



marketbuzz

MARKET UNDERSTANDING INTO THE BEEF CONSUMPTION MARKET IN THAILAND

Prepared for:



Reach
Them

Engage
Them

Understand
Them

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Background and Objectives

The removal of trade barriers on New Zealand beef places it on par with the trade advantages currently enjoyed by Australia. Under the ASEAN Australia New Zealand Free Trade Agreement, the tariffs for beef and offal imported from New Zealand to Thailand were removed on January 1st 2020. This was followed by the removal of tariffs and quotas on January 1 2021, under the New Zealand Thailand Closer Economic Partnership Agreement.

Despite the removal of trade barriers, New Zealand beef exports have not seen commensurate growth. New Zealand beef exports to Thailand have not kept pace with the overall market growth – while Thailand's total imports of chilled and frozen beef increased 41% year-on-year from August 2021, imports from New Zealand decreased by 8%. Furthermore, Australian chilled beef holds over 90% market share compared to less than 1% for New Zealand beef.

As a result, a detailed understanding on the market is required:

- To provide New Zealand exporters with a better understanding of Thai consumer behaviour and references for beef consumption in Thailand.
- Analyse consumer attitudes and perceptions of beef from countries of origin and identify the points of difference and key messages that New Zealand should build upon in their marketing efforts.
- Analyse competitors offer and provide practical recommendations around how NZ beef exporters can grow sales in Thailand

Core Project Objective

The scope of our research is to develop a fact based understanding of protein consumption trends, and current usage and attitudes towards the Beef category and New Zealand Beef in order to inform product form, process and market development strategies for the New Zealand Beef Exporters.



Research Objectives

Develop a fact based understanding of protein consumption trends, and current usage and attitudes towards the Beef category and New Zealand Beef in order to inform product form, process and market development strategies for the New Zealand Beef Exporters.

More specifically the key objectives of this program are centred on a data driven set of actionable consumer insights which will provide:

- Market Overview
 - Retail & B2B market size of beef and offal in Thailand, in category breakdowns
 - Analysis of beef imports by country of origin
- Consumer Preference & Behaviour
 - Deep dive into the beef consumption in Thailand – how frequently is beef consumed, what occasions etc
 - Attitudes and preferences around beef consumption in Thailand – reasons for consumption, purchase drivers, preferred cuts and flavours
 - Identify key customer segments for NZ exporters and profiling of target consumer personas
- Competitor Analysis
 - Deep dive into the attitudes and preferences of beef from various countries of origin including NZ, Australia, the US and Japan. What is the perception of different countries and which is preferred and why? What are the success factors driving the prominence of Australian beef?
 - Are there any factors that are holding NZ beef back? What is it? Awareness, Perception, wrong types of products?? And how can NZ exporters differentiate and what are strengths they should be capitalizing on for the market?
 - Analyse competitor offerings and identify white space opportunities in the market



Research Approach

Delivery of the overall project objective requires addressing four key areas utilising trends and market data, Usage & Attitudes study and a Deep Understanding of the Buying Experience for Beef.

Develop a fact based understanding of protein consumption trends, and current usage and attitudes towards the Beef category and New Zealand Beef in order to inform product form, process and market development strategies for the New Zealand Beef Exporters.

1

Retail landscape

- Review of the current modern trade protein based landscape (1). What is the current retail position for Beef? What assortment ? How does it compare to other Proteins? What are the type of cuts available?

Notes: (1) Lamb, Chicken Beef, Poultry, Pork and Fish

2

Users, Needs & Behaviours

- Who is currently purchasing beef and imported beef what format and at what price, how often, when and where and what for?
- What are the key segments that exist?
- What are their lifestyle choices and media habits so we can connect with them?

3

The Purchasing Decision and Channel

- Criteria/ influencing factors for beef?
- What is driving and influencing the purchase process for Beef?
- What are the perceptions and attitudes towards Beef and specifically NZ Beef vs. competitors?
- What products are brought from what channels and why?

4

Actions

- What are the key product and market development actions that will maximise the value growth of New Zealand Beef?

Market Report Dataset

Usage and Attitude Study

Integrated Report & Presentation



Research Methodology & Design

Stage 1: Mystery Shopping *Retail Landscape*

- **Sample Size:** 7 Stores with a range of different modern trade formats including
 - Central Food Hall
 - Tops Supermarket
 - Villa Market
 - Gourmet Market
 - Lotus's
 - Big C
 - Makro Food Service
- **Coverage:** GBKK
- The data collection period was on 27 April – 5 May 2022

Stage 2: Quantitative *Comprehensive Understanding of Usage and Attitude*

- **Method:** Mobile Phone Survey conducted through Marketbuzzz 12 Million Mobile Panel
- **Sample Size:** N=500
- **Respondents' Criteria:**
 - Male or Female
 - 18-60 years old
 - SES ABC
 - Nationwide (60% GBKK and 40% Urban UPC)
 - Purchase beef in the past 3 months
- The data collection period was on 14-23 June 2022

Stage 3: Qualitative *Depth Understanding of Usage and Attitude*

- **Method:** Online Focus Group Environment - Online Discussion conducted through a Video / Chat Environment
- **Sample Size:** 6 Focus Groups with 4 respondents per group
- **Respondents Criteria:**
 - Regular consumers of Beef (including OOH consumption)
 - Purchase imported beef in P6M
 - SES ABC+ (with MHI of Baht 40,000)
 - Good mix of occupation and marital status (single, married with kids/ without kid)
- The discussion was on 15-19 July 2022



Highlights – Quantitative & Qualitative

Overall Beef Buyers

Thais consumers are range of proteins in their repertoire and is usually consumed on a daily basis.

- 17% have purchased beef in the past 3 months
- Beef is cooked at home 2.5 times per week which is half the frequency of total home cooking

Beef purchasers - Middle age families with kids, larger household size and higher income. They are more likely to be living in Bangkok and the purchasers are predominantly female.

The core driver for eating beef and particularly imported beef is taste. Consumers believe that imported beef delivers a superior taste. Quality is there to ensure a delicious taste. It is assessed through color, appearance and level of fat and elasticity of the meat.

No surprise but local Thai beef has the highest level of awareness but lowest quality perception. Among the imported beef the country of meat Australia has the highest awareness with 61% along with Japan at 60% awareness. New Zealand is in the third rank with awareness of 48%.

Awareness of New Zealand beef comes from Social media, In-store and YouTube.

New Zealand Beef sits behind Australia and Japan with lower levels of awareness and lower purchase rates as a result. Greater visibility and availability will produce higher conversion and purchase rates with most Thai's eat beef from different countries and also openness and willingness to try imported beef.

Consumers are also looking for stories illustrating the process of raising and the quality. Aspects linked to the environment are secondary. Consumers assume that imported beef should have high standards.

MAIN REASONS FOR BUYING

Delicious/good taste
Versatility in cooking a variety of dishes.

REASONS FOR NOT BUYING

High Price
Worshiped to Guan Yin
Difficult to digest

Taste – Key Driver

Country of Origin Importance

NZ Beef Perception



Meat is safe and no contamination
Meat is tender
Cattle is raised with sustainable farming practices
Good quality meat



Easy to find
A beef that can be eaten often



Highlights

NZ Beef Quality

96% are satisfied with NZ Beef - while satisfaction with the good quality and delicious taste is key for imported beef, they are also like beef tender and juicy, marbling, prepared in different ways, easy to find and at a reasonable price – similar to other imported beef. Thai beef is more liked for availability of product, reasonable price and freshness of Thai beef.

Planned Buyers

Nearly half of beef buyers have a plan for the specific “country” of beef they want to buy, especially New Zealand beef buyers. Almost 40% intend to buy beef but haven’t decided on a country. Shoppers have a menu in mind before visiting the store. However switches and additional purchase may happen in store. Shoppers pay attention to pack and information. They assess quality through country of origin, color and aspect of the fat. The decision tree involves quality, country of origin, fit with menu, pack and price.

Where they buy

Thais regularly buy beef at the retail stores such as Lotus’s, Tops, Makro and at the Fresh Market. The purchase channel differs between imported and domestic beef. They tend to purchase imported beef at supermarket / hypermarkets and Thai beef is mostly bought at Hypermarket, Makro and Fresh Market. Price and promotions are more important for those buying in hypermarkets and at Makro. Supermarkets shoppers interact more often with the staff.

Fresh / Chilled Bought

Over 70% of beef bought is fresh/chilled beef, particularly among Thai beef buyers and it is followed by frozen beef and a lower level of purchase for dry aged beef. New Zealand buyers are more likely to purchase dry aged beef than other users.

Beef Cuts Bought

Tenderloin, Sirloin and Chuck Roll are the top 3 cuts that consumers buy the most, especially among Thai beef buyers. Rib Eye and T-Bone are the popular cuts for all imported brand users. Tenderloin and Brisket are the most popular for New Zealand.

Marinates & Value Added Popular

There is a high degree of both marinated and value-added beef purchases. While they buy marinated beef there is also a preference to marinate the meat by themselves.

The most popular item they buy are black pepper flavor for marinated beef and Shabu, BBQ and Kra-Prao set for value-added product.



Highlights

Occasions Important

Imported beef can be consumed for special occasions or on a regular basis. The frequency is clearly linked to the level of income. Imported beef is a premium product but not seen as a luxury.

Every country of beef serves the same occasion for the family meal – They want to eat something delicious and to enjoy family meal together. Regular meal for family includes as Kra-Pras and fried beef. But if they have a party, they will eat outside and order more special menus like steak. Frequency of out-of-home beef consumption is higher than in-home cooking.

Media

Online media, Recommendations and In-Store are the main source when they looking for information about beef. For online media, they search from the internet the most, followed by social media and YouTube. These are also media they are exposed to regularly which will also be important for any future communication plans for NZ Beef.



The Way Forward

Raise awareness of NZ Beef

- Extracting value from the Thailand market will rely on driving increased demand for NZ Beef.
- Greater visibility and availability will produce higher conversion and purchase rates with most Thai's eat beef from different countries and also openness and willingness to try imported beef and NZ Beef.
- Using online and point-of-sale comms is the best way to raise awareness of NZ Beef and try and convert the large group of purchasers who are ambivalent toward the NZ brand

Develop areas of differentiation from competitors

- NZ needs to develop areas of differentiation from competitors beef in key attributes that enable higher prices to be acceptable to purchasers through increased value perceptions e.g. enhancing perceptions of NZ Beef being high quality with excellent taste
- Image of local beef has some negative association with taste and quality but is cheaper. Australian Beef is seen as the most popular in Thailand, Japanese Beef has a consistently positive image backed by well known stories, and US Beef enjoys a mainly positive image despite some doubts on the process
- New Zealand beef lacks a strong image is mainly compared with Australian Beef. New Zealand beef benefits from the very positive image of the country generating a high level of credibility on premiumness /organic/ naturality/ safety which can be capitalised on to enhance its image and a point of differentiation.

Increase the range and availability of NZ Beef in Stores

- New Zealand needs to significantly increase the quantity of fresh or chilled products as it currently under-indexes on its share of retail – NZ's share of fresh or chilled exports of beef into Thailand is lower than leading countries, particularly Australia and Japan.
- Fresh or chilled NZ beef should be available in the key retail channels in packaged format as retail sales, with Chilled Beef being the key focus.
- In addition, increase product mix of beef to match customer demand in retail, particularly the demand for these products forms amongst the large segment of 'Heavy' users.

Increase promotional collateral in the retail channel and communication online

- Increase in-store promotional collateral for NZ beef; include recipes for beef that work and provide menu ideas and recipes that highlight the simplicity of preparation is also key to driving purchase of beef.
- In store promotion should also help increase the moderate conversion ratio of awareness of NZ beef to trial of it while also increasing the opportunity to capture those purchase occasions of imported beef instore.
- For online media, search is key along with social media and YouTube. A strong digital campaign promoting recipes for beef that work and provide menu ideas and recipes with celebrity chefs will help to increase awareness, perception and buying rates for NZ beef prior to the store – most beef is planned purchases.

Consider raising prices for NZ Beef

- In conjunction with marketing activity driving demand for NZ beef, NZ producers could look to raise prices as Thais expect higher prices from imported beef products. Currently the price point is at Thai local beef levels and not at the level of Imported Beef – price rises currently out-weigh the potential change in volume indicating there is room to increase prices.

A wooden cutting board with several slices of marbled beef, a small bowl of olives, and chopsticks.

OVERALL BEEF PURCHASE



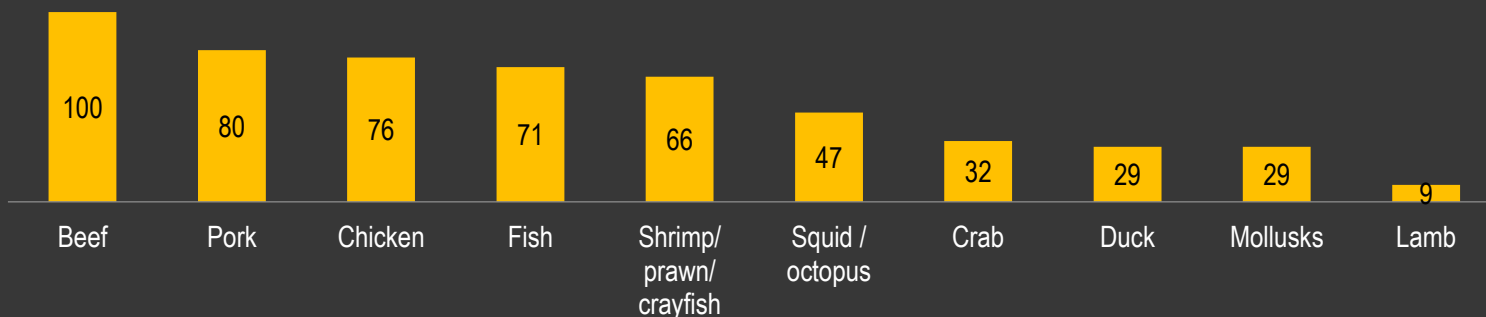
Overall Proteins Purchase and Cooking

Thais have a range of proteins in their repertoire and is usually consumed on a daily basis. 17% have purchased beef in the past 3 months and among those who buy, its regular and bought at least once a week, but not as much as other meats. Beef is cooked at home 2.5 times per week which is half the frequency of total home cooking.

