madre brava: Thailand

Audience Strategy Research - Protein Transition

December 2023

harrisx
A STAGWELL COMPANY

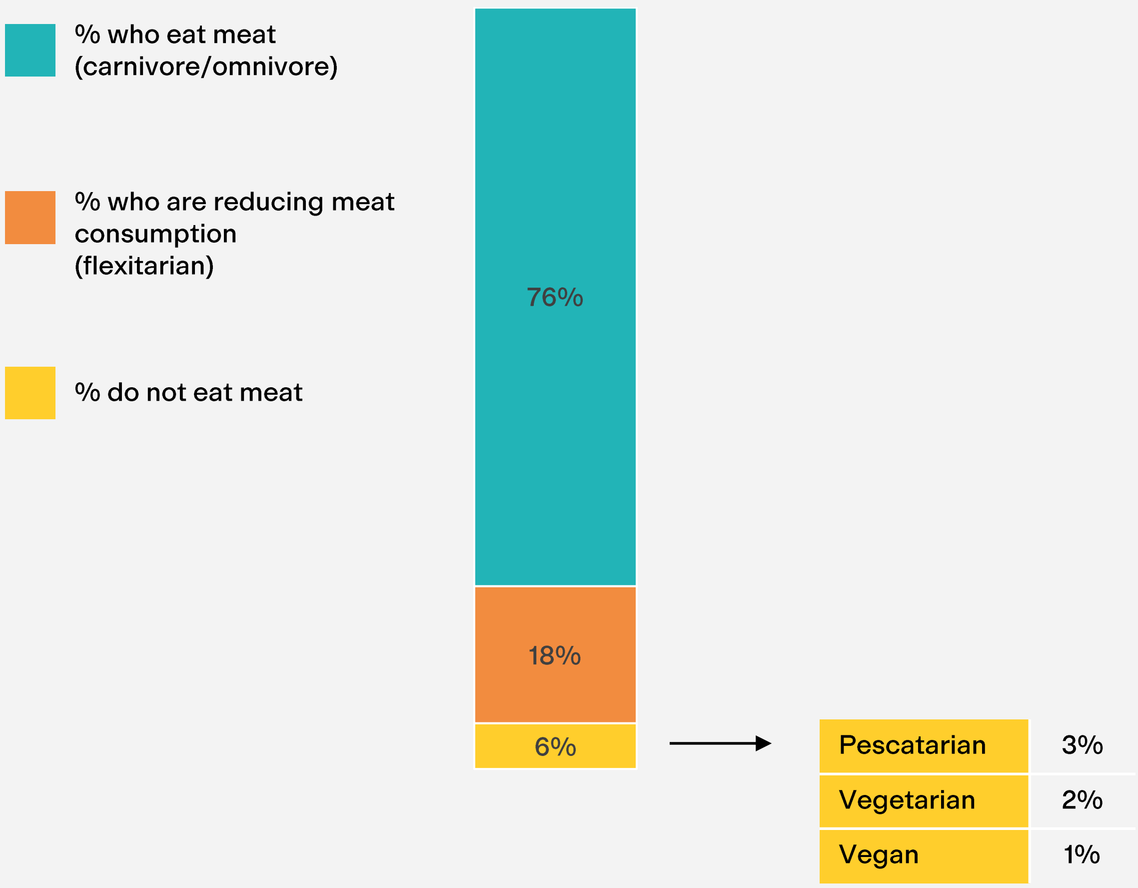
Survey contacted in October 2023

Let’s start by setting the context in Thailand...

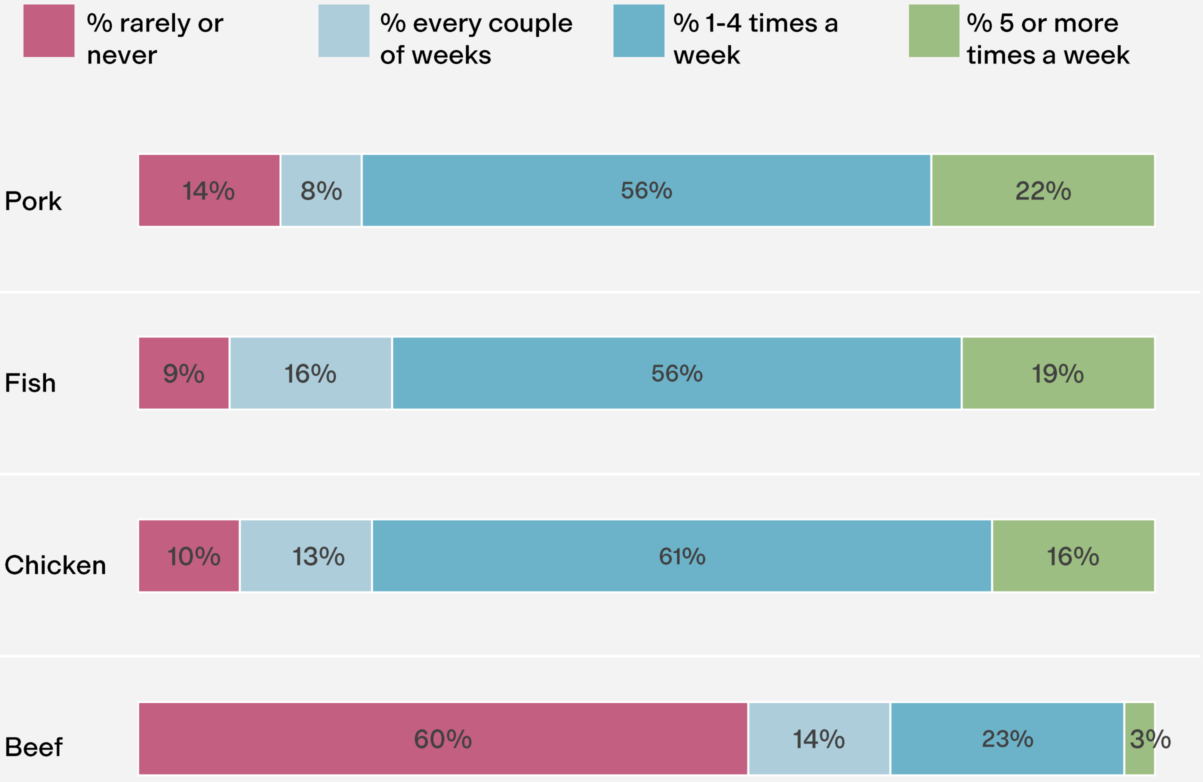
Consumption habits in Thailand

Meat consumption is widespread in Thailand, with most people eating Pork, Fish or Chicken at least once a week

Diet and overall meat consumption
(Among total population)



Frequency of meat/fish consumed
(Among total population)

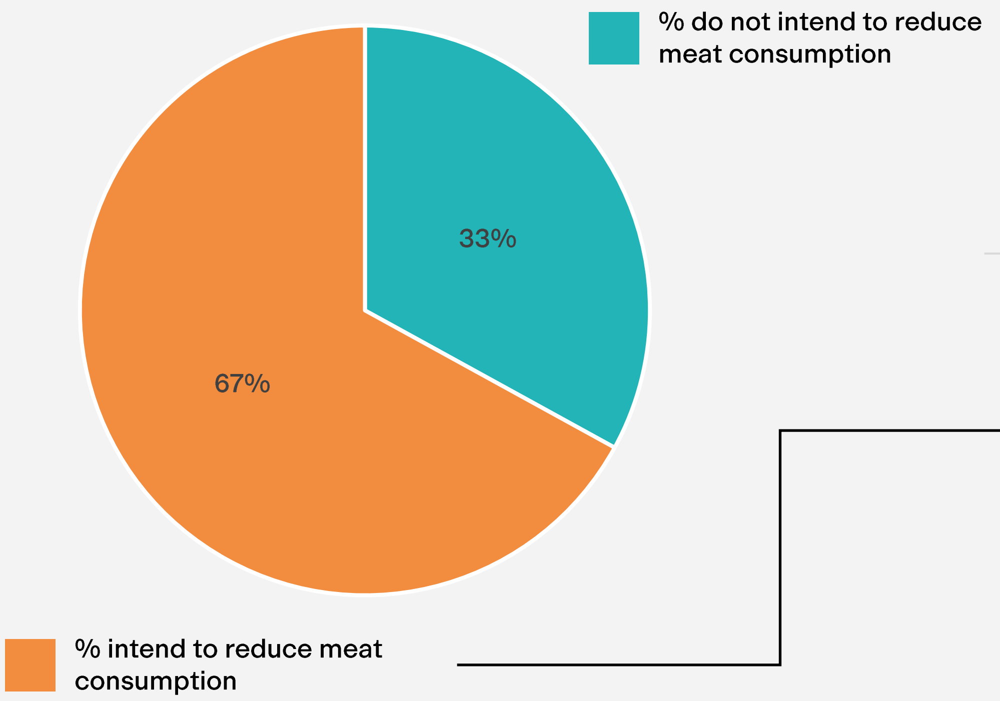


Flexitarians are defined as ‘actively reducing meat consumption’ and display a lower consumption of meat e.g. 68% of Flexitarians eat pork less than 3 times a week, compared to 45% of moderate/heavy meat eaters.

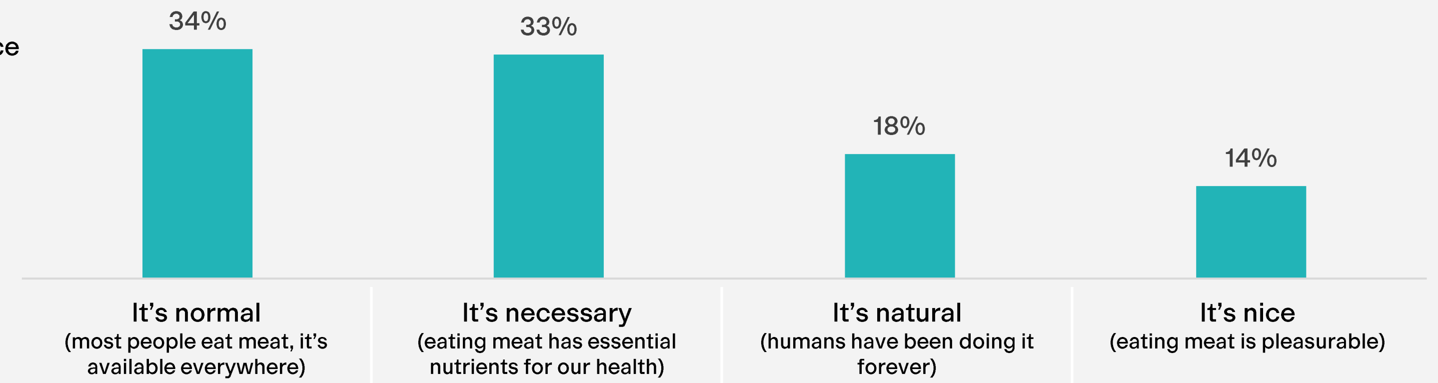
E1: How would you best describe your diet? E3: On average, how regularly do you eat the following...?

