

# Project Tracy

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

VIETNAM 

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

PERP<sup>i</sup>

ESOMAR<sup>23</sup>  
Corporate



**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**



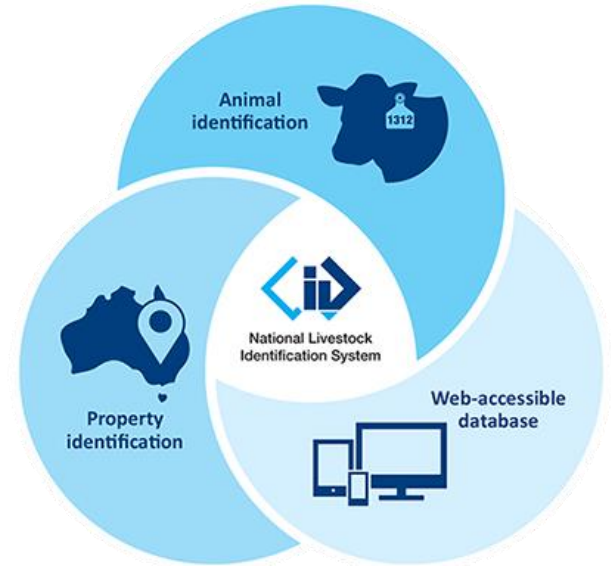
# The Australian red meat industry has developed a red meat traceability system that can track all Australian red meat from birth to slaughter

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>	25-26 Nov	22-23 Nov	21-22 Nov	21-22 Nov	18-19 Nov	25-26 Nov	19-20 Nov



# RESEARCH FINDINGS

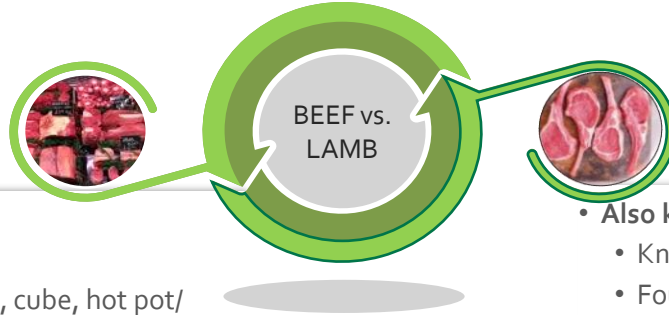


# IMPORTED BEEF & LAMB CATEGORY UNDERSTANDING

# Beef recalled as top of mind imported red meat, whilst lamb is rarely consumed across targets



Beef is consumed almost exclusively among imported red meat; whilst lamb is perceived to have a strong/harsh smell and there is limited knowledge of preparation and cooking of lamb.



IMPORTED BEEF

- **Number 1 spontaneous mention for “red meat”**
  - Perceived to be high in nutrition and to be tasty
  - Provides different serving ways i.e. steak, stir fry, cube, hot pot/ grilled, minced beef, etc.
- **More and more popular, due to:**
  - Increased availability through many points of sale
  - The price is considered as more and more reasonable (compared to increasing price of pork; and/or consumers having higher living standard who look for more tasty meat)
  - Developing themselves with many recipes (local and international) and preparation skill

- **Also known red meat variant**
  - Known to provide high nutrition
  - Found in the menu of Western style or fine-dining restaurants
- **But rarely consumed and not yet popular with the majority of Vietnamese**
  - Not familiar with the taste and smell
  - Limited knowledge of lamb preparation.

IMPORTED LAMB

"Giờ ăn bò nhập khẩu rất tiện và hợp vệ sinh. Giá cả cũng hợp lý mà mấy bạn nhỏ trong nhà cũng thích." / "It is very convenient to buy imported beef. We find it more hygienic and reasonable. My kids like it very much." - Older, HCMC

"Cũng biết thịt cừu nhiều dinh dưỡng, nhưng mùi nồng lắm. Em ăn buffet 1 lần rồi thôi à, chưa ăn lại." / "I know lamb is nutritious, but the smell is very strong. I tried once when having a buffet but have not tried it the second time yet." - Younger, HCMC

# For the majority, beef is mainly consumed at home



Beef consumption out-of-home is considered as more expensive and is eaten less frequently

## IN-HOME CONSUMPTION

- Beef is top of mind for imported red meat consumed at home
- Kids are the one who influence the decision – “*Mom, I want beef steak this weekend.*” or “*Why don’t we have beef barbeque this Sunday, Mummy?*”
- Most eat beef 1-2 times per week; with the average personal consumption around 80–100g per setting (stir fry) or 150–200g per steak
- Types of dish:
  - Weekdays: stir fry with vegetables, steak, etc.
  - Weekends/ family gatherings: hot pot, barbeque, beef salad, etc.
- Treatments: choosing cut beef as desired shapes/ dishes from supermarket/ imported meat store, unfreeze then cook when need

## OUT OF HOME CONSUMPTION

- Besides seafood, imported beef is the second choice when eating out
- Kids are the main influencers, then husband comes as second – they request specific restaurants to visit, based on dish e.g. visit Gogi House for grilled beef?”
- Average consumption is around 1 – 2 times per month
- Amount: As per restaurant serves (à la cart), or free flow (buffet menu)
- Type of dish: hot pot, steak, barbeque, buffet menu or à la cart
- Example of restaurants: Kichi-Kichi (conveyor belt hotpot), Hadilao/ Manwah/ Gogi House ( barbeque and hotpot or buffet menu), The Deck/ Mr Bistek/ El Gaucho/ Nam Son (for steak)



*“Thịt bò đã cắt sẵn theo từng món rồi, nên cứ rã đông rồi nấu luôn. Tính ra rất tiện.”/ “I usually buy beef with the desired cut. Just unfrozen and cook. It is very convenient for me.”* - Older, HCMC



*“Nhà em đã có những quán ruột. Thèm nướng thì đi Gogi House, thèm bit tết thì qua The Deck.”/ “We have some favourite restaurants. If thinking of barbeque and hotpot, we will choose Gogi House. Then The Deck for beef steak.”* - Younger, HCMC





# Local dishes are more consumed on weekdays, with more diverse dishes consumed on weekends and special events

On weekdays, consumers often prepare simple dishes or use pre-prepared ingredients for convenience in cooking. For special occasions, the meals are usually more diverse and involve more elaborate preparations.

