

# Alternative seafood consumer research

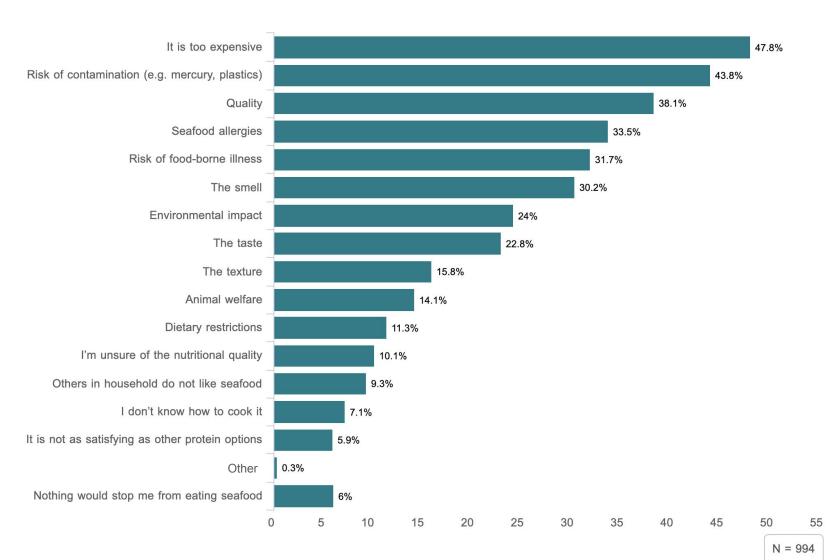
**Thailand** 

Research conducted by GFI and Getwizer



# Conventional seafood consumption barriers

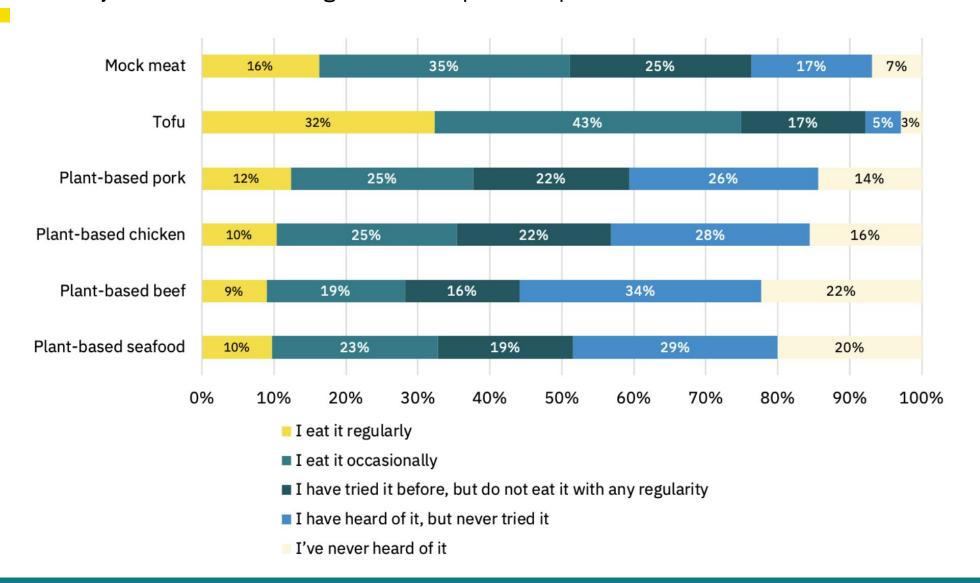
Which of the following reasons, if any, would stop you from eating conventional seafood regularly?





# **Alternative protein familiarity**

How familiar are you with the following alternative protein options?

