาออกไปกินข้างนอกไม่ค่อยซีเรียส เราคิดว่าเราอยากกินอะไร แล้วดูรีวิวว่าร้านไหนน่ากิน มีเมนูน่าสนใจมั้ย." / "I don't think too much when going out to eat. I pick from what I crave, see reviews which restaurant looks good or has interesting dish" (Younger, Bangkok)

When it comes to OOH dining, consumers trust the restaurant they choose and focus mainly on the taste. Only in special occasions (e.g. anniversaries, birthdays, end of the month) that they would want to indulge in really high-quality beef where how it's made or where the beef is sourced from is important

Types of dishes: Imported Beef – Key finding



Thai consumers see international dishes as more "special" because the beef is the main focus, unlike local dishes where herbs and spices often dominate the flavor

LOCAL DISHES

DAILY BEEF DISHES



Pad Kra Pao (stir fry w/ basil leaf)



Beef fried rice



Beef chili (stir fry)



Thai Beef Noodle



Isaan style grill beef (e.g. Thai Crying Tiger beef)



Green Curry

SPECIAL BEEF DISHES FOR SPECIAL EVENTS



Kaeng Om (Isaan Style beef soup)



Beef with Jim Jaew sauce



Thai Style BBQ



Pla Nuea (Spicy Beef Salad)

INTERNATIONAL DISHES



Bolognese Pasta



Japanese beef rice bowl



Stir fry beef Mala



Shabu / Hotpot



Chain-style steak, Home-made steak



Premium, restaurant quality steak



Hamburg Japanese style



Japanese BBQ



Korean BBQ



Yukhoe (Korean style marinated beef)

Imported meat purchase habits (for in-home) – Mostly purchased from the 4 top-tier supermarkets



But occasionally some opt for MACRO to purchase in bulk for better value



"พนักงานแนะนำดี แล้วเราก็อยกไปเดินซื้ออย่างอื่นเข้าบ้านด้วย สะดวกดี." / "The staff are informative, and I just want to walk around to shop for other items as well. Quite convenient." (Older, Bangkok)

"พวก Gourmet กับ Tops มันก็มีภาพลักษณ์ที่ทำให้เรารู้ว่าของเค้าดี เค้าคงไม่เอาของไม่ดีมาขายให้เสียหรอก." / "Retailers like Gourmet or Tops has a premium quality image. They probably won't risk selling poor quality products." (Younger, Bangkok)

1

Top Tier Supermarkets (Gourmet Market, Villa Market, Tops, Foodland)

- ✓ **Top-tier supermarkets credible for premium curation** (e.g. premium grade products, assurance of meat treatment to keep it clean / fresh). Consumers were not able to articulate what kind of 'treatment' these entails
- ✓ **Displays** – Allocated section for beef, proper displays of raw meat that assures freshness and hygiene (e.g. properly arranged in a clean, fresh ice), and offer detailed information (e.g. COO with flags or labels, weight, diet of the cow, expiration date). Some mentioned that Gourmet occasionally shows photo of the cow)
- ✓ **Convenient / Accessible** – Within usual commute route and/or close neighborhood, with multiple branches
- ✓ **Familiarity** - A usual place they shop for groceries, therefore, high familiarity of the market layout
- ✓ **Informative Staff** – Gives recommendations, advice, knowledge of each type of beef (e.g. unique textures of beef in particular country, what are the popular brands of a particular country, which type of beef suits a particular dish)
- ✓ **Seasonal promotions** –for imported beef (e.g. BOGO, xxx% discounts on seasonal imported beef)
- ✗ **No negatives. However, price point is high. Therefore, consumers gravitate to promotions on shelf** (e.g. BOGO, xxx% discounts on seasonal imported beef)

2

Value-tiered supermarket: Makro

- ✓ Good value for money when buying in bulk
- ✓ **Convenient/Accessible** – Within usual commute route and/or close neighborhood, with multiple branches
- ✗ **Inconsistent Freshness** – Occasionally lacking freshness of meat whether from how it's displayed (e.g. meat is not properly arranged in organized formation, dirty ice, etc.) and/or **perception** of poorly handled transport (Consumers do not actually know how it's transported, but the display leads to this perception)
- ✗ **Displays** - Not as properly displayed (compared to retailers) (e.g. meat is not properly arranged in organized formation, dirty ice, etc.)

Imported meat purchase habits (for in-home) – Generational differences observed



Younger more skew to Japanese retailers; while older are observed to be a bit more discerning when selecting their beef (more likely to purchase at specialist butcher shops)



"จะไป Donki บอย ยิ่งถ้าสำหรับชabuก็อยากได้เนื้อดี / "I will go to Donki especially for Shabu beef slices. I want quality slices." (Younger, Bangkok)

"ร้าน Butcher มันสดกว่านะ ผมจะรู้รอบเนื้อ จะได้ซื้อที่สดใหม่ / "Butcher shops are fresher. I know the period where they stock new beef. I will go buy when it's still fresh." (Older, Bangkok)

3 *MOSTLY FOUND IN YOUNGER DEMOGRAPHICS*

DONKI MALL

- ✓ A centre of all Japanese imported products (including meat), hence, leads to QUALITY and premium impression (e.g. premium grade products, assurance of meat treatment to keep it clean, fresh – based on packaging / display)
- ✓ Premium product curation – Donki mall is perceived to curate quality Japanese products, therefore, has a halo effect that all products from this mall is a premium quality.
- ✗ Higher price point (compared to top-tier supermarkets)

4 *ONLY FOUND IN OLDER DEMOGRAPHICS*

BUTCHER SHOP (e.g. 'King of Beef', 'Nue Tae - เนื้อแท้')

- ✓ Premium grade meat selections
- ✓ Variety of Options – Offer variety of options such as country of origin, cut, breed, etc.
- ✓ Customizable Amount – Able to customize weight, size, volume of amount
- ✓ Savvy, knowledgeable owners – Owners have in-depth knowledge about each type of beef
- ✓ Clear informative labels (e.g. country, type, cut, image of cow)
- ✓ Value for money – Getting very premium grade meat with lower price compared to retailers
- ✗ Must buy in bulk – Some butcher shops only allow bulk buy

- Source of information: Online Facebook page, staff's recommendation, tags/flags/labels on shelf
- Type of information: Type of cut, breed, country of origin, how to cook a specific cut, butcher shops etc.
- Examples of Online source: Youtube influencers, FB page 'คนรักเนื้อ' (People who loves Beef)

Key information for in-home beef purchase – Selecting the meat cut to ensure the best taste for the specific dish



While they enjoy learning about details like the country of origin or breed, these factors are less influential in their purchasing decisions.

IN-HOME CONSUMPTION

- **Meat cut / style for specific dish** - e.g. Ribeye for steaks, ground sirloin for burgers, etc.
- **Beef dish recipes** - Getting tips and tricks for restaurant-quality recipes they can DIY at home
- **Characteristics by Country** – Gaining knowledge on the different characteristics in taste, texture, and aroma of beef
- **Purchasing channel** – Knowing sources to find premium quality beef at a reasonable price (e.g. which shop is known for Australian beef)

Main sources of information (in order of impact /importance)

1. **Facebook Online Community Pages (main channel to gain new information)** – Most mention the FB page 'สมาคมคนรักเนื้อ' ('People who loves Beef') because it shares all beef-related information in a **consumer-friendly manner** (e.g. catchy headlines, simplified, non-technical cooking instructions, relevant recommendations of restaurants to current beef trend, visual-led, not text heavy content, etc.)
2. **Youtubers (chefs, influencers)** – To get an overall knowledge (e.g. recipes, beef knowledge, and gain better cooking skills)
3. **Staff at grocery stores** - Some gain information simply by conversing with staffs to help them make an informed decision at point of sale.
4. **Labels, Flags on Pack / Shelf info (most frequent touchpoint, but least impactful)** – Simply glancing on the information on the pack regarding country of origin, expiration date. This is the least impactful because its role is simply the last point of assurance before they make an informed decision. The decision is mostly already made before coming to the store that was influenced by the first 3 sources as mentioned above.



