



Final report

Project Cyclone | Trust and Traceability

Defining insights into Australia's global positioning of MLA's integrity system and maximizing the value proposition for the supply chain

Project code: V.RDA.2011
Prepared by: Nicholas Bounds, Carolyn Reid
Kantar Insights Australia
Date published: 11 November 2021

PUBLISHED BY
Meat and Livestock Australia Limited
PO Box 1961
NORTH SYDNEY NSW 2059

Meat & Livestock Australia acknowledges the matching funds provided by the Australian Government to support the research and development detailed in this publication.

This publication is published by Meat & Livestock Australia Limited ABN 39 081 678 364 (MLA). Care is taken to ensure the accuracy of the information contained in this publication. However MLA cannot accept responsibility for the accuracy or completeness of the information or opinions contained in the publication. You should make your own enquiries before making decisions concerning your interests. Reproduction in whole or in part of this publication is prohibited without prior written consent of MLA.

Abstract

Australia's red meat integrity system ensures the livestock industry can stand by what it sells. Incorporating on-farm assurance and livestock traceability, the red meat integrity system protects the disease-free status of Australian red meat and underpins the marketing of our product as clean, safe and natural. Integrity Systems Company (ISC) is responsible for delivering this world leading red meat integrity system, managing and delivering the industry's on-farm assurance and through-chain traceability programs.

Trust in the Australian Country of Origin (COO) brand is the outcome sought but may have many and varied expressions across different markets.

To understand how ISC can support and communicate its benefits in building trust with different members of the value chain, they need to identify what they can credibly communicate to build Trust in Australian beef and lamb in different markets.

Qualitative research was conducted in 5 global markets (Australia, Japan, South Korea, Singapore, and UAE), with business in-depth interviews with trade and retail contacts in four export markets, and consumer research in all five markets.

The findings identified a clear role for the ISC to play in supporting and growing trust in Australian COO red meat in export markets. Integrity systems can and should reinforce safety perceptions of Australian product (seen as a hygiene factor) but have a greater role to play in showcasing Australian red meat industries differentiating perceptions of clean, humane rearing practices, that provide a point of difference that reinforces quality and ultimately premium perceptions of the AU COO brand.

Executive summary

Background

A challenge in communicating the value of integrity systems identified understanding trust is key:

- Australia's red meat tracing and integrity systems are viewed as world class
- Their understanding and importance in red meat purchase decisions is unknown
- 'Australian Integrity Systems' are unlikely to be understood in the literal sense within the value chain. The concept of 'trust', and its interpretations, may reflect as a proxy
- There is a need to explore what 'Trust' means in different markets and groups in the value chain, its importance to decision making, its interpretation and its relative strength to other competitor imports
- This knowledge could provide an opportunity for Australian brand owners to leverage, leading to a competitive advantage and potential price premium

The overarching research objective:

Identify how MLA can ensure Integrity Systems are fulfilling their contribution to making AU beef the most trusted imported red meat across markets amongst stakeholders at all parts of the value chain, ultimately maximising premium perceptions.

Project Objectives

The research objective was to address six key questions:

1. **Definition of trust in the context of integrity systems** – what does it mean, how is it expressed, and how does it relate to red meat integrity systems
2. **Awareness of AU red meat integrity systems** and the link to trust
3. **Perceptions of trust associated with AU beef** – relative to our main competition
4. **Preference of and need for safety** and its link to trust and premium pricing
5. **Preference of and need for quality** and its link to trust and premium pricing
6. **Preference of and need for traceability** and its link to trust and premium pricing

Methodology

Qualitative research was conducted in 5 global markets (Australia, Japan, South Korea, Singapore, and UAE), with business in-depth interviews with trade and retail contacts in four export markets, and consumer research in all five markets. 45-60 minute one-on-one virtual in-depth interviews were conducted with the Trade, Retail and Consumers between 28 May and 11 June 2021.

The target audiences and sample by market:

MARKET	TRADE		RETAIL Hyper/Supermarket, Butcher	CONSUMER All buy AU beef
	Wholesaler, Retailer	Importer,		
Australia	0		0	12
Japan	6		3	12
Singapore	3		6	12
South Korea	6		5	14
UAE	6		6	14

Results/key findings

- Australia's integrity system is not recognised as the best – but nor are those of competitors
- Inspiring trust in Australian beef is fundamental to solidifying COO and industry brand reputation and standing across the value chain
- Comprehending the details and benefits of Australian integrity systems can result in a competitive advantage and a price premium
- Australia as COO serves as a proxy for trust in Australian beef as one of the most trusted suppliers of imported red meat

Benefits to industry

This research identified Australia's traceability system is a proof point that strengthens Australia's Country of Origin (COO) credibility and underpins integrity and transparent business practices.

The opportunity exists to educate global markets about the benefits of Australian traceability and integrity system features to their country – across all parts of the value chain.

Demonstrating the competitive advantages that make Australian integrity systems more trustworthy and beneficial than others will help maximise premium perceptions.

Future research and recommendations

Future research should focus on evaluating value propositions to encourage trade, retail and consumers to actively use Australian traceability and integrity systems to understand the farm to table journey across the value chain, amplifying Country of Origin perceptions of responsible practices in raising beef that is ethically and humanely produced, and does not use artificial inputs (e.g. antibiotics or hormones) when grown/produced, that may compromise the health of the end users.

Table of contents

Abstract	2
Executive summary	3
1. Background	7
2. Objectives.....	8
3. Methodology	9
3.1 Two key stages of the research process	9
3.1.1 Stakeholder interviews	9
3.1.2 Consumer online boards.....	9
3.1.3 Trade Depth-Interviews.....	10
4. Results.....	12
4.1 Integrity systems and traceability.....	12
4.1.1 Traceability and its link to safety	12
4.1.2 Trade, retail, and consumer knowledge of the supply chain	12
4.1.3 Opportunities for traceability systems in growing trust in AU COO product.....	13
4.2.3.1 Building with the Trade:	13
4.2.3.2 Building with Retailers:	13
4.2.3.1 Building with Consumers	13
4.3 COO perceptions, drivers of choice and premium.....	14
4.3.1 Perceptions of Australian COO red meat vs. key COO competitors	14
4.3.1.1 Market specific COO perceptions.....	14
4.3.2 Factors in the choice of COO brand.....	16
4.3.3 What builds premium perceptions?	18
4.4 Safety, quality, and trust	18
4.4.1 The relationship between safety and quality for imported red meat	18
4.4.2 A framework for building trust: Integrity, Expertise, Responsibility	19
4.4.3 Building trust through integrity systems and traceability.....	20
4.4.4 Communicating key benefits of integrity systems to build Trust in the AU brand	21

5	Conclusion	23
	5.1 Key findings.....	23
	5.1.1 Opportunity exists for ISC to play a role, but there is much work to be done	23
	5.1.2 There is a lack of awareness and understanding amongst key stakeholders today	23
	5.1.3 Trust is key, and integrity systems can play a central role in growing trust	23
	5.1.4 Education and communication are required	23
	5.1.5 Elevating beyond safety to grow quality perceptions, differentiate and drive premium	24
	5.2 Benefits to industry.....	24
6	Appendix	25
	6.1 Discussion guides	25
	6.1.1 Consumer Discussion Board – Australia	25
	6.1.2 Consumer Discussion Board Guide – Global	28
	6.1.3 Trade and Retail Discussion guide	33
	6.2 Recruitment specifications	38
	6.2.1 Consumer recruitment screener	38

1. Background

The Australian red meat industry has developed and invested in a sophisticated red meat integrity and traceability system, with the ability to track all Australian beef and sheep from birth to slaughter. Food safety and animal disease outbreaks are a threat to the global red meat industry, therefore the need to have a best in class integrity tracking system to protect and underpin Australia's red meat position and reputation is critical.

As a part of ISC's 2025 strategy, significant investment is allocated to improve the adoption of technology to enable greater verification and automation of animal movements, as well as utilising data to extract greater insights for farmers to receive increased returns.

While Australia's traceability system is considered world class, there is a need for a deeper understanding of the role and value it plays and its importance in the purchase decision of Australian red meat through the value chain, from trade to retail to consumers, both domestically, but more importantly in our key export markets.

The concept and specific terminology of 'integrity systems' are likely to be varied and multi-faceted in different markets, creating a challenge in defining a singular value proposition for the ISC and Australian red meat industry integrity systems in international export markets. The meaning, interpretation, and relevance of the components of integrity systems underpinning Australia red meat purchase decisions are likely to vary. It is unlikely that the technical understanding of 'Australian Integrity Systems' process will be understood or played back in the literal sense by many within the value chain. **However, it is hypothesised that the concept of 'trust', and its interpretations, may act as a proxy.**

The objective of this research was to explore the meaning of trust in the context of red meat, and specifically COO brands, in the domestic Australian market and four key export markets, amongst different user groups along the value chain. The specific areas of understanding focused on:

- Different expressions of trust in different markets
- How trust in the COO brand is built and maintained
- Its importance in the purchase decision hierarchy

Understanding these dynamics for Australia's product, relative to alternative COO red meat, is fundamental to building a competitive advantage for Australian red meat in export markets.