However, two thirds of meat eaters intend to reduce their consumption in the next 2 years

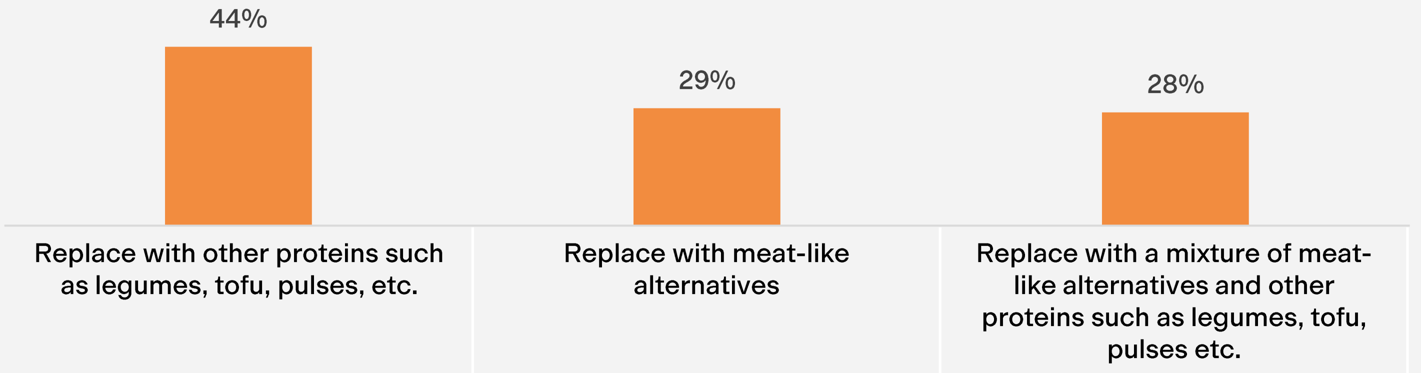
Intention to reduce meat consumption (in the next 2 years)
(Among current meat eaters)



Reason for not wanting to reduce meat consumption
(among those who do not intend to reduce meat consumption)



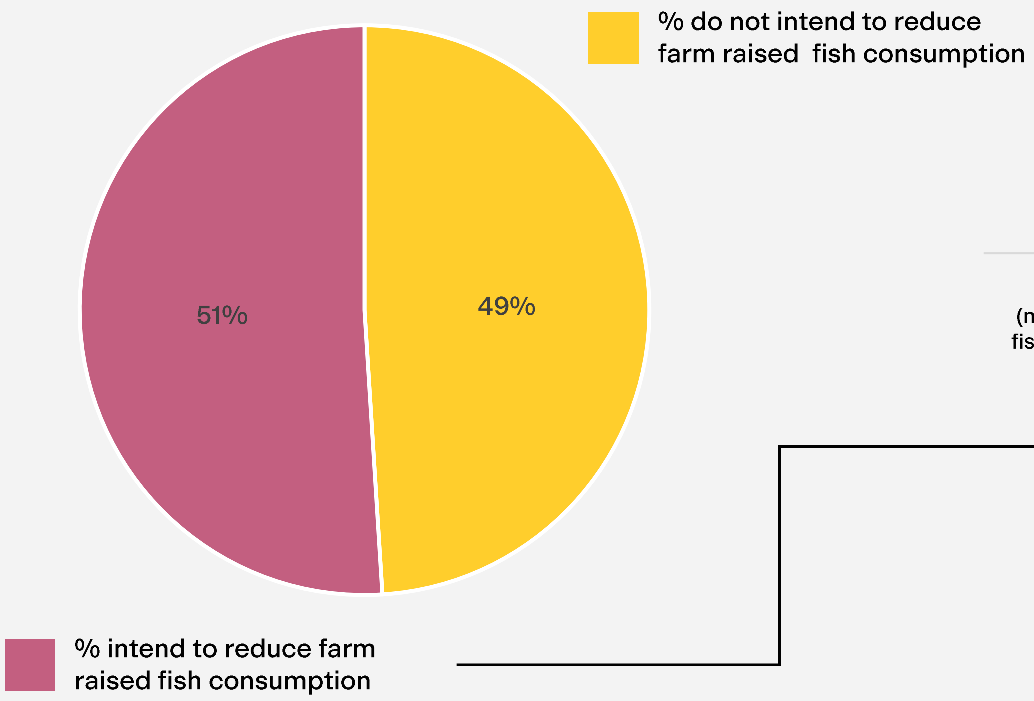
Ways to reduce meat consumption
(among those intend to reduce meat consumption)



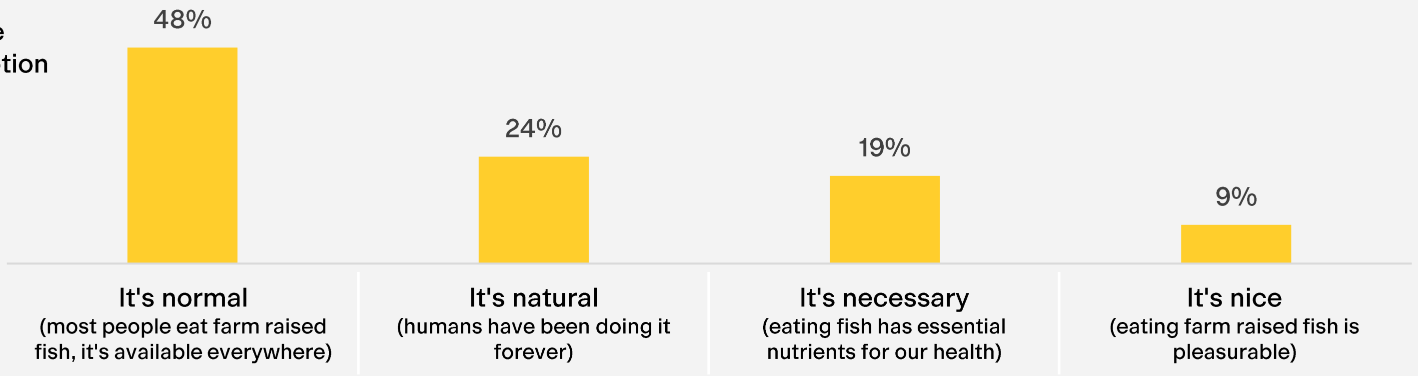
E3b: Which of the below best describes how your relationship with meat might change in the next 2 years? E3c: In what way do you intend to replace your current meat consumption with alternatives? E3e: What is it about meat that makes you most reluctant to cut down on current consumption?

Whereas only half intend to reduce their farm-raised fish consumption, largely down to the normality and availability of farm raised fish

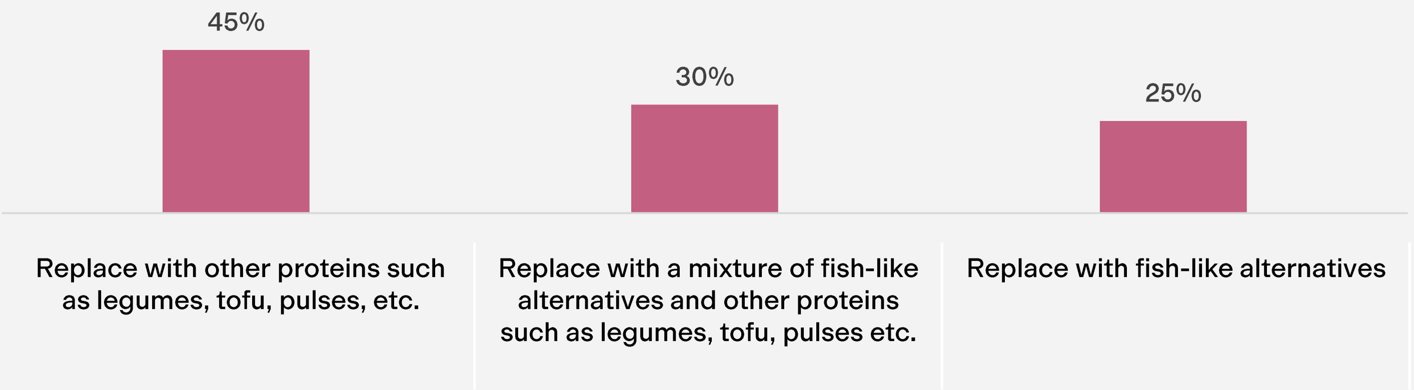
Intention to reduce farm raised fish consumption (next 2 years)
(Among current fish eaters)



Reason for not wanting to reduce farm raised fish consumption
(among those who do not intend to reduce farm raised fish consumption)



Ways to reduce farm raised fish consumption
(among who intend to reduce farm raised fish consumption)