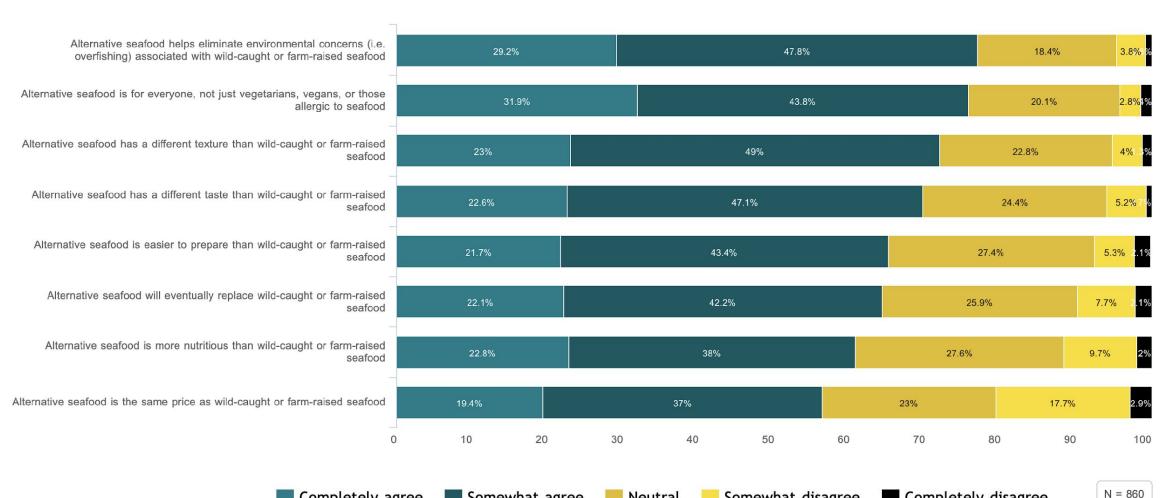


### **Thailand**

# Alternative seafood perceptions

Completely agree

Based on what you know or might have heard, how much do you agree or disagree with each of the statements regarding alternative seafood?



Neutral

Somewhat disagree

Completely disagree

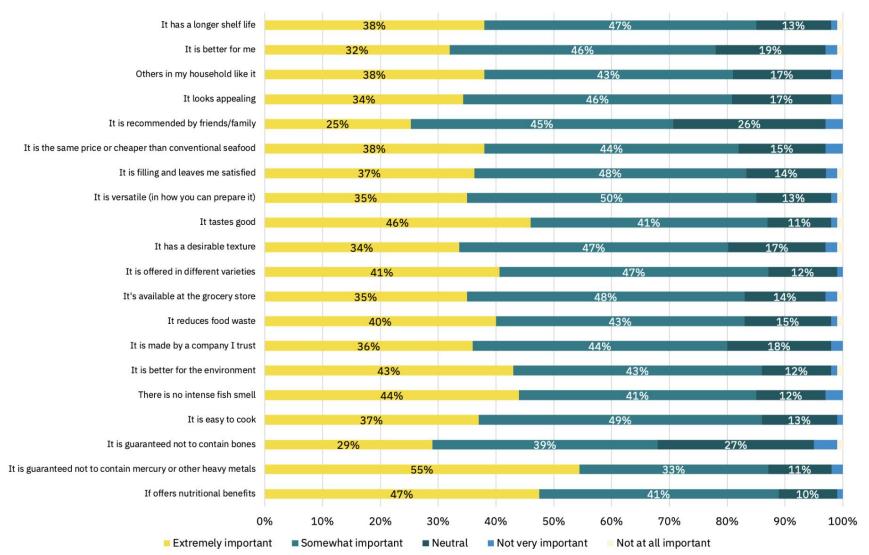
Somewhat agree





### Alternative seafood drivers

How important are each of the following in determining whether or not to buy alternative seafood?