The ISC can play a role in building and supporting this competitive advantage by identifying the specific role it can play in making Australia's beef the most trusted imported red meat in export markets amongst stakeholders at all parts of the value chain. In so doing the ISC can play a role in maximising premium perceptions of Australian red meat. The findings of this study will be used to develop measures that inform the integrity program's focus areas, determine Australia's competitive global positioning with regards to integrity systems, and validate the global proposition and narrative for the industry. These objectives were developed in conjunction with CMII, GM and R&D.

2. Objectives

The primary research objective is to establish the definition of trust and its various expressions, in the context of red meat and integrity systems, amongst different audiences along the value chain (trade, retail, and consumer), and diagnose the role that Australian integrity systems can play in building this trust.

Having defined what trust is in the context of imported red meat, a deeper understanding of the role trust plays in building or supporting premium perceptions of red meat, was a key outcome of the research.

These research objectives were summarised as:

1. Understanding the level of awareness of Australia's red meat integrity systems and its relation to the definition of trust
2. Understanding the perceptions of trust associated with Australian beef, relative to key competition
3. Exploring the preference of and need for safety and its link to trust and premium pricing
4. Exploring the need for quality, the role of quality in preference, and its link to trust and premium pricing
5. Establishing the preference and need for traceability and its link to trust and premium pricing

3. Methodology

3.1 Two key stages of the research process

3.1.1 Stakeholder interviews

An initial 1-hour stakeholder group interview was conducted with members of ISC and MLA's international marketing teams to provide an initial platform of knowledge for the research; to identify and confirm the key hypotheses to explore in research; identify existing knowledge gaps for both stakeholder audiences; and shape and confirm the core areas of exploration for qualitative research with the trade and consumer audiences.

3.1.2 Consumer online boards

The research considered the consumer perspective in five markets; four key international export markets, Japan, South Korea, Singapore, and UAE, as well as a benchmark of consumer perceptions within Australia, to provide a comparative perspective of trust in red meat and expectations of the role of traceability.

This data was collected through an online discussion board over a period of 24 hours. The sample consisted of 12-14 people in each market (table 1). The sample was specifically chosen to reflect a mix of consumers/purchasers of premium red meat, across a range of ages from 18-64 years, all to be main grocery buyers and meal planners in their household (see appendix 3 for market specific recruitment specifications). These consumer discussions were conducted with a sample of 12 consumers in Australia, Japan, and Singapore, and 14 consumers in South Korea and UAE.

Table 1: Consumer sample size by market

Market	Number of Consumers
Japan	12
Singapore	12
South Korea	14
UAE	14
Australia	12

Discussion boards with consumers covered four specific tasks:

1. **Exploration of consumers approach to food** – their philosophy about food, favourite meals they like to prepare at home, frequency of consumption of beef for an at-home meal

2. **Purchase and consumption of imported beef** – beef countries of origin purchased, pros and cons of buying beef from those countries, comprehension of how imported beef from different countries is produced
3. **Drivers of trust in imported beef** – the factors that drive trust in imported beef, and identification of what matters when buying and consuming imported beef
4. **Awareness and understanding of Australian beef and traceability/integrity systems** – production and process, willingness to pay more, awareness and comprehension of the Australian traceability and integrity system and the impact of awareness on willingness to pay a premium

For a detailed understanding of the tasks undertaken, please refer to Appendix 6.1, Consumer Board Discussion Guides.

3.1.3 Trade Depth-Interviews

In-depth conversations with trade and retail were conducted across four global markets to identify and explore the components of trust as it relates to reputation, purchase, and its link to integrity systems.

Digital in-depth interviews of 45 minutes duration, were conducted with trade (wholesalers, importers, and distributors) and retail (mix of channel) in four export markets – Japan, South Korea, Singapore, and UAE. Interviewees were sampled from a contact list provided by MLA. Table 1 below outlines the sample split.

Table 2: The sample split of Trade and Retail by market

	Trade [Wholesaler, Importer, Distributors]	Retail [Hypermarket, Supermarket, Butcher]
Japan	6	3
Singapore	3	6
South Korea	6	5
UAE	6	6

The discussion flow with trade and retail contacts covered the following topic areas:

- **Context** – business, current role, responsibilities sourcing and procuring imported beef
- **Countries of origin** – markets where trade or retail have sourced imported beef, drivers of consideration and decision-making, awareness and comprehension of beef production and processing
- **Awareness and understanding of traceability and integrity systems** – domestic, Australia and other global markets

- **Role of safety/food security systems** and who is/should be responsible for food safety
- **Role of trust** – what it means, different expressions and drivers, country of origin as a proxy for trust
- **Premium perceptions** – drivers of premium quality beef and the role of country of origin, hierarchy of COO product choice
- **Australian beef** – imagery, perceptions and understanding of traceability

For a detailed understanding of the discussion flow and questions please refer to Appendix 6.1.3, Trade/Retail Discussion Guide.

4. Results

4.1 Integrity systems and traceability

4.1.1 Traceability and its link to safety

Traceability, rather than being front of mind, or actively considered, is viewed instead as an invisible hand in verification from farm-to-table. Furthermore, it is almost always attributed to the government in the destination market, rather than the systems and processes of the Australian red meat industry.

Government bodies and regulations in the destination markets are attributed, in the first instance, with the responsibility of traceability when it comes to safety, with the trust in the basic safety of product seen as a responsibility of government bodies as gatekeepers. This leads to the idea that they are responsible for traceability. Across all stakeholder audiences of trade, retail, and consumers, there is an assumption that authorities in their market police and verify red meat as being fit for import, that it meets required certification standards, legal requirements, and claims matching product specifications.

With this foundation in place of the expectation that regulation and government are managing the safety of product entering the market, consumers then rely on the COO of imported red meat, and retailer brand image as verification of quality.

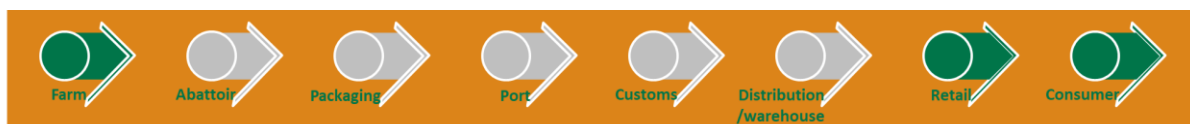
Traceability ladders to safety – but there is untapped opportunity in amplifying quality to maximise premium perceptions with retail, trade, and consumers, as the traceability is not actively engaged with or considered by any of the key audiences along the value chain in any structured sense.

A flow of information about the role of different parties in establishing safety flows along the value chain, starting with trade, who are relying on market regulations, to retailers who are relying on the verification undertaken by the trade, through to consumers, who are relying on their retailers to stock safe product of the expected quality.

4.1.2 Trade, retail, and consumer knowledge of the supply chain

For consumers and most retailers their concept of the supply chain is limited to a journey of **farm** to **retail** to **table** as shown in fig.1. The middle of the supply chain process is a mystery to most, with the trade being the most knowledgeable about the details of these mid-stages of the supply chain. Given this lack of comprehension, or understanding amongst consumers and retail, they rely on trade for their information.

Figure 1 – Supply chain stages referenced by stakeholders



The information that each is seeking differs, with trade and retail seeking early notification of delivery delays, and any climate driven changes in cut size or marbling. Retailers' focus is on business efficiency – this means avoiding out of stocks, and the timely supply of expected beef product at the quality specifications. In contrast, consumers are not seeking detail on the supply chain. Although there is

some appetite for demystifying this part of the journey and how it links to product quality, this is only in the context of more modern expectations that consumers have of transparent logistics and fulfilment processes.

“A traceability system would provide more information on some of the things I wonder about. Like when you order something and it's not available. But when you get it a month later – it's four weeks old. I don't think they're lying. I'm sure something happened to it on the way, but I wonder what exactly happened” Trade, Singapore

4.1.3 Opportunities for traceability systems in growing trust in Australia's COO product

4.2.3.1 Building with the Trade:

For the Trade audience, relationships and reputation are important, and traceability and integrity systems can help to build this through the key pillars of:

1. **Safety** – building an industry reputation for unrivalled and trustworthy health and food safety standards, and;
2. **Product quality** – specifications which continuously meet Australian beef standards and associated quality expectations. Key examples include packaging quality, ethical/ humane production, the absence of anti-biotics or hormones, meeting expectations of cut size, marbling, etc.