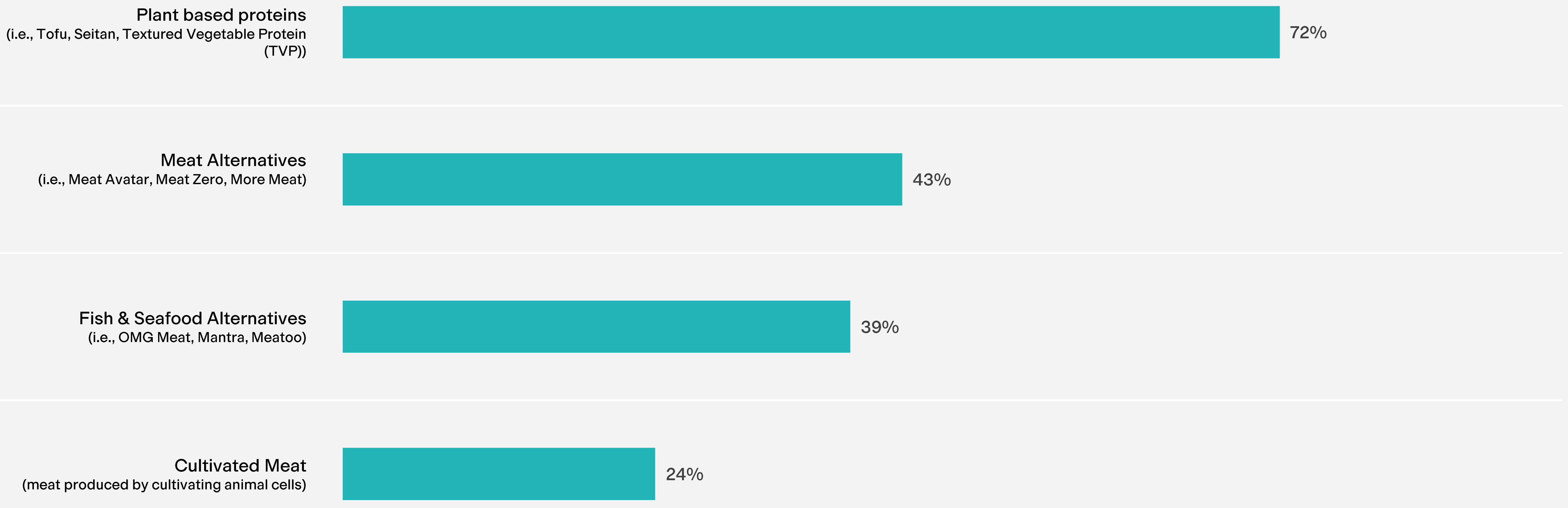


E4a: What's your relationship with eating farm raised fish? E4b: Which of the below best describes how your relationship with farm raised fish might change in the next 2 years? E4c: In what way do you intend to replace your current farm raised fish consumption with alternatives? E4e: What is it about farm raised fish that makes you most reluctant to cut down on current consumption?

Awareness of Alternative Proteins (AP's)

Awareness is highest for plant-based proteins and only 4 out of 10 people are aware of meat & fish alternatives

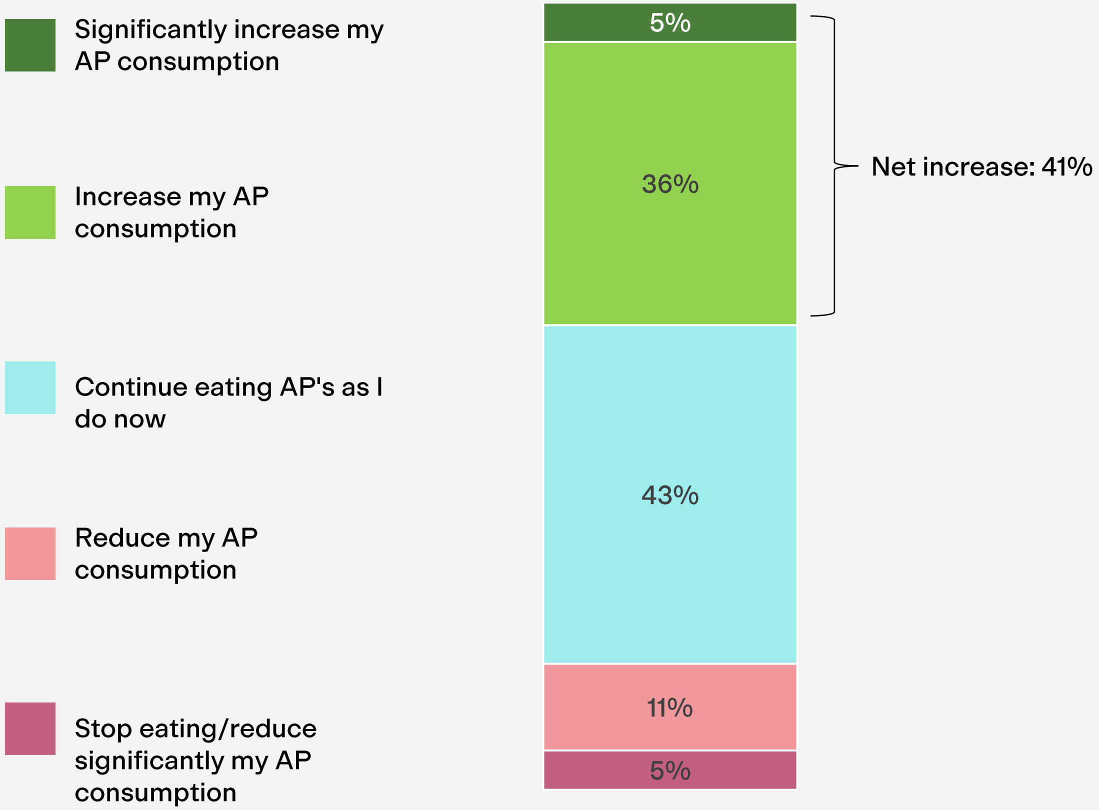
Awareness and of different AP's
(Among total population)



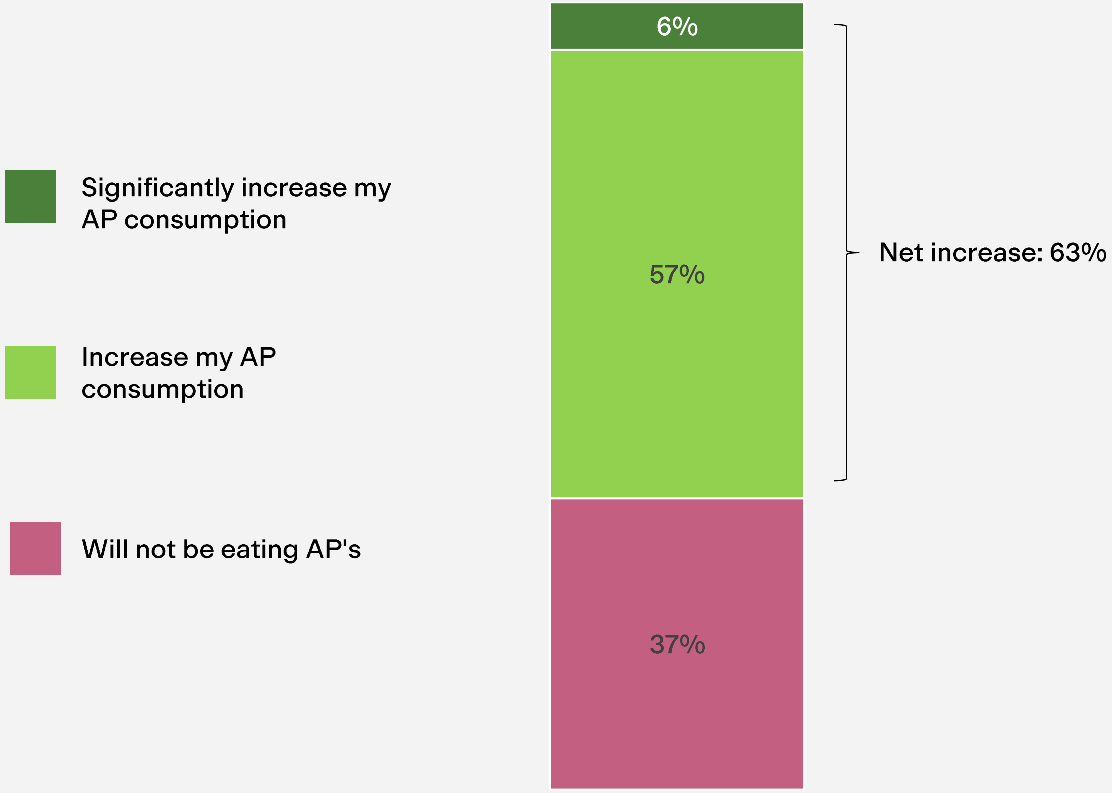
F1: Which of the following food items are you aware of?

There is a strong intention to increase consumption of AP's. This is especially true among those who have not tried AP's – which suggests intention isn't a significant barrier

Intention to consume more/less AP's
(Among people who have tried any type of AP = 89% of people)



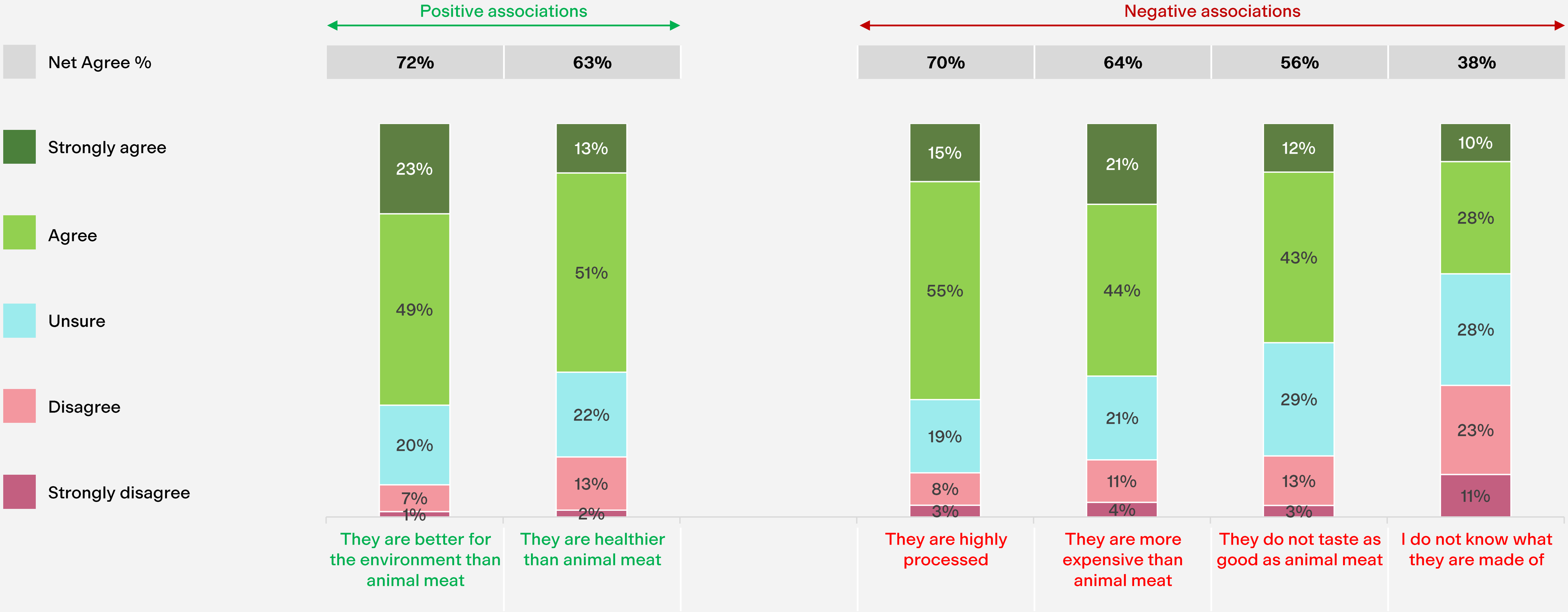
Intention to consume more/less AP's
(Among people who have not tried APs = 11% of people)