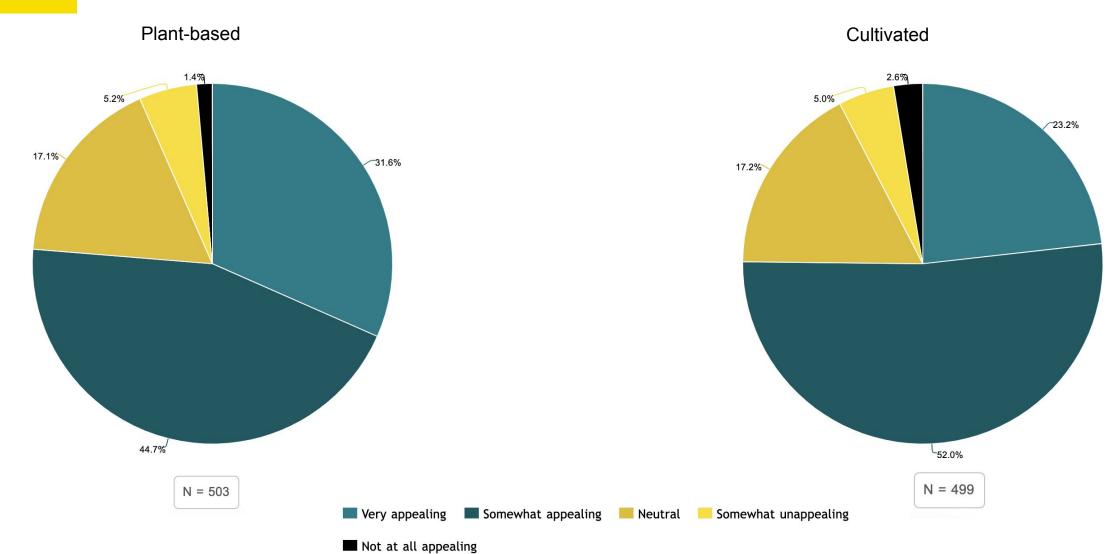






# **Appeal**

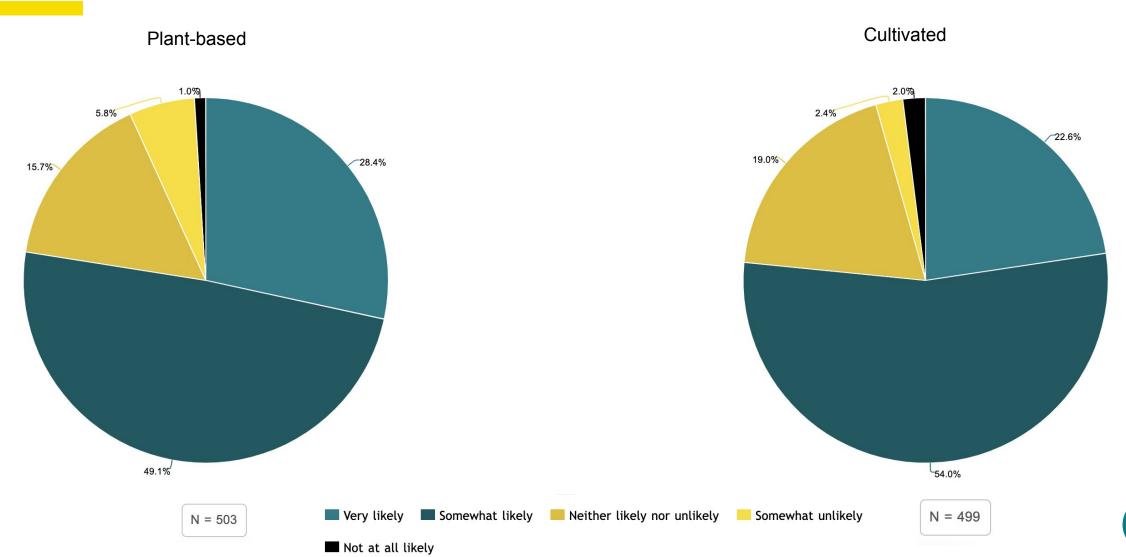
After learning a little more about alternative seafood, how appealing do you find this type of product?





# **Future consumption**

How likely are you to buy alternative seafood in the future?