## LOCAL DISHES

DAILY BEEF DISHES



Stir-fried beef with Tonkin jasmine flowers



Stir-fried glass noodles with beef



Sauté diced beef



Stir-fried beef with curry and coconut milk

## INTERNATIONAL DISHES

Not typically associated with daily dishes

SPECIAL BEEF DISHES FOR SPECIAL EVENTS



Vietnamese rare beef salad with lime



Vietnamese hotpot such as beef hot pot with fermented rice broth



Beef rolls with enoki mushrooms



Beef stew with beans



Pan-seared beef



Beefsteak



Grilled beef



Hotpot such as Kichi Kichi, Hadilao

"Ngày thường thì mình chỉ làm những món cơ bản như xào hoặc làm bò lúc lắc thôi, còn cuối tuần có thời gian hơn thì mình nướng lẩu, làm gỏi hoặc làm beefsteak." / "On regular days, I usually stick to simple dishes like stir-fried beef or shaking beef. On weekends, when I have more time, I go for hot pot, salads, or beefsteak" - Younger, HCMC

"Nếu có khách thì thường sẽ ăn lẩu, còn cuối tuần thì có thể dồn nấu ăn ngon 1 bữa cho gia đình, đồ ăn sẽ đa dạng hơn." / "If there are guests, hotpot is usually the preferred choice. On weekends, families might take the time to prepare a delicious meal, with a more diverse selection of dishes" - Older, HCMC

# Supermarkets are the key channels to buy imported beef to eat at-home

Specialty store/online store comes as second choice – for greater convenience



"Khi mình đi siêu thị thì kết hợp thêm mua sắm nhiều thứ khác, nhiều khi mất thời gian và tốn kém hơn. Còn mua ở cửa hàng thịt nhập thì tập trung chuyên môn đúng món mình cần thôi." / "When I shop at supermarket, I combine shopping for many other things, which sometimes takes time and more spending that needed. If I go to an imported meat store, I can focus on what exactly written in my shopping list." - Older, HCMC

1

## SUPERMARKET/ HYPERMARKET. E.g. AEON mall, Mega Market, GO, Emart

- ✓ A wide variety of meats are available, including pre-packaged sets paired with complementary ingredients such as grilled & fresh vegetables, and sauces, allowing time for selection (consumers can spend 30 mins to 1 hour shopping in supermarket, browsing, comparing prices etc)
- ✓ Reasonable pricing with frequent promotional offers
- ✓ Ensure food safety standards – consumers believe that before importing, the supermarkets follow stringent quality control procedures to guarantee food safety (verifying the origin of the meat, properly storing it, and enforcing food hygiene and safety regulations for employees).
- ✗ Meat are mixed up together; and there are no staff available for detailed consultation
- Source of information: New product sampling/ in-store promotion staff (PG)

2

## SPECIALTY STORE/ ONLINE STORE. E.g. Home Farm (popular), Hà Hiền

- ✓ Convenient, requiring minimal time for parking or shopping
- ✓ Staff available to provide advice and cut meat to suit customers' needs
- ✓ High preservation standards (both during delivery and storage at the store) – kept at a cold temperature (employees will close the freezer if a customer forgets to) and include dry ice during delivery to keep the product cold
- ✓ A variety of pre-made meat combos/ sets, often bundled with complementary food items. E.g. beefsteak paired with potato chips, sauces (BBQ and mushroom cream) etc
- ✓ Support online/ apps/ livestream purchases
- ✗ Delivered products are often close to their expiration date (i.e. been on the shelf for some time)
- ✗ Limited brand options and less variety in product selections
- Source of information: Staff will recommend the appropriate type of beef based on the buyer's needs.

# Minimart/ Convenience store considered as third channel for beef purchase



These are the final option for dealing with unexpected situations, such as an impromptu gathering with friends or running out of meat while cooking – skew to younger



3

## MINIMART/ CONVENIENCE STORE

- ✓ Able to meet urgent needs
- ✗ Only sell common cuts (e.g. beef brisket and beef tenderloin)
- ✗ Price are 10% higher than supermarket rates
- ✗ Usually sell meat from the U.S. and Australia – Limited options for COO (compared to Supermarket)
- Source of information: Purchases are often made quickly based on the buyer's needs (desired cuts) with limited consultation of staff or little attention to brand
- Examples: Bach Hoa Xanh, Co.op Food, Ministop, Circle K, An Nam

"Ở cửa hàng tiện lợi thì khi nào bí bách quá thì mình mới chạy qua mua thôi" / "At convenience stores, I only go to buy when it's really urgent". - Younger, HCMC

# Sources of information for beef (for in-home consumption) – Product packaging is key



Consumers also rely on staff advice, and online search for information about imported beef.

## IN-HOME CONSUMPTION

- Information that is often considered includes origin, use-by date, and production date.
- Main sources of information (in order of impact / importance)
  - Details on product packaging: information about origin; use-by date and production date (to ensure quality); and characteristics of the product (leanness, fat content, and type of meat)
  - In-store staff: Providing practical advice such as the right type of beef for specific dishes; differentiating the quality and characteristics of beef from various countries
  - Google search:
    - Commonly used search terms: “thit bo nhập khẩu” (imported beef), “Imported beef + origin”, “positioning of the meat”
    - Finding reputable stores and comparing products: Comments, reviews, and evaluations of different types of imported beef to make comparisons.



*“Search trên Google là một phần nhưng chủ yếu là ở siêu thị. Trên bao bì sản phẩm cũng thể hiện rõ độ nạc, độ mỡ, xuất xứ, hạn sử dụng và hạn sản xuất.” / “Google searches play a role, but purchasing primarily happens at supermarkets. Product packaging clearly displays leanness, fat content, origin, expiration date, and production date.” - Older, HCMC*

# Sources of information to choose beef when eating out – Trust in restaurant is key (reviews as main focus)



Recommendations from family and acquaintances are the most reliable sources



## OUT OF HOME CONSUMPTION

- When eating beef at restaurants, customers often prioritise the restaurant itself. Trust is placed in the establishment as most don't disclose the beef's origin, or it's unclear which type will be served. However, steakhouses may specify types like Australian or American beef on their menus.
- Main sources of information (in order of impact /importance)
  - Family & acquaintance recommendations: the most reliable source, based on real experiences
  - Social media (Facebook, Instagram and TikTok): for references
    - Facebook – **skew to older**: Groups like Hoi nhung nguoi phu nu dam dang (Homemakers Group ) or Nghien Bep (Kitchen Enthusiasts)
    - Instagram: Food reviewer accounts
    - TikTok – **skew to Younger**: less focused on specific types of beef but includes reviews of restaurants from popular influencers such as Vien Vibi, Vinh Thich An Ngon, Hoang Meo, and Te Linh, etc.), either sponsored or genuine.