F4a: How regularly do you think you'll be eating AP's, if at all, in 2 years' time?
Those who have tried APs N=1412, Those who have not tried APs N=175

Despite the environmental and health benefits being recognised, AP's are also perceived as processed and expensive (significant barriers to overcome)

Level of agreement with attitudes towards AP's
(Among total population)

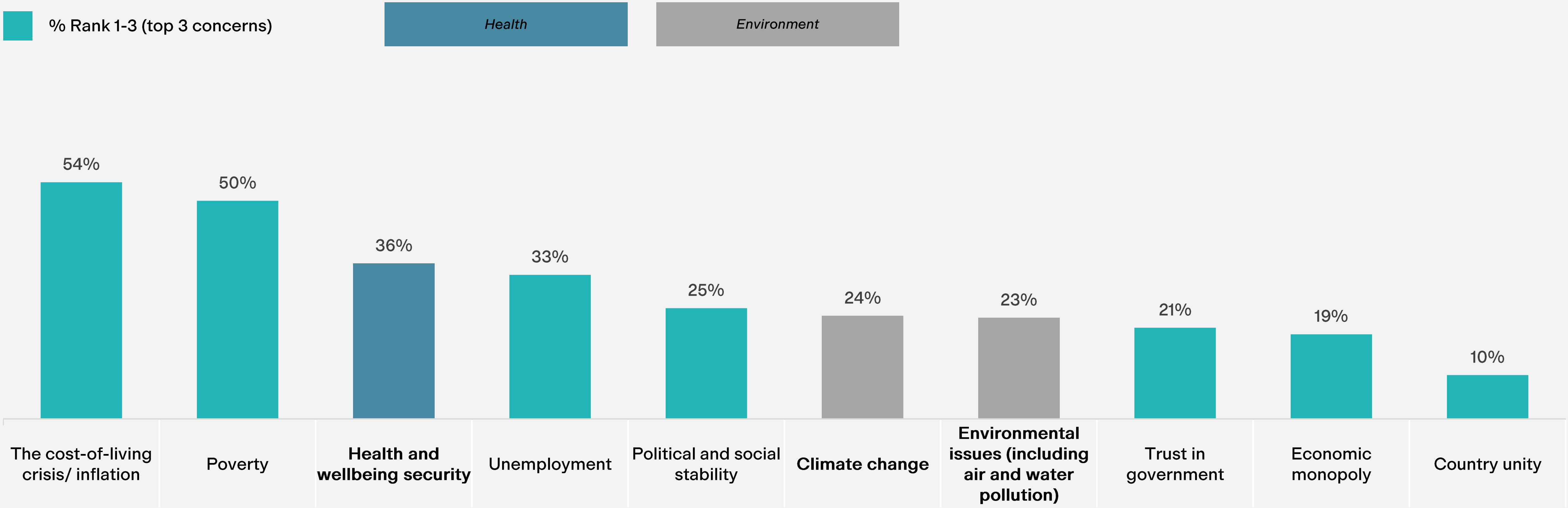


F3: To what extent do you agree or disagree with the following statements regarding AP's?

Concern towards the environment and industrial meat industry

Climate change and environmental issues are less of a concern in Thailand vs. health and wellbeing. Cost of living and poverty are top concerns

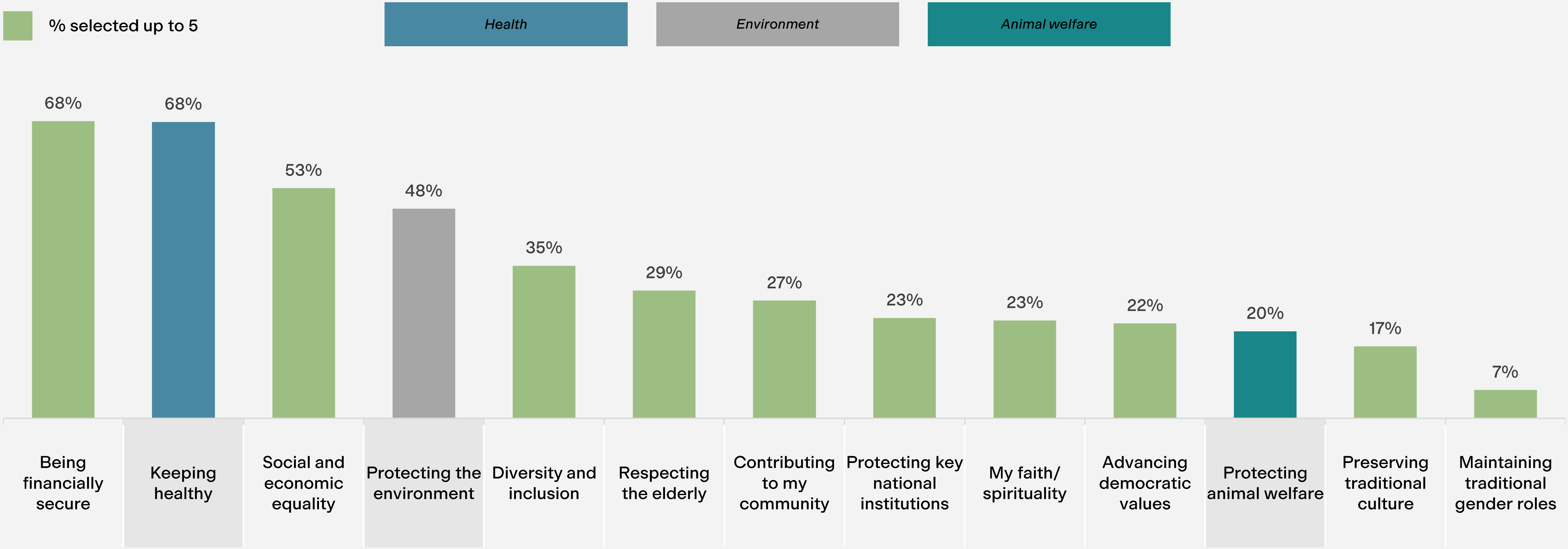
What people are concerned about
(Among total population)



D1: Below are a series of things that other people like you have told us they're concerned about. Please rank up to 3 based on how concerning these things are to you – where 1 is the most concerning.

This is supported by what's most important to people – with financial security and keeping healthy top priorities

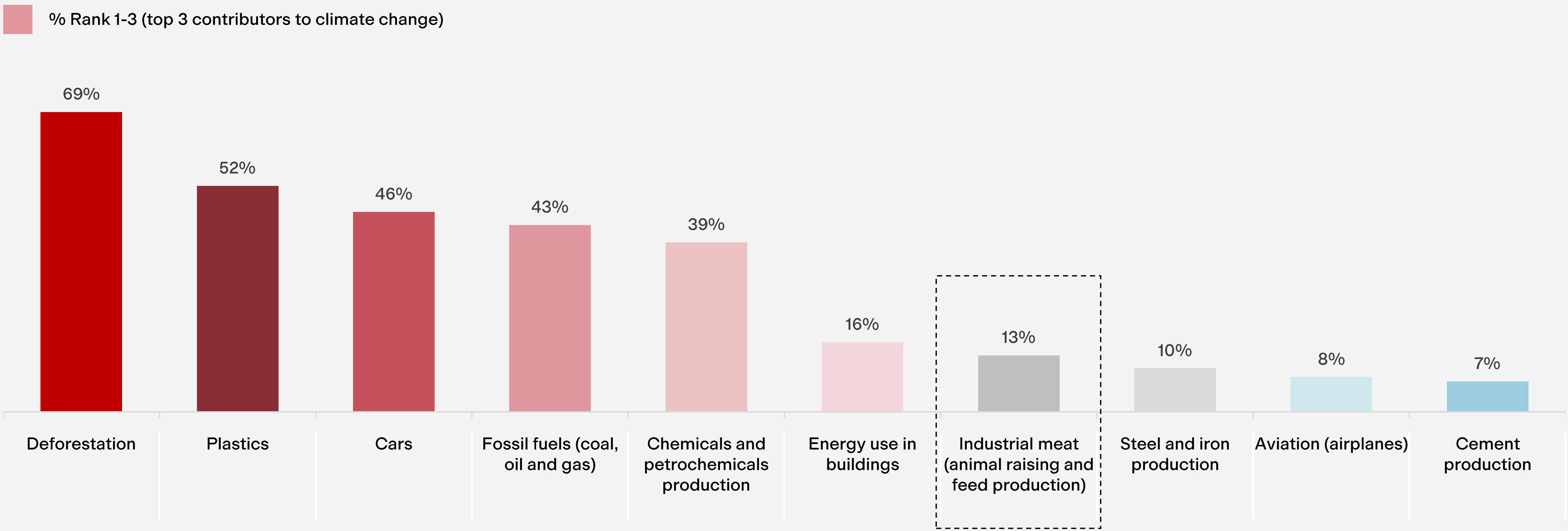
What things are most important to people
(Among total population)



C1: Which of the following things are most important to you?