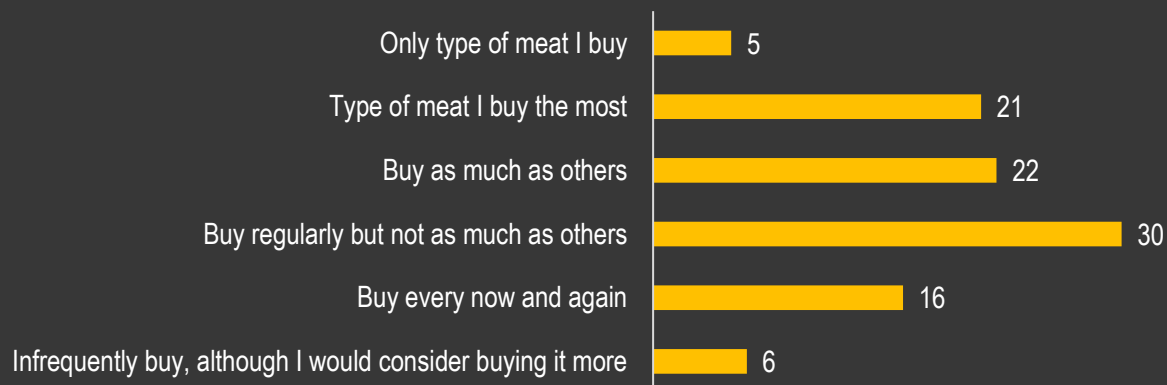
BEEF PURCHASED IN P3M

17%

TYPES OF PROTEIN PURCHASED IN P3M (%)



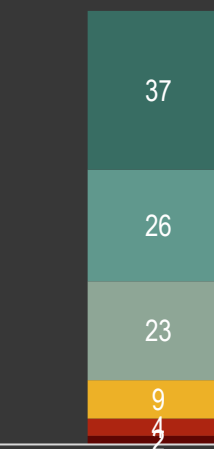
BEEF PURCHASE BEHAVIOR (%)



IN-HOME COOKING FREQUENCY OVERALL PROTEINS VS. BEEF? (%)

Overall Proteins

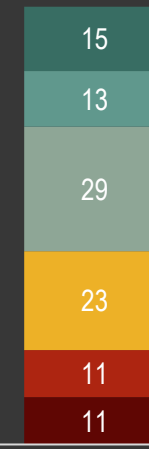
5 times/week



■ Daily
■ 2-3 times a week
■ Once a fortnight

Beef

2.5 times/week

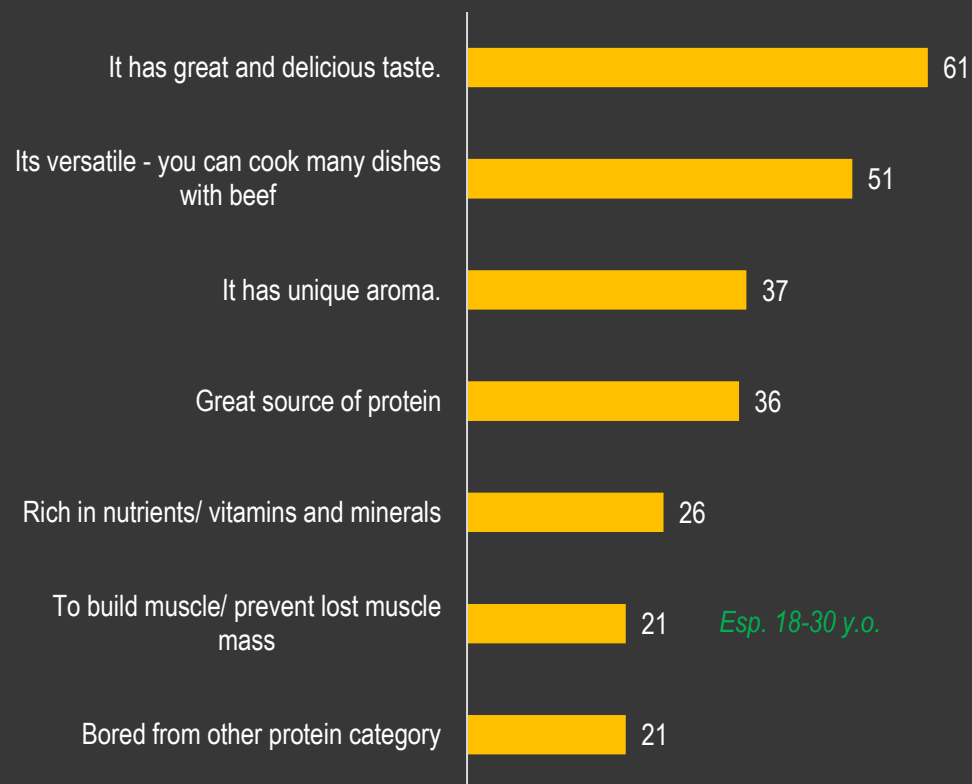


■ 4-6 times a week
■ Once a week
■ Once a month or less

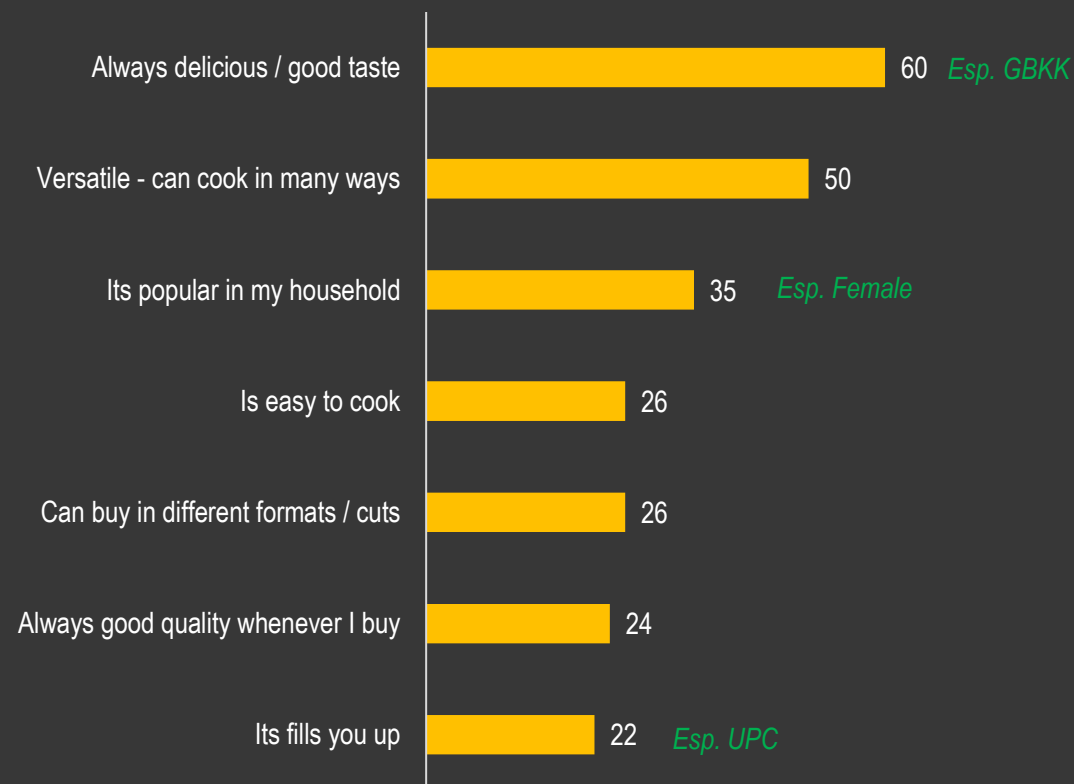
Category Drivers – Reasons for Eating and Purchasing Beef

While there are a range of reasons for eating and purchasing beef, the main ones are delicious/good taste and versatility in cooking a variety of dishes.

TOP REASONS FOR EATING BEEF (%)



TOP REASONS FOR BUYING BEEF FOR HOUSEHOLD (%)



It is all about Taste

Across all groups the core driver to eat beef- and imported beef- is taste. The taste is even described as addictive. For some respondents the specificity of beef VS other meats in terms of nutrient and cleanliness is also a trigger. Imported beef delivers a superior taste.



It is about taste and the family coming together

G3 Male Hypermarkets



More premium, better appearance, Color, smell, More fat content, It looks better

G1 Male Supermarkets



I eat beef because I like it and really want to eat I

G1 Male Supermarkets



Juiciness, texture, more dense

G2 Female Supermarkets



Boosts high protein energy. Beef provides more protein than other meats .Beef has also more fat content than other meats.

G5 Male Makro



Cleanliness and beef has a richer flavor than pork.

G4 Female Supermarkets



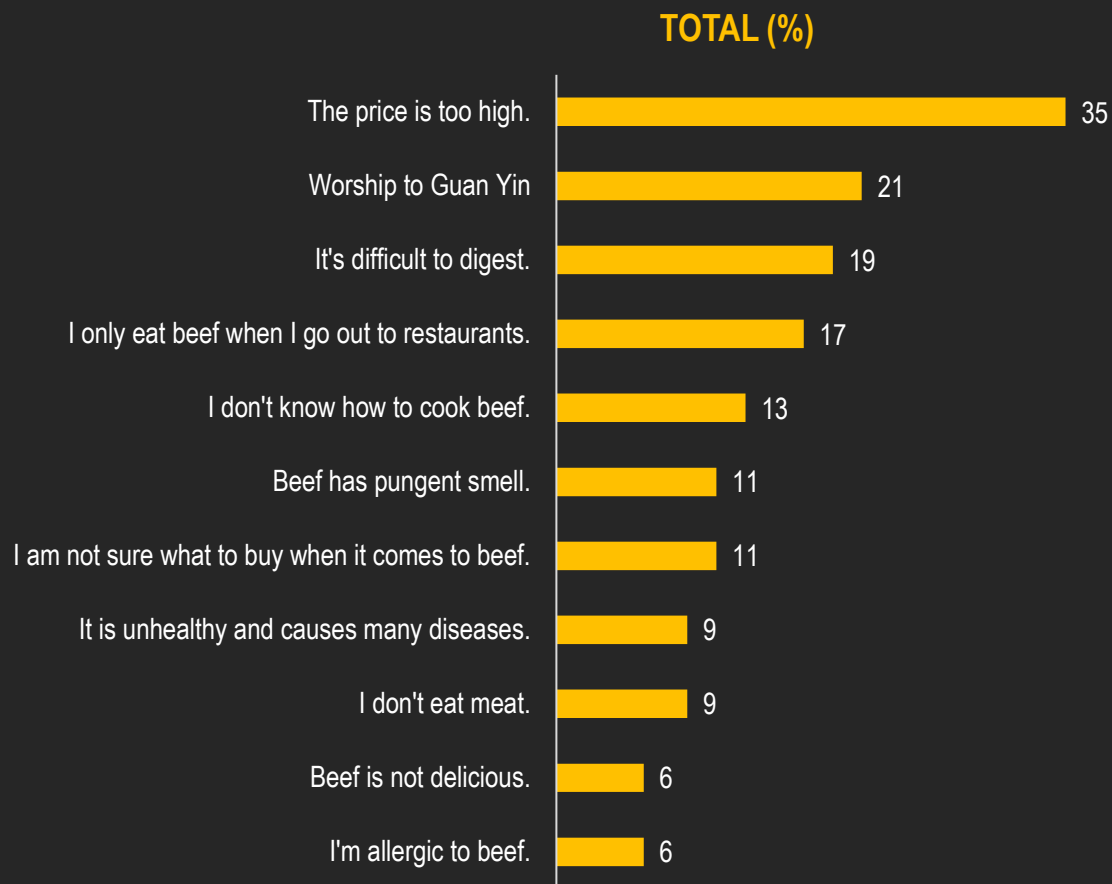
Beef has a different flavor than other meats. Eat because it's delicious. For the taste, the softness, the aftertaste.

G6 Female Makro



Category Barriers – Reasons for NOT Purchasing Beef

High price is the key barrier to buy beef. 21% won't eat because they have worshiped to Guan Yin, while 19% find it difficult to digest. Other factors include only eat beef at the restaurants and a lack of knowledge on how to cook beef.