*"Em lựa chọn quán theo review và đánh giá của quán đó và quán đó chế biến theo món nào mình thích nữa. Thường thì em sẽ chọn món sau đó sẽ chọn quán. Tôi quán thì mình cũng không chọn được thịt bò nước nào. Nếu mà em muốn ăn thịt bò của Nhật thì em sẽ vào nhà hàng của Nhật" / "I choose restaurants based on reviews, ratings, and whether they serve dishes I like. Usually, I decide on the dish first, then pick the restaurant. At the restaurant, I cannot choose the origin of the beef. If I want Japanese beef, I will go to a Japanese restaurant." - Younger, HCMC*

# Quality is the key factor when purchasing imported beef to consume at home



Whilst eating out, consumers choose the restaurants where the desired dishes are served.

## IN-HOME CONSUMPTION

- 1** **Quality** – Food is directly connected to nutrition and health for the whole family members. Family members (mostly kids, husband and parents) give comments about the quality i.e. tender/ chewy, highly fat/ lean, etc.
  - Mostly based on acquaintances' recommendation, the packaging, or self-experience, etc. to choose the beef.
- 2** **Source of origin** – Gives reassurance on the quality and the taste. The packaging helps them to distinguish the origins; PG/ store staff provide suggestions on beef types fitting to a specific dish
- 3** **Prestige of seller** – Guarantee the availability, preservation, stable price and consistent service. Consumers choose based on its location, convenience.
  - Recommended by acquaintances, advertising or self-search.

"Khi mua về nhà ăn thì mình ưu tiên chất lượng vì trực tiếp ăn vào người. Lựa chọn kỹ càng từ màu sắc đến xuất xứ ngay khi ở siêu thị luôn." / "When purchase to use at home, I prioritise quality. As we consume the beef into our body. I can consider the colour, the origin, etc. right at the supermarket." - Younger, HCMC

Rank by level of importance

## OUT OF HOME CONSUMPTION

- 1** **Dish/ Menu** – Select the restaurants where they serve the desired dishes/ menu. This is often recommended or discussed among family members.
  - Acquaintances' suggestion/ reviewers from social platform/ advertisement/ self-experience, etc are also important
- 2** **Prestige of restaurant** – To guarantee the standard of dishes/ services and consistent cooking skills. Experience and belief in restaurant's quality and prestige in beef selection.
- 3** **Quality of dishes** – To keep consumers' satisfaction; they collect the comments from family members to get approval
  - Reviews from acquaintances and reviewers or self-experience is also important

"Thường thì thèm món gì mới rủ nhau ra tới đúng quán đó ăn, vì mỗi quán sẽ mạnh về 1 món nhất định." / "When thinking about a specific dish, we may link it to a specific restaurant as each restaurant is famous for one or some signature dishes." - Older, HCMC

# Limited concerns recorded about red meat consumption in general



With current amount of beef consumption, the majority believe they are eating a balanced diet. Hence the lack of concern



CONCERNS	SOLUTIONS
<p>✗ Gout – Warning from media about gout which is caused by red meat consumption. However, this is lesser concern, as most people are consuming less than 500g of red meat per week.</p>	<ul style="list-style-type: none"><li>• Consume less than 500g per week</li><li>• Frequency is around 1 – 2 times/ per week</li><li>• Balancing their daily meal with vegetables</li></ul>
<p>✗ High blood pressure for elderly – Only a concern to women who live with their older parents.</p>	<ul style="list-style-type: none"><li>• Limit the amount of red meat (beef) given to elders. Use different types of protein instead</li></ul>
<p>✗ Weight gain – Some women worry that if eating red meat more often (more than 3 times per week with higher amount of red meat), they will consume more fat (contained in red meat) and will gain weight</p>	<ul style="list-style-type: none"><li>• Control amount of beef consumed each time (less than 100g for grilled/ stir fry or 150-200g for steak)</li><li>• Choose beef with less fat content (prefer Australian over American beef, etc.)</li></ul>

*"Mỗi lần ăn tính ra có 80-100gr thịt bò thôi, nên cũng khó có thể bị gout được." / "By calculation, each member of my family only use 80 – 100 gram beef per meal. That amount is not a concern of causing gout." - Younger, HCMC*

*"Khi mua thịt bò chỉ ưu tiên loại ít mỡ vừa không ngán vừa tránh béo phì." / "When buying beef, I prioritise low-fat beef to avoid greasiness as well as obesity." - Older, HCMC*

These women also control amount of beef and fat for each meal which helps them to keep fit and maintain a healthy diet



# Understanding Quality, Trust & Traceability

# As a developing market, consumers in Vietnam define QUALITY in quite simple and basic terms – freshness and origin are key



Consumers also rely on sensorials after cooking (tenderness, sweetness, aroma)

## • Quality is a combination several key factors:

1. **Freshness:** by looking at colour – not too dark, it should be pinky red and no blood inside the plastic bag
2. **Origin:** clear information of country of origin; as well as expiration date and weight
3. **After cooking:**
  - Tenderness: not chewy; must be tender and juicy when eating
  - Sweetness: natural sweetness from beef
  - Good smell: can easily smell the fat and beef naturally (some mentioned harsh smell when cooking Vietnamese beef)

## • Quality is crucial as it directly connects to health (better quality beef is better for the body)

- Emotionally, better quality beef is tastier in mouth and smells more fragrant when cooking and eating

## • The majority collect recommendations from acquaintances, reviews from social platforms and websites

- Acquaintances' suggestions considered the most important and credible, as it's given without any financial benefits. Moreover, they have real experience with the product. The recommendations mostly are about origins and/or stores.