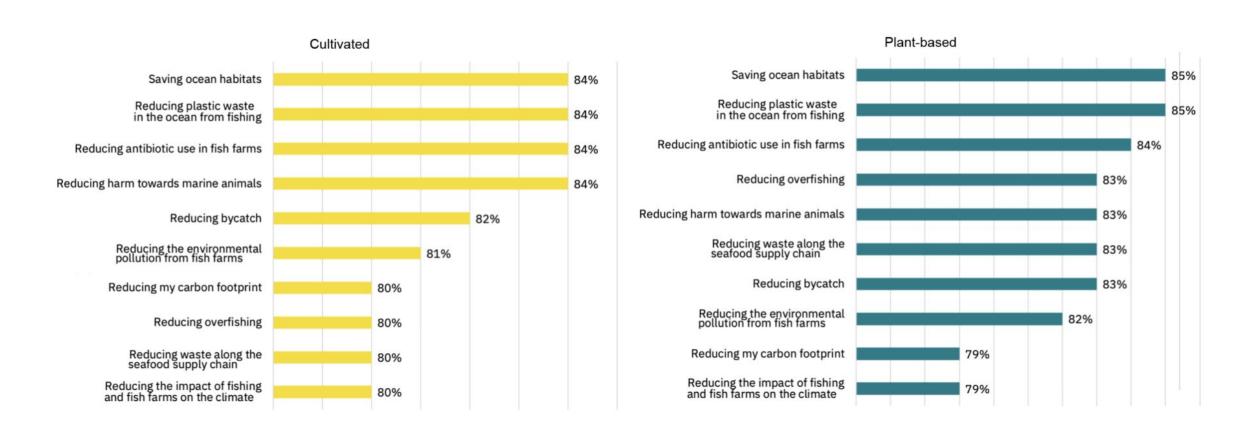




**Thailand** 

### **Environmental benefits**

If all of the following statements were true and on the label of or included in the advertising for an alternative seafood product, how important would each of the following environmental factors be in your decision to eat alternative seafood over wild-caught or farm-raised seafood?

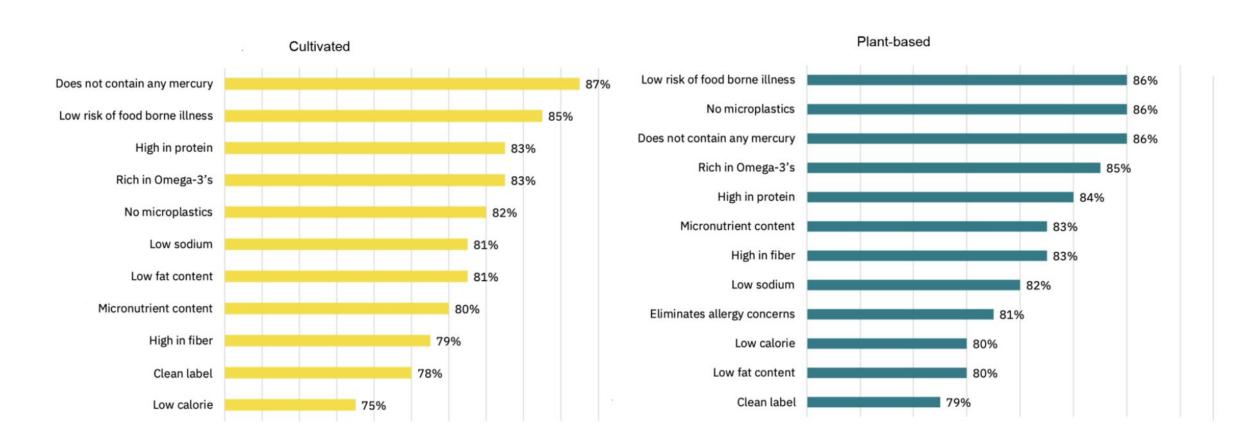




### **Health benefits**

Thailand

If all of the following statements were true and on the label of or included in the advertising for an alternative seafood product, how important would each of the following health factors be in your decision to eat alternative seafood over wild-caught or farm-raised seafood?