KEY BARRIER

35%

HIGH PRICE



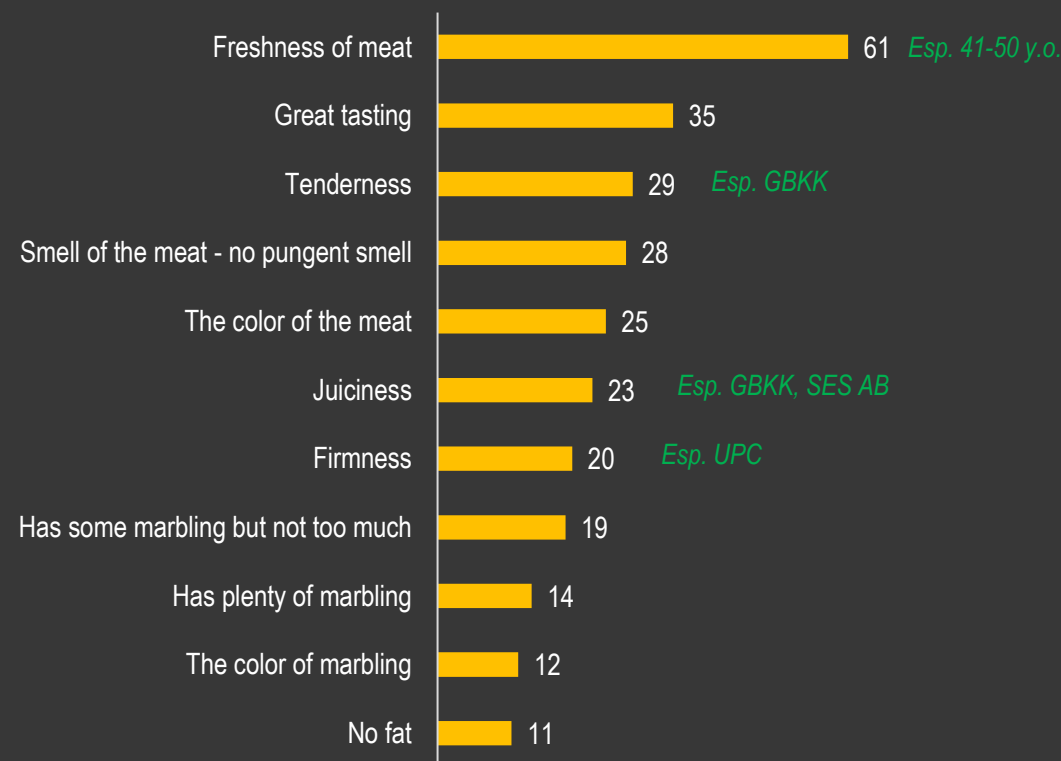
Beef Purchase Criteria

When purchasing beef, the most important criteria for beef selection are high quality and great tasting beef, and the availability of beef cuts for their recipe is the second main reason. And they will consider its freshness when it comes to buy a piece of beef. There is a difference between GBKK and UPC consumers. GBKK tend to focus on great tasting beef with tender and juicy texture while UPC are more rely on price.

IMPORTANT CRITERIA FOR THE CHOICE OF BEEF (%)



IMPORTANT CRITERIA FOR THE CUT OF BEEF (%)

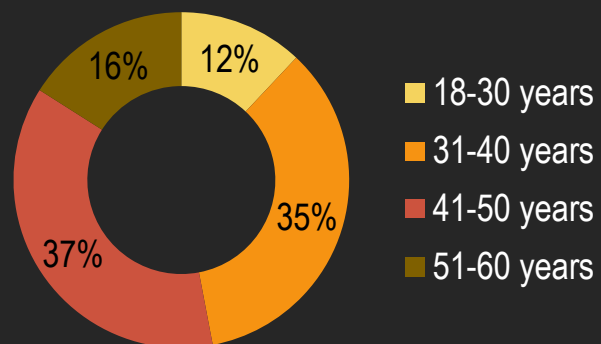




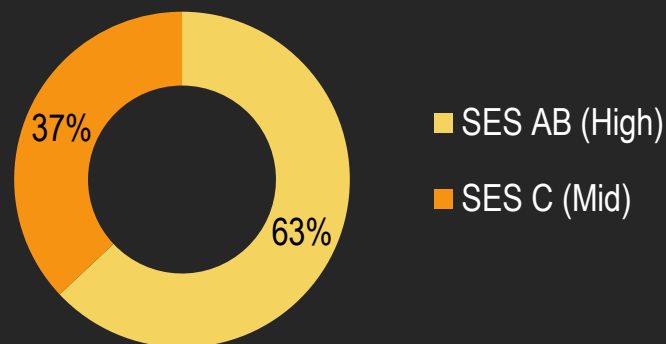
Who are Beef Purchasers ?

Beef purchasers tend to be more middle age families with kids, larger household size and higher income. They are more likely to be living in Bangkok and the purchasers are predominantly female.

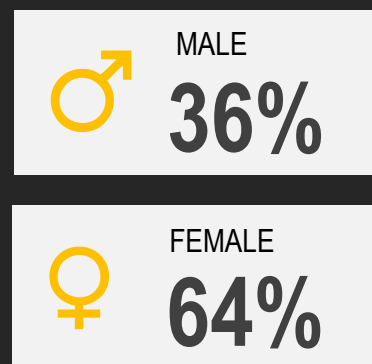
AGE



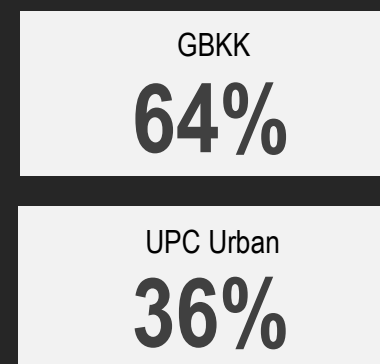
MONTHLY HOUSEHOLD INCOME



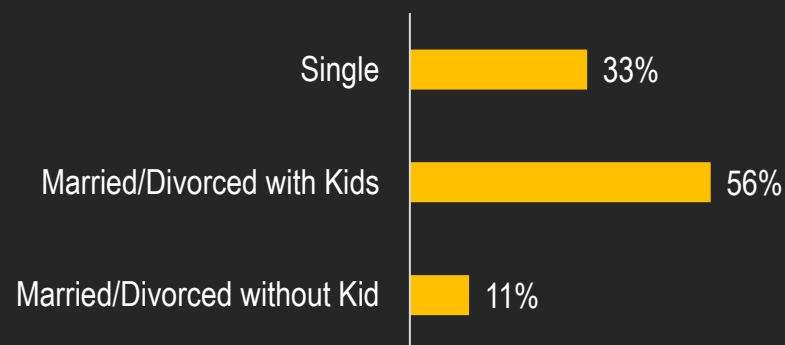
GENDER



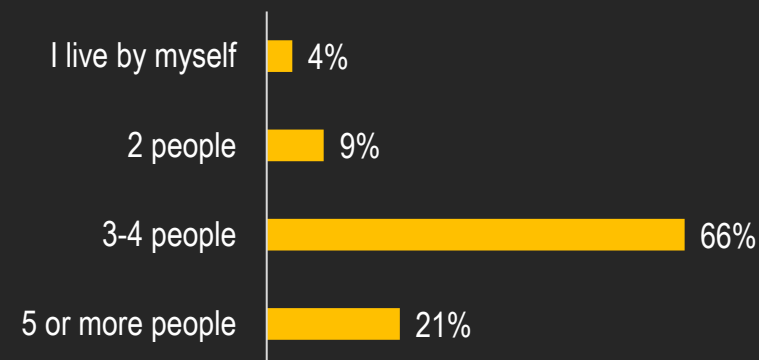
REGION



MARITAL STATUS



NUMBER OF PEOPLE IN HOUSEHOLD



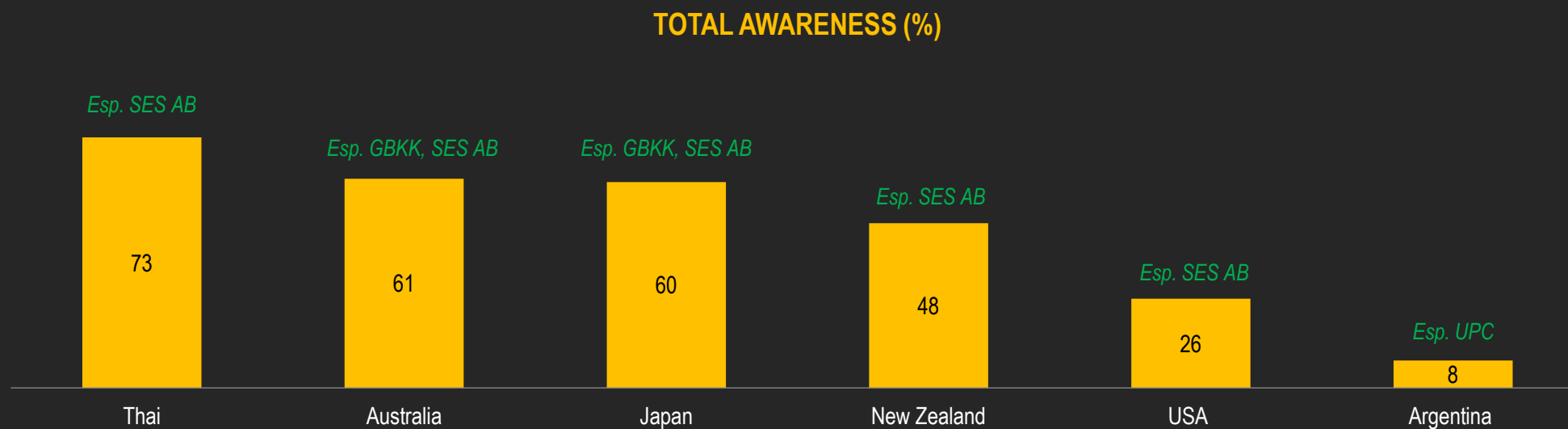
A wooden cutting board with several slices of marbled beef, a small bowl of olives, and chopsticks.

COUNTRY OF BEEF AWARENESS AND PURCHASE



Country of Beef Awareness

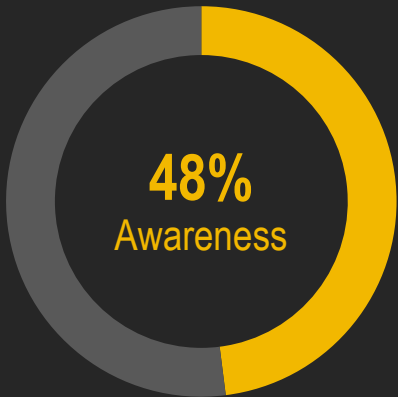
No surprise but local Thai beef has the highest level of awareness. Among the imported beef the country of meat Australia has the highest awareness with 61% along with Japan at 60% awareness. New Zealand is in the third rank with awareness of 48%.





New Zealand Beef Awareness and Source of Awareness

Awareness of New Zealand beef is at the similar level across the profile, although higher among high income households. Social media, In-store and YouTube are the main sources of awareness of the brand.

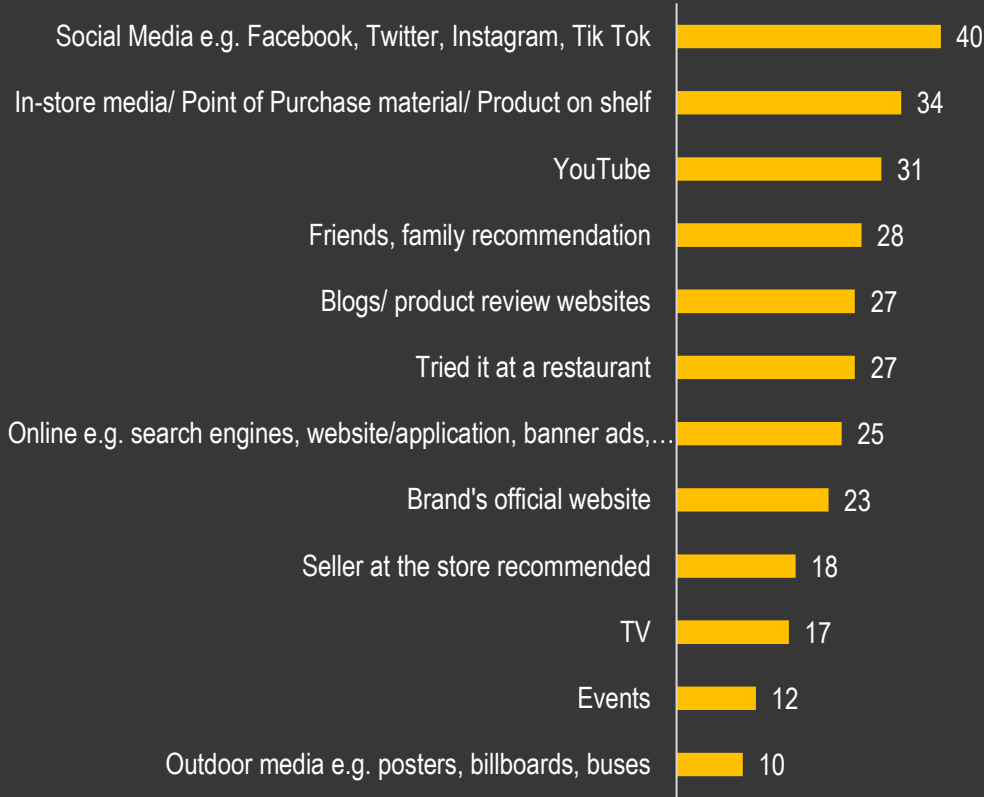


Base: All respondents N=536
Q8

Male		Female	
52%		45%	
GBKK		UPC	
48%		48%	
18-30 yrs.	31-40 yrs.	41-50 yrs.	51-60 yrs.
39%	44%	49%	59%
SES AB		SES C	
53%		39%	