"Dựa theo kinh nghiệm nhìn màu sắc và độ tươi của miếng bò tươi. Rồi cộng thêm xuất xứ và loại bò mình hay mua mà chọn." / "Just follow my experience, I may look at the colour and the freshness of the beef. I also check the origin and the type of beef that I usually purchase." - Older, HCMC

"Tiêu chuẩn chăn nuôi cao hơn nên thịt sạch sẽ thấy an tâm hơn. Việt Nam hay cắt bán ngay chợ không sạch sẽ, nhiều khi để ngoài đường lâu cũng dễ nhiễm khuẩn hơn." / "High standard in farming makes imported beef more hygienic, so I feel more reliable. Vietnamese beef mostly sells openly in wet market for hours where it can be easily contaminated." - Younger, HCMC

# Trust is mostly defined in belief of origin and seller's prestige



## No specific definition for Trust in imported beef



- For most, TRUST comes from the quality of the beef or the brand name of the seller (i.e. supermarket/ store/ restaurant, etc.)
  - At supermarket/ store: consumers can select the beef by themselves (see the freshness/ source/ origin)
  - At restaurant: consumers choose the brand name (long-established restaurant, how big the chain is, and the quality of meat as seen in reviews and self-experience, etc.)
- Trust represented the quality that had been proven over the years
  - **Emotional:** feel safe, worry-free about the source/ preservation process/ service
  - **Practical:** understand a prestige seller must have its standard to select beef (food safety, expiration dates, preservation process, etc.)
  - **Interest to pay premium:** to ensure qualified beef with standardised process and selection procedure.
- **Sources of information:** from search engine, yet acquaintances play the most reliable (not getting profit from the recommendation, and has actual experience)

"Thương hiệu lớn có quy trình nhập hàng rõ ràng từ đó tạo nên tên tuổi của họ. Rồi chính nhờ sự uy tín đó người ta mới tin tưởng hơn đến chất lượng sản phẩm, dịch vụ của họ." / *"Big brand name always has clear process to select the products. Then consumers believe in the prestige of a brand who provides good quality of products and services."* - Younger, HCMC

"Thương hiệu lớn giá thành có cao hơn chút thì vẫn yên tâm. Vì mình hiểu họ cần phải chi cho con người để thực hiện đúng quy trình hay có dịch vụ tốt hơn." / *"I am still happy to pay more for a big brand name. As I understand they have to hire more people to get all the procedure and service done."* - Older, HCMC

"Khi chọn mua bò nhập khẩu về nhà ăn thì Úc và Mỹ là 2 loại bò mình tin tưởng. Trong đợt dịch ít lựa chọn mua nhầm bò của nước Hồi giáo nào đó, sau nghe tin bò của họ bị nhiễm bệnh mà sợ quá trời." / *"When choosing to buy imported beef to eat at home, Australian and American are the two types of beef I trust. During the pandemic, there are limited options to choose, I bought from some Muslim country. After that, hearing that their beef were infected, I was so scared."* - Older, HCMC

# Sources of Information about Trust – Word of mouth is the most reliable



Social media, search engines, sellers, and promotion girls (PGs) primarily focus on marketing strategies or driving sales through promotional efforts, unlike the unbiased recommendations from family and friends.



Source	Information Received	Recalled Information	Credibility
<b>Word of Mouth (Friends/Family)</b>	Information from relatives or friends who have used the product, sharing direct experiences about quality and origin. Their shared information is detailed and trustful.	<ul style="list-style-type: none"> <li>• More likely to remember details (pros &amp; cons) based on personal experiences shared</li> <li>• They can provide information on where to buy imported meat, the country of origin, and places to eat</li> </ul>	Most reliable (no monetary benefit for giving information)
<b>Sales assistant/ Seller</b>	Sellers share details about the product's origin, meat type, pricing, and promotions through direct communication or online platforms such as livestreams.	<ul style="list-style-type: none"> <li>• Information from direct conversations (consulting information, COO, types of meat suitable for dishes)</li> <li>• Images of product</li> </ul>	Medium credibility, depending on the honesty of the seller.
<b>Promotion girl (PG)</b>	<ul style="list-style-type: none"> <li>• The country of origin, quality</li> <li>• The flavour/ experience of product</li> <li>• Promotions</li> </ul>	<ul style="list-style-type: none"> <li>• The flavour of beef, quality, COO due to face-to-face interaction</li> <li>• The package</li> </ul>	Usually give the first impression towards new products
<b>Social media (Facebook/ TikTok)</b>	Advertisements about imported beef from suppliers or small vendors. User reviews or ratings.	<ul style="list-style-type: none"> <li>• TikTok: Eateries and restaurant to eat</li> <li>• Facebook: cooking recipes and some meat review posts</li> </ul>	Just for reference or finding new experiences/trials
<b>Search engine</b>	"Bo nhap khau/ imported beef", "Imported beef + origin", or type the name of dish "Bo nhung lau, bo bit tet"/ beef for hot pot/ beef for beefsteak" are popular key words that they used to search	<ul style="list-style-type: none"> <li>• The product's origin</li> <li>• Price comparison</li> <li>• Reliable stores - when searching, Home Farm store will appear on the top</li> </ul>	Just for searching extra information about the product, price comparison or place to purchase

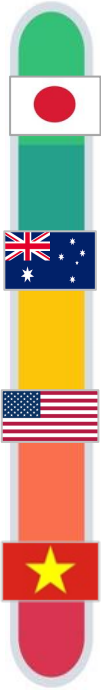
# Japan is the most highly trusted country for Vietnamese consumers



Associations with nature, technology & safety standards are factors to build trust in customers. Japan is well-known in Vietnamese market for a long time and Japanese products have seamlessly integrated into every aspect of Vietnamese life.



HIGH



JAPAN

- High quality and reliability - Vietnamese are well-acquainted with Japanese products (e.g. home appliances, cars, cosmetic), especially those made for the domestic market.
- These products are known for their durability and quality in Vietnam.

AUSTRALIA

- When people think of Australia, images of kangaroos and koalas often come to mind, symbolizing lush green environments and untouched nature. This perception reflects the ample space for animals to live and thrive freely, fostering confidence in the safety and cleanliness of its natural, high-quality products.