4.2.3.2 Building with Retailers:

Stock management and turnover are important to retail, and traceability can play a role in creating greater day-to-day retailer business efficiencies. This can be done by:

1. **Reducing stock waste** *e.g., due to sub-standard packaging, stock close to expiry dates, has a long stable shelf-life;* and
2. **Reinforcing quality** – beef is processed to the highest standards at every step and can be traced to COO, product matching expectations of order specifications and providing simple access to information about the processing/abattoir standards *(for some retailers)*

4.2.3.1 Building with Consumers

For consumers, the functional proof points (in particular taste) are most important, followed by the well-being, feel good factor. They are using different sources as a proxy for traceability that reinforce trust. The key functional elements that consumers are using to verify the quality of product are *freshness, mouth feel, and taste*. These are supported by emergent differentiating associations such as *health/better for me* communicated through *free from* i.e., the absence of antibiotics or hormones, ethical and humane production, farming conditions which are perfect to raise and produce beef.

Integrity systems can underpin the safety perceptions of imported red meat product, as they hold information from safety to quality verification, across the supply chain. The concept of traceability ladders to safety. However, as it is not often attributed to the right factors and not clearly understood, it represents an untapped opportunity to move beyond safety and amplify quality credentials to maximise premium perceptions with retail, trade, and consumers.

4.3 COO perceptions, drivers of choice and premium

4.3.1 Perceptions of Australian COO red meat vs. key COO competitors

As the two largest and most salient COO brands amongst the audiences KANTAR spoke with across the markets, Australian and USA beef are often spoken about together. However, they are not seen as the same. Rather they are compared and contrasted, with each providing a point of reference to the other. More often than not, Australian red meat is seen as the 'better' option, as Australian beef is seen as clean, safe, and ultimately higher quality, elevating it above US product.

Australian beef is associated with being grass-fed as well as being 'free from' unwelcome inputs such as antibiotics or hormones, and is expected to be processed to the highest standards. These are all highly motivating benefits, and to some extent reinforce one another in a broad perception of being 'clean'.

For the trade these translate to business-focused strengths, with Australian beef seen as a consistently good choice because of its clean image, solid Return On Investment (ROI), and consequent ongoing consumer demand, while maintaining consistent quality standards in functional experience (taste and texture were specifically referenced).

Key differentiating associations consistently mentioned across markets are:

- Associated with clean rearing practices and environment
- Healthy, grass-fed, well-cared-for cows
- Ethical and humane production
- Chemical-free – does not use antibiotics or hormones when grown or produced
- Processes that are easy, reliable, and transparent *i.e., ease of commerce, transparency, ethical business behaviours and practices*

Ultimately, irrespective of market or stakeholder audience in the value chain, those Kantar spoke with tend to see Australian red meat as being at the top of the pile compared with other imported red meat product. However, there are some differences in the primary associations across markets and audiences – though for different reasons.

These perceptions are outlined in more detail by market below.

4.3.1.1 Market specific COO perceptions

Japan

Australian beef's clean, safe image pulls it apart from the US – chemical free, free from antibiotics or hormones, and processed to quality and natural standards are motivating benefits vs the US, which competes on taste for some, but doesn't come with the natural and rural romance of Australia.

Australian beef is seen as healthy/better for me with grass fed underpinning natural perceptions. It has less fat and more lean meat, which gives the impression that it is good for your health. US beef, by contrast, is seen as tastier driven by grain feeding.

A fundamental positive in Japan mentioned amongst both the trade and consumers is that Australian beef has never had any issues with safety. While all imported product is seen and expected to be safe, Australian has the proof in that it has never had a safety issue.

Ultimately, the main perceived difference between Australian and US beef is taste, with the quality of Australian product never queried by trade and retailers. Differences in taste are attributed primarily to feed and environment, with grass fed strongly associated with Australia and with natural, compared with grain fed which is associated more with the US and with marbling, but less with natural process. Australian beef are believed to be raised in a clean and open environment with clean, fresh water and open air. Some believe this produces a better taste because beef is raised in a stress-free environment – and will therefore be better for consumers and their families.

Singapore

Consistent quality standards in taste and texture, associated with clean rearing practices and environment are a fundamental association with Australian product in the Singaporean market. These are supported by perceptions that the product is healthier, due to animals being grass fed.

A secondary bundle of associations ties to ethical and natural rearing and production – where animals are well cared-for, and more naturally reared, with few or no antibiotics when grown.

The processes of the Australian industry are seen as easy, reliable, and transparent i.e., ease of commerce, transparency, ethical business behaviors and practices.

There is also a perception that Australian product is 'available', so trade see it as the option to import for popular everyday use (of premium imported product) and consumers perceive it to be available through their usual channels. These perceptions have built a perceived positioning of Australian beef being 'accessible premium' in the Singaporean market.

South Korea

Korean consumer perceptions of imported beef generally are that it is from non-Asian markets, it is for everyday consumption and less expensive than Korean or Japanese beef. Australian and US beef are seen as major players in imported beef from Western markets, and thus are predominantly what Koreans' reference when considering imported beef. Local and Japanese beef occupy a super premium positioning in Korean consumers' minds, with local Hanwoo beef perceived to be one of the best in terms of flavour and freshness, aligning with the South Korean taste palate e.g., marbling, slightly sweeter taste, etc. Beef of Japanese origin is on par with local product, and both are perceived as not affordable in everyday consumption due to price.

"To feed all family members including kids, Korean beef is not affordable. I am satisfied with good enough quality, and the price of imported beef" (Consumer, buys Australian and US beef)

In contrast Australian beef is perceived to be better for me in terms of health and wellness, with these perceptions borne out of the rural romanticism of Australia. This has built emotionally positive perceptions around how Australian beef is raised, which then translate to the perceived functional benefits sought.

Consumers see Australian beef as cattle raised from fertile pastures; not necessarily tender in texture but low in cholesterol and better for you; clean, green, highly professional agricultural country; clean processing system i.e., cattle are slaughtered in clean facilities, freshly packed with quick freezing.

UAE

"We buy from Australia and New Zealand as they are trustworthy countries. It is different than purchasing from Pakistan or India. We trust them because the factory and farms would be

cleaner. Customers are pleased with Australian beef, but they may hesitate about the Indian or Pakistani” (Trade, UAE)

Australian beef is on top of the pyramid and on the same par as USA, Japan, and Europe – all of which are seen as top tier, producing the highest quality product, packaged to reflect luxury and exclusivity, and meeting the maximum standards for food security and safety.

Australian beef is perceived as having consistency in quality and greater process transparency over other markets. Thus, Australian food security systems are deemed as unfaltering in supporting these beliefs being highly selective when considering product safety, transparent, accurate in information shared and providing on farm and off farm evidence from sources across the supply chain.

Australia is viewed as maintaining impeccable quality control and adherence to strict health standards where other COOs are perceived to cut corners. An ideal climate and abundance of natural fodder, leading to healthier and safer product with no need for hormones or preservatives, Australian beef is perceived to have a longer shelf-life with a more accurate estimation of expiration. It is assumed that those raising animals treat them with more humane care, and this is less often associated with other COO.

Other countries' product often require cleaning, removing bones, drying blood, while Australian beef is almost ready to use, and the process for rearing and treatment of animals results in a soft, tender product, closest to Arab preferences. Australia is seen to have a variety of cuts and ready to use quality makes it more versatile and suitable for different cuisines and cooking styles.

4.3.2 Factors in the choice of COO brand

Trade and Retail

There are four key factors mentioned when discussing what fundamentally impacts COO choice and purchase for the trade and retail audience, illustrated in fig.2:

1. Process
2. People/relationships
3. Demand
4. Supply

Figure 2 – Brand Choice Factors for Trade & Retail



Process is the protocols and steps involved to complete the transaction, including how well process and regulation is understood, ease of transaction and doing business, and transparency. This is a

fundamental element in establishing and maintaining trust, and a clear opportunity for integrity systems to support and amplify.

Beyond the processes, trade and retail then rely on the quality of, and satisfaction with, their business relationships. These often take considerable time to establish. Given the aforementioned reliance on those further up the value chain for information, maintaining this becomes fundamental to the development and maintenance of trust. This element of relationships is important everywhere; however, it is the most important factor in particular markets.

While it may seem obvious consumer demand is a key driver of choice, not all markets have the same dynamics of available product to meet consumer demand for specific product types. Trade and retail will seek to meet customer/consumer demand with the COO and specific product procured to meet their customer needs. In contrast, supply factors are an influence on the preferences and choices for trade where availability is more limited.

The importance of these four factors and how they inter-relate for the trade and retail varies by country. The strength of long-standing relationships impacts the delivery of an ample supply of quality meat that fits the desired specifications and is a key consideration in the Japanese and Korean markets.

Consumer

In contrast to the framework that can be broadly applied to how trade and retail choose their product, consumers in each market where the consultant conducted the interviews tend to have a differing hierarchy of influences on product choice.

In broad terms there tended to be seven considerations:

1. Perceived safety of the product
2. Freshness of product (some markets)
3. Pricing of the product
4. Flavour/taste of product
5. Consistency of the product quality
6. Availability in their preferred supermarket/shop
7. Country of origin of the product

However, the importance and relevance of these differed from market to market. A brief description of the hierarchy of factors in consumer choice, by market, follows.