Green text - Significantly higher than other subgroups at 95% confidence level

NEW ZEALAND BEEF SOURCE OF AWARENESS (%)

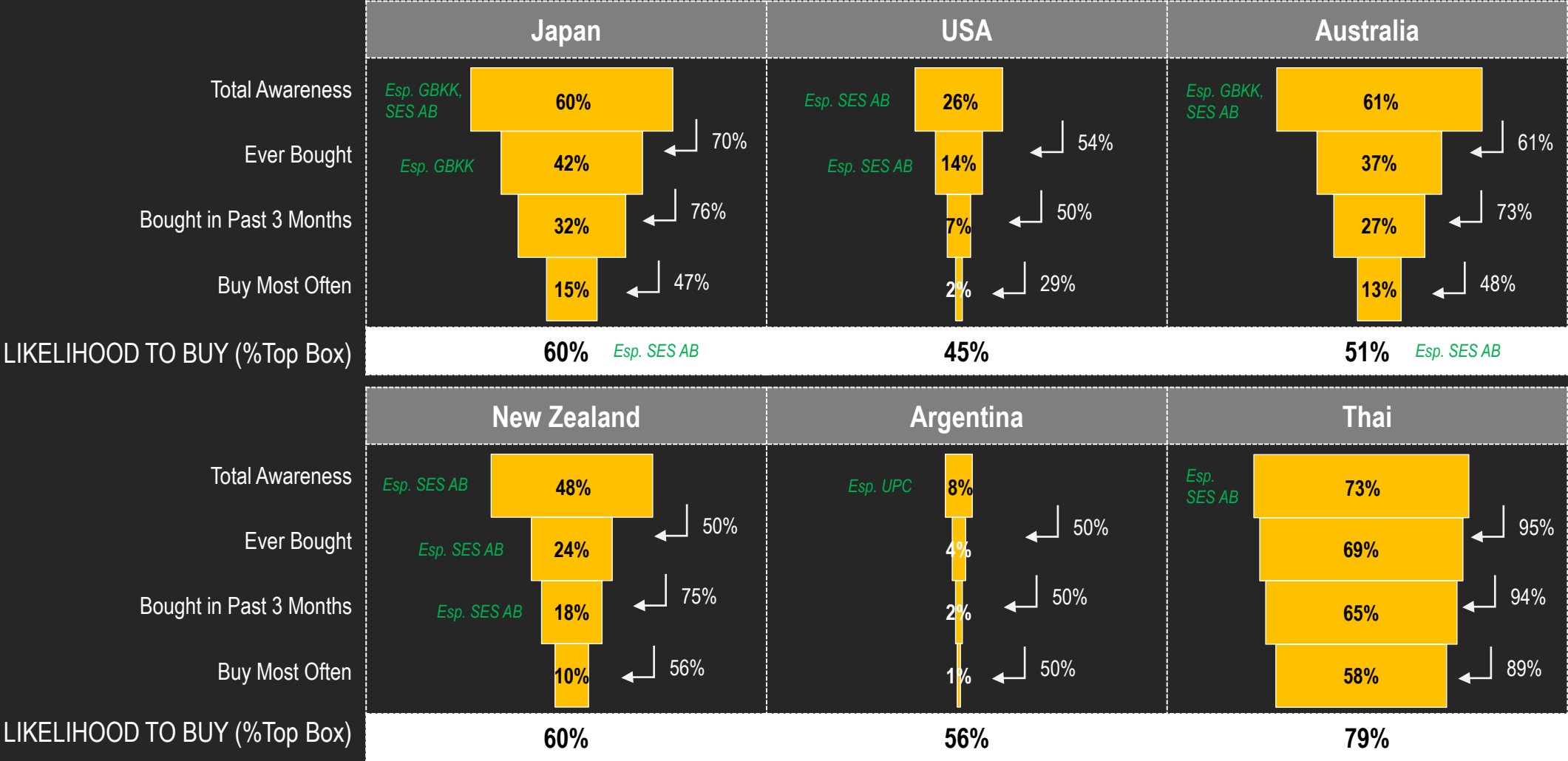


Base: Those who aware New Zealand beef N=255
Q20



Country of Beef Usage Funnel

Local Thai Beef dominates the market with the highest brand awareness, highest conversion rate at all stages of purchase funnel and the most considered brand to buy in the future. Of the imported beef, Japanese and Australian Beef are second-tier with strongest brand funnels. New Zealand Beef sits in the third-tier with average level of awareness and conversion and stronger among upper income households. USA and Argentina Beef are behind other brands both awareness and usage. Openness to try is all imported beef is at similar levels indicating an willingness to try all imported beef.



Base: All respondents N=536
Q8-Q11, Q17

Green text - Significantly higher than other subgroups under the same brand at 95% confidence level



Country of Beef - Imagery

New Zealand has the strongest image in terms of safe meat, sustainably farmed meat, tenderness and high meat quality. However, it's not easy to find and is not perceived as a beef for celebrating special occasion like other imported brands. Japanese beef is seen as organic meat, has plenty of marbling and tender meat. Australian beef is seen for special occasions but is also high priced. Thai beef is distinctive in product popularity due to wide availability and range of beef cuts to choose but lacking in product properties; taste, texture and quality.

+++



Meat is safe and no contamination
Meat is tender
Cattle is raised with sustainable farming practices
Good quality meat



Organic Meat
Suitable for special occasions
Meat is Tender
Plenty of marbling



Suitable for special occasions



High Price
Suitable for special occasions
Plenty of marbling



High Price
Organic
Delicious taste



Easy to find
A beef that can be eaten often
Wide range of beef cuts
Popular

Easy to find
A beef that can be eaten often

Easy to find
Beef that can be eaten often
High Price
Wide range of beef cuts

High Price
A beef that can be eaten often

Easy to find
Organic meat
It's a meat where cows are grass-fed
Unique aroma

Popular
Suitable for special occasions

Plenty of marbling
High price
Meat is safe and no contamination
Suitable for special occasions

This analysis shows the relative strengths of imagery relative to the brand.
An Index is calculated over the average for each and removes any brand size differences.
The higher the Index Score the stronger the association with the brand.

% results are Indexed over the Average to determine higher or lower





Country of Beef - Imagery

New Zealand has the strongest image in terms of safe meat, sustainably farmed meat, tenderness and high meat quality. However, it's not easy to find and is not perceived as a beef for celebrating special occasion like other imported brands. Japanese beef is seen as organic meat, has plenty of marbling and tender meat. Australian beef is seen for special occasions but is also high priced. Thai beef is distinctive in product popularity due to wide availability and range of beef cuts to choose but lacking in product properties; taste, texture and quality.

INDEX SCORE

	Japan	USA	Australia	New Zealand	Argentina	Thai
It is a popular to eat.	96	107	103	95	77	121
Meat is tender.	115	94	108	113	90	80
It has unique aroma.	103	88	109	106	103	90
It has great and delicious taste.	102	93	102	105	111	87
It is a good quality meat.	97	98	105	111	100	89
It has a wide range of beef cuts to choose.	85	105	95	91	95	129
It has plenty of marbling.	113	113	101	107	95	71
It has high price.	86	148	89	105	134	37
It is easy to find.	79	79	90	47	97	208
It's organic meat.	118	83	99	104	113	82
It's a meat where cows are grass-fed.	96	88	102	110	103	101
Cattle is raised with sustainable farming practices.	109	90	101	112	92	96
Meat is safe and no contamination.	104	94	92	116	107	87
It is a beef that suitable for celebrating special occasions.	113	117	115	90	80	86
It is a beef that can be eaten often/ not eat in any special occasion.	83	91	86	68	93	178

This analysis shows the relative strengths of imagery relative to the brand.
An Index is calculated over the average for each and removes any brand size differences.
The higher the Index Score the stronger the association with the brand.

% results are Indexed over the Average to determine higher or lower

	Less		More
Color index	< 90	90-110	>110



Beef Perceptions

Perceptions of countries of origin are diverse - Australian Beef is seen as the most popular in Thailand, Japanese Beef has a consistently positive image backed by well known stories, US Beef enjoys a mainly positive image despite some doubts on the process.



Australian Beef is seen as the most popular in Thailand

Australian beef is rated high on quality, taste, freshness and healthiness.

Australian beef has a distinctive flavor, more beefy, dense, intense, less fat than Japanese beef, with some unique aroma.

Australian beef has its own species, is fed with grains and grass, using a specific diet.

“When raising cows of this breed in a hurry, not focusing on profit. The process of raising cows from waking up until going to bed. It is a cold area, there are pastures, and the way of raising is to allow the cows to take medicine freely. Music is played so that the cows are not stressed and the beef will be tender

Australian beef has been promoted by Michelin starred chefs. “Most chefs and restaurants use it” It can fit with many menus but is most often used for steaks.



Japanese Beef has a consistently positive image backed by well known stories

There is a consensus on the qualities of Japanese beef: soft, tender, melts in mouth, mild flavor, high content of fat. The pink color and the marble texture are distinctive. Japanese beef is considered as expensive but the quality justifies the price.

The stories include the species of Wagyu, Matsusaka and Kobe beefs, the process of raising cows with beer. The levels of quality from A1 to A5 define the level of fat and red beef and the price.

Japanese beef fits well with shabu shabu but is not found appropriate to cook a steak: ” If you use Japanese beef to cook steaks, it will be too tender and lose a lot of the water”.

Some participants find that Australian beef has gained share from Japanese beef in the past years.



US Beef enjoys a mainly positive image despite some doubts on the process

US Beef is seen as premium with features comparable to Australian Beef: “Intense and concentrated taste. Close to OZ but better, maybe selected for export. Better technology to raise the cow, the varieties. High standards but expensive” “Big, bold cow that will give a larger amount of meat. It’s the Ground Beef that is used to make burgers. It is meat with less fat content than wagyu beef”

“America’s cows feed primarily on corn. American beef is meat obtained from hybrid cows. Makes a thick, soft texture and tastes good. For me, the price of American beef is quite high”

US is seen as a “super power to raise cattle industrially”, which raises the issue of possible contamination by chemicals.

US Beef is seen as well adapted for steaks and burgers.



Low awareness and mixed image for beef from Argentina

Few respondents are aware or have seen beef from Argentina.

“Seen at Makro. I don’t know. It is natural beef. It is exported beef “

Even the perception of the country is vague: “large country”, Diego Maradona”, “hot weather”.

Spontaneous perceptions include some doubts on quality and taste:

“They will grill the Argentine beef whole. It won’t be as smooth as wagyu beef. Probably harsh. Thai beef may be tastier. Probably similar to Thai beef”

“I don’t think I should try. Its meat is probably sticky”



Beef Perceptions

Consumers are aware of New Zealand beef but the levels of experience and knowledge are limited. New Zealand beef is mainly compared with Australian Beef. A limitation is the level of price perceived as higher than Australian beef. On the positive side, New Zealand beef benefits from the very positive image of the country generating a high level of credibility on premiumness /organic/ naturality/ safety.



In the shadow of Australian Beef

Consumers are aware of New Zealand Beef. A few have tried and enjoyed beef from New Zealand. However New Zealand is not among the top of mind countries (Australia/ Japan/ US) and will be often defined in comparison with Australian Beef.

“We don't know New Zealand beef even though Australia and New Zealand are next to each other. But Australian beef is more famous”

“I don't think New Zealand beef is as juicy as Australian beef and not tender”

“Softer than Australian beef”

“I think New Zealand beef is of the same quality as Australian beef. because the climate and terrain are similar”

Most comments focus on the limited availability:

“New Zealand beef is placed with a small area and a small number of parts”

“No promotion and difficult to find”

“When it comes to space Australian beef is leading, followed by Thai's beef. New Zealand beef visibility is minimal.



Backed by the image of the country New Zealand beef has a high level of credibility on premiumness/organic/ naturality/ safety.

Several very positive features linked to the perception of the country are mentioned after probing.

“NZ is richer country. More grass field, more winter. More tender”

“Plenty of pastures, few inhabitants, and a reputation for livestock should be able to produce quality beef”.

“New Zealand beef should be more premium. Because it is a small country to raise less, it can be raised to better quality. If you think of New Zealand, you will think of the open nature because the country is an island. New Zealand is less polluted”.

“I think it's probably the climate and terrain. The weather should be cool. Good air affects the quality of beef”





Perceptions Grass Fed vs Grain Fed

Consumers express some opposite views on the relative benefits of grass fed VS grain fed.

Grass fed is superior.

(mainly from supermarkets groups)

“I think cows that are grass fed are better. If it is a grass fed cow, it will have more fat content”

“Grass-fed cows are raised in an open system, giving cows freedom. It will affect the quality of beef”

“Grass fed is more expensive. because the cows were fed in nature”



Grain fed is superior.

(mainly from hyper and Makro groups)

“ Grain fed gives more proteins”

“Grain feeding is a control diet for cows. They receive the right amount of feed”

“Grain fed? more complete nutrition than grass-fed cows.”