"เพจชมรมคนรักเนื้อจะให้ความรู้ว่าเนื้อแบบนี้เหมาะกับทำแบบไหน สอนวิธีทำอาหาร หอดยงใจให้ดูเหมือนร้านอาหาร."/> / "The FB page will educate what type of beef suits this particular dish, how this dish is made, how to try beef like restaurants, etc.."

(Younger, Bangkok)

Key information for out of home beef purchase – Seek information on restaurant quality & reputation



They often rely on reviews, usually sought through social media

OUT OF HOME CONSUMPTION

- **Reviews of the restaurant to gauge Taste experience** - To gather insights from experienced customers about their food and overall experience; and to discover trending new restaurants for future visits.
- **To know what specific restaurants are known for , in terms of type of beef dish & country of origin** (e.g. if a restaurant is known for Japanese Wagyu or for a dish like shabu) –
- **Presentation of the dish** – Visual presentation of the dish speaks volumes, as it helps consumers gauge the taste and quality restaurant and the dish. This is presented both in still photos and/or videos that zoom in to highlight attributes such as the goeyness of the beef, the soft/juicy texture, the sauce/sides that complement the beef, polished presentation that looks elevated and unique etc)
- **Price range and Location of restaurant**

Main sources of information (in order of impact /importance)

1. **General social media reviewers** (e.g. TikTok, Instagram, Youtubers, Facebook) – To check what's trending and helps them explore new things. The main FB group page consumers mention is the 'สมาคมคนรักเนื้อ' / 'People who love beef', while other pages are simply randomized clips/sources they get intercepted in social media.
2. **Facebook Online Community (main channel to gain new information)** – A community where like-minded people will share real experiences they have with beef restaurants. Therefore, they are trustworthy information.



"เวลานึกข้างนอกเราไม่ดูอะไรมาก ดูแค่มenuที่อยากกิน แล้วดูว่าร้านไหนน่าจะทำเมนูนี้อร่อย ดูรีวิวเอา." / "I don't think too much when eating out. I just think of what I want to eat and see reviews on which restaurants does that dish well" (Older, Bangkok)

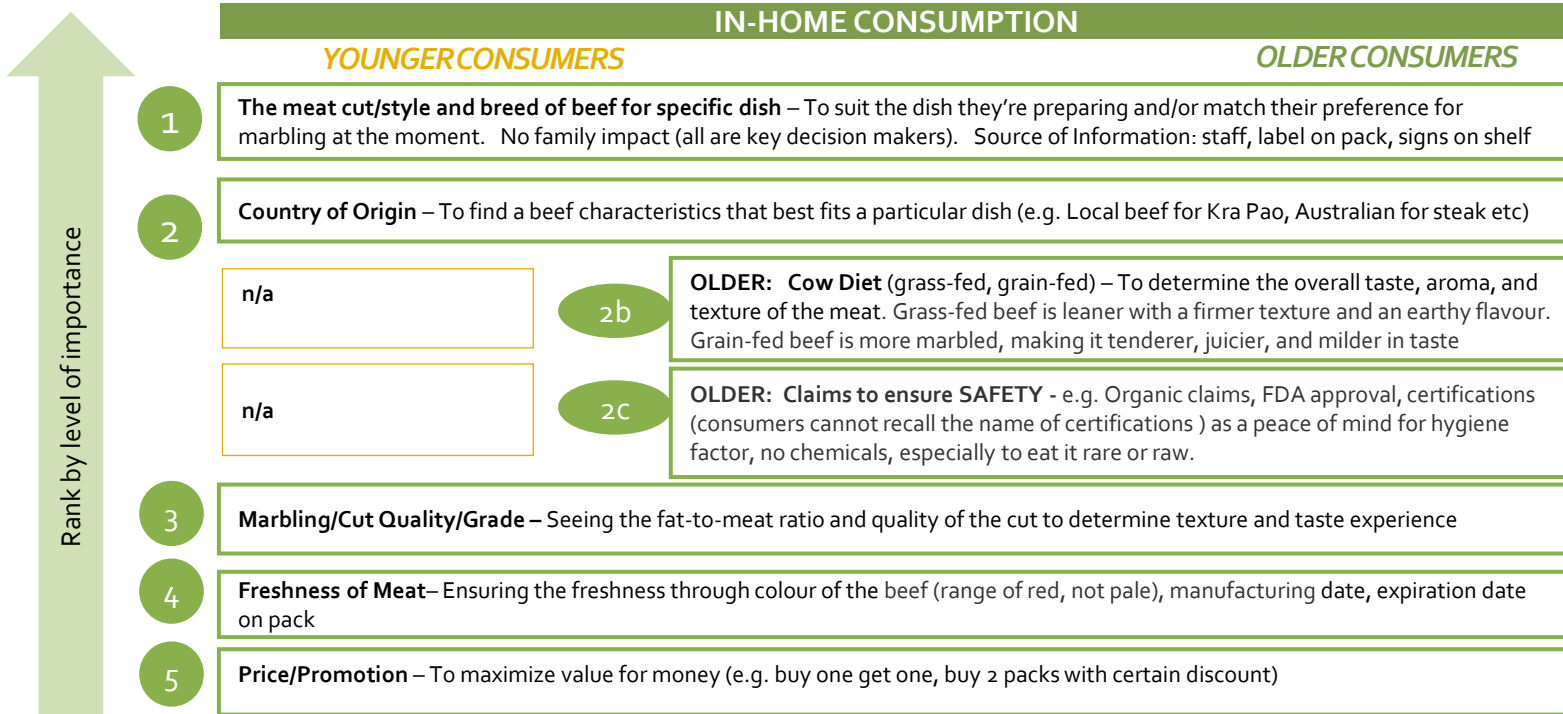
"ถ้าบ้านนอกอยากหาที่จริงจัง เช่น Wagyu ญี่ปุ่น." / "If eating out I'd like something premium quality, like Japanese Wagyu." (Older, Bangkok)

"ดูTikTok ทุกวันเลย ก็จะดูรีวิวว่าตอนนี้ร้านไหนดัง." / "I use TikTok every day and I'll see reviews on restaurants that are now trending." (Younger, Bangkok)

Decision Factors for in-home Imported beef – Age differences noted



Older demographics have a more discerning selection criteria and more attentive to claims and descriptions of the beef to ensure safety and quality; compared with younger demographics