Deforestation is the biggest perceived contributor towards climate change. Industrial meat is rarely seen as a top contributor

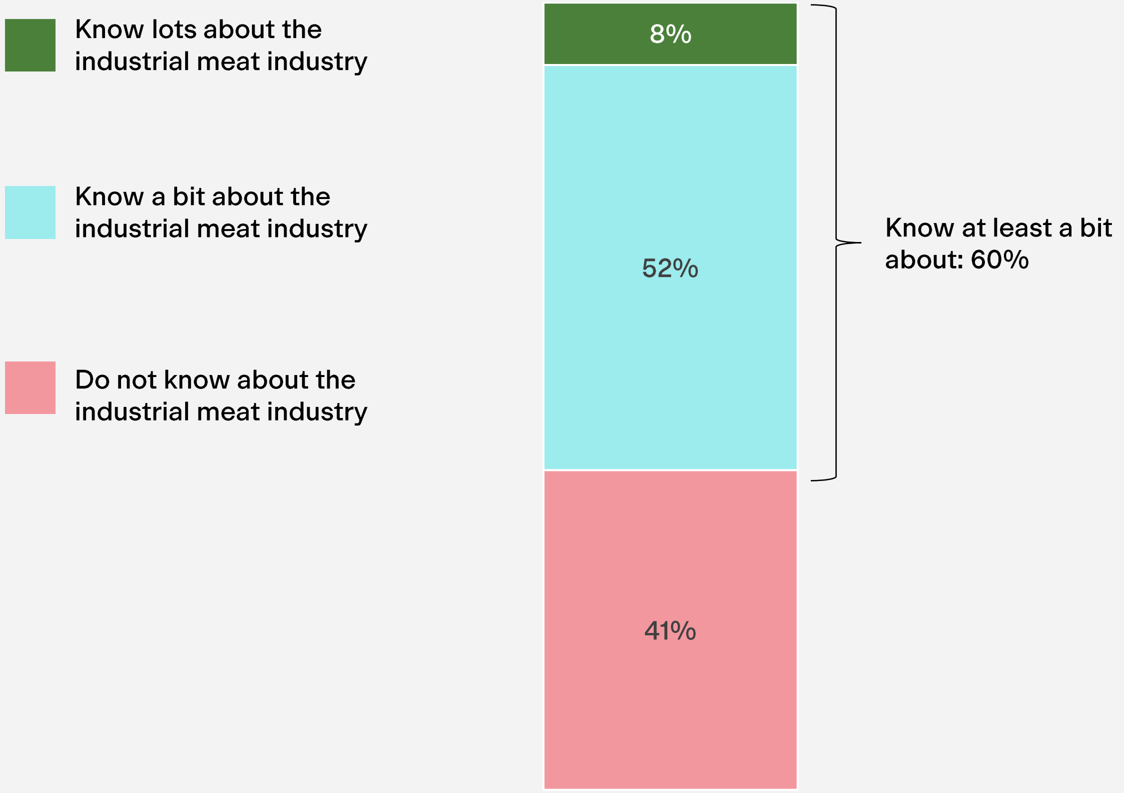
Perceived biggest contributors to climate change
(Among total population)



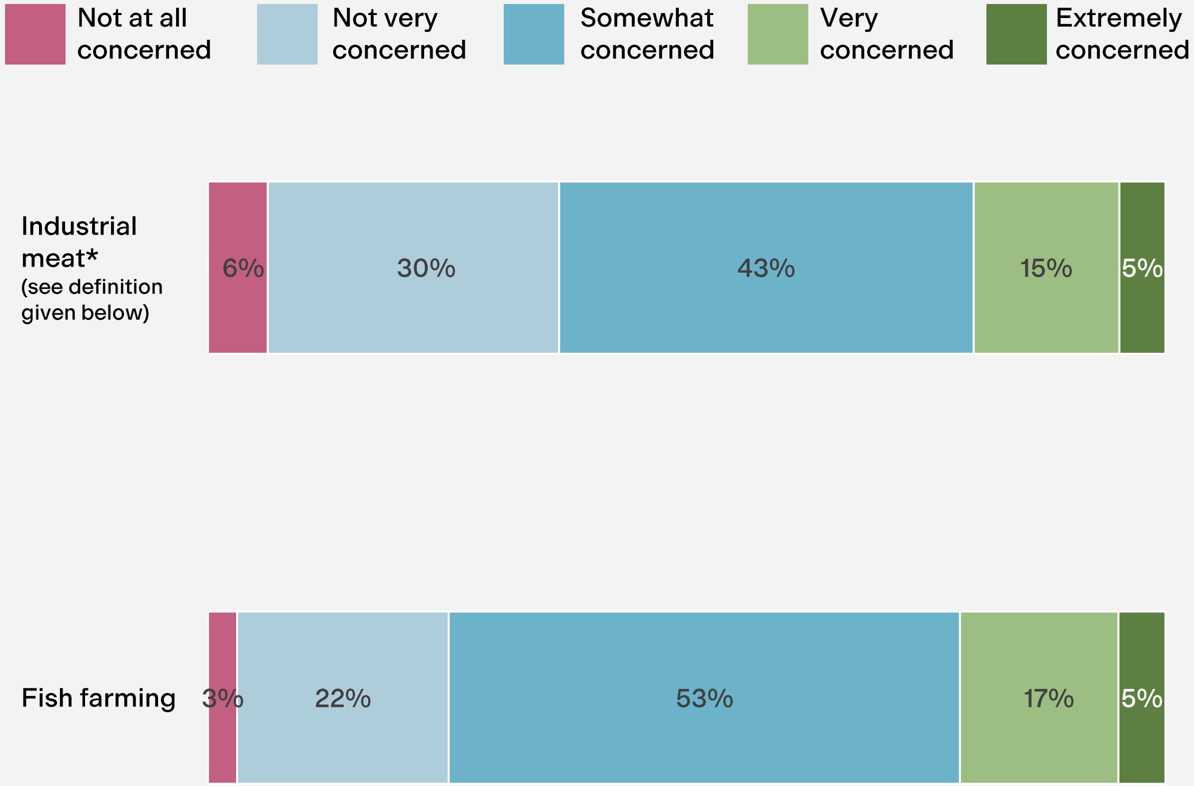
D4: Out of the list below, which are the biggest contributors towards global warming worldwide?

One reason for this is that knowledge of the industrial meat industry is low. There are moderate levels of concern (after definition is provided)

Knowledge about the industrial meat industry
(Among total population)



Level of concern towards the industrial meat/fish farming industries
(Among total population)



*Industrial meat definition provided:
The system of modern industrialized livestock farming for the production, packing, preservation, and marketing of meat such as chicken, pork and beef.

D5: How much do you know about the industrial meat industry? D6: How concerned or unconcerned are you with the impact of industrial meat on the environment, people's health, and animals?

How does Thailand compare vs. other markets?

Thai consumers differ in their meat and AP consumption intentions and attitudes. This supports the idea that Thailand has strong AP growth potential

Notable differences between Thailand and other global markets researched in 2022*

More Thai people intend to reduce their meat consumption in the next two years

% of meat eaters who believe they will reduce/stop eating meat in the next two years:

- Global average – 46%
- US – 38%

- Thailand – 67%

Thais eat meat because its 'normal' – whereas other markets eat meat because it's 'nice'

Reasons amongst current meat eaters for reluctance to reduce meat consumption:

It's normal:
- Global– 17%
- Thailand – 32%

It's nice:
- Global - 32%
- Thailand – 14%

Overall, there is less rejection of AP consumption in Thailand

% who say they will not be eating AP's in 2 years' time:

- Global average – 27%
- US – 34%
- France - 32%

- Thailand – 9%

*Global Markets: UK, France, Germany, US, Brazil

Now let's turn our attention to audience strategy...

How we’ve identified potential audiences...

Here's how we identified 4 different audiences in Thailand

INDIVIDUAL'S STRENGTH OF SUPPORT

The level of support for change + the level of support for alternative proteins (top box)

(score out of 24)

-

INDIVIDUAL'S STRENGTH OF OPPOSITION

The level of opposition to support change + the level of opposition for alternative proteins (<u>bottom 2 box</u>)

(score out of 24)

=

INDIVIDUAL'S NET LIKELIHOOD TO SUPPORT THE CAUSE

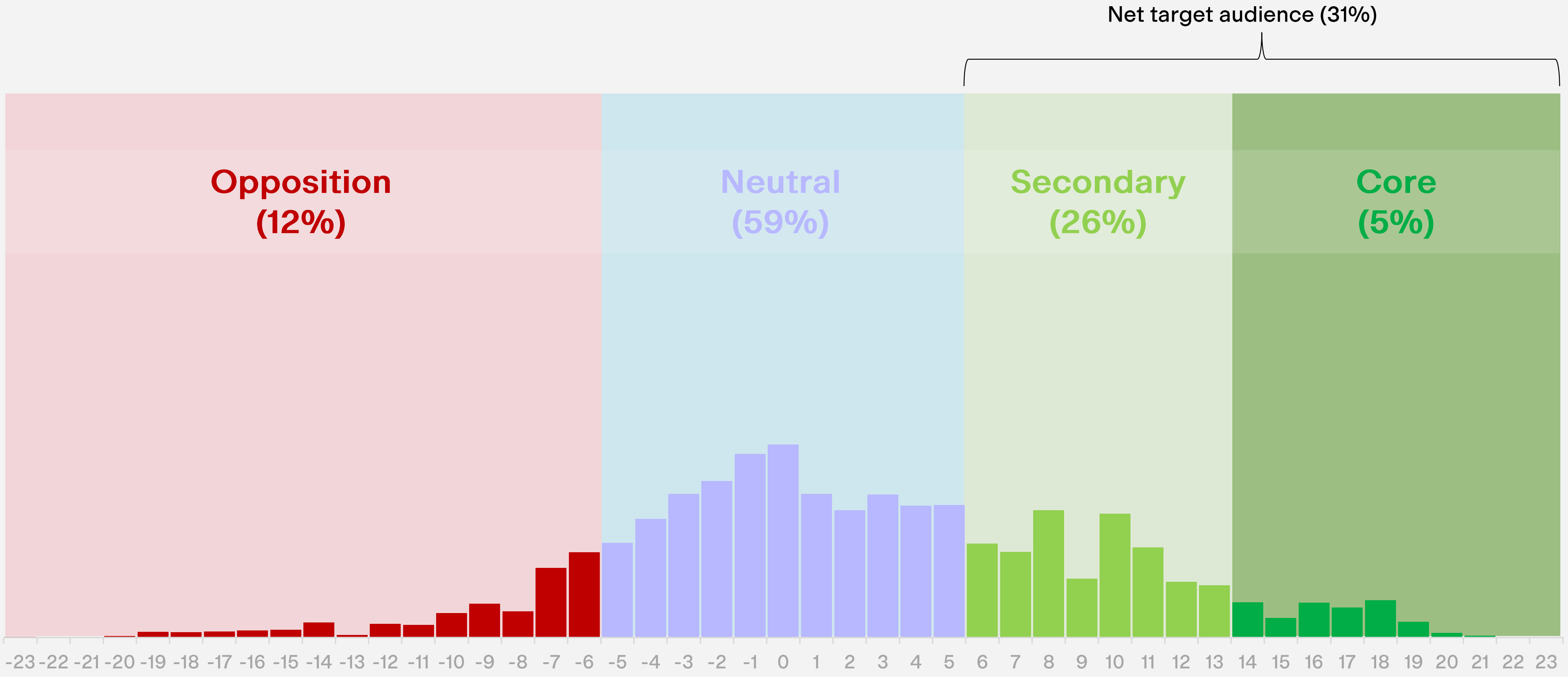
(a score between 23 and -23)