“Grain-fed cows is more expensive and better Grass fed is just easier to find. More expensive as the cost of raising the grain would be higher



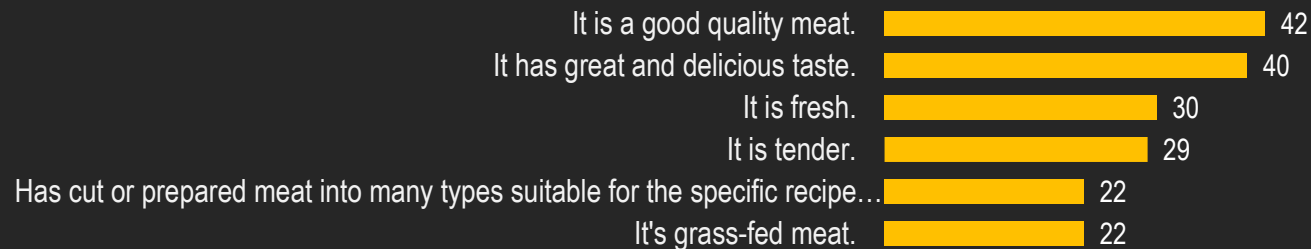
Key Drivers – Reasons for Buying

Drivers are consistent for all imported beef - good quality meat and delicious taste are the main reasons for buying. For Thai beef, product availability, reasonable price and the freshness are key reasons for buying Thai beef along with quality and taste.

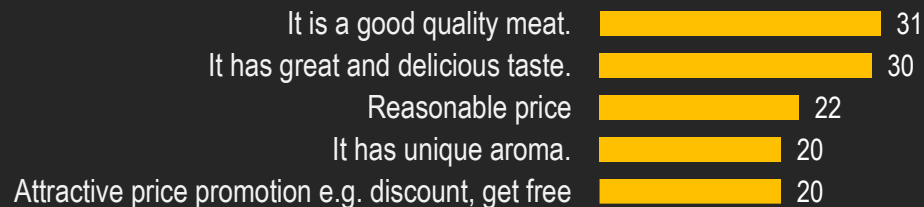
Top Reasons for Buying (%)



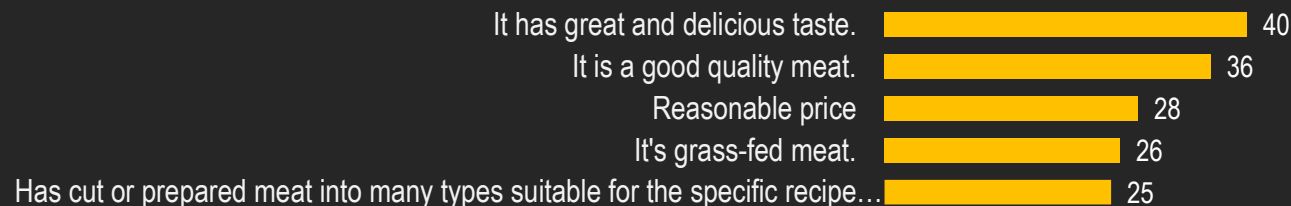
n=82



n=72



n=51



n=311





Clear Preference for Imported Beef

There is a clear preference for imported beef for most menus as the smell and the taste will be better. Thai beef is used because it is cheaper and in menus for which the taste will be hidden by the preparation



Imported is more satisfying than Thai beef, Texture, taste aroma are better. Thai beef you have to add many ingredients

G2 Female Supermarkets



If it's a steak or grilled dish, it uses imported beef. If it's a beef rice dish, imported beef is also used because the smell is not very strong. But if it's curry food, it's used as beef in Thailand

G6 Female Makro



If it's a curry dish, I use imported beef. Because it has a delicious taste and absorbs the curry well and the smell of beef is not strong.

G5 Male Makro



Thai beef can be used for grilling if it is a foreign breed of cow that were raised in Thailand, such as Wagyu beef, or Angus beef,. They call it Thai Wagyu beef or Thai Angus Beef.

G6 Female Makro



I cook by using imported beef mostly. Because the price is not too expensive. Price is a little bit different. But imported beef has a better taste and texture

G5 Male Makro



Importance Factors

Tasty	Sustainable/ Eco Friendly	Unique products	Quality packaging
Healthy	Safe	Easily available	Traditional production process
Of High Quality	Authentic taste	Feels like traveling	Reliable food producer
Grass Fed	Carbon neutral/ Zero carbon	Trendy	Interest my friends on social media
GMO Free	Grain Fed	To create special moments	

G1 Male supermarket

Taste, Story, Heritage, Producer, Safety, Reliable

They suggest adding” having a story” (What kind of cow, where is it coming from)

Less important: Sustainability/ eco friendly, trendy, trendy , carbon neutral .

Traditional production process and reliable food producer can be components of the story.

G2 Female supermarket

Tasty, High quality, safe, authentic taste

Tasty is what they expect from beef with quality. Safe means nothing artificial .

Less important: Carbon neutral, zero carbon. Heritage? Can be a plus if the price is not too far. Trendy? Can be a trend at some time

G3 Male hypermarket

Easily available, Quality packaging, Of high quality, tasty

Quality packaging? If the packaging is bad, it can lead to poor quality beef. ‘Tasty’ and ‘Of high quality’? The taste comes with the quality of the beef. Story? It is also important.

Less important: Animal welfare- Friendly , Sustainable Eco Friendly, Carbon neutral Zero Carbon. It should be standard and I think that they are all equal.

G4 Female hypermarket

Healthy, Tasty, Of high quality. Also Safe, Animal welfare friendly, Grain Fed

Healthy will depend on how the cow is fed and slaughtered. High quality means well raised. Less important attributes.

Zero Carbon, environmentally friendly? More related to factories. Positive Food Heritage and culture? Does not affect decision making

To create a special moment? Indifferent about this statement. Interest My Friends on Social Media, Trendy? No effect on me.

G5 Male Makro

Tasty, Of high quality , Grain Fed Safe, Easily available

Tasty is the most important . Of high quality: Beef color. Halal Symbol, brand and national flag on the package. Safe: No additives. We have to focus on safety first.

Less important: GMO free, Sustainable, Eco Friendly, Zero Carbon, environmentally friendly? It doesn't matter to the consumer, there will be agencies that take care of it.. “But if it's a chef who has a Michelin star to recommend, this one will be more interesting”.

G6 Female Makro

Tasty, Healthy, Of high quality, Grain Fed,

Tasty? It comes from the country of origin. High quality? Depends on brand, Country, pack, appearance of the beef.

Less important: environmentally friendly Zero Carbon, It's not an interesting issue for the product. Free from GMO” maybe if it was a product from China. One mentions positive food heritage and culture thinking of Japan.. Traditional Production process? The words are too long to put on the packaging.



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G6 Female Makro



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G5 Male Makro

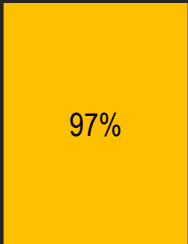


Satisfaction towards Country of Beef

Consumers are satisfied with all countries of origin although for different reasons. While satisfaction with the good quality and delicious taste is key for imported beef, they are also like beef tender and juicy, marbling, prepared in different ways, easy to find and at a reasonable price. Thai beef is more liked for availability of product, reasonable price and freshness of Thai beef.

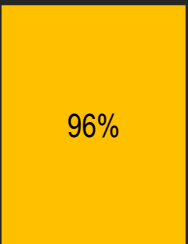
SATISFACTION SCORE (% Top 2 Box)

Japan



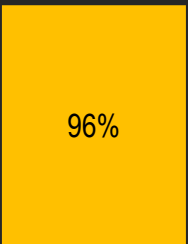
N=82

Australia



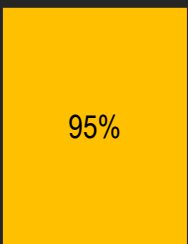
N=72

New Zealand



N=51

Thai



N=311

Base: Each brand users (Those who buy specified brand most often)

SATISFACTION AREAS

Base: Those who satisfied with each brand

Japan

(N=80)

• It is a good quality meat.	53
• It has great and delicious taste.	42
• Safety and no contamination	32
• It is tender.	30
• Has plenty of marbling	27
• It is juicy.	24
• It is fresh.	22

Australia

(N=69)

• It has great and delicious taste.	39
• It is a good quality meat.	36
• It is tender.	32
• Has cut or prepared meat into many types suitable for the specific recipe e.g. slice, minced, steak, dice, etc.	28
• It is fresh.	24
• Easy to find product	23
• Reasonable price	20
• Safety and no contamination	20

New Zealand

(N=49)

• It has great and delicious taste.	43
• It is a good quality meat.	28
• It is juicy.	24
• Has cut or prepared meat into many types suitable for the specific recipe e.g. slice, minced, steak, dice, etc.	24
• Easy to find product	24
• It is fresh.	23
• Has plenty of marbling	22
• Safety and no contamination	22
• Reasonable price	20

Thai

(N=295)

• Easy to find product	61
• Reasonable price	58
• It is fresh.	55
• It has great and delicious taste.	41
• It is a good quality meat.	34
• It has a wide range of beef cuts to choose.	29
• It is tender.	24



Country of Beef Purchase Behavior

When it comes to buying beef, they are not country loyal and most imported buyers have 2-3 country choices in their consideration set.
Thai beef buyers are more likely to buy based on price.

COUNTRY OF BEEF BOUGHT MOST OFTEN (%)

OVERALL
CATEGORY (%)
N=536



JAPAN
N=82



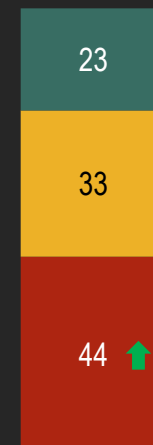
AUSTRALIA
N=72



NEW ZEALAND
N=51



THAI
N=311



■ Brand loyal, typically buy the same origin

■ 2-3 Origins to buy and stick to these

■ Don't care about origins, will buy at a price that I can afford

↑ Significantly higher than others at 95% confidence level



Country of Beef Repertoire

Beef buyers are more likely to have on average 2 countries of beef to purchase in their repertoire. New Zealand buyers are most likely to buy Australian beef same as Australian buyers also buyer of beef from New Zealand along with Japan. Whereas Thai and Japanese beef buyers are more likely to buy from each other when they purchase beef.

		Country of Beef Bought Most Often			
		Japan	Australia	New Zealand	Thai
N=		82	72	51	311
Country of Beef Bought in Past 3 Months	Japan	100	20	10	22
	USA	11	10	4	2
	Australia	12	100	26	14
	New Zealand	14	19	100	7
	Argentina	1	0	8	0
	Thai	23	17	11	100
Average Brand Consumed in Past 3 Months		1.59	1.67	1.59	1.45



Country of Beef User Profile

The profile of buyers by country of origin are mostly consistent – Female middle aged 31-50 years, higher income and residing in Bangkok. NZ beef buyers tend to be slightly younger.

		Country of Beef Bought Most Often			
		Japan	Australia	New Zealand	Thai
	N=	82	72	51	311
Gender	Male	27	29	42	40
	Female	73	71	58	60
Age	18-30 y.o.	7	17	18	11
	31-40 y.o.	49	46	39	26
	41-50 y.o.	40	21	35	43
	51-60 y.o.	5	16	8	21
Region	GBKK	61	62	60	66
	UPC	39	38	40	34
Household Income	SES AB	59	67	69	63
	SES C	41	33	31	37



GENERAL BUYING AND EATING BEHAVIOR



Planned vs. Unplanned Purchase

Most shoppers have a menu in mind when they go to buy. The path to purchase is mostly planned, particularly for hypermarkets and Makro shoppers.



Most of the time, I have a menu in mind

G3 Male Hypermarkets



For example, if I want to eat stir-fried basil with beef, I will go and buy it at Lotus.

G4 Female Hypermarkets



Having a menu in mind, we go buy Makro.

G5 Male Makro



I intend to buy. If I intend to cook it at home, then go to the mall to buy it immediately

G4 Female Hypermarkets

Switching and additional purchase may happen in store.



Makes me want to buy more, I intended to buy tenderloin, but when I saw the ribs I think I thought I would do barbecue as well.

G5 Male Makro



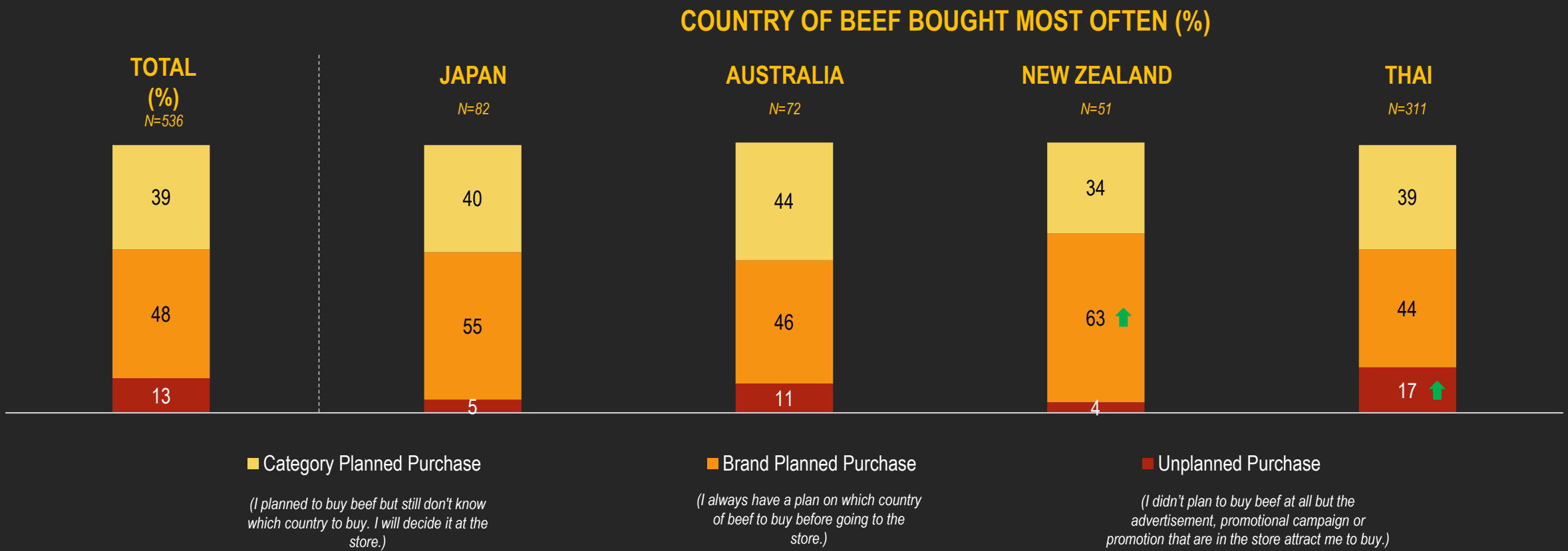
I will also look at other brands to look at the price and expiration date.