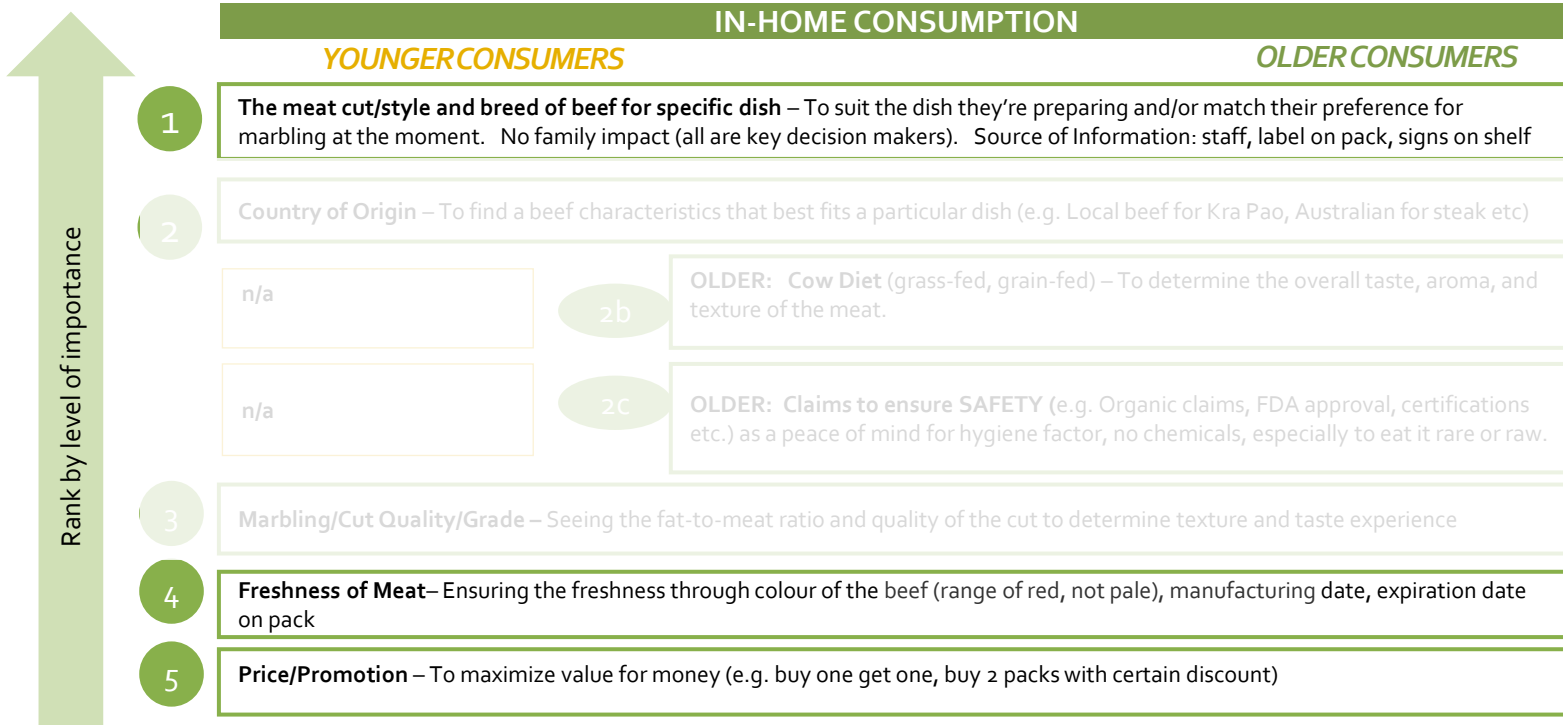
"จะดูเรื่อง organic claims เรื่อง ความสะอาด ไม่มีสารเจือปน." / "I look at organic claims to ensure the cleanliness of it, that there's no food preservatives or additives that is dangerous." (Older, Bangkok)

"ดูการเลี้ยงดูของวัวด้วย เป็น grass-fed, grain-fed, organic grass-fed เพราะมันจะกระทบ texture ของตัวเนื้อ." / "I look at the diet of the cow whether it's grain-fed or grass-fed or organic grass-fed because it affects the texture of the meat." (Older, Bangkok)

Decision Factors for in-home local beef – Less complex selection criteria



For local beef, consumers simply focus on the cut of the beef, its freshness, and price.



Decision Factors for out of home beef – Consumers mostly rely on reviews to gauge the quality/credibility of the restaurant



Therefore, this will help them gauge the quality of the food as well.



OUT OF HOME CONSUMPTION

1

- **Best looking restaurant for the cuisine/dish they crave** – Consumers check reviews to assess the food quality and whether the restaurant is known for that particular dish/cuisine. Cues include:
 - Food presentation, ambiance of the restaurant,
 - Reviews - responses of experienced customers, popularity of the restaurant.
 - **Country of Origin** can be an important judging cue IF the cuisine they crave is a beef-centric cuisine where the beef is the star of the dish (e.g. Japanese Wagyu for BBQ, Australian Beef for steaks, etc.)
- Decisions are made jointly by family members or with their partners
- Source of Information: Online reviews from social media (TikTok, Facebook, Instagram)

2

- **Distinctive Dish/Menu** – Restaurants that offer highly unique dish/menu that triggers their curiosity and sense of exploration
- Source of Information: Online reviews from social media (TikTok, Facebook, Instagram)

3

- **Price** – Price range is another factor that will help determine the quality and taste of the food

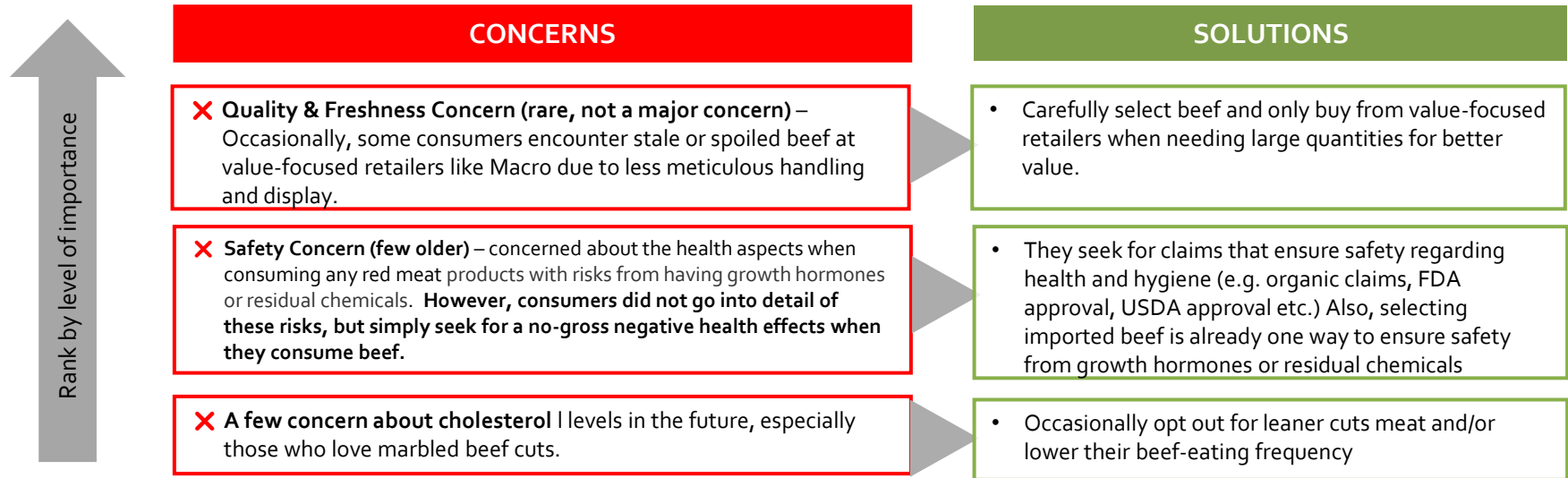
"เราเลือกจากเมนูก่อนเลย แล้วค่อยไปดูรีวิวว่าร้านไหนดูดี" / "I simply choose from what I want to eat and then go see reviews of which restaurant looks good for that dish."
(Older, Bangkok)

"เราดูวิธีที่เค้าพรีเซนต์เมนู ถ้ามันดูน่ากินมันก็คงอร่อยจริงๆ." / "I look at the food presentation. If it looks appetizing, then it's probably good" (Younger, Bangkok)

Thai consumers do not have critical concerns about beef consumption



However, few, mild concerns that Thai consumers have is regarding Quality/Freshness, Safety, and Cholesterol concerns.



"มีบ้างที่ไปซื้อ Macro แล้วได้เนื้อไม่สดกลับบ้านมา." /
"There are occasions where I came home with
spoiled beef from Macro." (Older, younger)

"แฟนผมคอเลสเตอรอลสูง พยายามไม่กินบ่อย
เท่าเดิม." / "My boyfriend's cholesterol is
quite high, we try to cut back a bit."
(Younger, Bangkok)



Understanding Quality, Trust & Traceability

Definitions of Quality – Freshness, taste / aroma, price and country of origin define a good quality meat



'Quality' results taste - the better the quality, the better the taste. However, a few also defines QUALITY through the lens of safety and nutritional value.