In the Japanese market product needs to be safe to be considered, but for premium imported product found in their preferred supermarket/channel this is taken for granted. The pricing (fits my budget), flavour/taste preference of the household, and perceived quality are the key drivers of choice. COO plays a role as a decision driver where there is uncertainty about safety.

South Korean and Singaporean consumers leverage similar attributes to guide choice, expecting the fundamentals that allow them to judge product quality to be met. These are:

1. Freshness, appearance (colour, marbling)
2. Sold by a trusted retailer
3. Price that meets their needs
4. Delivering the expected meal outcome experienced previously

The UAE has differing decision drivers for the different consumer audiences, with COO playing a role in the decision, but signalling different things to Arab and Ex-pat and Western consumers. COO is a signifier of safety first and foremost, for Arab consumers which ladders to quality. In contrast COO is used by Western consumers to guide product functional attributes of flavour and reinforce quality expectations. For both audiences, freshness is a key driver of choice, signalling quality for local consumers and safety for foreign consumers.

4.3.3 What builds premium perceptions?

Willingness to pay more by audience comes back to the differentiating assets, and consumer demand for specific premium beef drives trade/retail willingness to pay for the acquisition of this product. Consumer demand relies on quality and the unique assets that reassure consumers.

The rising price of Australian beef/red meat has been noted and suggests there may be an upper limit on price - potentially impacting demand in the absence of maintaining premium perceptions.

At the simplest level, Australian product is seen to be different from other imported COO product, and this reinforces quality perceptions. The primary differentiator is the perceived clean and welfare-led rearing and farming processes, allowing Australian COO to own the 'clean', healthier image. More than any other COO, Australian beef is consistently associated with 'clean' farming and beef that is ethically and humanely produced.

Further to this clean image, Australian producers have established high standards to be met and high expectations amongst customers, but are seen to deliver to these high expectations, and has established a reputation for delivering reliably and consistently. Underpinning this success is the consistent reliable process which allows Australian growers and supply chain to confidently deliver excellent product. Thus, Australia's advantages in process and product can be leveraged vs competitor COO to drive demand, reinforce relationships and showcase the difference that justifies our premium perceptions.

Across markets the key aspects of Australian red meat perceptions (process, product, and people) that are differentiators and can help maximize premium perceptions:

- Superior service through the supply chain – responsive, easy to partner with, honor commitments
- Dialing up grass fed vs grain fed benefits as they relate to both functional benefits such as health, taste, and higher order emotive benefits
- Clean-farming, ethical and humane production, free from antibiotics or hormones vs mass factory imagery

4.4 Safety, quality, and trust

4.4.1 The relationship between safety and quality for imported red meat

Trade and retail believe local government and industry regulation address and police safety. The opportunity is to shift the attribution of safety and process away from local regulators to Australian production systems and the ISC and highlight the benefits of regular integrity system usage. Given the presumption of safety across the value chain, any reliance on this as a key benefit or element of differentiation, risks eroding the value of integrity systems and Australian COO premium perceptions.

*“Nowadays there are no safety problems with the beef being imported into Japan. In the past there used to be lots of problems. That was commonplace some 20 years ago. Now we don't have that problem. Everyone is supplying quality suited to the Japanese. Safety, taste, color, tenderness are all satisfactory. There is very little difference between countries of origin”
(Trade, Japan)*

Ironically it is Australian product's impeccable safety record that nullifies the benefit of seeking to differentiate on or amplify difference through claims specific to safety. There has never been a serious safety breach for Australian red meat. Both the trade and retail assume safety is taken care of via domestic government protocols, and consumers are reassured, foremost, by their retailer and expectations retailers are adhering to regulation and stocking quality product.

Trade and retail trust that the combination of local government and industry regulation will ensure safety, thus viewed through this lens, safety is implicit and so ultimately a hygiene factor. Safety is fundamental to trust but also subconscious, and only becomes noticed or relevant in the cases where it has failed. COO has less of a role with trade and retail regarding safety because the onus is on the domestic protocols. Even in cases where the domestic market has lower safety standards, trade and retail trust the protocols to filter entry of compromised product.

Consumers, who are removed from the import process, are more likely to actively use COO as a proxy for safety. Australian traceability and integrity systems are not attributed with the safety of the product, this is instead attributed to local regulation. Australia's traceability and transparent process is more important in consumers' minds, in laddering to consistent quality. This is because, while safety is expected (and should be implicit), quality is sought and deconstructed (and so should be explicit) – it is a discriminator across COO that commands and justifies a premium. Trust delivered through quality relies on the right process, product, and people:

- **Process** – the systems in place, and ease-of-purchase from start to finish., For trade and retail, it's transparency of information, interactions, efficiency, and timeliness. For consumers, it's an easy shopping experience from a trusted retailer
- **Product** – desired specifications in taste, cut, colour, freshness, texture, and consistent quality
- **People** – the face to face and behind the scenes relationships, built over time, ensuring a confident and satisfying experience

4.4.2 A framework for building trust: Integrity, Expertise, Responsibility

Through extensive meta-analysis of brand equity data and market performance, Kantar has developed a framework for evaluating and diagnosing how trust is built, shown in figure 3. The structure has three components: Inspiration, Expertise, and Responsibility.

The first component of the trust framework reflects the foundational trust in a relationship. This is reflected in the interactions that inspire trust, and has different components that work in combination to build a base of trust between the user and the provider.

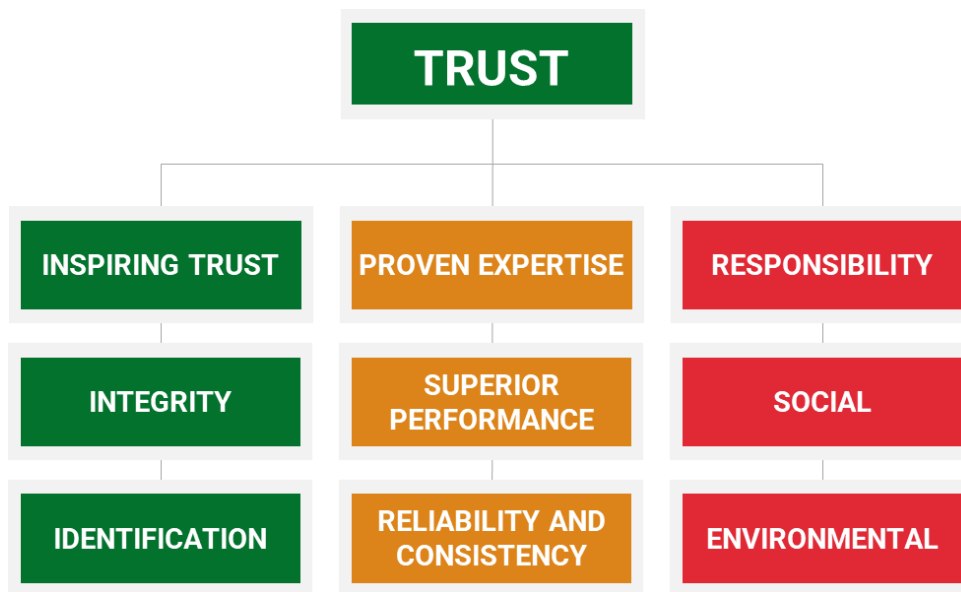
1. **Integrity** – are you seen as open and honest, transparent in your dealings with others, fulfilling commitments reliably
2. **Identification** – seen as caring for customers and consumers, and thus they identify with you

- 3. **Inclusion** – treats all with whom they engage (across the value chain) with respect and inclusivity

Proven expertise is a combination of attitudes that ladder to superior performance on the key functional aspects of your category, while delivering a clear proposition reliably and consistently. This ultimately builds a perception you are the best at what you do.

Responsibility reflects a consideration of the role brand, category or industry plays in its connectedness to others. The impact it might have socially, environmentally and the extent to which they can be trusted to do the right thing by those impacted in their process.

Figure 3 – Trust Framework



4.4.3 Building trust through integrity systems and traceability

The ISC and Australian red meat industry can leverage assets to communicate to all parts of the trust framework. This is first and foremost done through establishing a baseline of trust through the first two pillars of *integrity* and *proven expertise*. However, it is essential the ISC and MLA communicate how our integrity systems and processes support the differentiating perceptions of responsible practices and execution of those practices within the industry associated with Australian red meat.

Trust in Australian beef is delivered through COO brand, the process and product. It is reinforced by the business practices and underpinned by the COO perceptions of Australia and its values and culture: Australians are perceived to be open, honest, and direct – further inspiring trust.

Trade processes are robust and value safety and quality. At the same time traceability and transparency in all steps of production and across the supply chain talk to integrity and shared values your retail and trade partners – and consumers – increasingly identify with. This includes strong and ethical business practices which are mirrored and appreciated – and talk to Australian integrity.