G4 Female Hypermarkets



Planned vs. Unplanned Purchase

Nearly half of beef buyers have a plan for the specific “country” of beef they want to buy, especially New Zealand beef buyers. Almost 40% intend to buy beef but haven’t decided on a country. The smallest groups of buyers, mostly Thai beef purchasers, are induced in the store without having planned it.





What happens in store?

What else do they shop/ buy

Beef is a destination category and a central part of the trip in store.
In supermarkets beef can be the only product purchased.

“Go to the beef right away. I go there to buy beef”

In hypermarkets consumers tend to buy other grocery items. They will also consider various options for beef and look at discounts.

“I'll go buy some beef first, then go look at the household items”

In Makro shoppers will follow the order dictated by the store design.

“I walk based on directions provided by the store. Fruit and vegetables first, followed by beef.”

Buying beef

Shoppers check if the product they are looking for is available and often consider other options of beef or meat.

“I will go straight to the beef first. Check if the part of the beef I want, such as the loin, is still there, see if there are any parts. Check if the portion of beef I want is out of stock. Then go to look at other types of products first, then walk back to get the beef.”

“Explore which pieces of beef are available because each day has different beefs. Even if I go regularly, the products will never be the same”.

Interestingly they tend to grab the beef at the end of the shopping trip:

“ I'll go buy the last one. I'm worried about the temperature if I bought beef before. I'm afraid that the beef will spoil first while I walk to see other products”



What do they pay attention to when it comes to beef?

Pack

The packaging plays multiple role:

- Information on the brand, the product description, the country of origin, the grade –for Japanese beef-the process.
- Protection of the product. Shoppers will check if the pack is well sealed.
- Reminder of the taste and the enjoyment to eat beef. Some packs are found attractive and elegant.

Store Information

In Makro the shopper is guided by the organization by zone/ cabinets helping to identify type of beef and country of origin and by posters and brochures.
“I will read the brochure that Makro has placed next to the freezer”

Store Staff Interaction

Asking advice is more common in supermarkets.
“ I will take the beef recommended by the seller” The recommendation will be based on the intended menu.

In hypermarket and in Makro the discussion is limited to availability/ out of stock situations.
“In Lotus I won't ask the staff, I will only ask if the items I want are out of stock”
“I feel that the staff at Makro don't give advice. There are only signs for us to read ourselves”



Place of Purchase

Consumers regularly buy beef at the retail stores such as Lotus's, Tops, Makro and at the Fresh Market. The purchase channel differs between imported and domestic beef. They tend to purchase imported beef at supermarket / hypermarkets and Thai beef is mostly bought at Hypermarket, Makro and Fresh Market.

	Total	Country of Beef Bought Most Often			
		Japan	Australia	New Zealand	Thai
N=	536	82	72	51	311
Lotus's	52	35	41	41	61
Tops	46	47	47	43	45
Makro	44	21	40	47	50
Fresh Market	44	12	26	19	63
Big C	33	23	22	23	40
Foodland	27	34	33	32	23
Specific Butcher Shop	23	22	20	23	24
Gourmet Market	20	42	33	17	11
Villa Market	14	30	15	26	8
Makro Food Service	14	10	13	5	15

Channel Selection Differences



Tops is a leading supermarket among participants.

They use supermarkets for most grocery shopping.

Some select the store based on country of origin.

“ I will use Tops for Shabu”

“Gourmet has more variety of brands”

Reasons to use hypermarkets are linked to convenience and price.

“Convenience, near my home. I have bought some at Tops supermarket, but the beef sold at Tops is more expensive than at Big C and Lotus”.

“Products are not much different. If it is sold in the Tops supermarket or Gourmet, the beef will be specially selected but will be sold at a higher price”

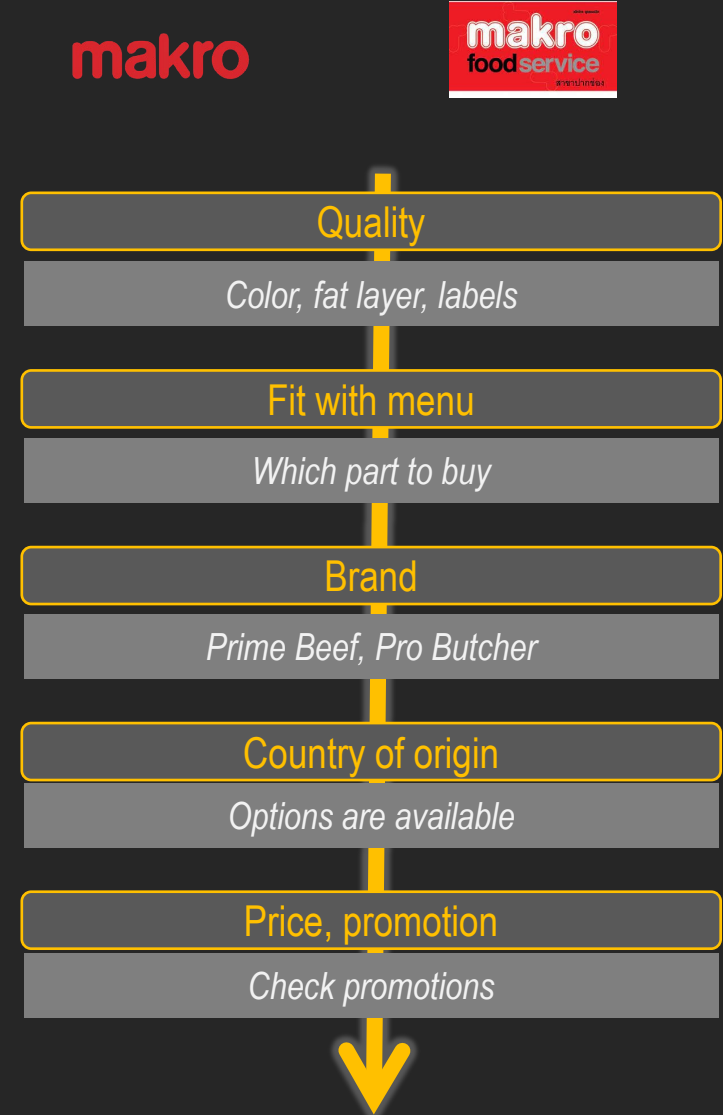
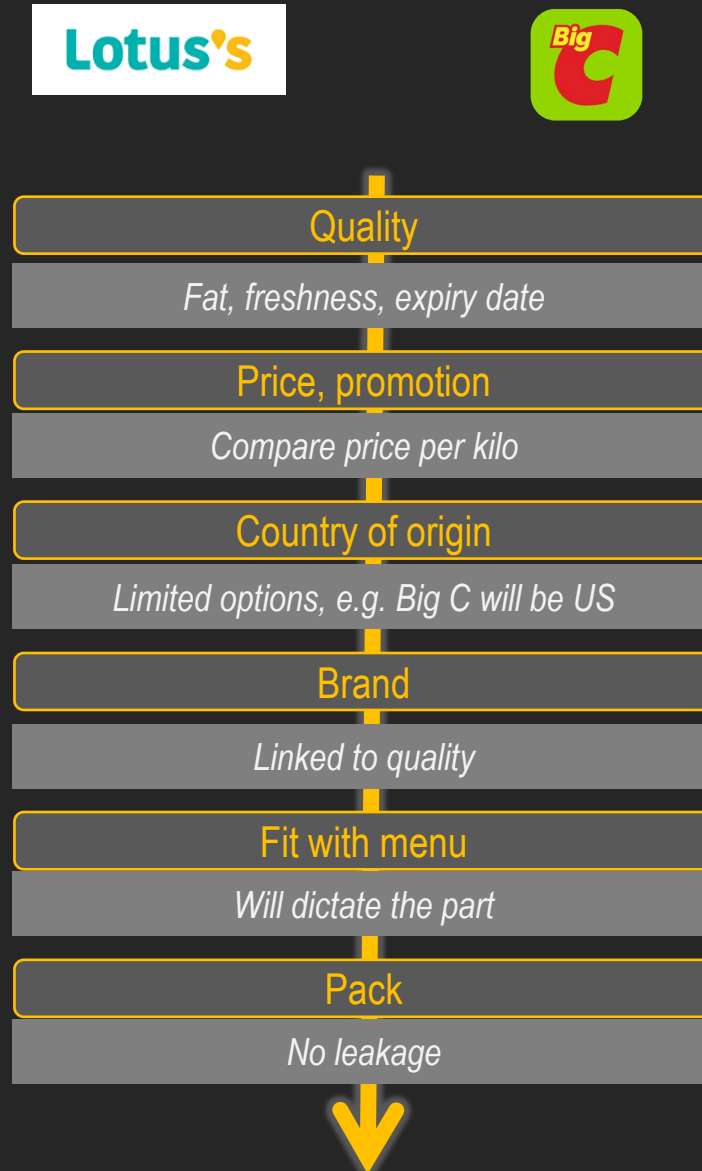
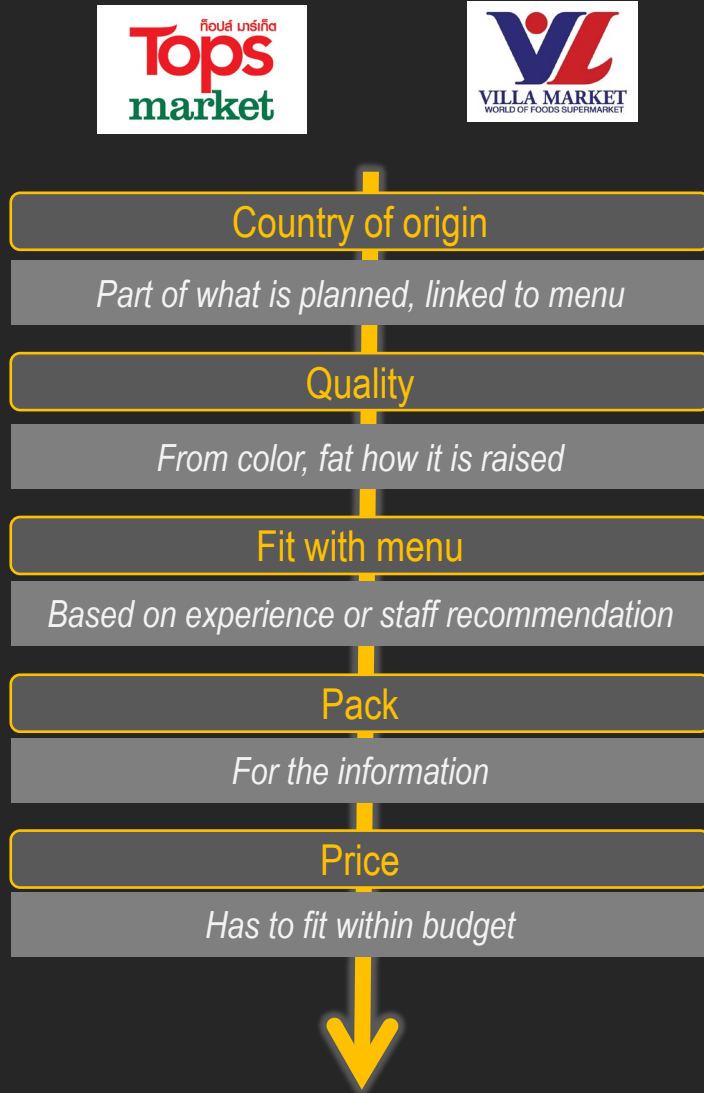
Consumers using Makro are convinced that it is the best channel to buy beef.

“There is a wide variety of beefs, including marinated beefs, frozen beefs, sliced beefs, chunks”

“Wide selection of beef, affordable and quality beef. have everything we need. More diverse than in other stores. There are more than 10 freezers”

“Fresher than Lotus's”

The Purchase Decision Tree based on Channel





Assessing Quality in Beef

The ultimate assessment of quality is the eating experience, “when you chew it, you feel how soft and tender it is”. However the appearance before consumption gives indications on the quality.

Color

All agree that the color should not be dark. Best color should be pink or bright red.

“I like the pink color of Japanese beef”.

“It must have a dark red color. If it is Western beef, (*) it will be red like a cherry”.

Fat aspect

“Look at the stripes of fat inserted in the red meat. If the amount of fat content inserted in beef is not too much or too little, it will make the beef tender”.