• Quality is defined by:

- **Country of Origin (COO)** – Where the beef is from dictates the taste and quality. The image of the country will influence the perception they have of the beef (e.g. Japan is known for craft/meticulousness which leads to well-raised beef such as Wagyu, Australia is known for their natural surroundings,, therefore, their beef is naturally, organically raised)
- **Rearing Method** – Its diet, absence of growth hormones, and harmful chemical residues, free-range etc. all of which leads to a better taste experience, safety, and nutritional value. Consumers collect these information through experience overtime, whether through staff, online pages, or from noticing the certifications on pack they usually buy
- **Freshness** – Associated with better freshness of beef: vivid red colour, not pale or dulled colour
- **Taste, Texture, Aroma** – An elevated level of taste, texture and aroma that elevates the overall indulgence
- **Higher price**
- **Premium packaging** (e.g. black container, premium label design, nicely cut pieces)

"เป็นเนื้อที่ไม่มีสารเร่งฮอร์โมน ปลอดภัยต่าง." / "I think of beef that is absence of growth hormones, no harmful chemical residues, and organic grass-fed."
(Older, Bangkok)

• Quality is highly important, as it leads to better taste experience and assurance for safety and nutritional value

- **Practical:** Better taste experience and higher nutritional value
- **Emotional:**
 - Better satisfaction and enjoyment from good taste
 - Higher engagement to the meat component in their meal

• Information sources:

- **Brand of the meat** – Brands that have established their credibility and trust in the market (e.g. Harvey, AMG) has a halo effect that leads to instant perceived quality
- **Label/Tags on pack** – given details/information on the label (e.g. COO, cow's diet, certifications)
- **Shelf Signs** – Signs on shelf indicates the COO whether it's local or imported, and which country is it imported from.

"นึกถึงความสด สีสด ไม่คั่ว." / "I think of freshness, fresh red colour, not dull colour."
(Younger, Bangkok)

Consumers assess the quality of beef based on the brand and labels on the packaging. While they may only skim through the information, it provides assurance and helps build trust in the product's quality

Trust in beef provides peace of mind and assurance about both quality and safety



For consumers this is shaped by country reputation, strict standards, and credible certification. Trust simplifies the buying process for consumers, but it doesn't always justify a higher price unless compared to less credible options



Trust is defined and cued:

- **Country's Image & Credibility** – e.g. Japan is known for meticulously raised Wagyu, USA is known for Black Angus .
 - **Certification** – Each country will have different stamp approval or grading system to guarantee their quality standards (e.g. USDA for USA, A5 grading system for Japanese Wagyu, AUS-MEAT in Australia)
 - **Brand** – Brands from specific countries (e.g. Harvey, AMG)
- **Strict standards & thorough process** – the more detailed and strict, the greater the trust in the brand or manufacturer. Consumers judge this based on the certifications and badges on the pack (e.g. FDA, USDA) and overtime have gained **rough understanding** through staff, FB pages, etc. on what these certifications mean
- **Retailers credibility**
- **High Visibility & Presence** – Commonly available in multiple groceries, retailers, restaurants. Being accepted and trusted by the key players of the food industry assures them that it is trustworthy.

- **Trust has high importance** because it gives consumers peace of mind and assurance when purchasing beef without having to put effort to scrutinize the product
 - **Emotional:** Trust is built based on the story, and the whole process that helps elevate emotional engagement to their whole experience from purchasing, cooking, to eating.
 - **Practical:** It simplifies the purchasing journey by eliminating doubts & uncertainty

"แบรนด์ที่น่าเชื่อถือ มีการรับรองว่าปลอดภัย." / "A brand that is credible and has a guarantee of some sort that it's SAFE." (Older, Bangkok)

"ถ้าวางขายหลายๆ ที่ก็น่าเชื่อถือ." / "If it's seen and sold everywhere, it has credibility." (Younger, Bangkok)

"ทำให้เรารู้สึกมั่นใจว่ามันปลอดภัย สะอาด เพราะเราเห็นตั้งแต่การเลี้ยงดูที่ดี ที่ละเอียด" / "The process makes us feel like it's safe, clean because we can see the quality and detailed process of how they raise the cows " (Older, Bangkok)

Sources of Information about Trust –

Trust can be established through 3 main drivers: Real people in communities sharing their first-hand, unfiltered experience, through PREMIUM image whether through retails, restaurants, and EXPERTISE through staffs or butcher shop owners



Source	Information Received	Recalled Information	Credibility
Social media – (Youtube videos, Facebook beef community pages, cooking shows)	<ul style="list-style-type: none"> Japanese beef being raised with beer and music Cooking shows (e.g. Black Angus from USA) Cooking recipes for beef dishes Aussie beef are only grass-fed that makes the meat more delicious (from social media) 	<i>Same as information received</i>	High credibility <ul style="list-style-type: none"> FB community pages makes up of real consumers sharing real experiences Cooking shows and its establishment that connotes credibility
Staff in retail & butcher shop's owners	<ul style="list-style-type: none"> Standards and processes of rearing Seasonal promotions (e.g. Aussie Beef season) Taste & texture of each country's beef Trusting in the quality of retailer's curation (derived from long-establishment and other quality products of cross category) 	<ul style="list-style-type: none"> Taste & texture of each country's beef (e.g. Butcher shop's owners explain how Argentina is known for beef tongue) Seasonal Promotions (e.g. BOGOs, discounts on imported beef from xx country) 	High credibility <ul style="list-style-type: none"> Butcher Shop – The owner & staff have in-depth knowledge about beef Retailers – Premium, top-tier retailers (e.g. Tops, Villa, Gourmet) are long-established in high quality products. Therefore, credibility and trust halos to all the assortment offered in the store.
Packaging Labels & stamps	<ul style="list-style-type: none"> Country of origin Country's Certification Labels / stamps on pack Cow's Diet 	Country's Certification – <ul style="list-style-type: none"> USDA from USA A5, F1 from Japan Labels /Stamps- 'Organic' claim 	High credibility – The more certifications and stamps, the more assurance it gives the consumers. Even though they're not savvy nor curious to know what each means in an in-depth way, but it shows that it went through strict standards and thorough process
Restaurant	<ul style="list-style-type: none"> Beef menu promotions (e.g. Australian beef steak, A5 Japanese Wagyu) 	<i>Same as information received</i>	High credibility for most premium quality restaurants. Consumers judges by the premiumness of the restaurant (e.g. price, ambience, décor, branding of the restaurant)
Word of Mouth (Friends/Family)	<i>N/A - Thai consumers did not mentioned any influence from friends/family</i>		

Trust in beef - Perceptions vary by COO, by linking a country's reputation, standards, and processing methods to consumer confidence



Japan is known for craftsmanship, Australia and the USA for reliability. However, Brazil, Argentina, and India for lower trust due to least familiarity



HIGH



LOW

JAPAN

Japan (as a whole) is associated with craftsmanship, meticulousness, story behind products that leads to exceptional quality, and therefore, trust. Japanese BBQ is a well-known beef cuisine in Thailand, known to feature Japanese Wagyu beef.

AUSTRALIA & NZ

Both are comparatively trustworthy as they are neighbouring countries and viewed to have similar process/quality.