USA

- High standard, but skewed to industrial – The USA leans heavily on the application of science and technology, as its advancements in these fields are exceptionally developed, even considered groundbreaking. As a result, American agriculture and livestock farming is perceived as less natural

VIETNAM

- Lacking internationally comparable testing standards – Vietnam has yet to establish testing standards on par with other countries in the region and around the world.
- Agriculture is not conducted on a large scale, as it primarily consists of small household businesses, leading to inconsistent product quality.

LOW

# Traceability seems new but appreciated by the majority

Although some consumers heard of the term, they have not seen or tried any product with that benefit yet.



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

**SPONTANEOUS:** Low awareness overall in Vietnam

- Only some consumers heard of the term, but not sure from what source or context (maybe from news)
- Consumers think they can check the origin, from which farm/ location and expiration date.

**PROMPTED:** Once prompted, some consumers have some awareness, from other categories (dairy, local pork – but these do not have QR codes provided for scanning/ checking) – QR code is expected

- **Comprehension:** It is seen to guarantee the source, and all the steps of the process from transferring, slaughter, etc; right up to the retailer, etc. QR code is expected
  - Providing slaughtering date seem new to all – it will ensure the meat is new, and that details cannot be fakes all the details
- **Importance:** Traceability is important as it gives more trustworthiness to the meat and can encourage purchase intent
- **Communication** – Consumers expect to see this at supermarket/ store on LED TV or standees next to the freezer
  - Staff in the store or PG in the supermarket to provide/ explain the term;
  - Introduce & encourage consumers to scan QR code for trial, more credible way to experience
  - Website (of Australian beef/ meat brand/ supermarkets/ stores) & fan pages (of Australian beef/ meat brand / supermarkets/ stores) on social platforms to provide all information about the whole process.

"Tính năng truy xuất nguồn gốc này rất hay, tạo sự tin tưởng và cung cấp thông tin rõ ràng về nguồn gốc." / "This traceability feature is very good. It creates trust and provides clear information about origin." - Older, HCMC

"Tăng độ tin cậy lên nhiều lần vì rất khó để làm giả những thông tin này." / "Increase reliability significantly. As I believe it's very difficult to fake these information." - Younger, HCMC

"Nên làm đoạn clip chiếu trên các nền tảng mạng xã hội và để trên màn hình LED siêu thị. Vừa gây chú ý mà dễ hình dung nữa." / "Should make a clip to show on social networks and play on LED screens in the supermarket. It can grab our attention and easy to visualise." - Younger, HCMC



## Deep Dive into Country of Origin & Australian Beef

# Australia is considered as a prestige origin with high awareness



America, Australia, and Japan are the leading countries associated with imported beef. American beef is often recognised for its brisket, while Japan is renowned for its premium Wagyu

## BEEF:

- Country of origin is important, as it determines the flavour, price, and quality of the product. Certain countries are known for specific beef cuts and preparation methods.
  - Japanese Wagyu is famous for its marbling and tenderness,
  - American beef is renowned for brisket (used in hotpot, grilling)
  - And Australian beef (tenderloin, ribeye) is often used for beefsteak.
- **In-home:** Choosing based on personal preferences (e.g. liking fatty meat or affordable options) or the intended cooking method (grilling, hotpot, pan-searing, etc.)
- **Out of home:** Restaurants and food service establishments often use country of origin as a marketing tool to differentiate their offerings (e.g. Japanese restaurant with Japanese beef). There are also many restaurants that let customers choose what COO of beef they want to process.

## Highest awareness:



"Nguồn gốc xuất xứ quyết định giá cả, chất lượng như thế nào và mùi vị của thịt. Thịt bò Úc có mùi rất đặc trưng nhưng mà nó khô, còn ba chỉ bò Mỹ thì phổ biến, rẻ và nhiều mỡ, phù hợp nướng hơn." / "The origin determines the price, quality, and flavour of the beef. Australian beef has a very distinctive aroma but tends to be dry, while American brisket is popular, affordable, and more fat which is more suitable for grilling." (Older, HCMC)

## Lower awareness






"Ở một số quán ăn như The Deck thì nó cũng sẽ để nguồn gốc xuất xứ của bò, cách chế biến như thế nào ở trên Menu của nhà hàng. Nếu không có thì mình sẽ hỏi" / "At some restaurants, like The Deck, the menu specifies the beef's country of origin and its preparation method. If this information is not provided, customers will typically ask." (Younger, HCMC)

# Spontaneous association of Top 3 COO – Japan, Australia, USA



Australian beef believed as naturally fed, with a high quality and affordability

Rank by level of preference overall

COUNTRY	ASSOCIATIONS:
 JAPAN	<ul style="list-style-type: none"> <li>• <b>Spontaneous associations</b> – expensive, quality, Wagyu, Kobe</li> <li>• <b>Overall</b> – Generally positive, with a strong emphasis on quality, safety, health and famous beef</li> <li>✓ High-quality beef (for all JP beef), well-known beef (for Wagyu)</li> <li>✓ Strict food safety standard &amp; strict farming practices –belief driven by broad product category perceptions (all products exported from Japan undergo strict inspection)</li> <li>✗ High price compared to other origins, making consumers hesitant to cook at home</li> <li>✗ In Vietnam, imports mainly focus on famous cuts, with limited availability of less popular options.</li> <li>• <b>Communications recalled</b> - Wagyu beef in luxurious settings and high-end restaurants (these restaurants will advertise that their restaurants have Japanese Wagyu as a premium option)</li> </ul>
 AUSTRALIA	<ul style="list-style-type: none"> <li>• <b>Spontaneous associations</b> – natural, grass-fed, affordable, high-quality, large-scale farms</li> <li>• <b>Overall</b> – overall assessment: Positive, with a focus on natural, healthy, and affordable beef</li> <li>✓ Beef with distinctive flavour (challenging for respondents to describe clearly, but some mention a grass smell)</li> <li>✓ Wide range of cuts and products available</li> <li>✓ Good value for money</li> <li>✓ Raised on large-scale farms, grass-fed &amp; natural production methods; ensures quality through regulated processes - Influenced by milk commercials and the perception low population density. They also connect Australia with its natural greenery</li> <li>✗ Can be less marbled and tender than other countries (usually used tenderloin, ribeye for beefsteak)</li> <li>• <b>Communications recalled</b> – Advertising for Australian dairy shows vast green pastures used for livestock grazing</li> </ul>
 USA	<ul style="list-style-type: none"> <li>• <b>Spontaneous associations</b> – brisket, affordable</li> <li>• <b>Overall</b> – Positive, with a strong reputation for the variety cuts, affordability, popularity</li> <li>✓ Popular with many brands (Swift, Choice, Angus, Prime, Brisket) &amp; sold in many places</li> <li>✓ A diverse range of cuts (brisket, tenderloin, ribeye, short ribs) available</li> <li>✗ Higher marbling content - the fat content in American beef is considered higher than lean meat options</li> <li>• <b>Communications recalled</b> - American brisket is widely served at buffets, hotpots, and BBQ restaurants, leading consumers to perceive it as fairly mainstream.</li> </ul>