↓

The distribution of this score was used to classify people into one of four buckets (see next slide)

The individual's strength of opposition was refined in Thailand to include the bottom 2 box % (as opposed to just the bottom box % used in the global research)

Here's how the four different audiences falls out in Thailand



And here's the fall out across key demographic groups:

	By Gender		By Age		
	Male	Female	18-29	30-44	45-64
Opposition	13%	10%	15%	11%	10%
Neutral	59%	55%	61%	55%	55%
Secondary	23%	29%	21%	27%	29%
Core	5%	5%	3%	7%	6%
Net target audience	28%	35%	24%	35%	35%

Profiling the different Thai audiences

Core	Secondary	Neutral	Opposition
The core audience are ready to support the cause. The have the highest awareness of different AP's and many eat them on a regular basis. They have the strongest positive associations with AP's and majority intend to increase consumption within the next 2 years. Although a large proportion of them still eat meat, they are the most likely audience to be non-meat eaters or are actively reducing their consumption.	The secondary audience will need more convincing but are warm and supportive of the cause. They have good awareness of AP's, however only a small proportion eat them regularly. The majority intend to reduce meat consumption and increase AP consumption within the next 2 years.	Most people are neutral. It's unlikely that they'll proactively support the cause, despite being generally sympathetic to at least some of the issues (they won't oppose). They have moderate awareness of AP's and don't eat them regularly. They are still likely to reduce meat consumption, and some will increase AP consumption in the next 2 years.	There is a minority of people who would either passively or actively oppose the cause. They are heavy meat eaters and the majority do not intend on reducing their meat consumption. While they have moderate awareness of AP's, very few eat any AP's regularly as very few of them have positive associations with AP's.



Core

- Gender parity
- Middle aged - 30-44 years (40%)
- Higher income - Upper-Mid (38%)
- Living with partner & kids (57%)
- Majority have a Bachelor’s / Master’s degree (78%)
- Most Flexitarian (40%) & Omnivore (46%)
- Mains concerns are of Climate change (43%), Environmental issues (36%) and Health and wellbeing security (47%)
- Partake in the Vegetarian Festival (82%)

Secondary

- More female (55%)
- Mostly aged 45-64 years (45%)
- Higher income - Upper-Mid (34%)
- Living with partner & kids (44%)
- Majority have a Bachelor’s / Master’s degree (69%)
- Mostly Omnivore (62%) with higher-than-average proportion of Flexitarian (27%)
- More likely to think they are very environmentally conscious (54%), but would like to be environmentally conscious (27%)
- Partake in the Vegetarian Festival (64%)

Neutral

- Gender parity
- No age difference vs nat rep.
- More rural (20%)
- Less likely to live with my partner / spouse (with children (28%)
- Majority are Omnivore (75%) with lowest levels of Flexitarian (13%)
- Primary concerned about poverty (54%) and sig. less concerned about climate change (21%)
- Less likely to know about industrial meat, but are willing to take a guess (30%)
- Low purchase consideration toward alt. meat (13% - very likely to buy)

Opposition

- More 18-29 yrs (39%)
- A skew towards male (56%)
- More lower to mid-low income (78%)
- Most are Omnivores (71%) with lowest levels of Flexitarians (11%)
- Majority love/ like eating meat (63%) and intend to continue eating meat as they do now (52%)
- Perceive themselves to be to have a low level of environmentally consciousness (26%) and most are very satisfied with how environmentally conscious they are (51%)
- Lowest awareness about industrial meat (62% - It’s not something I know about)

With a target audience identified, let's look at the drivers / barriers to AP growth

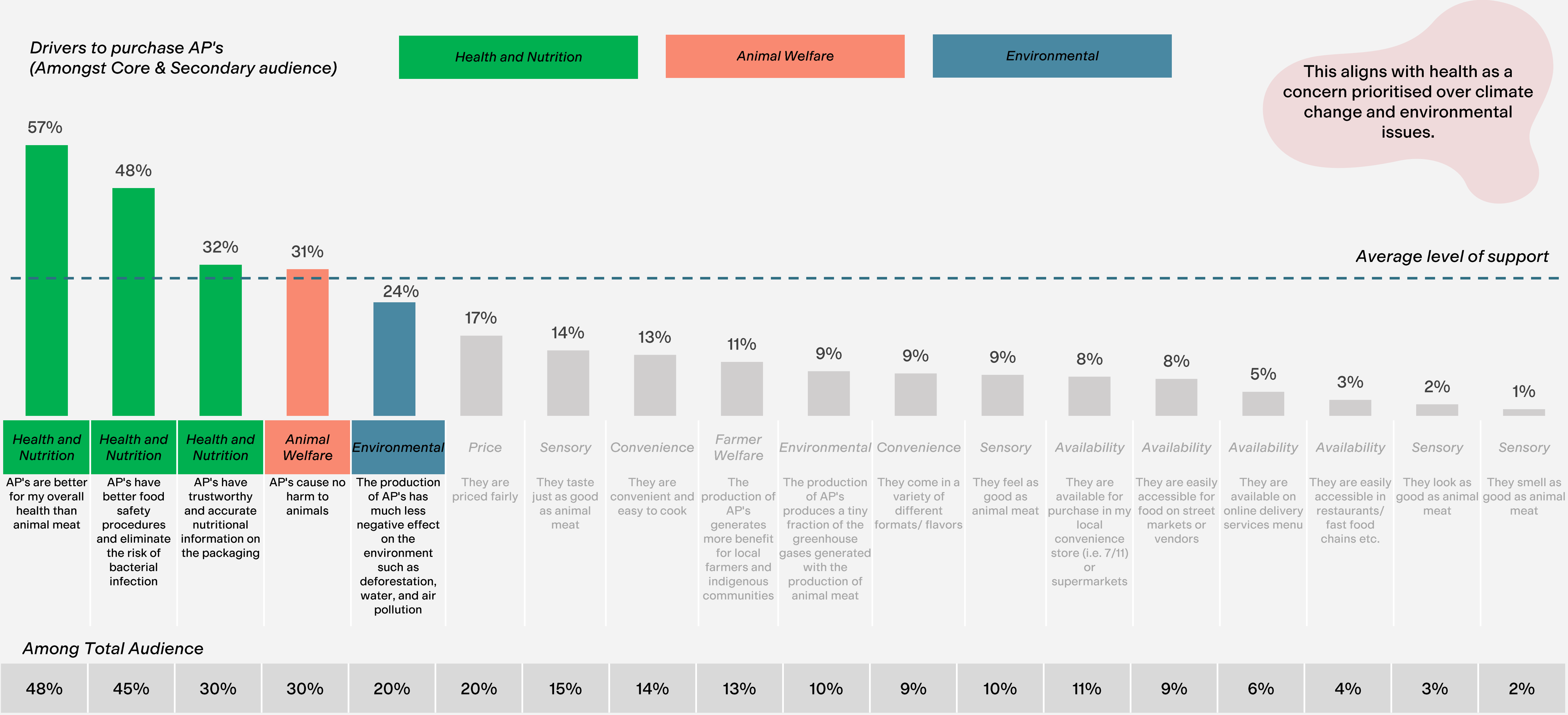
Drivers to AP consumption growth

18 drivers to AP consumption, grouped into 8 thematic buckets

Health & Nutrition	Environmental	Farmer Welfare	Animal Welfare	Price	Sensory	Convenience	Availability
Are better for my overall health than animal meat	Less harmful to the environment (e.g. deforestation, water, and air pollution)	Can benefit local farmers/indigenous communities (more than animal meat production)	They cause no harm to animals	They are priced fairly	They taste just as good as animal meat	They come in a variety of different formats/ flavors	They are available for purchase in my local convenience store (i.e. 7/11) or supermarkets
Has trustworthy and accurate nutritional information on the packaging	Produce much less greenhouse gas vs. animal meat production				They feel as good as animal meat	They are convenient and easy to cook	They are easily accessible through street markets or vendors
Has better food safety procedures and eliminate the risk of bacterial infection					They look as good as animal meat		They are available through online delivery services
					They smell as good as animal meat		They are easily accessible in restaurants/ fast food chains etc.

G1. Select the MOST and LEAST relevant reasons as to why you may consume AP's

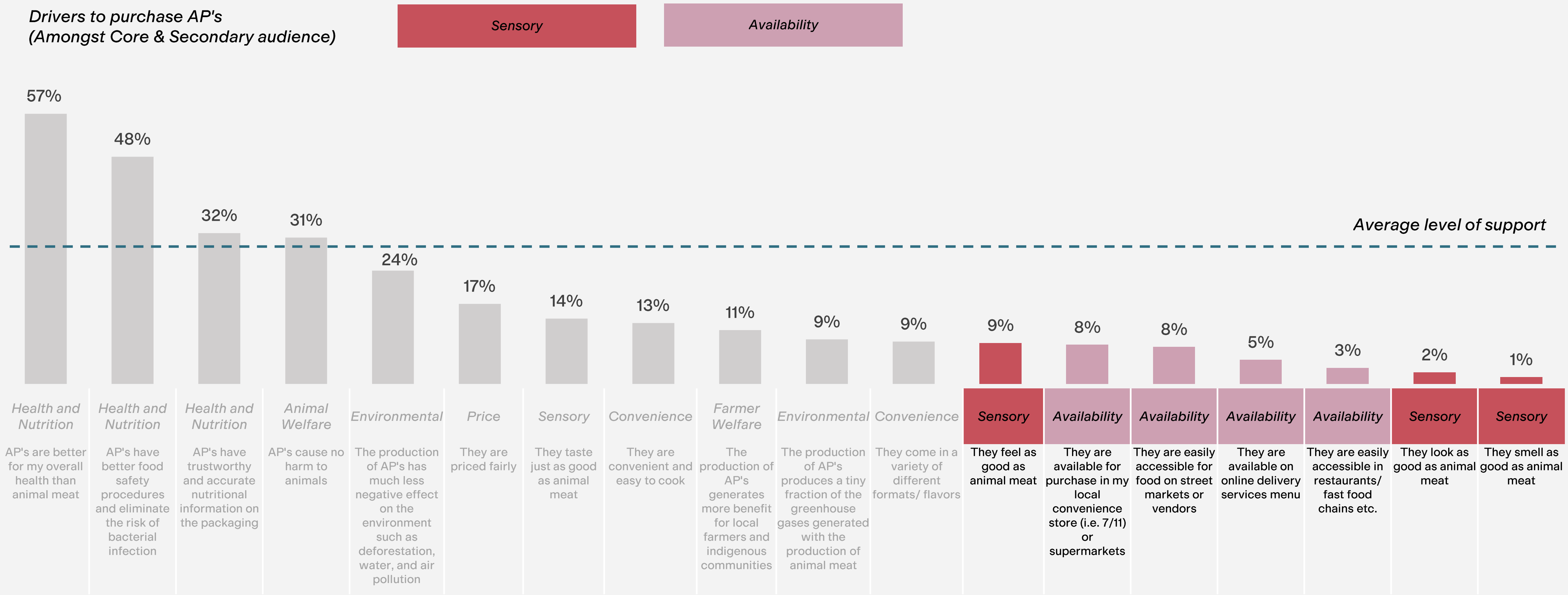
Health and nutrition benefits are clearly the biggest drivers of AP consumption. Secondary drivers include better animal welfare and a less negative impact on the environment