- AU - The most accessible beef in Thailand, commonly used in restaurants and readily available in grocery stores. This leads to establishing strong trust

UNITED STATES

The country's image of beef burger culture creates strong Trust halo effect in their beef quality. Consumers are also aware of strict export standards (e.g. USDA). High familiarity in Thailand (e.g. Black Angus)

ARGENTINA & BRAZIL

Not a common choice amongst Thai consumers, therefore, lower trust established

INDIA

The country's image of being less hygienic leads to low trust. Low familiarity as consumers have not seen or experience Indian beef in Thailand

"ญี่ปุ่นคำดีเรื่องความเป็นศิลปะ ความ craft อยู่แล้ว มันเลยมีสตอรี่ทำให้เรารู้สึกมั่นใจ." / "Japan is already known for its arts and craftsmanship There's a story to it and it makes me confident and have trust in their products." (Younger, Bangkok)

"มันเป็นเรื่องราวที่เราได้ยินมาด้วย เคยเห็นข่าวออนไลน์ว่าคำเปิดเพลงให้วิวฟัง มันทำให้เราเชื่อมโยงในสินค้า ผูกกับเรื่องคุณภาพ." / "It's the stories I hear about Japan. I also remember seeing an online page saying they turn on music for the cows. It just makes me trust in their products and that links to the quality" (Younger, Bangkok)

"เราเห็นเนื้อออสเตรเลียทุกที่ ร้านอาหารเนื้อส่วนใหญ่ก็เป็นเนื้อออส มันเลยคุ้นเคย ทำให้มันใจ." / "We see Aussie beef everywhere. Most restaurants will have it so it's familiar, making me trust it." (Older, Bangkok)

"ถ้าเนื้อที่มาจากออส จะมั่นใจที่จะกินดิบมากกว่า." / "If it's Aussie beef I'm more confident to eat it raw." (Older, Bangkok)

"มันคือภาพที่เราเห็นเวลาไปต่างประเทศนั้นๆ สำหรับออสเตรเลียก็เห็นทุ่งหญ้าเขียวๆ ภูเขา ภูมิอากาศบ้านคำที่เป็นธรรมชาติ ก็จะคิดว่าเลี้ยงวัวแบบธรรมชาติ ก็น่าจะดี." / "It's the image we envision when thinking of that country. For Australia, we often picture green pastures, mountains, and a natural climate, which makes us believe the cattle are raised naturally, leading to good quality." (Younger, Bangkok)

"ประเทศอินเดียมันแอบไม่ค่อยน่าเชื่อถือ อาหาร street food คำเราขังท้องเสียได้เลย." / "I'm not so confident with Indian beef, even their street food can give us diarrhea (Younger, Bangkok)

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

Awareness of Traceability is low in Thailand



Only a few older consumers have heard of it, typically introduced through butcher shops, premium markets, and YouTube clips.

SPONTANEOUS:

- Most consumers are not aware of this concept before
- Only a few respondents (**from the older demographics**) are familiar with this concept. They understand clearly that this gives transparency regarding the end-to-end process of the beef.
- Source of awareness:
 - **Butcher shops** – This can either be proactively introduced by the owner, or it can be consumer's curiosity to understand more that is triggered by labels on the pack (e.g. cow's picture/name, certifications), or even the array of options that require explanation to help consumers make an informed decision
 - **Labels at premium Gourmet Market** – Consumers mostly mentioned QR codes or number being provided for them to scan
 - **YouTube clips**
- Overall, the concept of TRACEABILITY is frequently associated with Japanese beef as a top-of-mind. This perhaps is derived both from the country's overall image of art, craft and meticulousness, but also through collected experiences and knowledge consumers gained over time through various sources (same sources mentioned before)

"เราเคยรู้อยู่แล้วจากYoutube ที่เคยเห็นของว่าญี่ปุ่น สามารถดูได้ในทุกขั้นตอน ว่าวัวมีการเลี้ยงดูยังไง กินยาแบบไหน ชื่ออะไร." / "I've seen the story of cows in Japan in Youtube before. Customers are able to see how it's raised, what they're fed with, even the name of the cow." (Older, Bangkok)

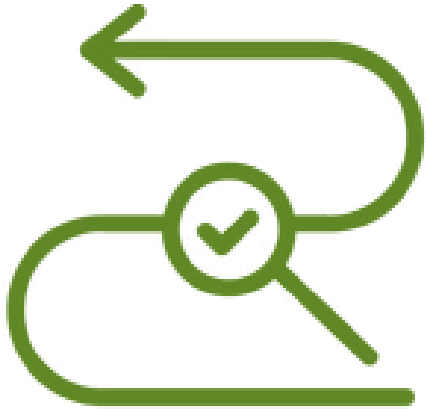
"ตอนนี้ก็มีนะแบบนี้ จะมี QR โค้ดบนแพ็คเกจของเนื้อญี่ปุ่น ตามห้าง Gourmet Market." / "I've seen QR codes on the pack of Japanese beef at Gourmet Market for customers to track." (Older, Bangkok)

"ผมเคยเห็นอะไรแบบนี้ที่อังกฤษ." / "I'm familiar with this concept because I've seen it before when I travelled to England." (Older, Bangkok)

After prompted, consumers are able to comprehend the concept



While consumers understand that traceability provides transparency, reinforcing trust and confidence, it is not a primary purchase driver (more of a 'nice to know'). This response stems from a lack of education on its significance. Therefore, it has the same weight of importance as knowing the COO, but it does not trigger higher engagement to the product/brand.



- **PROMPTED AWARENESS** - Once we shown the description, some consumers are reminded that they've heard of this before, while others have not heard of it before. Those who are familiar with the concept mentioned their awareness is derived from labels in Gourmet retail or Butcher shops that states the cow's name, birth date, slaughter date, etc.
 - **COMPREHENSION** is high - Consumers clearly understand this concept is about giving transparency; and therefore, leads to confidence and assurance in the product.
 - **IMPORTANCE** - The concept is simply a 'nice-to-know' for consumers. While it does reinforce trust and confidence in the product, it is not their main criteria to purchase.
 - More 'trust' does not equate to 'more value'
 - Consumers already have a solid level of trust just from know the COO that is familiar and known for beef (e.g. Australia, Japan, USA)
- COMMUNICATION MEDIUM & MESSAGING** – Educational messages are required; that can guide them with knowledge, so as to understand the concept better
- **Consumer-friendly approach** expected - easy-to-digest information that they can immediately understand without too much effort.
 - **Info-graphics** on signs on shelves or on the pack that visualized the journey of the cow, or why traceability is important in a way that is eye-catching (visual over text)
 - **Short, intriguing headlines** (e.g. 'Where am I from', 'How am I safe / natural?', 'Scan for safety assurance')
 - **Spokesperson**– Utilising people to speak the message in a relevant, approachable way to educate importance of the matter (e.g. Presenters/reviewers who are known for food, staffs at retails, etc.) Consumers did not have specifications on who the presenters/ reviewers must be. However, their persona should be relevant and coincides with food.

"ต้อง Educate คนก่อน เราไม่ได้สนใจเรื่องนี้ แต่ต้องทำให้เราเข้าใจก่อนว่าทำไมเรื่องนี้สำคัญ." / "They should educate the customers first. We're currently not interested in this matter, but they have to make us understand first why it's important." (Older, Bangkok)

"ต้องทำข้อความที่สั้นๆ ง่ายๆ" / "Have a short, concise message." (Younger, Bangkok)

"เค้าควรทำเป็น info graphics ให้เราไม่ต้องอ่านเยอะ ตัวหนังสือน้อยๆ ภาพเยอะๆ." / "They should make it into an info-graphics. Less texts, more visuals." (Younger, Bangkok)

illuminate To increase engagement, messages must be educational, consumer-friendly, and easy to understand



Deep Dive into Country of Origin & Australian Beef & Lamb

Awareness & importance of COO – Highly important factor



COO used as a main indicator in judging quality. Highest awareness and quality, especially for beef from Japan, Australia, and USA



BEEF:

- Country of Origin is highly important as it's the main indicator for consumers to judge the quality of the beef. Especially for In-home consumption, consumers rely on this indicator to measure the Quality and, therefore, taste experience of the meat

SPONTANEOUS AWARENESS:

Highest awareness:



Lower awareness





"เนื้อออสเตรเลียจะเป็นอันแรกที่นึกถึง หาได้ง่าย เป็นที่นิยม." / "I think of Australian beef first. It's easy to find and it's popular." (Older, Bangkok)

"ไม่ค่อยคุ้นเคยกับเนื้อจากArgentina หรือBrazil เลย ไม่ค่อยเห็นด้วยมั้ง." / "I'm not too familiar with beef from Argentina or Brazil. Maybe it's because I don't see these very often" (Younger, Bangkok)

Spontaneous association of COO – Japan and Australia are the two primary sources of beef for Thai consumers



Japanese beef is reserved for special occasions and indulgence; Australian beef is enjoyed more frequently

COUNTRY	ASSOCIATIONS:
 JAPAN	<ul style="list-style-type: none"> • Spontaneous associations – Exceptional quality, Full indulgence, High Price, Wagyu • Exceptional quality (intricate beef taste /texture), but not an everyday choice due to high price, & high fat content. ✓ Exquisite Taste, texture – intricate marbling, soft, juicy, melts in the mouth, high indulgence ✓ Meticulous Process – associates to intricate raising methods that leads to good texture beef (e.g. grass-fed, grain-fed, beer-fed, music, etc.) ✗ High priced – Not suitable for every day, casual occasions ✗ High fat content – Not suitable to eat as often due to health concerns, and overly rich taste. • Communications recalled - Story behind of how the cows are raised from end to end (e.g. fed with beer, have them listen to music, etc.). The source of information is Youtube videos and social media
 AUSTRALIA	<ul style="list-style-type: none"> • Spontaneous associations – Most popular, approachable, accessible, high-quality beef in Thailand • Good 'value for money' due to its high quality, good texture/taste that is familiar, within approachable price ✓ Dense, but soft texture, fun or satisfying to chew without being too sticky ✓ Wide range of quality, cuts, grades to choose from ✓ Less fat (marbling), therefore, able to eat more, without feeling too rich (due to good balance of fat) and more frequently ✓ Aromatic ✗ If cooked medium well-done, texture can be too tough. ✗ Not as juicy due to less marbling. • Communications recalled - Associated with natural landscapes—mountains, rivers, free-range cows, natural seasons, and grass-fed practices—offering a sense of safety and an 'organic' feel – This perception is mostly derived from the overall perception of the country.



"เนื้อออสเตรเลียเป็นอะไรที่คนไทยคุ้นเคย น่าจะเพราะมันหอม นุ่ม หนึบแต่ไม่เหนียว." / "Aussie beef is what Thais commonly choose. Maybe because of its dense but soft texture. Not too chewy." (Older, Bangkok)

"เนื้อญี่ปุ่นมันแทรกเยอะ ปลายเนื้อละเอียด แต่กินไปเรื่อยๆ จะเลี่ยน "Japanese beef has a lot of fat, very intricate marbling, but eating too much of it will be too rich." (Younger, Bangkok)

Spontaneous association of COO – American beef is also well regarded, but price does not always constitute value for money



Thai beef is seen as an affordable, no-frills choice, ideal for Thai dishes where spices and herbs dominate, making imported beef unnecessary

COUNTRY	ASSOCIATIONS:
 <p>USA</p>	<ul style="list-style-type: none"> • Spontaneous associations – Highly dense texture, red vivid colour, thick cuts, Black Angus beef <ul style="list-style-type: none"> • A premium-grade, highly dense, thick and juicy that is fitting for steaks. ✓ Dense, chewy texture (chewier than AUS beef) - why is that good? ✓ Fitting for steaks ✓ Clear beef aromas ✗ Less fresh due to far transportation, consumers see it as less fresh compared to other COO beef ✗ Less value for money – highly priced due to distance travelled, and taste/texture does not always justify the increased price. ✗ For some, highly dense texture is not preferred • Communications recalled - A few have recalled seeing the quality process of how cows are raised that leads to premium quality. Most do not recall any communication
 <p>THAILAND</p>	<ul style="list-style-type: none"> • Spontaneous associations – Most suitable for Thai local dishes with a texture that is more chewy than imported beef. ✓ Fitting for local dishes – its leaner and tougher texture that suits stir-fry dishes (e.g. Beef Krapao) due to its coarser texture. Also, Thais do not want to waste good, premium imported beef since it will be overpowered with spices/herbs. ✓ Lower price – Comes with lower price and therefore, good value for money ✗ Coarser/Tougher texture – Considered not as soft as imported beef such as Aussie beef. • Communications recalled - N/A No communications were mentioned

"เนื้อแดงเข้ม หนา สายพันธุ์ Black Angus กลิ่นแรง" / "US beef is bold red, thick, it's Black Angus breed, and very strong aroma." (Older, Bangkok)

"เนื้อไทยมันอร่อยกว่ากับเมนูไทย ที่มีเครื่องเทศแรง ไปกรรบก ลิ่นเนื้ออยู่แล้ว" / "Thai beef is better with Thai dishes. There are herbs and spices that overcome the beef taste." (Younger, Bangkok)

Overview: Comparison of Countries on key factors (Beef) – AU is highly ranked on each variable, but often behind Japan



AU beef is considered premium due to its strong country image, reputation for quality beef, and positive consumer experiences. Thai local beef is seen to be inferior to most imported beef, except for India. However, due to low to no familiarity with Brazilian and Argentinian beef, Thai beef is perceived high in Trust, Food Safety, and Animal welfare

FACTOR	LOWER				HIGHER	REASON FOR AU RANK
QUALITY	← [India]	[Thailand]	[Brazil] [Argentina]	[USA] [New Zealand] [Australia]	[Japan] →	<ul style="list-style-type: none"> AU – Based on consumers' positive experience that ensures Quality + positive perception of the country being known for beef
PRICE	← [India]	[Thailand]	[Brazil] [Argentina]	[New Zealand] [Australia]	[USA] [Japan] →	<ul style="list-style-type: none"> AU – more affordable price that comes with premium quality.
TRUST	← [India]	[Brazil] [Argentina]	[Thailand]	[New Zealand] [Australia] [USA] [Japan]	→	<ul style="list-style-type: none"> AU – country is known for beef, therefore, its credentials support their trust.
FOOD SAFETY	← [India]	[Brazil] [Argentina]	[Thailand]	[New Zealand] [Australia] [USA] [Japan]	→	<ul style="list-style-type: none"> AU – Associate to 'natural, organic' environment, organic process that ensures safety
ANIMAL WELFARE	← [India]	[Brazil] [Argentina]	[Thailand]	[New Zealand] [Australia] [USA] [Japan]	→	<ul style="list-style-type: none"> AU – Known for 'free-range' method that dilutes cows' stress level. It is likely derived from their overall perception of the country
PRESTIGE / STATUS	← [India]	[Thailand]	[Brazil] [Argentina]	[New Zealand] [Australia] [USA]	[Japan] →	<ul style="list-style-type: none"> AU – widely socially accepted and acknowledged as high-grade
HEALTH & NUTRITION	← [India]	[Thailand] [Brazil] [Argentina]	[New Zealand] [Australia]	[USA] [Japan]	→	<ul style="list-style-type: none"> AU – Considered comparably similar nutrition value with most other credible imported beef. A few derives from 'organic' perception

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



BEEF

"เนื้อออสเตรเลียเหมาะสำหรับเด็กมาก แล้วก็ ถ้าจะกินดิบ ก็จะไม่กลัวของออสเตรเลียดีที่สุด." / "Aussie beef is perfect for steaks and if I'm going to eat it rare or raw, I'd go for Aussie or Japanese beef." (Younger, Bangkok)

"เนื้อ US กลิ่นแรงมาก มีความกระด้างกว่า แต่แล้วแต่คนชอบ" / "US beef has a very strong smell, and a bit tougher texture. But this is up to each person's preference." (Older, Bangkok)