To build trust through proven expertise, Australian beef consistently delivers to trade, retail, and consumer expectations, and leveraging differentiating associations that reflect responsible practices.

Consistent high quality standards of freshness, tenderness, and superior tasting product, untarnished by inputs, all reflect the proven expertise component of trust. And humane treatment and consideration of animal welfare reflects ethical rearing and farming processes, that consider environmental impact. Grass fed reinforces natural rearing, while the absence of antibiotics or hormones amplifies the difference, and thus the premium.

This gives the ISC a platform to communicate the transparency and precision of process, which reinforces the safety and reliability of Australian red meat, and underpins the consistent quality, ultimately inspiring trust.

In summary trust is:

- Delivered through the belief Australian beef is processed to the highest standards
- Traceability and transparency in all steps of production talk to integrity and shared values your retail and trade partners – and consumers – can identify with
- Reinforced by expertise – superior performance, reliability, and the consistent delivery of high/premium quality Australian beef
- Underpinned by COO perceptions of responsible practices in raising beef that is ethically and humanely produced, and does not use artificial inputs (e.g., antibiotics or hormones) when grown/produced, that may compromise the health of the end users

4.4.4 Communicating key benefits of integrity systems to build Trust in the AU brand

There is a greater opportunity to communicate how Australian red meat traceability and the integrity systems Australian industry has in place, can inspire trust through quality delivery at every step of the value chain.

Beyond integrity, traceability can provide incontrovertible proof of the adherence to expected standards of process, safety, and quality assurance farm to table. The ISC and MLA can leverage integrity systems to support the associations they already have with Australian red meat.

“You just know Australia has good quality beef. I think it’s based on what I know about the country. You think it has clean air, the cows roam free.” (Consumer, Singapore)

Communicate the details of Australia’s integrity systems – Details of integrity systems are not well known nor associated with the benefits sought. Amplify unique processes or assets of the Australian system vs others, and how they integrate with global market processes. Amplify the benefits of having access to transparent, open, and available data on the process

Reinforce safety through transparency – Safety is a hygiene factor and a necessary platform for higher order associations like quality and trust in Australian red meat. Communicate that end-to-end management and measurement means nothing is missed. All product is 100% safe

Endorse the importance of business relationships – Relationships in key markets rely on maintaining transparent and reliable trade practices. Communicate how traceability and integrity systems supports Australian producers and exporters to deliver consistent quality product confidently and reliably

Showcase the superiority, versatility of the Australian product range – Australian red meat is seen as functionally superior in most instances. Communicate how the Australian systems

support producers in growing and producing the best of what they need. This is a differentiator vs the competition

Highlight Australia's clean, responsible rearing and production – Associations with responsible farming practices and clean rearing are a unique asset to Australian COO, especially vs the USA. Communicate that Australian integrity systems allow producers to pursue responsible farming practices, minimising use of 'enhancements' to ensure product cleanliness safety/quality

5 Conclusion

5.1 Key findings

5.1.1 Opportunity exists for ISC to play a role through transparency and provision of data, but there is much work to be done

Australia's traceability and integrity systems are not thought of or engaged with regularly – negating their potential value and impact. The opportunity is to drive transparency beyond traceability and Australian beef safety. The existence of technology and data collection systems already in place presents the opportunity to amplify the Australian beef quality and premium narrative with the retail and trade, giving them greater access to information about the journey of the product that can be leveraged for their own confidence, or communicated along the value chain to their customer.

Access to data and visibility of the supply chain journey is increasingly commonplace for consumers, seen in adjacent categories, and while the use would be limited in the fresh-meat category (as opposed to fashion), and expectation is of far less detail, there may be a future opportunity that would also reinforce the sense of trust through openness and transparency. For consumers knowing that the information is available does as much to build trust, as actually accessing that information.

5.1.2 Lack of awareness and understanding amongst stakeholders

Australia's integrity system is not recognised as the best – but nor are those of competitors

- Each of the 5 global markets engaged has a different understanding of the AU integrity system – and none knew as much as they should
- The system as they know it is thought to be good, but not particularly different vs other countries in ways that matter
- Retail, consumers, and even trade, across all markets do not comprehend Australia's integrity system details or the benefits by country or audience

5.1.3 Trust is key, and integrity systems can play a central role in growing trust

Inspiring trust in Australian beef is fundamental to solidifying COO and industry brand reputation and standing through the value chain. Trust is delivered through the belief Australian beef is processed to the highest standards:

- Traceability and transparency in all steps of production talk to integrity and shared values your retail and trade partners – and consumers – can identify with
- Reinforced by expertise – superior performance, reliability, and the consistent delivery of high/premium quality Australian beef
- Underpinned by COO perceptions of responsible practices in raising beef that is ethically and humanely produced, and does not use artificial inputs (e.g., anti-biotics or hormones) when grown/produced, that may compromise the health of the end users

5.1.4 Education and communication are required

Comprehending the details and benefits of Australia's integrity systems can result in a competitive advantage and a price premium. Australia as COO serves as a proxy for trust in Australian beef as one of the most trusted suppliers of imported red meat:

- Australia's traceability system is a proof point that strengthens Australia's COO credibility and underpins integrity and transparent business practices
- Opportunity exists to educate global markets about the benefits of Australia's traceability and integrity system features to their country – across all parts of the value chain
- Demonstrate the competitive advantages that make Australia's integrity systems more trustworthy and beneficial than others – helping to maximise and validate premium perceptions

5.1.5 Elevating beyond safety to grow quality perceptions, differentiate and drive premium

MLA and the ISC can build trust and support premium perceptions by communicating the distinctive benefits of Australian products and the process; and showcasing how Australia's integrity systems supports this.

1. **Australian beef is rated among the world's best** – Australian beef has an excellent reputation. Beef from competing countries of origin also have, to varying degrees, strong reputations i.e., Japan, Argentina, US, and Canada. Highlighting the strengths of Australian beef [unique taste and clean farming practices] could help differentiate AU from competitors to increase preference and maximise premium perceptions
2. **Consistent quality is Australia's differentiating asset** – Quality is explicitly and directly linked to Australia's country of origin image and premium perceptions. It is the differentiator which celebrates why Australia's red meat and integrity systems are distinctive from competitor markets
3. **Ensuring product safety is a hygiene factor** – Safety is implicit and a must-have for category leaders. With no significant safety issues in imported beef in decades, safety is assumed. While safety is a critical element in building and maintaining trust, comprehension of Australia's integrity systems across all parts of the supply/value chain is a requisite to making Australian beef the most trusted imported red meat – and maximising premium perceptions
4. **Australia's integrity systems are not viewed as unique** – Because integrity systems are not well-understood, Australia's systems are not seen as notable or differentiating

Traceability and its inherent transparency underpin safety – but integrity systems need to be elevated beyond safety, to help reinforce and maximise quality and premium perceptions across the value chain. Communication and education of integrity system uses and benefits will help drive usage and propel the vision of Australia's integrity systems as world-class.

5.2 Benefits to industry

This research identified Australia's traceability system is a proof point that strengthens Australia's Country of Origin credibility and underpins integrity and transparent business practices. The opportunity exists to educate global markets about the benefits of Australian traceability and integrity system features to their country – across all parts of the value chain.

Demonstrating the competitive advantages that make Australian integrity systems more trustworthy and beneficial than others will help maximise premium perceptions.

6 Appendix

6.1 Discussion guides

6.1.1 Consumer Discussion Board – Australia

MLA Project Cyclone Trust and Traceability Discussion Guide

Audience: Consumers

-60 Minutes Online Board-

Hello...and welcome to the study. My name is _____ and I am your moderator. Thank you so much for helping us with this project. We are from Kantar, an independent market research company and a member of The Research Society -Localise, as appropriate- We're looking forward to working with you and we hope you are, too.

This is a closed forum; it is private and only people that we have invited can participate. Your responses [and all Images and videos you upload] will only be viewable by us and our client

Before we get started, here are a few guidelines to help things go smoothly:

1. First, there are no "right" or "wrong" answers! We're interested in what *you* think, feel, and do... so please respond as honestly as possible.
2. Make your case – give us as many descriptive details and explanations as possible in your posts. Why you feel the way you do is really important so please avoid 'yes/no' and 1–2-word answers and answers with no explanation. If you do, we'll have to come after you to explain more, so the more you tell us upfront, the better!
3. Don't worry about spelling, typos, or grammar. I'm sure we'll be able to figure out what you mean!
4. Keep an eye out for follow-up questions from us over next day. We may want more information regarding a specific comment or question.