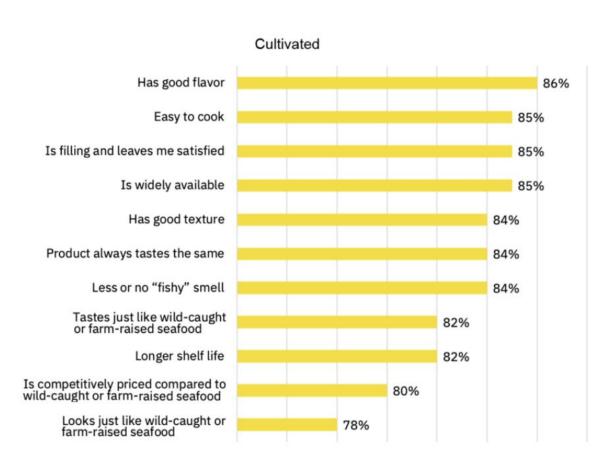


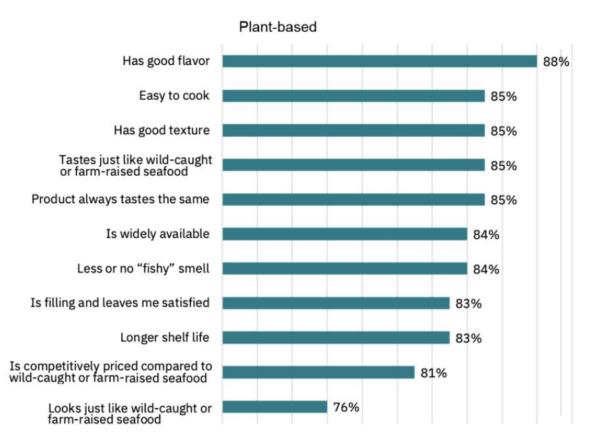


**Thailand** 

### **Product benefits**

If all of the following statements were true and on the label of or included in the advertising for an alternative seafood product, how important would each of the following factors be in your decision to eat alternative seafood over wild-caught or farm-raised seafood?

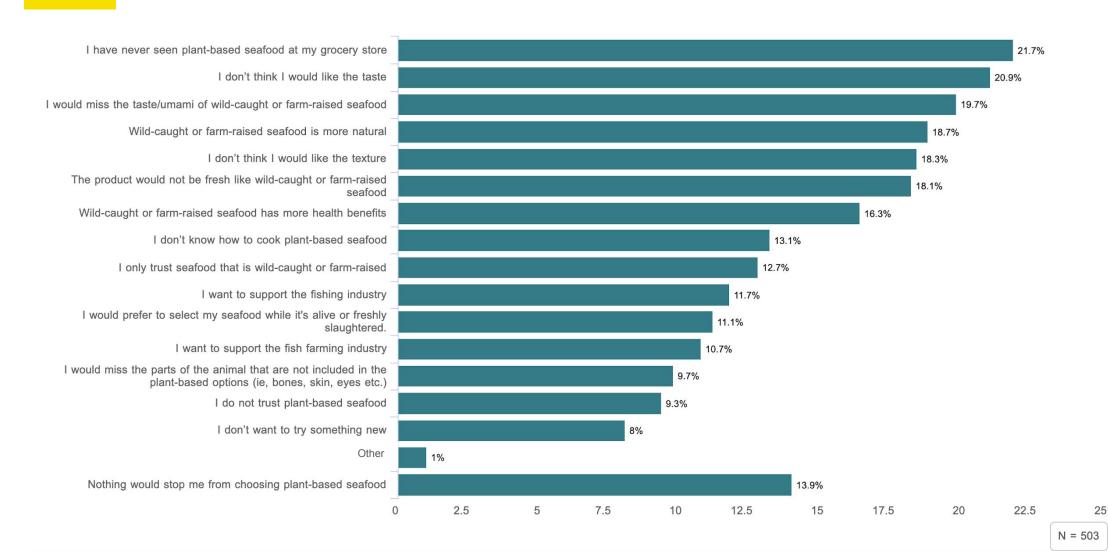






# Consumption barriers: plant-based

Which of the following might stop you from choosing plant-based seafood?