"เนื้อ New Zealand น่าจะคล้ายๆ ออสเตรเลีย จากภูมิอากาศ." / "I think NZ beef is similar to AUS's beef based on the geography and the weather." (Younger, Bangkok)

"เนื้อญี่ปุ่นนุ่มมาก คุณภาพของเนื้อดีมาก น่าจะเพราะการเลี้ยงดู หรือให้อาหารพิเศษ." / "Japanese beef is so soft, the quality of the beef is exceptional. Probably due to how it's raised and the special diet like grain-fed" (Younger, Bangkok)

"เคยเจอที่ร้าน Butchers shop ว่า Argentina ดังเรื่องลิ้นวัว." / "I've seen Argentinian beef in a butchers shop. They said that it's known for beef tongue." (Older, Bangkok)

"ไม่เคยลองเนื้อที่ Brazil เลย ไม่ค่อยมีชื่อเสียง" / "I haven't heard anything about Brazilian beef, I don't think it's popular here." (Older, Bangkok)

"เนื้อ US มีคุณภาพ ที่การรับรอง." / "US beef has quality, there's guarantee and certifications" (Younger, Bangkok)

"เนื้อออสเตรเลียพรีเมียม เพราะเป็นที่นิยม เนื้อสวย แพคเกจจิ้งดูแพง." / "Aussie beef is premium because it's very popular, beautiful cuts, and premium packaging" (Younger, Bangkok)

"เนื้อออสเตรเลียพรีเมียมหมดแหละ แต่แค่มีความต่างระหว่าง option มันมี range ของคุณภาพจริงๆ Wagyu ยังมีที่ Australia เลย." / "All Aussie beef is premium, but it just depends on the options. There's a range of quality. They even have Australian Wagyu" (Younger, Bangkok)

"เป็นความรู้สึกส่วนตัว ว่าเนื้อ Argentina น่าจะคล้ายๆ ของ US เพราะมันอยู่ใกล้กัน." / "This is purely my impression that Argentinian beef may be similar to US beef because it's geographically close to one another" (Younger, Bangkok)

"วัวที่ NZ กับ AUS น่าจะมีความสุขนะ เค้าปล่อยให้ free-range อยู่กับธรรมชาติ ทุ่งหญ้า แม่น้ำ ภูเขา แล้วน่าจะอุดมสมบูรณ์ด้วย." / "Beef from NZ and Australia must be happy cows because it's free-range and they can roam around nature in the fields, rivers, mountains. It should be very fertile" (Older, Bangkok)

Thai consumers highly trust and value the quality of Australian beef



This perception is driven by its widespread visibility, association with Australia's natural and authentic image, consistent taste and packaging, and occasional reinforcement through media



- **TRUST** – Australian beef is highly trustworthy:
 - **High Visibility** (& familiarity) in grocery stores, restaurants, and butcher shops
 - **Country's Image** –associated with natural scenery and free-range cows, emphasizing the expertise and authenticity of its beef quality that they can trust
 - **Communications** - no clear associations mentioned; but consumers have a very clear association to natural scenes from Australia and ladder it to how organically, naturally it's raised. This reinforces their trust in the Quality and Safety of the meat.
- **QUALITY** – Australian beef has established strong credentials in quality, and consumers' personal experience reinforces this perception :
 - **Own experiences** – The taste, texture, aroma that is elevated (compared to local beef) has time and time again reinforced the quality of Australian beef.
 - **Premium Packaging** of Australian beef brands connotes **QUALITY** (e.g. **black container box, premium label design, nicely cut piece**)
 - **Certifications on Pack** (e.g. Australia Global) – what certifications specifically?
 - **Communications** - A few respondents recalled this perception being derived from cooking shows (e.g. Master Chef) showcasing Australian beef as premium quality and star ingredient.

"เป็นเนื้อที่ถูกปากคนไทย มีคุณภาพเพราะมีตรา Australia Global ที่รับรองคุณภาพ" / "It's what suits Thai taste, and there's assured quality from the stamp on the pack 'Australia Global.'" (Older, Bangkok)

"เราคุ้นเคยกับมันอยู่แล้ว ร้านอาหารที่ไหนเราก็ใช้เนื้อออสเตรเลีย มันเหมือนทุกที่ก็เห็นตรงกันว่าเป็นเนื้อที่มีคุณภาพ." / "It's everywhere. It's in every restaurant that has beef and it's like everyone attest to this that it has quality." (Younger, Bangkok)

Aussie Beef & Lamb Labelling is largely unfamiliar



However, the design is associated with natural elements, reinforcing perceptions of authenticity and organic quality, while the 'Aussie' name builds trust due to Australia's established positive reputation in Thailand

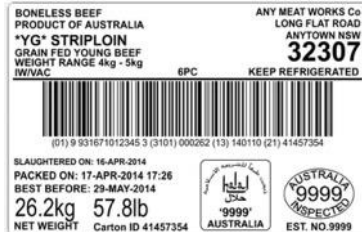


- The majority of Thai consumers have not seen this logo
 - A few has mentioned that they have in passing at grocery stores.
- **Comprehension** – While most consumers do not recognize that the logo is the silhouette of Australia, they can associate it with natural elements (mountains, sky, rivers, grass fields) evoking the cows' natural environment and reinforcing perceptions of authenticity, and organic quality.
 - Trust is established simply from the name 'Aussie' Beef and & Lamb simply because it shows COO from Australia, which already has established positive credentials in Thailand.
- **Impact on decision making** – the logo has neutral impact
 - Australian brands inherently carry a halo effect of Quality and Trust, with consumers perceiving all Australian brands similarly as long as they originate from Australia.
 - Therefore, it has potential to be considered in their Australian brand repertoire due to its credibility

"ก็เฉยๆ นะ ไม่ได้โดดเด่นอะไร แต่ดูน่าเชื่อถือดี" /
"It's okay not too distinctive, but it's credible
looking." (Younger, Bangkok)

"ทำให้เราเชื่อมั่นเป็นแบรนด์ของออส." / "This makes
us know that this is Australian brand. It gives
assurance" (Older, Bangkok)

Clearly communicates that the meat is from Australia; and hence it has potential to be included in consumers' brand choices



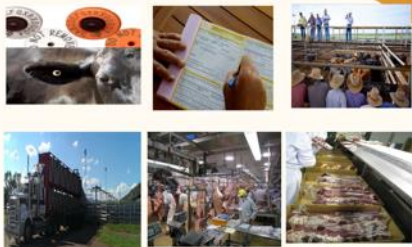
Australia's Red Meat Integrity System Reinforces Trust & Safety



It holds moderate appeal, but it doesn't directly influence their beef purchase decisions (more of a 'nice to know')

AUSTRALIAN BEEF PRODUCTION IDENTIFICATION & TRACEABILITY - National Livestock Identification System

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



RESTRICTED. © Meat and Livestock Australia.



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

- **Spontaneously, consumers reacted positively**, as it reinforces trust (provides a story and transparency) and it can trigger curiosity on how they can track it (e.g. QR code) it quickly and seamlessly
- **Moderate appeal overall** – This is simply a nice-to-have information but is not a deciding factor when purchasing beef.
 - ✓ **Resonant elements:** This reinforces trust and safety well, making consumers feel confident, especially when it comes to Premium-grade beef.
 - ✗ **However, this information is seen as simply a 'process-based' check list**, whereas what truly engages them is understanding the tangible benefits they will gain from these processes (e.g. safety, quality, etc.)
- **Credibility** – This system is seen as highly credible - Having a detailed, transparent process/steps demonstrates strict standards & a thorough process (one of the ways to judge trust)
- **Impact on decision making** - While this reinforces trust (especially when it comes to premium-grade beef), it only holds limited interest as it doesn't directly relate to taste experience. Therefore, the most impact will be that it may be considered part of their repertoire.