G1. Select the MOST and LEAST relevant reasons as to why you may consume AP's

Sensory comparisons to meat (look, feel, smell) and availability are not positive growth drivers for AP consumption

Drivers to purchase AP's
(Amongst Core & Secondary audience)



Among Total Audience

48%	45%	30%	30%	20%	20%	15%	14%	13%	10%	9%	10%	11%	9%	6%	4%	3%	2%

G1. Select the MOST and LEAST relevant reasons as to why you may consume AP's

Barriers to AP consumption growth

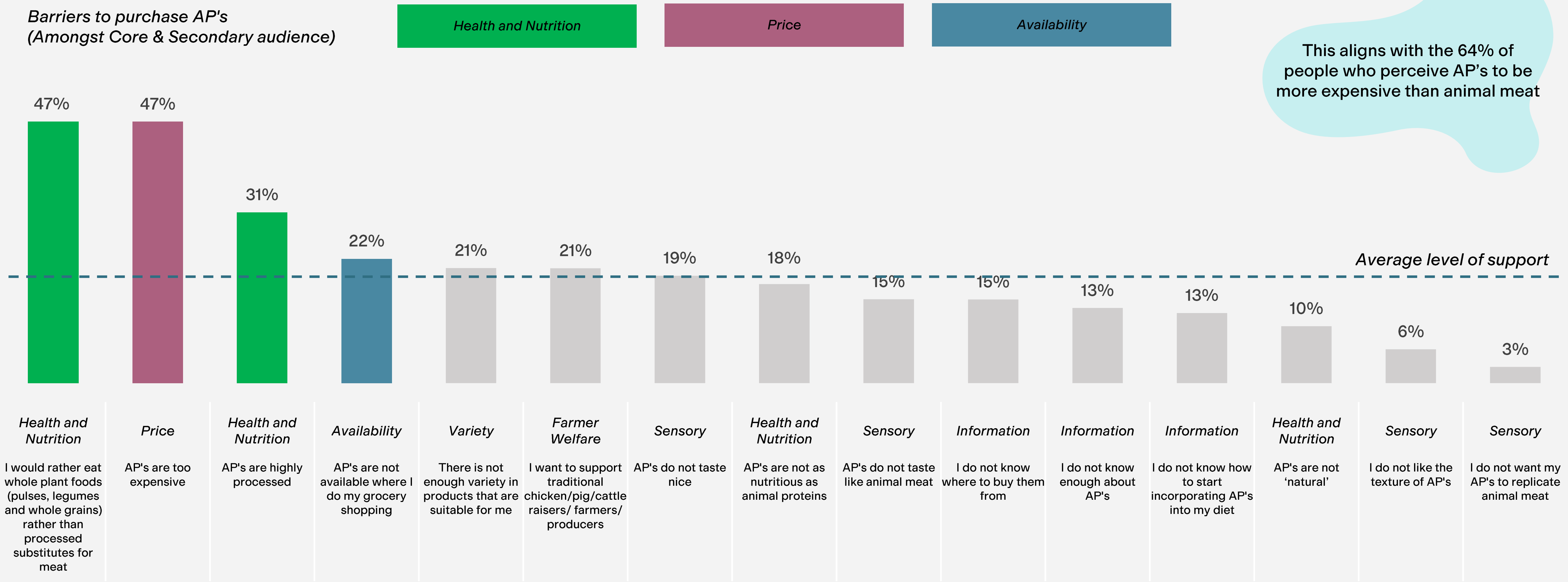
15 barriers to AP consumption, grouped into 7 thematic buckets

Health and Nutrition	Farmer Welfare	Lack of information	Price	Sensory	Variety	Availability
They are not as nutritious as animal proteins	I want to support traditional animal raisers/ farmers/ producers	I do not know where to buy them from	They are too expensive	They do not taste nice	There is not enough variety in products that are suitable for me	They are not available where I do my grocery shopping
They are highly processed		I do not know how to start incorporating AP's into my diet		They do not taste like animal meat		
They are not 'natural'		I do not know enough about AP's		I do not like the texture of AP's		
I'd rather eat whole plant foods (pulses, legumes and whole grains) than processed substitutes for meat				I do not want my AP's to replicate animal meat		

G2. Select the MOST and LEAST relevant reasons as to why you may not consume AP's

Price and a preference for substituting meat with whole plant foods are the two primary barriers to AP growth. AP’s processed perception and a lack of availability are secondary barriers

Barriers to purchase AP's
(Amongst Core & Secondary audience)



This aligns with the 64% of people who perceive AP’s to be more expensive than animal meat

Among Total Audience

45%	45%	45%	45%	45%	45%	45%	45%	45%	45%	45%	45%	45%	45%	45%

G2. Select the MOST and LEAST relevant reasons as to why you may not consume AP's

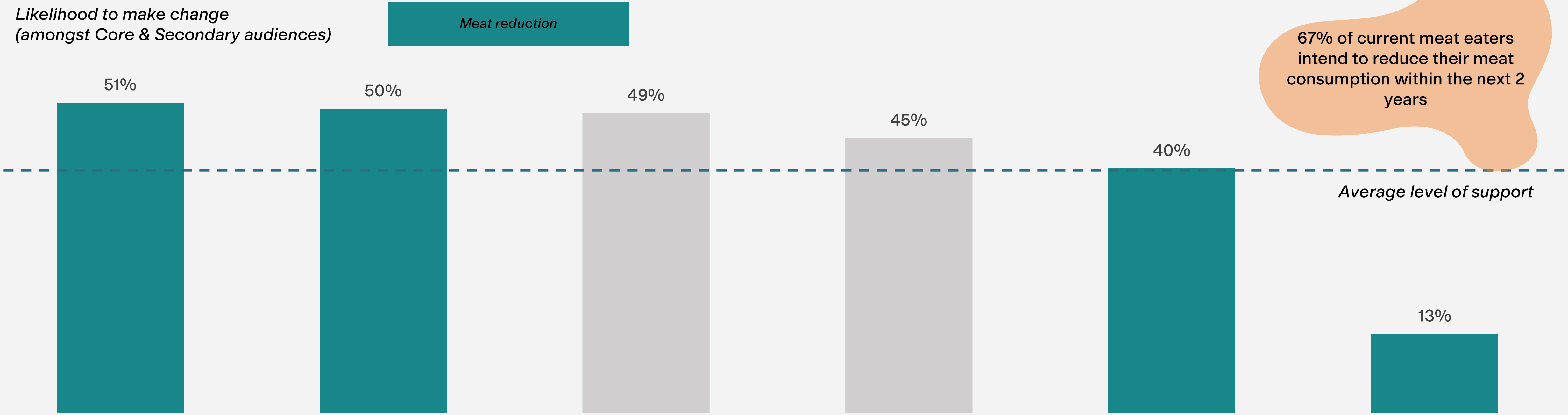
And finally let’s look at the level of support the target audience has for the cause

Measuring potential support for calls to action

Meat reduction (balancing with more plant based whole foods and AP's) is likely among the target audience. However, stopping eating meat altogether is a step too far

Likelihood to make change
(amongst Core & Secondary audiences)

67% of current meat eaters intend to reduce their meat consumption within the next 2 years



Meat reduction	*Meat reduction*	*Communication*	*Change of buying habits*	*Meat reduction*	*Meat reduction*
Swap up to 50% of your meat intake for a mix of plant-based (such as legumes, tofu, and pulses) and AP's *Not shown to vegetarians/ vegans*	Eat more plant based whole foods such as legumes, tofu, and pulses instead of meat-like alternatives	Encourage family and friends to swap animal meat for AP's and/or plant-based proteins such as legumes, tofu and pulses	Shop at supermarkets that sell AP's	Swap up to 50% of your meat intake for AP's *Not shown to vegetarians/ vegans*	Stop eating meat altogether *Not shown to vegetarians/ vegans*
Among Total Audience					
16%	22%	20%	20%	16%	6%

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I2: How likely would you be to do the following?