*"Thịt bò của Nhật có chất lượng đồng đều, ngay cả những sản phẩm khác như mỹ phẩm, thực phẩm chức năng và họ đặc biệt quan tâm đến sức khỏe, nên tuổi thọ của họ cũng cao nhất" / "Japanese beef is known for its consistent quality, much like their other products such as cosmetics and supplements. They place a strong emphasis on health, which contributes to their high life expectancy."*  
 (Younger, HCMC)

*"Em thấy có mấy quảng cáo sữa rửa rồi có mấy nông trại bò to lắm chi. Bò được thả cho ăn cỏ tự nhiên... Úc thì em thấy ba chi không có trội, chủ yếu là thịt thăn bò hoặc lõi vai. Mùi của thịt cũng rất đặc trưng, thơm" / "I've seen some milk ads showing large cattle farms where cows are grass-fed naturally. Australian brisket isn't prominent; it's mainly tenderloin or ribeye. The beef also has a very distinctive, aromatic flavour."*  
 (Older, HCMC)

*"Nghe tới Mỹ là em nghĩ tới ba chi bò Mỹ liền. Giá thành cũng rẻ hơn và thịt thì cũng nhiều mỡ hơn nên thường để ăn lẩu hoặc nướng cho đỡ ngán" / "When I think of the U.S., I immediately think of American brisket. Their beef is more affordable and has more fat, making it ideal for hotpot or grilling to avoid getting too greasy."*  
 (Older, HCMC)

No rejection to any COO, but they may hesitate to buy Chinese beef (although not available in Vietnam)

# Overview: Comparison of Countries on key factors (Beef) – Japan and Australia lead on most factors



Australia is well-regarded for its high animal welfare standards, with cattle raised naturally on open pastures, without being subjected to forced feeding or unnatural diets. Australian beef is believed to be premium, high quality product; however, still considered lower than Japanese (who only export Wagyu and Fuji) to Vietnam

FACTOR	LOWER		HIGHER	REASON FOR AU RANK
QUALITY				<ul style="list-style-type: none"> <li>AU - Offering a distinctive flavour. Grass-fed and raised naturally on large-scale farms. AU tends to be leaner, with less fat</li> </ul>
PRICE				<ul style="list-style-type: none"> <li>AU - Australian beef is moderately priced, costing 10,000–20,000 VND more than American beef</li> </ul>
TRUST				<ul style="list-style-type: none"> <li>AU - undergoes a strict rearing process, with regulated farming practices. Raised on large-scale farms with closed-loop production systems.</li> </ul>
FOOD SAFETY				<ul style="list-style-type: none"> <li>AU –raised naturally, without the application of industrial farming methods</li> </ul>
ANIMAL WELFARE				<ul style="list-style-type: none"> <li>AU –promotes a natural lifestyle; grass-fed, clean/hygienic environment, treated gentle, spacious farms</li> </ul>
PRESTIGE / STATUS				<ul style="list-style-type: none"> <li>AU follow Western standards, with a high quality of life and naturally raised livestock</li> </ul>
HEALTH & NUTRITION				<ul style="list-style-type: none"> <li>AU – Australian beef is leaner with less fat, making it a healthier option for adults.</li> </ul>

# Consumer verbatims about comparison of countries on key factors (Beef)



"Người Nhật thì họ kỹ tính nên những sản phẩm của họ đảm bảo được chất lượng cao. Và cũng phải như thế nào thì họ mới dám ăn đồ sống." / *"The Japanese are meticulous, so their products ensure high quality. It is also because of this attention to detail that they feel confident eating raw food."* (Older, HCMC)

"Úc thì nổi tiếng về việc chăn nuôi theo mô hình trang trại và chăn nuôi tự nhiên trên đồng cỏ xanh. Nhìn thấy tụi nó tận hưởng thiên nhiên trong lành mà ghen tỵ luôn." / *"Australia is famous for its farming model and natural grazing on lush green pastures. Seeing them enjoy the pure nature makes me jealous."* (Younger, HCMC)

"Em thấy Mỹ không tập trung về chăn nuôi, chủ yếu phát triển công nghiệp." / *"The U.S. seems less focused on livestock farming, with a primary emphasis on industrial development."* (Younger, HCMC)

"Giá thịt bò Nhật rất cao, em thấy bán ở nhà hàng sang trọng hoặc là nhà hàng chuyên bán đồ Nhật thôi, còn thịt bò Úc hay Mỹ thì em thấy bán nhiều ở siêu thị, dễ mua hơn." / *"Japanese beef is very expensive and is typically found in high-end or specialised Japanese restaurants. In contrast, Australian and American beef are more widely available especially in supermarkets."* (Younger, HCMC)

"Úc thì đất đai rộng và ít dân cư và nó có cơ hội sản xuất trên những đồng cỏ. Nên là khi sản xuất thì nó phải để ý đến thể hệ sau và mình nghĩ là quá trình xử lý chất thải của con bò cũng sẽ được áp dụng vô trong quá trình khác." / *"Australia has a vast land and a low population, providing opportunities for production on grasslands. This means production must consider future generations, and I believe waste management from cattle is likely integrated into other processes."* (Older, HCMC)

"Em thấy thịt bò Úc ít béo nên đỡ sợ dư mỡ. Thịt bò Nhật thì mặc dù mỡ sạch nhưng nhìn chung vẫn có mỡ nên cũng hơn ngán." / *"I find Australian beef to be less fatty, so it is less likely to feel greasy. While Japanese beef has clean fat, it still contains fat overall, which can make it feel a bit too rich."* (Older, HCMC)

# Australia delivers Trust on updated technology and is believed to have high quality in agriculture products



However, no communication from beef is recalled across targets.