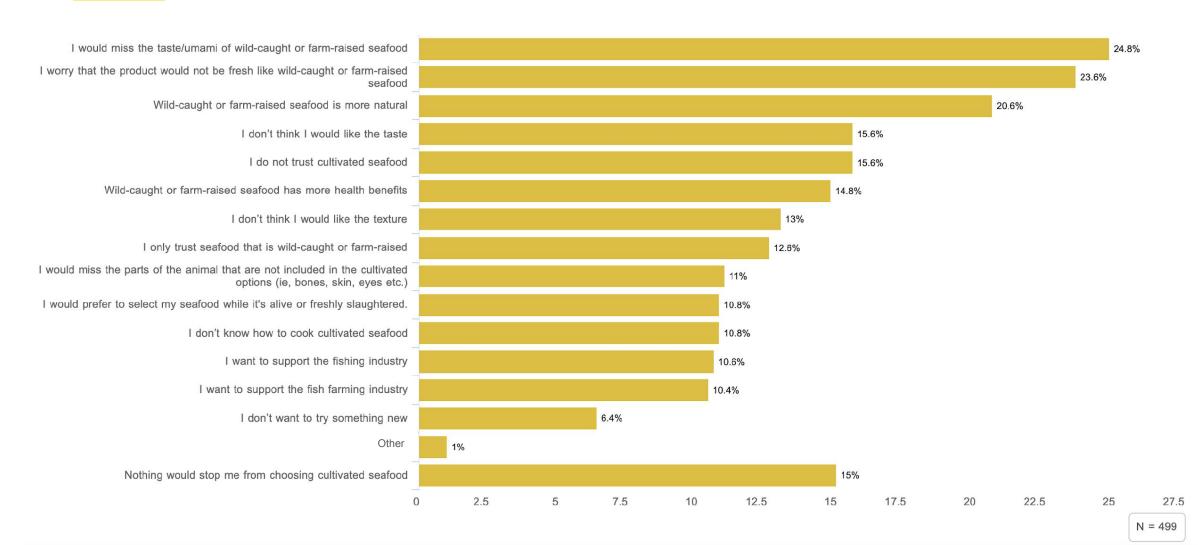






# **Consumption barriers: cultivated**

Which of the following might stop you from choosing cultivated seafood?





# Consumer segmentation by demographic

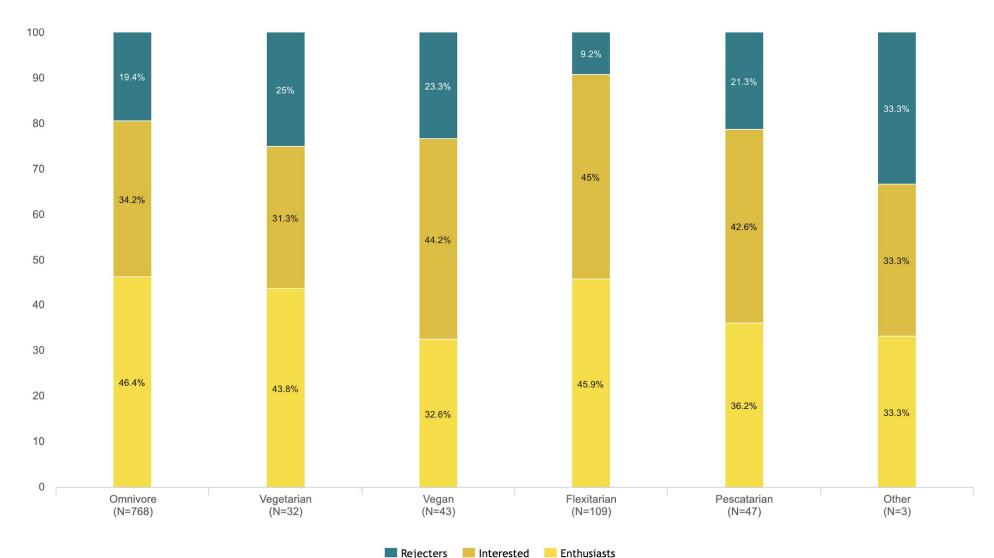
98.5 percent of the respondents were ethnically Thai, with 0.7 percent Chinese, 0.3 percent Khmer, and 0.3 percent Karen. The majority of the respondents (51.2 percent) were from central Thailand and were therefore more representative of an urban audience than rural.