“The more marble, the softer and more delicious”

“Look at the stripes of beef to see how much fat is inserted into the beef. We should be able to see the lines clearly for a quality beef. Consumers prefer white fat over yellow fat that may be interpreted as not fresh

The elasticity of the meat is another indicator of quality: “
Try pressing on the beef. If pressed down and the beef can regain its shape, it's good beef”

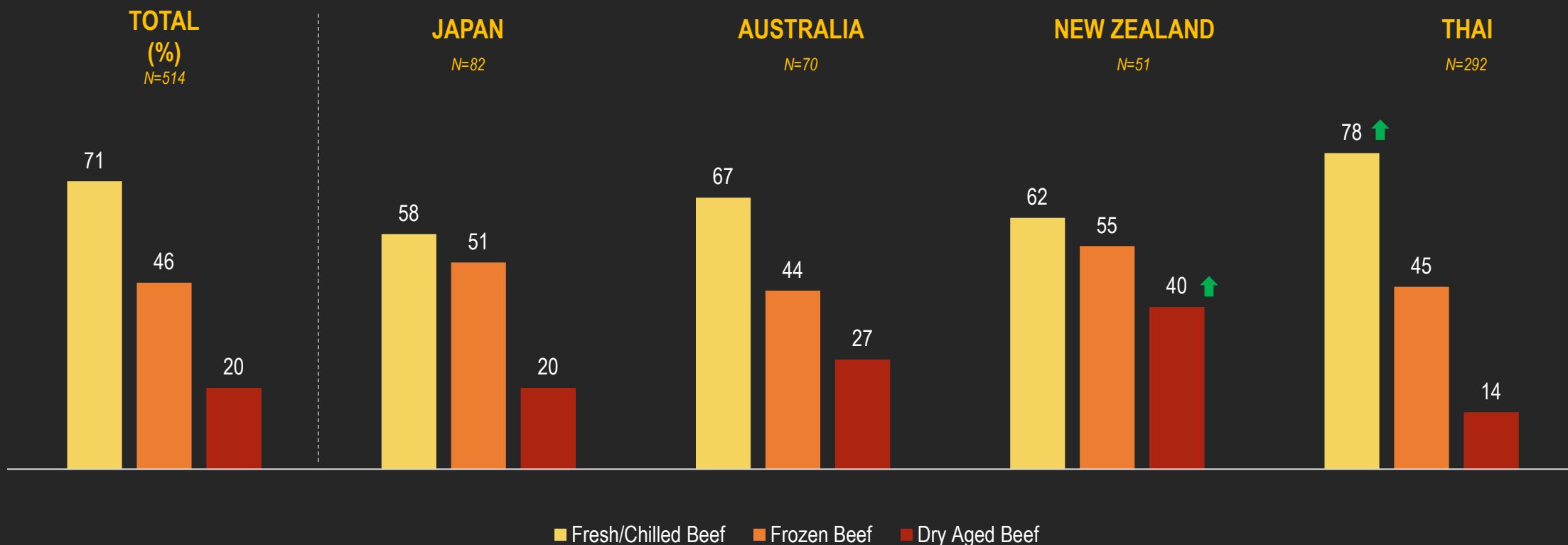
(*)They call beef from Australia and New Zealand “Western beef”



Beef Buying In Store

Over 70% of beef bought is fresh/chilled beef, particularly among Thai beef buyers and it is followed by frozen beef and a lower level of purchase for dry aged beef. New Zealand buyers are more likely to purchase dry aged beef than other users.

COUNTRY OF BEEF BOUGHT MOST OFTEN (%)





Chilled is more common than Frozen and Dry Aged

More chilled beef bought - they have some reservations towards frozen and find dry aged far too expensive



Chilled VS Frozen



Most prefer to use chilled beef as Frozen takes time, requires a slicer and is seen as lower quality –even if it is softer.

“Frozen beef can be used as curry or stir-fry dishes. But if it's a grilled menu, use chilled beef.”

The fact that they have to use immediately chilled beef is not a problem.

Frozen beef can be used as it is cheaper: “Whichever one is cheap, has a promotion, will buy that one”.



There is a good awareness and understanding of Dry Aged beef. “It is a beef that has been cured at a temperature of 0 to 5 degrees Celsius in humidity of not more than 70 percent, and the taste of the beef is more intense than normal beef.”

All acknowledge the higher quality of dry aged beef but the perception of price is a limitation.

“When I see the price, I feel that if I buy dry aged beef, I can buy more beef of other types”.

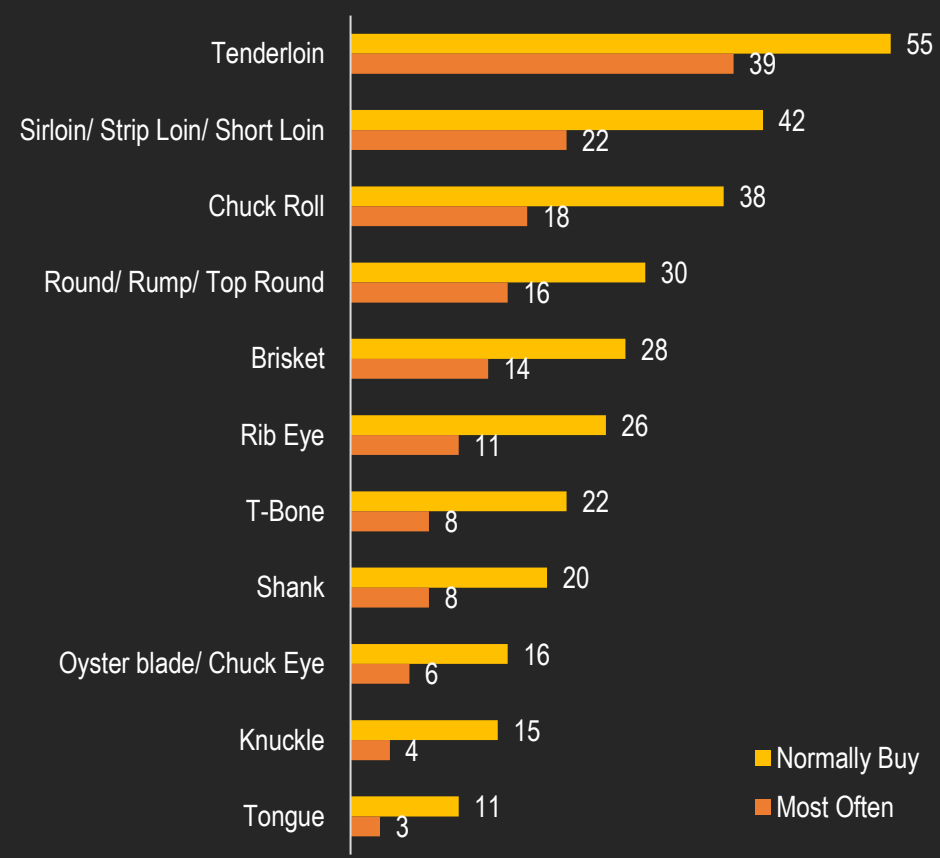
Thai beef is also available as dry aged but there is some concern on taste.



Types of Beef Cuts Purchased

Tenderloin, Sirloin and Chuck Roll are the top 3 cuts that consumers buy the most, especially among Thai beef buyers. Rib Eye and T-Bone are the popular cuts for all imported brand users. Brisket is also popular for New Zealand and Oyster blade among both Australian and New Zealand buyers.

TOP BEEF CUTS PURCHASE (%)



TOP CUTS PURCHASE MOST OFTEN (%)

	Country of Beef Bought Most Often			
	Japan	Australia	New Zealand	Thai
N=	82	72	51	311
Tenderloin	35	27	41	43
Sirloin/ Strip Loin/ Short Loin	19	14	9	27
Chuck Roll	16	7	12	21
Round/ Rump/ Top Round	11	11	14	19
Brisket	7	13	23	15
Rib Eye	15	23	15	6
T-Bone	17	12	9	4
Shank	7	8	14	8
Oyster blade/ Chuck Eye	3	14	13	3
Knuckle	5	3	5	5
Tongue	1	6	1	3



Quantity of Beef Cuts Purchased and Spending

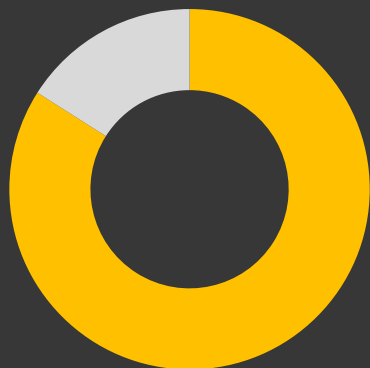
(Mean)	Tenderloin	Sirloin/ Strip Loin/ Short Loin	Chuck Roll	Round/ Rump/ Top Round	Brisket	
AVG. KILOGRAM PER PURCHASE	0.78	1.33	0.82	0.84	1.48	
AVG. PRICE PAID PER KILOGRAM (THB)	490.92	501.34	502.3	489.94	466.81	
	N=209	N=116	N=94	N=86	N=75	
(Mean)	Rib Eye	T-Bone	Shank	Oyster blade/ Chuck Eye	Knuckle	Tongue
AVG. KILOGRAM PER PURCHASE	1.05	0.97	0.97	1.46	1.14	1.55
AVG. PRICE PAID PER KILOGRAM (THB)	645.12	577.7	482.21	732.78	599.36	504.5
	N=58	N=40	N=41	N=32	N=23*	N=16*



Marinated Beef and Value-Added Products

High purchase of both marinated and value-added beef. The most popular item they buy are black pepper flavor for marinated beef and Shabu, BBQ and Kra-Práo set for value-added product.

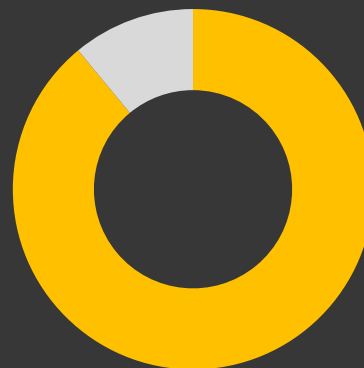
84% PURCHASE MARINATED BEEF



FLAVOURS OF MARINATED BOUGHT (%)

• Black pepper	48
• Jim Jaew	29
• Sesame	29
• Teriyaki	20
• Salted	15
• Gyo Shio Yaki	12
• Gyudon	10
• Gochujang	10
• Karamiso Yaki	9
• Bulgogi	7

89% PURCHASE VALUE-ADDED BEEF



VALUE-ADDED PRODUCTS BOUGHT (%)

• Shabu/Sukiyaki	48
• BBQ	43
• Kra-Práo	42
• For curry	27
• Yakiniku	16

Limited Range of Menus

For most respondents the range of menus is limited, particularly among male respondents.

Male tend to focus on steak and Japanese dishes.
Those buying from Makro are more creative.

Female cook a broader variety of menus



Shabu, hot pot, grill

G1 Male Hypermarkets



Grilled beef and like to cook beef by grilled. Or eat beef as a shabu. What I used to create myself was to put grilled beef together like a hamburger.

G3 Male Hypermarkets



Stir-fried beef with curry paste, beef panang, stir-fried basil with beef, poached beef with dipping sauce. Braised beef. Stir-fried beef with rice noodles and various seasonings. Curries such as beef massaman curry, and beef green curry.

G5 Male Makro



Japanese sliced beef. Can make many menus shabu, suki yaki, hot pot, eat with rice

G2 Female Supermarkets



Sukiyaki, grilled with butter, maybe some stir-fried with basil. Stir-fried Beef with Soy Sauce. If it's a special menu

G2 Female Supermarkets



Green curry with beef. Beef Curry with Eggplant Dip Jaew Nuea. I will do this by melting the butter in a pan. Put the red onion and stir fry with butter. Then add the beef and stir until cooked. Then season with tamarind juice and roasted rice.

G6 Female Makro

Marinating can be better at home

Respondents use marinated beef for stir fried menu, grilled beef salad or brisket beef.

They do not use marinated for Suki Yaki, western style steak.

They buy marinated beef but prefer to marinate by themselves as they “can add the spices they want” and are not sure of the taste if they buy already prepared.

“If I cook fried beef, it may be marinated with various seasonings such as oyster sauce, seasoning powder, and seasoning sauce.”





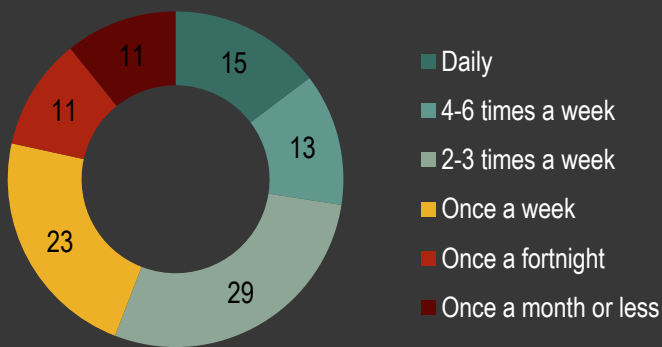
Eating Behavior : In-Home vs. Out-of-Home

Frequency of out-of-home beef consumption is higher than in-home cooking. They have cooked beef to eat at home when they want to eat something delicious, to enjoy family meals, to boost up energy and not for special occasion; just a regular meal for family so that the menus are common such as Kra-Práo and fried beef. But if they have a party, they will eat outside and order more special menus like steak.