- **TRUST** – Australian beef is considered trustworthy due to strict and high requirements/ standards for food and beverages within Australia – perception comes from news/ communication
  - Implementing high/ updating technology into agriculture – often linked to news or communications from Australian dairy industry
  - High standard in importing and exporting makes Australia a big brand name for its products
  - Australian products are long-established in many product categories in Vietnam, such as dairy, supplements, fruits, etc. (such as Aptamil, Blackmores, Nature's Way, Healthy Care, Meadow Fresh, Devondale, Australia's OWN, cherry, mandarin, orange, grape, etc.)
- **QUALITY** – Australian beef has strong Quality credentials in Vietnam; as high quality Australian beef is seen in the market, as well in fine-dining restaurants
  - Images of green fields, healthy/ cheerful cows, airy environment, etc. are strongly connect to Australia (from communication of dairy and tour services, etc.)
  - However, lack of communication for beef in Vietnam recalled.

*"Không hiểu sao khi nhắc tới Úc là hình ảnh cánh đồng, bò, thiên nhiên trong lành, v.v. hiện lên. Dù không nhớ là từ quảng cáo nào."/>* / "I cannot explain why, but whenever mentioning Australia, images of green fields, cows, pure nature, etc. come to mind. Although I don't remember which advertisement it was from." (Older, HCMC)

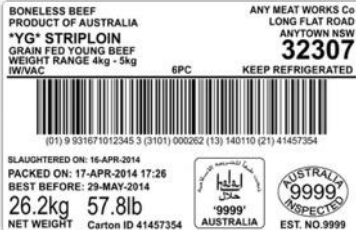
*"Nghe nói tới hàng Úc là thấy xịn rồi. Từ trái cây, sữa, thực phẩm chức năng, v.v."/>* / "In my mind, Australian products are good and premium such as fruits, dairy, supplements, etc." (Younger, HCMC)

Leveraging from other categories like dairy, supplements, fruits, etc; Australian beef is considered prestigious with high quality and trust (although no specific beef communication is recalled)

# Aussie Beef & Lamb Labelling is unfamiliar in Vietnam



Associations with the logo are positive, connected to Australia's nature (cues for more quality end beef product). They consider it artistic. The packaging details expiration date & slaughter date is also unique and interesting



- The majority of Vietnamese consumers have not seen this logo
- Comprehension – Once viewed, it is easy to comprehend, and positive associations
  - The colours connect to the the nature of Australia – green for tree/ grass, blue for ocean, yellow and red for the sunshine and sunset
  - Only some consumers recognise the shape of Australia
  - This can connote a high living standard for the cow with pure/ clean environment, airy living space (so a less stressful cow), which results in higher quality beef
  - Note: the clear expiration date and QR code for traceability is also appreciated – new and shows transparency
- Impact on decision making – Aussie Beef & Lamb Labelling is thought to have a positive impact on purchase choice, as it seems a more reliable product than other offerings
  - QR code on each piece of meat i.e. frozen right after slaughter in Australia, can help to prevent infection (helps them understand the process)

"Logo này đẹp quá, nhìn như bức tranh nghệ thuật vậy. Em cảm thấy như đang ngắm nhìn hoàng hôn trên thảo nguyên." / "This logo is so beautiful. It looks like a painting. I feel like watching the sunset on the prairie." (Younger, HCMC)

"Nhìn QR code này là tò mò giờ điện thoại ra quét liền á. Nó kích thích mình mua dùng thử vì đáng tin cậy hơn. Có thể mắc hơn 10% cũng ok." / "Looking at this QR code, I will be curious and take out my phone to scan. It stimulates me to buy because it is more reliable. It's still ok if I have to pay 10% more." (Older, HCMC)

## Positive comments towards the Aussie labelling cueing of high purchase intent across targets

# Australia's Red Meat Integrity System elicits appreciation and premium perceptions



Creates differentiation and newness compared to other offerings. It is also highly credible for Australia to implement such a system

**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 : "interesting, safe, new, more premium, good value for money, etc." are common terms response to the system
- Highly appealing overall, due to the transparency in the system
  - ✓ Consumers can check all the details about the beef that they buy and consume.
  - ✓ Credibility raised as this is new and unique – help consumers prevent eating unclear-origin and/ or infected beef.
  - ✗ However, some consumers expressed their concern of the expected price point – they expect this to cost (around 20 – 30% higher than current offerings)
- Credibility – This system is seen as highly credible; Vietnamese believe Australia can run the whole system as they are strong in agriculture and technology.
- Impact on decision making – This will trigger curiosity and purchase intent

*"Hệ thống này hoành tráng ghê luôn. Họ dám đưa ra như vậy thì không thể nào làm gian dối được." / "This system is huge and brilliant. If they dare to say so, it is impossible to lie or hide." (Older, HCMC)*

*"Chỉ những quốc gia uy tín mới có thể thực hiện được hệ thống này. Nó càng tăng thêm độ tin cậy cho người dùng. Em tò mò muốn dùng thử ghê." / "Only reputable countries can operate this system. It further increases consumers' reliability. I am curious and want to buy it." (Younger, HCMC)*



## Hệ thống Nhận diện và Truy xuất Nguồn gốc Sản xuất Thịt Bò Úc Hệ thống Nhận diện Gia súc Quốc gia

- ✓ Gắn thẻ tai
- ✓ Tài liệu (Tờ khai của nhà cung cấp)
  - ✓ Chợ mua bán gia súc
  - ✓ Vận chuyển
  - ✓ Giám sát
  - ✓ Giết mổ
  - ✓ Làm lạnh
  - ✓ Mổ xẻ và pha lóc
  - ✓ Đóng gói
  - ✓ Dán nhãn thùng carton
  - ✓ Kênh bán lẻ hiện đại



RESTRICTED. © Meat and Livestock Australia.