Demographic	Alt seafood enthusiasts (45%)	Alt seafood interested (36%)	Alt seafood rejectors (19%)
Average age	37: • 41% Millennials • 31% Gen Xers	38: • ~60% Millennials or Gen Xers	<ul><li>37:</li><li>Highest representation of Gen Zers (32%)</li></ul>
Female/male ratio	52/48	49/51	41/57
Monthly household income information (national average was 27k Thai baht [THB] in 2021)	Average income: 52k THB	Average income: 49k THB	Average income: 37k THB



# Dietary preference by consumer type

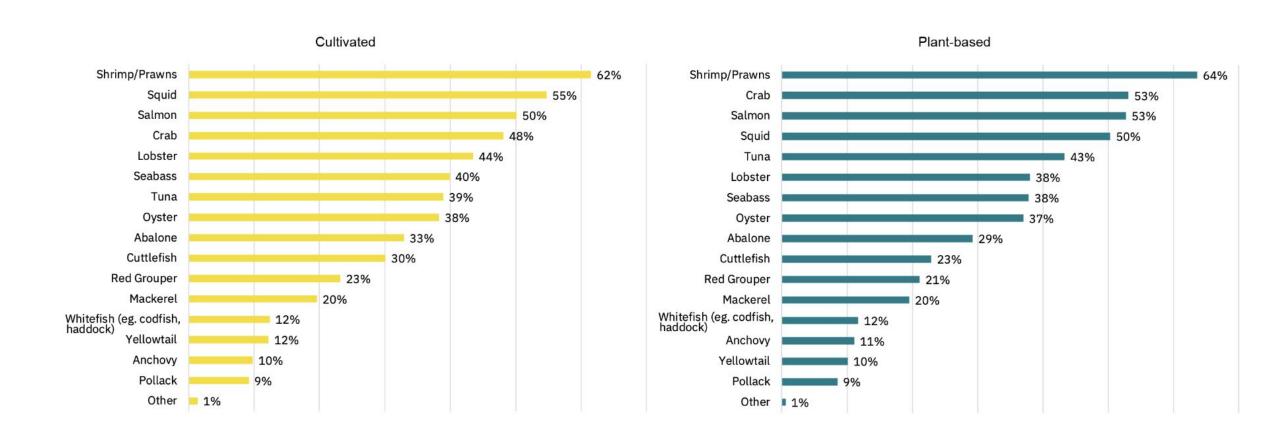
What is your dietary preference?





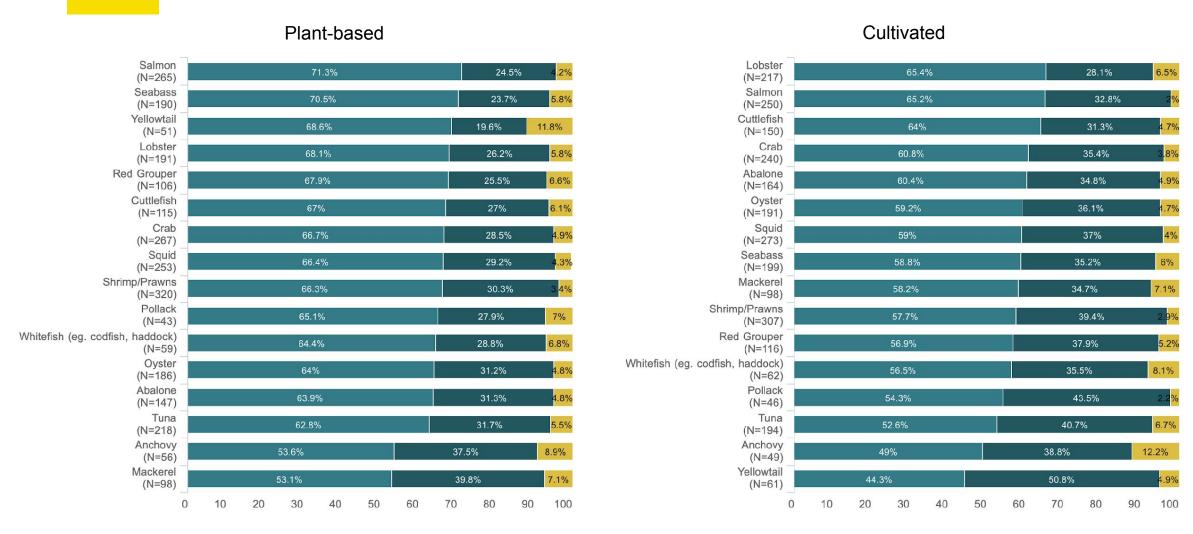
### **Species preference**

Imagine that alternative versions of the following species of fish and shellfish were available to you. Which would you be interested in purchasing?