"ก็ชอบนะ เห็นตั้งแต่ต้นน้ำถึงปลายน้ำ แต่ก็ต้องลองกินก่อนว่าอร่อยมั้ย." / "It's nice. Seeing the whole process from start to finish, but I'll have to taste it first whether it's good" (Older,

Bangkok)

"ก็ต้องทำให้มัน track ได้ง่าย ๆ แต่อันนี้ก็ดี น่าเชื่อถือ แต่ก็ไม่ได้อร่อย." / "Just need to be easy for customers to track. But this is good, it's credible, but it doesn't mean it'll be delicious." (Older,

Bangkok)

Australia's Red Meat Integrity System – Thai stimulus



การระบุ (IDENTIFICATION) และการตรวจสอบย้อนกลับ (TRACEABILITY) การผลิตเนื้อวัวออสเตรเลีย – ระบบระบุปศุสัตว์แห่งชาติ

- ✓ ติด Ear Tag
- ✓ บันทึกรายละเอียด
- ✓ เอกสาร (ประกาศผู้ขายแห่งชาติ)
- ✓ ลานขาย
- ✓ ขนส่ง
- ✓ สังเกตการณ์
- ✓ โรงเชือด
- ✓ แขนเย็บ
- ✓ ข่าแหละ ตัดแต่ง
- ✓ บรรจุ



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Communication Recommendations – Educating consumers Is the priority, and explaining what the consumer benefits would be from this



The tone of voice - to be done in a light-hearted, relatable way that can attract attention

- **Most important aspects to communicate:**
 - **Why Traceability & Integrity is important, and how it can benefit the consumer:** Thai consumers do not put much weight on this matter unless they understand WHY it's important:
 - **Quality Assurance to ensure consistent/ good taste** : Being informed on meat's origin, farming practices, feed/nutrition, handling and storage methods that ensures consistent quality and enhances meat's flavour profile.
 - **Food Safety for No-gross negative health effects:** Informing practices, standards, and certifications that ensure no-gross negative health effects (e.g. no growth hormones, antibiotic-free meat, health-monitoring, etc.)
 - **Relatable messaging**, including light-hearted, humorous elements - include a short message/story that bridges a connection between the consumer and the product through humour, curiosity, or a light-hearted story. E.g. a cow that's given a human voice : *'Where Am I From?'*, *'Why Am I Delicious?'*, *'I had a great life --- find out why'*
- **Information sources** – most expect to see information on the shelf / pack (using info-graphics)
 - **Spokesperson Online or Offline**– Utilising people to speak the message in a relevant, approachable way to educate importance of the matter (e.g. Presenters/reviewers who are known for food, staffs at retails, etc.) Consumers did not have specifications on who the presenters/ reviewers must be. However, their persona should be relevant and coincides with food.
 - **Booth at Markets** with demonstration on how to scan QR code on the pack + free gifts
- **Impact on purchase decision making:** Highlighting clearly on the consumer benefits of the system will increase their engagement on the product and therefore, may increase their willingness to pay more. This is particularly influential for special dinner occasions when consumers seek premium beef, serving as a compelling story to justify its value

"จริงๆ ถ้ามีการสื่อสารที่ให้ feeling เหมือนเลี้ยงเองที่บ้าน แบบ home-made ก็ดีนะคะ." / *"If they communicated in a home-made, wholesome way it's kinda nice."* (Younger, Bangkok)

"เขียนป้ายใหญ่ๆ บนแพ็คก็ได้ว่า 'ฉันมาจากไหน' / *"Have a big quote on the pack saying 'Where Am I From?'"* (Older, Bangkok)

"โชว์โลโก้บนจอLED ให้เห็นว่าสแกนดูยังไง แล้วก็กิจกรรม ส่วนลดอะไรให้" / *"Show how to scan on LED screen to let us see how it works. With some activities and free giveaways'."* (Older, Bangkok)



SUMMARY & WAY FORWARD

Thai consumers prioritise cut style, country of origin, and marbling quality the most



Beef is highly versatile, Thai consumers use it to prepare a wide variety of local and foreign dishes. It is a staple for daily meals, but also for special occasions

1

Red meat purchase decision making

Top 3 commonalities of criteria between both younger and older demographics:

- **Cut, Cut Style, Breed to suit the dish of preference:** Thai consumers select specific cuts or breeds to match the dish they're preparing or their desired marbling
- **Country of Origin:** Consumers consider the country of origin to find beef characteristics that best fit a particular dish
- **Marbling, Cut Quality, Grade:** They prioritize the fat-to-meat ratio and overall quality of the cut to determine texture and taste

- **Older consumers are observed to be more discerning** and seek more detailed information when making choices:
 - Consider cow's diet (grass-fed, grain-fed) for taste and aroma.
 - Value safety claims like organic labels and FDA approval.

Quality beef leads to superior taste



Trust in beef through assurances of safety and country reputation.

While traceability reinforces transparency and trust, its impact on purchasing is limited

2

Understanding trust and quality for consumers

3

Importance of traceability

- **QUALITY results in superior taste** - the better the quality, the better the taste. However, a few also define through the lens of Safety and nutritional value.
 - Quality is assessed from brand and labels on the packaging. While they may only skim through the information, it provides assurance and helps build trust in the product's quality
- **TRUST comes from assurance in quality and safety**, shaped by country reputation, strict standards, and credible certification. Trust provides peace of mind by assuring quality and simplifies the buying process, but it doesn't always justify a higher price unless compared to less credible options
 - Countries with strong, positive associations—like Japan for craftsmanship and Australia for reliability — instills higher trust, leading consumers to believe in the consistent, high-quality beef they offer
- **TRACEABILITY** - Consumers understand that traceability boosts transparency and trust, but it's not a primary factor in purchasing, as trust already stems from familiar COOs (Australia, Japan, USA)
 - Hence, to increase engagement, messages must be educational, consumer-friendly, and easy to understand. They must focus on the benefit of traceability to the end consumer (ultimately how it impacts on the taste)

Australian beef, alongside Japanese beef, is one of the two most popular choices in Thailand



Australian beef is perceived as approachable, accessible, and a good value for money, offering familiar taste and texture while being associated with a natural, organic image

4

Perceptions towards
Australian red meat

- **Key perceptions:** Australian beef is approachable, familiar and affordable
 - Popular, high-quality beef that is readily available and affordable compared to other premium beef options. It offers good quality and taste at a reasonable price
 - Australia is also associated with natural landscapes, free-range cows, and natural seasons, giving it an "organic" feel and perpetuating the perception of trust and quality
- **Reaction to Integrity** - Consumers already associate Australian beef with credibility, and expertise, leading to a natural perception of high integrity in their practices
 - They appreciate the transparency, safety, and quality assurance provided by the Integrity System, but it is more of a 'nice to know', rather than having a key impact on decisions

Recommendation: Communication on Australia's Traceability and Integrity System need to focus on the end benefit to consumers



It is essential to educate consumers to develop greater awareness and understanding on the issue; using light-hearted, consumer-friendly, engaging messaging to connect

- **Most important to communicate: WHY Traceability & Integrity is important, and how it can benefit the consumer:** Thai consumers do not put much weight on this matter unless they understand WHY it's important:
 - **Quality Assurance to ensure consistent/ good taste** : Being informed on meat's origin, farming practices, feed/nutrition, handling and storage methods that ensures consistent quality and enhances meat's flavour profile.
 - **Food Safety for No-gross negative health effects:** Informing practices, standards, and certifications that ensure no-gross negative health effects (e.g. no growth hormones, antibiotic-free meat, health-monitoring, etc.)
- **Messaging needs to be relatable and engaging** – the use of light-hearted, humorous elements is important for Thai consumers- include a short message/story that bridges a connection between the consumer and the product through humour, curiosity, or a light-hearted story. E.g. a cow that's given a human voice : *'Where Am I From?', 'Why Am I Delicious?', 'I had a great life --- find out why'*

Thank You

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