And here are a few handy tips on the tech stuff:

Technology is great and it is undeniably helpful. But don't we all experience some tech glitches every now and then? Please take note of the following before getting started:

- All questions can be answered from your phone, tablet and/or computer.
- Any of the following browsers are required on your computer, laptop, tablet and/or mobile phone -Localise, as appropriate-



- Google Chrome, Mozilla Firefox and Apple Safari (latest versions)
- Microsoft Browsers: Edge (all versions) and Internet Explorer 11



- Android: Chrome for Android and Stock Android Browser (latest versions)
- iOS: Mobile Safari and Chrome (iOS 7 or later)

If you have a question about the system, technical issues, or tasks you have been asked to complete, please contact chatterbox@civi.com or click the 'contact' button on the forum webpage. -Localise, as appropriate-

Thanks so much for joining us! Let's get started...

1. Getting to know you

We'd like to start by getting to know you a bit. Please tell us a little about yourself:

- What part of the country do you live in? What do you like most about your city/town?
- Who is in your household? Please tell us a little about each of the members of your household.
- How would you describe yourself, that is, if you were writing a bio or profile for someone who doesn't know you, what would you say about yourself in a sentence or two?
- Please post a photo of yourself doing something you enjoy. What's happening in this photo, how are you feeling, and why did you choose this one? [**Programming – please allow photo upload**]

2. What's Happening with Food in your World?

We want to learn more about you and your approach to food, the way you like to eat, and your philosophies about what matters to you when it comes to feeding yourself and/or your family.

- Let's start with your philosophy about food. You may not have thought of it as an actual philosophy, but how would you describe your basic approach to food and the way you like to eat? Why do you say that? You can answer this question using words, or if you'd prefer to do something more visual, please make a drawing or pull a picture from the internet that illustrates your philosophy/approach to food...and explain what the pictures represent. [**Programming: Allow photo upload**]
- What are your 2-3 favourite dinner meals that you like to prepare at home? Please tell us everything in the meal, including vegetables, carbs, protein/meat, sauces, and anything else.
 - Which of these meals is your favourite? Why is that?
- If you can, please share with us a photo of tonight's dinner [or if you already have a recent photo of an at-home dinner, you can provide that] [**Programming: Allow photo upload**]

- How often in a typical month do you/your family have beef for an at-home dinner?

- Below is a list of things that people say matter to them when they're buying and consuming beef. Please select the 5 things on this list that matter most to you. And then please mark with a * the 2 that are most important: **[Programming: insert rating exercise]**

The country it's from	Nutritional information	Use by date/Sell by date
Is guaranteed safe to eat	Is sustainably sourced	Is consistent/always the same quality
Is fresh	Price – is worth its premium price	I know how beef is made/produced through all its stages
Flavour /Taste	Price – fits in my budget	I trust the safety of the beef
Is high quality	Is free from chemical, additives, preservatives, hormones, additives	The animals are treated humanely
From a reputable store/market	Has a tracing system for its products	The tenderness of the beef

- Now, thinking about the 5 things that matter most to you, for each one, please tell us which country's beef you are thinking of [Programming: insert text box]

- Do you ever wonder about the safety of beef you buy? Why do you say that?
 - And what about other red meat or chicken: do you ever wonder about their safety? Why do you say that?

- When thinking about the word trust, how does it apply when you buy beef? What does trust mean to you in this sense?

3. Australian Beef

- When you think about beef from Australia, what 3-4 words or phrases come to mind?

- Are you aware of the steps involved to make/produce Australian beef? What do you think is involved?

- Is how your beef is made/produced something you think/care about? Why do you say that?
- Australia has a system that can tell you everything about the beef you buy including the farm the cow came from and all its movements until it lands on the store shelf.
 - What do you think about that?
 - How much does this matter to you: a lot, a little, not at all? Why do you say that?

4. Learning more about beef

- Thinking about beef you buy in Australia, is there anything you want to know that you don't currently know
- If there's more you want to know, what kind of evidence do you want to see; what would you consider proof?

And that's it! We thank you so much for participating in our project. Your inputs are so important to us!

6.1.2 Consumer Discussion Board Guide – Global

MLA Project Cyclone Trust and Traceability Discussion Guide

Audience: Consumers

-60 Minute Online Board-

Hello...and welcome to the study. My name is _____ and I am your moderator. Thank you so much for helping us with this project. We are from Kantar, an independent market research company and a member of The Research Society (Localise, as appropriate). We're looking forward to working with you and we hope you are, too.

This is a closed forum; it is private and only people that we have invited can participate. Your responses [and all Images and videos you upload] will only be viewable by us and our client

Before we get started, here are a few guidelines to help things go smoothly:

5. First, there are no "right" or "wrong" answers! We're interested in what *you* think, feel, and do... so please respond as honestly as possible.
6. Make your case – give us as many descriptive details and explanations as possible in your posts. Why you feel the way you do is really important so please avoid 'yes/no' and 1–2-word answers

and answers with no explanation. If you do, we'll have to come after you to explain more, so the more you tell us upfront, the better!

7. Don't worry about spelling, typos, or grammar. I'm sure we'll be able to figure out what you mean!
8. Keep an eye out for follow-up questions from us over next day. We may want more information regarding a specific comment or question.

And here are a few handy tips on the tech stuff:

Technology is great and it is undeniably helpful. But don't we all experience some tech glitches every now and then? Please take note of the following before getting started:

- All questions can be answered from your phone, tablet and/or computer.
- Any of the following browsers are required on your computer, laptop, tablet and/or mobile phone -Localise, as appropriate-



- Google Chrome, Mozilla Firefox and Apple Safari (latest versions)
- Microsoft Browsers: Edge (all versions) and Internet Explorer 11



- Android: Chrome for Android and Stock Android Browser (latest versions)
- iOS: Mobile Safari and Chrome (iOS 7 or later)

If you have a question about the system, technical issues, or tasks you have been asked to complete, please contact chatterbox@civi.com or click the 'contact' button on the forum webpage. -Localise, as appropriate-

Thanks so much for joining us! Let's get started...

1. Getting to know you

We'd like to start by getting to know you a bit. Please tell us a little about yourself:

- What part of the country do you live in? What do you like most about your city/town?
- Who is in your household? Please tell us a little about each of the members of your household.
- How would you describe yourself, that is, if you were writing a bio or profile for someone who doesn't know you, what would you say about yourself in a sentence or two?

- Please post a photo of yourself doing something you enjoy. What's happening in this photo, how are you feeling, and why did you choose this one? [**Programming – please allow photo upload**]

2. What's Happening with Food in your World?

We want to learn more about you and your approach to food, the way you like to eat, and your philosophies about what matters to you when it comes to feeding yourself and/or your family.

- Let's start with your philosophy about food. You may not have thought of it as an actual philosophy, but how would you describe your basic approach to food and the way you like to eat? Why do you say that? You can answer this question using words, or if you'd prefer to do something more visual, please make a drawing or pull a picture from the internet that illustrates your philosophy/approach to food...and explain what the pictures represent. [**Programming: Allow photo upload**]
- What are your 2-3 favourite dinner meals that you like to prepare at home? Please tell us everything in the meal, including vegetables, carbs, protein/meat, sauces, and anything else.
 - Which of these meals is your favourite? Why is that?
- If you can, please share with us a photo of tonight's dinner [or if you already have a recent photo of an at-home dinner, you can provide that] [**Programming: Allow photo upload**]
- How often in a typical month do you/your family have beef for an at-home dinner?
- We're interested in your use of imported beef from countries other than your own: What is it about imported beef that makes it right for your dinners?
 - From which countries do you buy imported beef?
 - For each, please tell us the pros *and* cons of buying beef from that country. Please be as detailed as possible.
 - Are you aware of how imported beef from different countries is made and what goes into making it?
 - What are you aware of? Is it important to know? Why?
 - When thinking about the word trust, how does it apply when you buy imported beef? What does trust mean to you in this sense?
- What are the factors that make you trust the imported beef from the countries from which you buy? [*THIS IS INFORMATION FOR THE MODERATOR BUT IS TO BE DELETED BEFORE PROGRAMMING THE BOARD. IS NOT CONSUMER-FACING: Listen for/Probe how safe it is to eat, that the beef can be traced to a specific farm, sustainable practices, treatment of animals, indicators of product quality, where it's from...*]

- Please complete this sentence: I always trust the beef from *-respondent's country-* because _____.
- Please share two stories with us:
 - Tell us about a time when you purchased imported beef for at-home use, and you were *very pleased* with the beef. Please include details about what made you pleased, and why
 - Tell us about a time when you purchased imported beef for at-home use, and you were *disappointed with or had concerns about* the beef. Please include details about what made you concerned/disappointed, and why.
 - In the case when you were disappointed, what do you wish had been done differently so this wouldn't have happened?
- Below is a list of things that people say matter to them when they're buying and consuming imported beef. Please select the 5 things on this list that matter most to you. And then please mark with a * the 2 that are most important: **[Programming: insert rating exercise]**

The country it's from	Nutritional information	Use by date/Sell by date
Is guaranteed safe to eat	Is sustainably sourced	Is consistent/always the same quality
Is fresh	Price – is worth its premium price	I know how beef is made/produced through all its stages
Flavour /Taste	Price – fits in my budget	I trust the safety of the beef
Is high quality	Is free from chemical, additives, preservatives, hormones, additives	The animals are treated humanely
From a reputable store/market	Has a tracing system for its products	The tenderness of the beef

- Now, thinking about the 5 things that matter most to you, for each one, please tell us which country's beef you are thinking of [Programming: insert text box]
- Do you ever wonder about the safety of beef from other countries? Why do you say that?