### **Purchase intent**

How interested would you be in purchasing the following species of alternative fish or shellfish?



Moderately interested

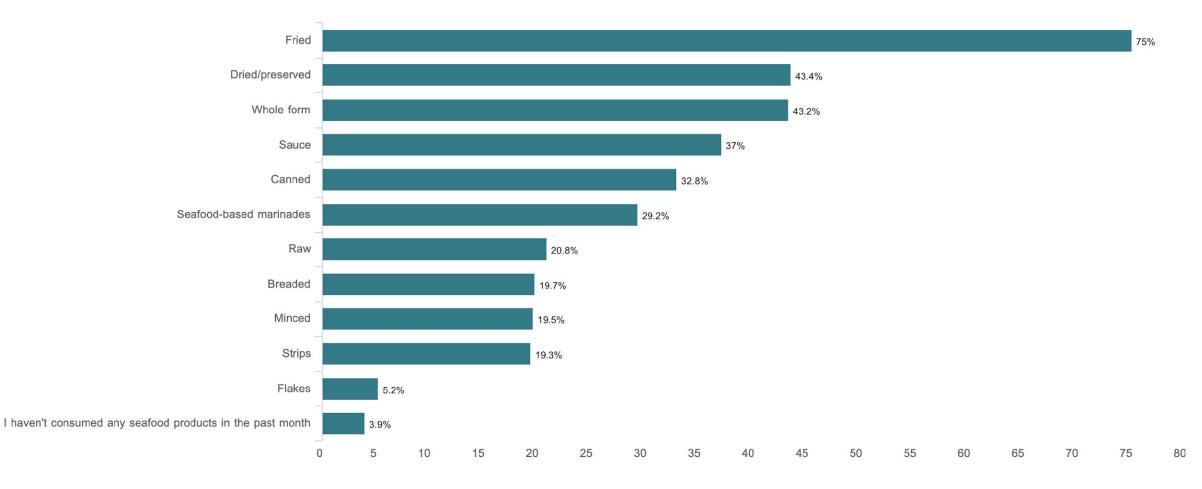
Slightly interested

Extremely interested



### **Seafood form**

Which form(s) of conventional seafood products have you consumed in the past month?





### **Food attitudes**

Food is about maximizing my nutrition

I am confident in knowing which foods are 'healthy' or 'unhealthy' for me

I am knowledgeable of health & nutrition trends

I consider the environmental impact food has when deciding what to eat

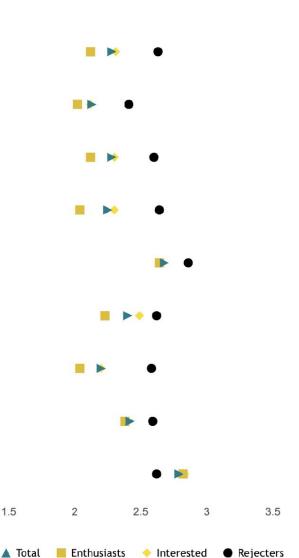
I follow a strict regimen when it comes to what I eat

I frequently substitute / replace ingredients in the food I eat (in recipes, in my order at restaurants)

I prefer eating the dishes I love more frequently by making healthy ingredient substitutions

When I grocery shop, my family's preferences come first

When it comes to food, I stick to what I know



Food is about maximizing my satisfaction

I'm not confident in knowing which foods are 'healthy' or 'unhealthy'

I am not knowledgeable when it comes to health & nutrition trends

I do not consider the environmental impact food has when deciding what to eat

I eat whatever I want

I rarely substitute / replace ingredients in the food I eat (in recipes, in my order at restaurants)

I'd rather eat the dishes I love in their true form (i.e., no healthy substitutions) less frequently

When I grocery shop, my preferences come first

When it comes to food, I always look to try something new