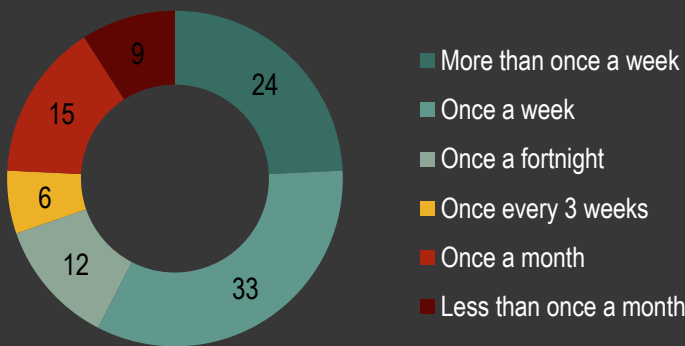
FREQUENCY (%)





Home Cook : 2.5 times/week



OOH Eating : 4 times/week



EATING OCCASION (%)

		
Whenever I want to eat something delicious	59	49
When I enjoy family meal.	56	49
When to reward myself with a delicious meal	27	30
When want to celebrate special occasions or festivals such as birthday, anniversary, New Year	25	26
When I see cooking content on TV/online media/other media and I want to try to cook the same menu.	23	
When I want to boost up my energy.	21	15
When having a party with friends	20	30
When I need a healthy meal.	19	18
As a regular meal for me and the household / No special occasion	28	19

TOP MENUS EATEN (%)

		
Kra-Práo	51	51
Fried beef e.g. with garlic and pepper, fish sauce, dried beef	45	34
Grilling	43	32
Steak	41	27
Stir-fried beef e.g. with oyster sauce, black pepper, chili	38	26
Braising	31	26
Thai curry menus e.g. Green curry, Massaman, Panang	28	25
Soup e.g. Tom Zabb, Tom Yum, Beef Soup	28	24
Noodles	25	23
Shabu/ Suki	22	19
Barbecue	21	16



Restaurants Deliver a Superior Experience

All agree that chefs in restaurants have a better selection of meat, show more cooking skills and are able to use a broader range of ingredients

“More delicious in restaurants, more sauces. Some parts I cannot do at home like T Bone”

“We don’t have all the sauces, like brown sauce. And they don’t overcook beef”

“The chef uses the full range of seasonings and spices and uses better quality beef. ”

“If I eat at the restaurant, I order a menu that I can't cook by myself, like Roast Beef”



They can get advice from chefs but most will prefer to stick to simple menus at home.

“ if I cook it there will be no sauce”

“At home I wont use much time, maybe 15-20 minutes”

“ The main issue is not to overcook”



Do occasions play a role in beef country of origin?

Every country of beef serves the same occasion for the family meal – They want to eat something delicious and to enjoy family meal together. If they want something delicious its more likely to be Thai and Australia although this is based on availability more so compared to other countries of origin. New Zealand beef tends to serve for an energy boost.

IN-HOME EATING OCCASION (%)	Total	Country of Beef Bought Most Often			
		Japan	Australia	New Zealand	Thai
N=	536	82	72	51	311
Whenever I want to eat something delicious	59	37	63	51	66
When I enjoy family meal.	56	59	51	55	58
When to reward myself with a delicious meal	27	22	34	23	28
When want to celebrate special occasions or festivals such as birthday, anniversary, New Year	25	30	28	22	24
When I see cooking content on TV/online media/other media and I want to try to cook the same menu.	23	29	24	24	20
When I want to boost up my energy.	21	19	21	42	18
When having a party with friends	20	22	23	21	19
When I need a healthy meal.	19	15	29	24	17
As a regular meal for me and the household / No special occasion	28	25	20	23	32



Both Special & Regular Occasions

Imported beef can be consumed for special occasions or on a regular basis. The frequency is clearly linked to the level of income.

The **special occasions** mainly take place with family.
The atmosphere is warm, informal, fun.

“Just a good atmosphere, mom, dad, kids: family together”

“ I will be eating imported beef dishes with my family during the long weekend. ”

“Small party. You can lay down. Not like in a restaurant”

Regular usage is from consumers who value the nutritional qualities of beef or those who are in love with the taste and can afford it.

“Nearly at every meal.”

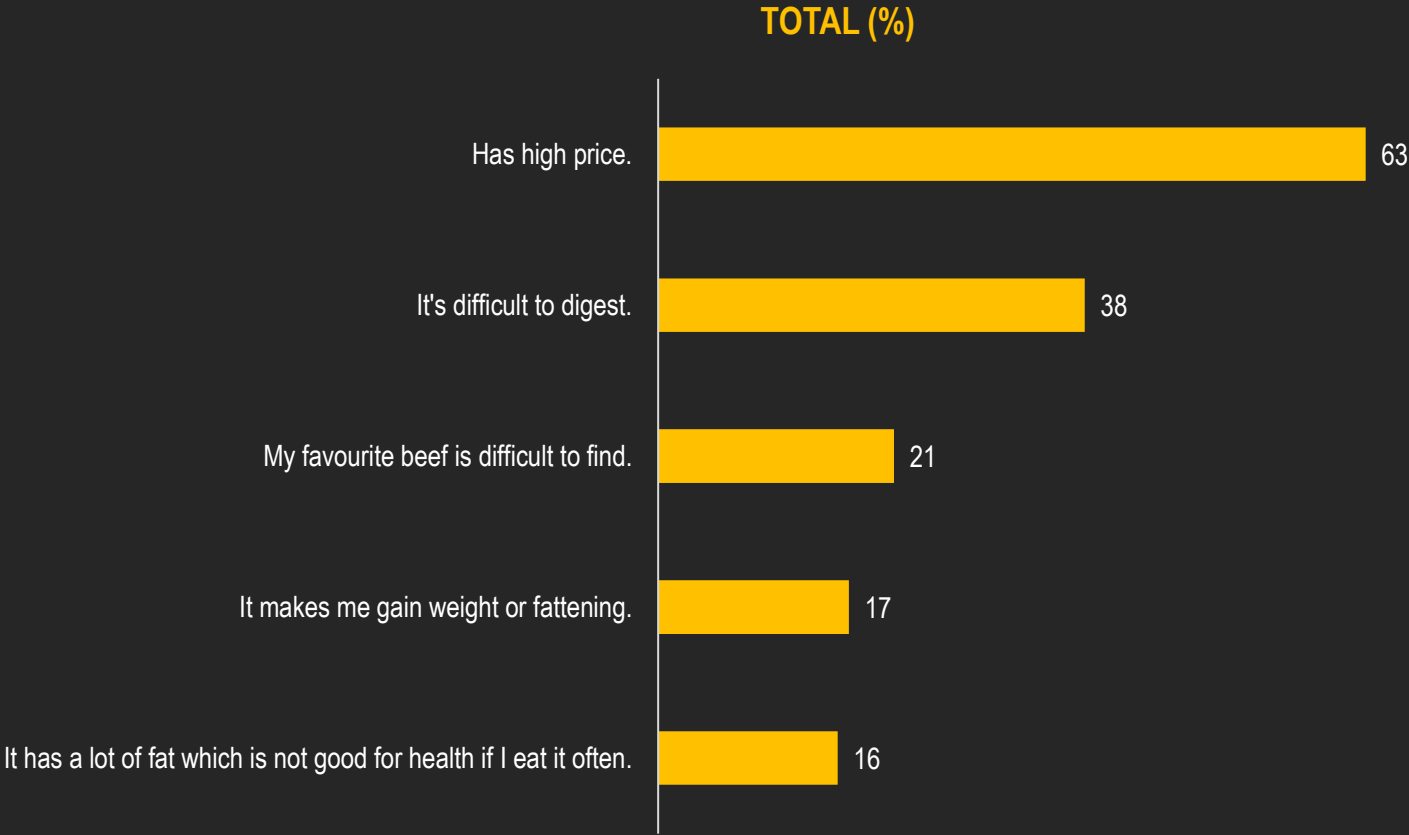
“ A few times a week”





Reasons for not eating beef on a regular basis whether cooking at home or eating out

High price is a key barrier not only for buying beef but also blocking them to eat frequently.



KEY BARRIER FOR
EATING FREQUENTLY

63%
HIGH PRICE





Information Sources for Beef

Online media, Recommendations and In-Store are the main source when they looking for information about beef. For online media, they search from the internet the most, followed by social media and YouTube.

TOP INFORMATION SOURCES (%)



TOP SOURCE OF INFORMATION

49%
INTERNET SEARCH





Information Sources for Beef

Online media, Recommendations and In-Store are the main source when they looking for information about beef. For online media, they search from the internet the most, followed by social media and YouTube.



They use Google to find ideas of menus (typing beef menus or delicious beef)



You Tube plays a major role. “ It will say what you can do with this part of beef like sirloin” “If he's cooking a beef-related menu, he'll also explain about beef.” “I follow foreign chef Gordon Ramsay” Several YouTube channels are mentioned : Beef and The, The weeping tiger channel, Mom Thanat Daek channel, Khun Boom Tharit's channel

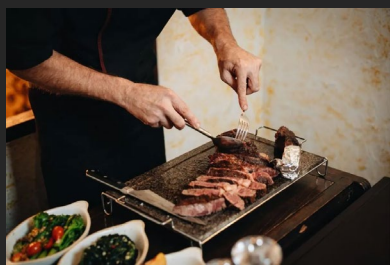


Facebook for reviews, ideas of menus (Master Chef or other chefs), pages like the Hungry Pig. Groups like meat lovers, I like stir-fried basil or Food groups.



Information Sources for Beef

Offline channels are equally important particularly restaurant and stores.



Chefs are seen as experts and reliable. Consumers try to get information when visiting restaurants:

“I may ask from the chef how they make it, which part they use”

“ In a restaurant in hotel there is a beef refrigerator in the dining room and it tells you where the beef came from, that this piece of beef is suitable for any type of cooking. It helps us decide what beef to cook on the menu. So I took it and tried it.”

“Much meat restaurants at Silom. It's a butcher-style restaurant where I can choose which part to take, which they will advise me as well”.



Store, to see what is available, get information from packs and labels. Demo in Central Food Hall Central World In store teaching menus. One suggest a small TV screen with a video introducing the product in store is fine.

Also:

TV: TV Khun Toi's kitchen tv program, but most of Khun Toi's kitchen tv shows are Thai food.

Friends “They teach me how to cook and add ingredients”.

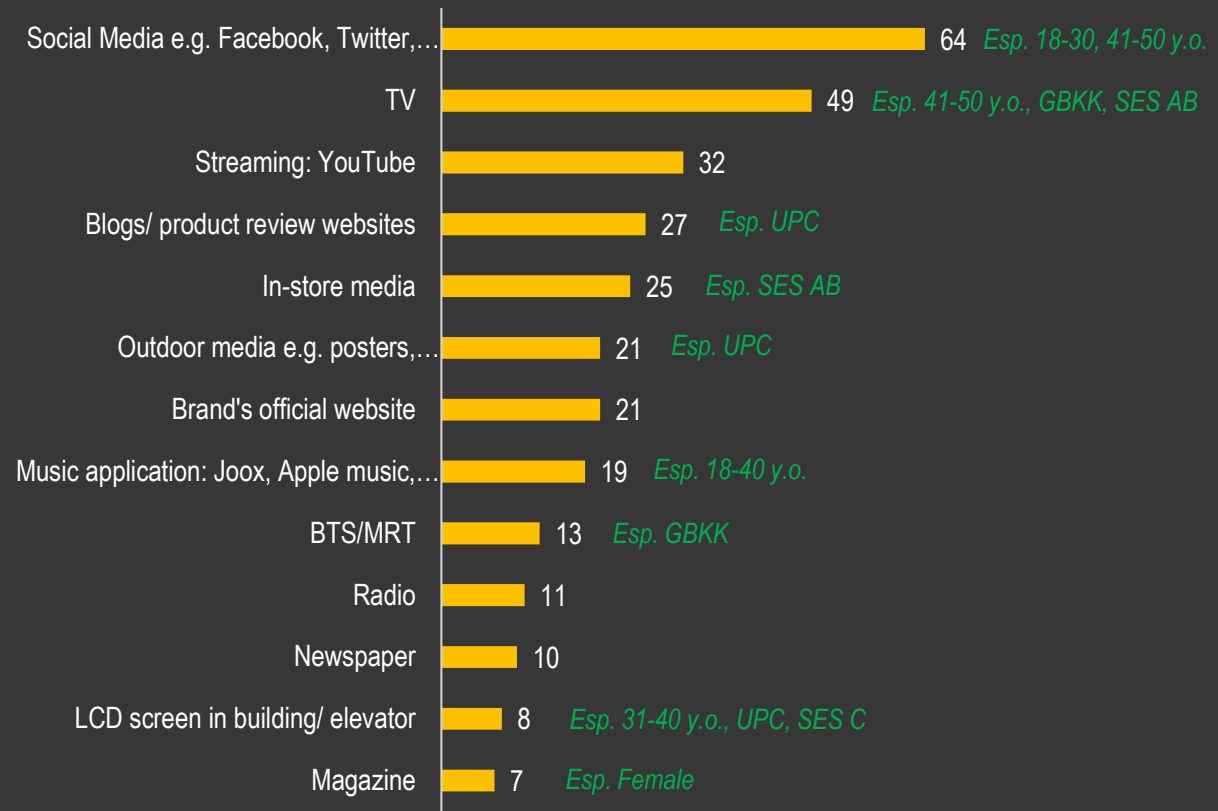
Events. Only one has been to Khun Toi Fair's kitchen.



Media Consumption

Social media is the main media they consume on daily basis. As a result, they use social media as well as other online media such as YouTube and internet to find information about beef, cooking products or recipes. TV is also another important channel they watch.

DAILY MEDIA CONSUMPTION (%)



SOURCE OF INFORMATION FOR FOOD PRODUCTS, COOKING METHODS OR NEW RECIPES (%)