# Combining both online and offline communication is important to reach more consumers



## The Integrity system needs to a visualisation of the whole process (video clips on social platforms)

- **Most important aspects to communicate about traceability & integrity system:**
  - Introducing Traceability & Integrity System:
    - How it works – same as description in the slide (from ear tag, record details, ... to modern retailers)
    - How the system is different from other countries/ sources without this Integrity system (some local dairy or pork brand mentioned this system but without QR code)
  - Highlighting the value to consumers: how the meat is different, nutrition/ food safety benefits
- **Information sources** - most expect to see at point of sale or online
  - **Instore / point of sale (POS):** PG/ staff to introduce the system and provide leaflets; LED TV to show the clip; stand (around 1 meter height) to briefly advertise the traceability and the brand
  - **Online:** Website/ Youtube channel/ Facebook fanpage: share information and clip about the brand and traceability integrity system. TikTok/ online stores (such as Homefarm, Sashimi King, etc.), KOL: review and share about the product/ system
- **Impact on purchase decision making:**
  - Highly impact on purchase decision making thanks to clear communication
  - Direct communication from PG at POS will trigger curiosity and purchase intent
  - It may also prompt them to read/watch further and explore via online tools to deeply understand the brand, its value and increase credibility.



"Giờ em làm biếng đọc lắm. Cứ làm clip rồi chia sẻ trên mạng xã hội là tiếp cận được nhiều khách hàng nhất." / **"Now I am too lazy to read. Just make a clip and share it on social platforms. It will reach many customers."** (Younger, HCMC)

"Cho mấy bạn PG ở siêu thị, hoặc nhân viên cửa hàng giới thiệu thêm về thương hiệu cũng như hệ thống truy xuất nguồn gốc này. Nên để thêm màn hình LED tại quầy chiếu đoạn clip về hệ thống này luôn cho dễ hiểu." / **"PG at the supermarket or store staff to introduce about the brand and traceability system. It is recommended to add an LED screen at the counter showing a clip about this system. It will be easier to understand."** (Older, HCMC)



# SUMMARY & WAY FORWARD

# Vietnamese consumers prioritise quality (mostly by looking at colour), and country of origin



Women are the key decision makers for beef purchase. Beef is highly versatile, used in many local dishes, as well as it to prepare a wide variety of local and foreign dishes. Lamb is rarely consumed in Vietnam

1

Red meat purchase decision making

- Beef is consumed mostly at home (1 - 2 times per week) or out of home (1-2 times per month). On weekdays, local dishes (beef stir fry or stir fry noodles) at home, usually with local beef. On weekends & special occasions, there is a more diverse range of options (beef salad, hotpot, grill, steak, etc). Out of home, hotpot, BBQ or beef steak are most common.
- Supermarket is the top shopping destination for imported beef. With multi choices on origin and cuts; and it is reasonable and credible. Specialty store/ online stores focus on selling imported beef and convenient with combos and sets are also important for some consumers.
- When purchasing to eat at home, quality (pinky red, not too dark, and no blood inside the packaging) and country of origin are key choice factors. Acquaintances' suggestion believed as the most reliable source with real experience.
  - Whilst consumers think about prestige/ brand name of the restaurant prior to eating out. Only steakhouse provides information about beef's origin, buffet/ hot pot/ BBQ restaurants rarely show the origins.
- With balancing dietary between protein and vegetables, Vietnamese consumers show limited concerns towards consuming red meat (they consume around 80 – 100 gram of beef for weekdays; and 150 – 200 grams on weekends).

# Vietnamese consumers provide simple definitions towards Quality and Trust



V, but lack of knowledge about Traceability.

2

Understanding trust and quality for consumers

3

Importance of traceability

- **QUALITY**: is a combination of freshness (pinky red colour, no blood inside the pack), origin when choosing at store; as well as tenderness, sweetness and good smell after cooking
  - Quality is important as directly connected to health (as source of nutrition, but also need to ensure no toxins will enter body)
  - Recommendation from acquaintances and google search are common method to find information about imported beef.
- **TRUST**: is defined by the belief in country of origin and the trust / brand name of the seller (i.e. supermarket/ store/ restaurant, etc.)
  - Trust is represented by the quality that has been proven over the years. Emotionally, consumers are worry-free about the source/ preservation process. Practically, they understand a prestige seller/ brand must adhere to their own standards in food safety/ preservation process
- **TRACEABILITY** is a new concept to Vietnamese; but elicits interest; consumers are eager to explore more.
  - It results in increased credibility and triggers trial intent across targets as consumers can check the whole process from raising to processing. Consumers believed that only big organization can provide such information and drives confidence in their operation.

# Australian beef (along with Japanese) are the most well respected in Vietnam



Australian red meat and Integrity system is appreciated across targets with credibility and elicits purchase intent.

4

Perceptions towards  
Australian red meat

- Australian beef is highly praised:
  - Australian beef is widely available and familiar – existed in the menus of fine-dining restaurants and most supermarkets
  - High for animal welfare standards, with cattle raised naturally and freely on open pastures, without being subjected to forced feeding or unnatural diets.
  - Perceptions of Australian beef are leveraged from other categories of Australian products in Vietnam, like dairy, supplements, fruits, etc; - considered prestigious with high quality and trust
  - Overall, Australian beef is considered premium with high quality (but still considered lower than Japanese beef)
- **Reaction to Integrity** – The system is new and unique, can elicit interest. It is also considered credible that Australia can launch this system
  - The system shows its capability of raising high quality cows with genuine tracking tools. With this system, consumers believe that they can have high quality beef with clear origin and safe meat.
  - However, some are concerned that this system will result in an increase price

# Recommendations – Communicate all of the key parts of the process, but also on the benefit to the consumer, in relation to key product attributes



Online and offline communications are suggested to fully cover all targeted consumers.

The tone of voice should be professional to provide trust

- **Most important messages to communicate:**
  - To introduce Traceability & Integrity System – how the system works (from ear tag, raising at farm until processing and delivering to modern retailers)
  - Highlight how transparent the system can be; by supplying a QR code on label on beef - so more information can be accessed
  - Provide the benefits/ value that consumers can have – how the meat is different, nutritional values, food safety benefits
- **Messaging needs to be ???**
  - Communicating via both online and offline communications is suggested to build brand awareness and increase credibility.
  - Besides PG/ stands/ LED TV available at store/ supermarkets, introduction clips also recommended to show via online platforms for further reach.
  - Professional tone of voice to ensure the clear information and increase trust toward the whole Traceability and Integrity System.

# 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.