3. Australian Beef

- When you think about beef from Australia, what 3-4 words or phrases come to mind?

- Are you aware of the steps involved to make/produce Australian beef? What do you think is involved?
- What do you look for in imported beef when being prepared to pay more for it?
- Approximately how often have you purchased beef from Australia in the past 2 years? Why is that?
- Australia has a system that can tell you everything about the beef you buy including the farm the cow came from and all its movements until it lands on the store shelf.
 - What do you think about that?
 - How much does this matter to you: a lot, a little, not at all? Why do you say that?
 - Do you think you would pay more for Australian beef by having this knowledge, or about the same?

4. Learning more about imported beef

- Thinking about imported beef from other countries, what do you want to know that you don't currently know?
- *[THIS IS INFORMATION FOR THE MODERATOR BUT IS TO BE DELETED BEFORE PROGRAMMING THE BOARD. IS NOT CONSUMER-FACING: Listen for/Probe: safe to eat, ethically produced, sustainable practices, high quality in taste and appearance...]*
- Regarding your response to the previous question about what you want to know about imported beef from other countries, what kind of evidence do you want to see; what would you consider proof?
- If there was a way to use your mobile phone in a store to learn what country your beef came from, would you use it? Why is that?

As we wrap up, we have one final request – please record a short video of yourself telling us your thoughts about buying imported beef. **[Programming: insert video instructions]** Please tell us the following:

- Why you buy imported beef from other countries
- The country whose beef is your favourite
- How much you trust the beef from this country and why
- The things you like about this country's beef – from how it's produced to buying it to eating it

- What could be better about this country's beef – from how it's produced to buying it to eating it

And that's it! We thank you so much for participating in our project. Your inputs are so important to us!

6.1.3 Trade and Retail Discussion guide

Project Cyclone Trust and Traceability Discussion Guide

Audience: Retailers, Trade [Wholesalers, Importers, Distributors]

-30 Minute Virtual In-Depth Interview-

WELCOME AND INTRODUCTION – 5 mins

Thank and explain purpose of interview: *To understand your thoughts and perceptions when it comes to buying imported beef for your business*

- *Introduce...* Kantar and moderator
- *Purpose and topic...* research is being undertaken to understand your needs and behaviours when procuring imported red meat from Australia and other countries
- *Participation...* No right/wrong answers, share thoughts/opinions, ask questions, encourage, open and honest answers
- *Timing...* 30-minute interview
- *Confidentiality...* Recording of the sessions, confidentiality/privacy, no names used, reporting on aggregate

Do you have any questions for me before we get started?

ADMIN POINTS for MODERATOR

- This guide has a lot to cover, but we're really interested to hear their opinion, open and free flow
- Remind, as appropriate, that all questions and answers are about the procurement of imported beef

- Interview should run for 30 minutes

GENERAL DISCUSSION – 15 mins

Objective: To understand and uncover key behaviours and what matters regarding integrity systems, traceability, and food safety and security when purchasing imported beef, the factors they consider, and what impacts and influences their decisions. We are also listening for the intangible, like TRUST and other emotions.

- Please tell me about your job: what is your title, and what are your main responsibilities regarding procuring imported beef?

- In the past year, from what countries have you purchased imported beef?
 - What do you like about the beef from each of these countries? *[Capture a response for each country mentioned]*

- Thinking about when you are planning to purchase imported beef, what are the 3-4 things that influence your decision most; that is, what do you take into consideration or base your decision on? *[Listen for/Probe as appropriate: food safety, traceability of beef, sustainable practices, treatment of animals, indicators of product quality, country of origin. Also allow discussion of examples not on this list]*
 - Why those things?
 - Which one is the most important to you? Why is that?

- Are you aware of how the imported beef you purchase is produced, from its rearing to when it gets to you? Is this important to know? Why/why not? *[Probe Australian beef, as appropriate]*
 - Does this influence your purchase decisions at all?
 - What parts of the production chain are important for you to consider and understand for your purchase decision? Why?
 - How do you describe them?

- How important to you are 'food security systems' or 'food safety systems', in the context of imported beef that you buy?
 - Where do they fit in your decision-making regarding procuring imported beef?
 - Do you ever have any concerns regarding food safety/security with respect to imported beef you may buy from different countries? Why/Why not. *[Probe for details, including country of origin]*

- Does the concept of trust play a role in your decisions and behaviours when you're thinking of buying imported beef? Why do you say that?
 - How do your feelings of trust impact the decisions you make when buying imported beef?

- What exactly does trust mean to you when you buy imported beef? How is it expressed/demonstrated?
 - Are there different imported beefs –from different countries-- you trust more than others? Why?
 - What makes them more trusted?
 - What makes the others less trusted?

- When thinking about trust in imported beef, is it your trust in the product traceability and systems that are in place -or- trust in the relationships and people you're working with to procure imported beef that matters more to you? Or is it something else? Why do you say that?
 - In these scenarios, what does trust look like, that is, can you share an example of how your level of trust in such a situation impacted your decision?

- When buying imported beef, how much do you think about product quality?
 - What are the specific things you're thinking about as relates to product quality?
 - What are your needs or preferences in this regard?
 - Where does trust in product quality sit in your decision-making?
 - How do you know that your needs are being met in this regard?

- When buying imported beef, how much do you think about traceability of the product?
 - What are the specific things you're thinking about as relates to traceability?
 - What are your needs or preferences in this regard?
 - Where does trust in the traceability of products sit in your decision-making?
 - How do you know that your needs are being met in this regard?

- When buying imported beef, how much do you think about product safety?
 - What are the specific things you're thinking about as relates to product safety?
 - What are your needs or preferences in this regard?
 - Where does trust in product safety sit in your decision-making?
 - How do you know that your needs are being met in this regard?
 - What are the elements that characterise food safety/security to you?

- Regarding traceability when buying imported beef, how important is it to you that you can know about the whole life movements of a specific animal, from the farm to the store shelf? Why do you say that?

AUSTRALIAN BEEF – 10 mins

Objective: Focus on Australian beef imagery, perceptions, and systems

- When was the last time –if ever—you purchased Australian beef?
 - *[If they haven't purchased Australian beef in 2+ years]* – What is the reason you haven't purchased Australian beef recently?

- To your knowledge, is Australian beef you buy different from beef from other countries? If so, in what ways? Why do you say that? *[Probe/Listen for – product safety, Australian systems, traceability, product quality, taste, appearance...]*

- Please tell me about your thoughts and/or experiences regarding Australian beef.
[Moderator: if they don't currently buy Australian beef, please try to ascertain why that is and what their opinions are of Australian beef, anyway]
 - What do you associate with Australian beef? Any words, images, etc. that come to your mind when you think of Australian beef? Why these?
 - *[For Australian beef buyers only]* - What are the most important factors you consider when buying Australian beef? *[Listen for/Probe: quality standards, great taste, long shelf life, meets my customer's needs, is ethically/humanely produced, it can be traced back to its origin, is from a country I trust, high level product safety, high quality inspection systems]*

- And still thinking about Australian beef, what do you think about Australian food security/safety systems? What do they do well and not so well? *[Probe for details. [For those who do not currently buy Australian beef, try to ascertain whatever opinions they may have about it.]*
 - How does Australia compare to other countries regarding food security/safety systems for beef they grow?
 - Do you pay more for Australian beef because of these factors?

- Please tell me about the role of trust when buying Australian beef: what do you trust? Why is that?

WRAP-UP

- Thinking about Australian food safety/security systems, what do you want to know that you don't currently know? *[Listen for/Probe: at the farm, supply chain, what was done to the product, where it moves, where it goes...]*

- *[Regarding their response to previous question:]* What kind of evidence do you want to see; what would you consider proof?

UAE Only:

What role does Halal play regarding purchasing and selling imported beef? Does it impact the sellers' food safety/security system? Is one more important than the other?

6.2 Recruitment specifications

6.2.1 Consumer recruitment screener

INTRODUCTION	SCRIPT
<p>We're conducting some research with consumers. We are not trying to sell anything; this is legitimate, independent and objective market research. We are simply looking for your general views and opinions.</p> <p>We have an online research forum that will run for 1 day on (insert date). You will be expected to spend about 60 mins completing the activities</p> <p>You will receive \$70 as thanks for completing the online forum.</p> <p>Do you think you will be available on this date for about 60 mins to complete the activities?</p> <p>If Yes - We need to run through a qualifying questionnaire first, to see if you are suitable for this study.</p>	

PRIVACY STATEMENT	SCRIPT
<p>Kantar Australia recognizes the importance of protecting an individual's privacy. This statement provides information as to how Kantar Australia collects, uses and safeguards the personal information provided to us.</p> <p>Millward Brown Pty Ltd (ABN No: 84 106 925 866) (t/a Kantar Australia) respects and upholds your rights under the Australian Privacy Principles contained in the Privacy Act 1988 (Commonwealth) ("Privacy Act"). Kantar Australia is a member of the Association of Market and Social Research Organisation (AMSRO) and adheres to the Privacy (Market and Social Research) Code 2014 ("Code"). For more information about the Privacy Act, the Australian Privacy Principles go to Australian Privacy Principles, OAIC.</p> <p>Before I can confirm you for the study I'd like to just check a few details with you...</p>	

Q1.	INDUSTRY SCREENING	SINGLE CODE
Do you or does any member of your household work in or have worked in the last 5 years any of the following industries/occupations?		
Advertising	1	CLOSE
Market research	2	
Food manufacturer, retailer or distributor	3	
Livestock industry, cattle farm, butcher shop, etc.	4	
Journalism	5	
Public Relations	6	
Marketing or Communications	7	
Finance	8	CONTINUE
Telecommunications	9	
None of these	10	

Q2.	MARKET RESEARCH PARTICIPATION	SINGLE CODE
-----	-------------------------------	-------------

Have you participated in any market research previously?				
		In the past 1-3 months	In the past 3-6 months	6 months or longer
Yes	1	CLOSE	CONTINUE TO Q3	
No	2	CONTINUE TO Q4		

Q3.	PREVIOUS MARKET RESEARCH TOPIC	MULTI CODE		
You mentioned that you have previously attended a market research group discussion, in-depth interview, or online research study. Could you please tell me what it was about?				
	Automotive	1	CONTINUE	
	Education	2	CONTINUE	
	Food and beverage	3	CLOSE	
	Travel and Leisure	4	CONTINUE	
	Financial / insurance products/services	5	CONTINUE	
	Other	6	CONTINUE	
	None of the above	7	CONTINUE	

Q4.	DATA USAGE	SINGLE CODE		
Should you qualify for this study, we may ask you to share pictures and/or videos which will be used to support our research findings and reporting to our client. Please note that your pictures and/or videos will only be shared with Kantar's client for this purpose and will not be used for any other purpose including marketing or advertising and will not be shared with any other third party. Do you consent to this?				
	Yes – I consent to the described data use	1	CONTINUE	
	No – I do not wish to participate	2	CLOSE	

Q5.	UPLOADING	SINGLE CODE		
How confident and comfortable are you when it comes to taking pictures and videos (talking to the camera) and uploading them onto the internet?				
	Extremely confident - I have a lot of experience and love doing this	1	CONTINUE	
	Confident - I don't always do this but am confident and comfortable doing so	2		
	Not at all confident or comfortable doing this. I don't have a lot of experience and do not consider myself a big user of technology	3	CLOSE	

Q6.	ONLINE FORUM	SINGLE CODE		
How confident and comfortable are you when it comes to expressing your thoughts and opinions online?				
	Extremely confident - I have a lot of experience and love doing this	1	CONTINUE	
	Confident - I don't always do this but am confident and comfortable doing so	2		
	Not at all confident or comfortable doing this. I don't have a lot of experience and do not consider myself overly expressive online.	3	CLOSE	

Q7.	PLACE OF BIRTH	SINGLE CODE		
In which country were you born?				

Australia	1	CONTINUE
In another country other than Australia	2	CLOSE
Refused	3	CLOSE

Q8.	GENDER	SINGLE CODE
Record Gender.		
Male	1	RECRUIT 75% FEMALE/25% MALE
Female	2	

Q9.	AGE	SINGLE CODE
Please would you tell me your age last birthday?		Record exact Age: _____
Younger than 18 years	1	CLOSE
18-24 years	2	RECRUIT A MIX
25-34 years	3	
35-45 years	4	
46-55 years	5	
56-64 years	6	
Older than 65 years	7	CLOSE
Refused	8	CLOSE

Q10.	LIFESTAGE	SINGLE CODE
Which of the following statements best describes you?		
Single/ married/ with a partner, no children (own, step-children or guardian of children), not current pregnant	1	CAPTURE AND CONTINUE
Single/married/have a partner; with children	2	
Single/married/have a partner; all children have left home	3	
DO NOT READ OUT- Prefer not to answer	4	

Q11.	RESIDENCY	SINGLE CODE
Where do you live?		

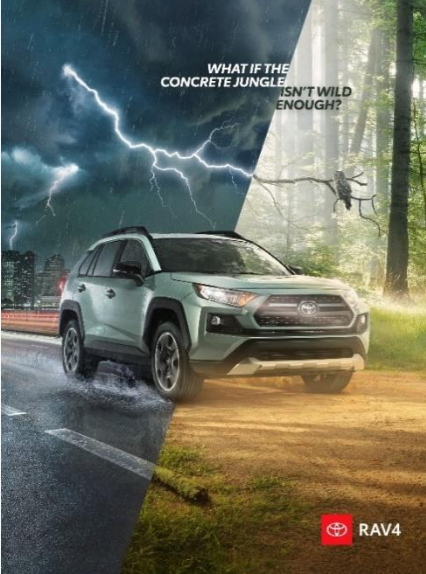
Sydney	1	RECRUIT A MIX FROM SYDNEY, MELBOURNE, BRISBANE, PERTH & ADELAIDE ONLY
Other NSW	2	
Melbourne	3	
Other Victoria	4	
Perth	5	
Other WA	6	
Brisbane	7	
Other Queensland	8	
Adelaide	9	
Other SA	10	
Hobart	11	
Other Tasmania	12	
Darwin	13	
Other NT	14	

Q12.	MAIN GROCERY BUYER	SINGLE CODE
How often do you personally do the grocery shopping for your household?		
Almost all the time	1	CONTINUE
Half or more than half the time	2	CONTINUE
Less than half the time	3	CLOSE

Q13.	MEAT CONSUMPTION	MULTI CODE
Which of the following do you regularly consume?		
Red meat - Beef	1	MUST CODE TO CONTINUE
Red meat - Lamb	2	
White meat [Chicken, pork]	3	
Seafood	4	
Vegetable	5	
Eggs	6	
I do not eat meat, I am a vegetarian	7	CLOSE
I only eat plant-based food / I am a vegan	8	CLOSE
I only eat fish/seafood / I am pescatarian	9	CLOSE

Q14.	CONSUMPTION FREQUENCY	SINGLE CODE PER LINE
How often do you consume each of the following?		
	Daily	2-3 times a week
	Once a week	Once a fortnight
	2-3 times a month	Once a month
Red meat - Beef	1	RECRUIT A MIX
Red meat - Lamb	2	
White meat [Chicken, pork]	3	
Seafood	4	
Vegetable	5	
Egg	6	

Q15.	CONTINUED MEAT CONSUMPTION	MULTI CODE
Which of the following foods might you stop consuming / reducing consumption of in the future?		
Beef	1	CLOSE
Lamb	2	
White meat [Chicken, pork]	3	
Seafood	4	
Vegetable	5	
Egg	6	
None of the above	7	

Q19.	CREATIVITY	RECORD ANSWER
<p>Please have a look at the print advert below.</p> <p>What do you think this advert is trying to communicate to its audience? What is the key message? What do you like about it? What don't you like about it?</p> 		

IF DOES NOT QUALIFY SAY:

We thank you for your time, however based on the responses you have provided today, you do not qualify. We will be in contact as soon as another research study is available. Thank you.

IF QUALIFY SAY:

<p>ONLINE FORUM</p> <p>Based on the responses you have provided today, you qualify to participate in this research.</p> <p>Would you be interested in participating?</p> <p>If Yes – Review the Front page and provide full session information to respondent (ensure they write it down) and understand the incentive they will receive</p> <p>SAY: Are you sure, you will be able to commit to participating online? Is there anything you can think of that might mean you will not be able to log on each day? For instance; overtime at work? or some other commitment?</p> <p>If you tell us now that you are available, we will really be relying on you, as this study is very important to us, & our client.</p>
<p>READ: Representatives from our client may observe the research online. The transcripts / downloads will only be used by us for the purposes of this research and will not be given to anyone else without your full knowledge and consent. Please be assured your responses will be anonymous in our report.</p>
<p>We would really appreciate you calling us on [insert phone number] if anything urgent comes up and you are no longer able to attend, as we do need to replace you.</p>
<p>I agree that anything I see or read during the research should be treated as confidential and will not be revealed to anyone outside of the research discussion to be held.</p>
<p>ALLOW FOR TERMINATION</p>
<p>IF QUERIED ABOUT BONA FIDES OF RESEARCH AT ANY STAGE SAY: Please be assured this is genuine market research. If you have any queries, you can call Kantar on (02) 9929 1111 or call the Market Research Society's free survey line on 1300 364 830.</p>