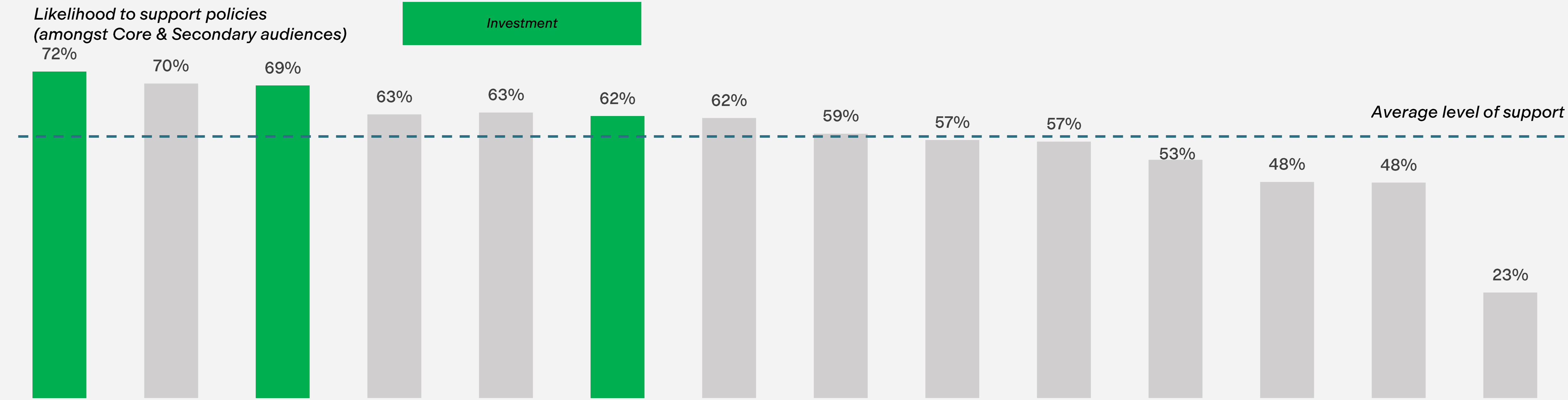
Measuring likelihood to support policies

The likelihood to support or oppose 14 potential policies (grouped up into 5 buckets) were prioritised

Regulation of production	Regulation of consumption	Consumer awareness & education	Taxation	Investment
Regulate major food companies to boost alternative protein production	Require supermarkets/fast food chains to offer more AP's	Mandatory environmental and health labeling on meat/fish packaging	Tax increase on animal meat to make them more expensive	Investment into alternative protein research and development
	Public procurement of AP's in institutions e.g. Schools	National guidelines on meat/fish/alternative protein's health/environmental impact	Tax reduction on AP's to make them cheaper	Support for farmers transitioning from farming to new jobs
	Mandate food retailers and restaurants to align with the World Health Organisation guidelines for a healthy diet	Public education on the harms of industrial meat and benefits of alternatives		Invest in farmer transition to eco-friendly practices
		School curriculum on meat's impact, alternatives, and nutrition		Back startups and small/ medium companies in alternative protein production

I1: To what extent would you support or oppose the following policies designed to help encourage the consumption of AP's and reduce animal meat/fish consumption.

Investment, particularly into farmer support (to transition to new jobs or eco-friendly practices) garners strong support



Investment	*Taxation*	*Investment*	*Consumer awareness & education*	*Regulation of consumption*	*Investment*	*Consumer awareness & education*	*Regulation of consumption*	*Consumer awareness & education*	*Investment*	*Consumer awareness & education*	*Regulation of consumption*	*Regulation of production*	*Taxation*
Support for farmers transitioning from farming to new jobs	Tax reduction on AP's to make them cheaper	Invest in farmer transition to eco-friendly practices	Mandatory environmental and health labeling on meat/fish packaging	Mandate food retailers and restaurants to align with the World Health Organisation guidelines for a healthy diet	Investment into alternative protein research and development	Public education on the harms of industrial meat and benefits of alternatives	Require supermarkets/fast food chains to offer more AP's	National guidelines on meat/fish/alternative protein's health/environmental impact	Back startups and small/ medium companies in alternative protein production	School curriculum on meat's impact, alternatives, and nutrition	Public procurement of AP's in institutions e.g. Schools	Regulate major food companies to boost alternative protein production	Tax increase on animal meat to make them more expensive

Among Total Audience

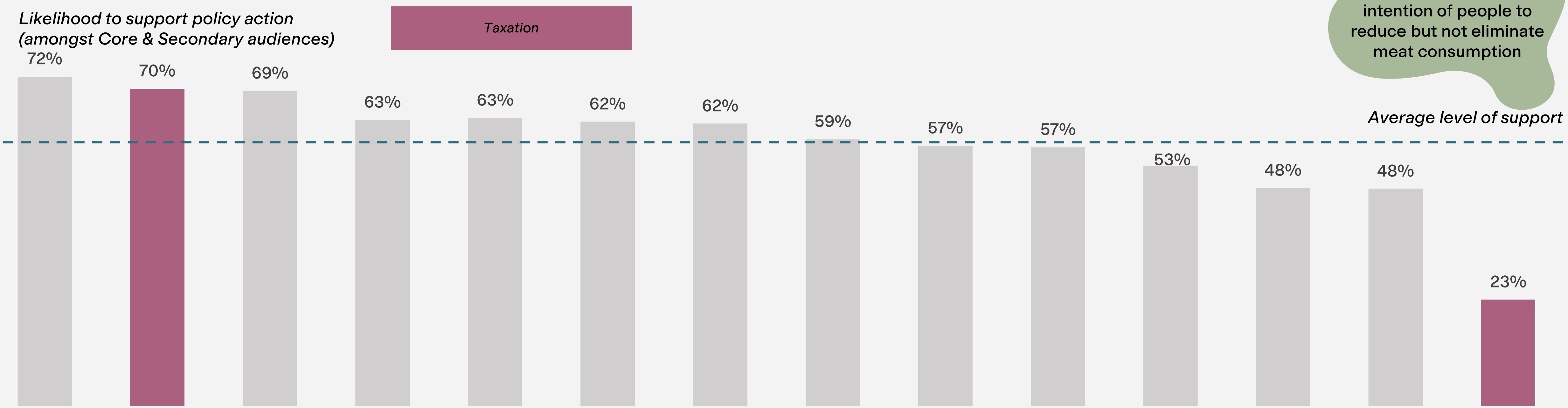
40%	36%	37%	31%	32%	27%	32%	28%	26%	25%	25%	20%	20%	10%

I1: To what extent would you support or oppose the following policies designed to help encourage the consumption of AP's and reduce animal meat/fish consumption.

Taxation reduction on AP's is highly supported, whereas a tax increase is rejected – likely due to the personal impact on the consumer

This aligns with the intention of people to reduce but not eliminate meat consumption

Likelihood to support policy action (amongst Core & Secondary audiences)



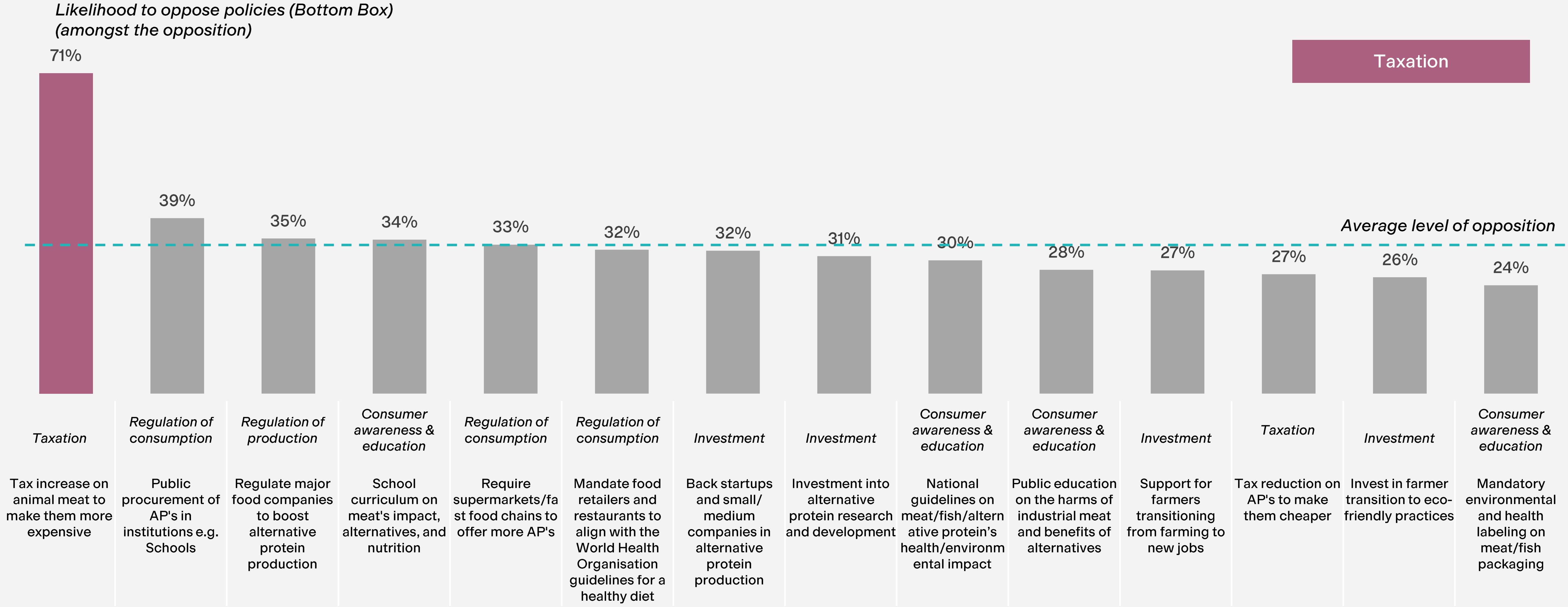
		Among Total Audience
Investment	Support for farmers transitioning from farming to new jobs	40%
Taxation	Tax reduction on AP's to make them cheaper	36%
Investment	Invest in farmer transition to eco-friendly practices	37%
Consumer awareness & education	Mandatory environmental and health labeling on meat/fish packaging	31%
Regulation of consumption	Mandate food retailers and restaurants to align with the World Health Organisation guidelines for a healthy diet	32%
Investment	Investment into alternative protein research and development	27%
Consumer awareness & education	Public education on the harms of industrial meat and benefits of alternatives	32%
Regulation of consumption	Require supermarkets/fast food chains to offer more AP's	28%
Consumer awareness & education	National guidelines on meat/fish/alternative protein's health/environmental impact	26%
Investment	Back startups and small/medium companies in alternative protein production	25%
Consumer awareness & education	School curriculum on meat's impact, alternatives, and nutrition	25%
Regulation of consumption	Public procurement of AP's in institutions e.g. Schools	20%
Regulation of production	Regulate major food companies to boost alternative protein production	20%
Taxation	Tax increase on animal meat to make them more expensive	10%

Among Total Audience

I1: To what extent would you support or oppose the following policies designed to help encourage the consumption of AP's and reduce animal meat/fish consumption.

Measuring likelihood of policy opposition

Opposition focuses strongly on the increased taxation of animal meat



Among Total Audience

45%	10%	9%	8%	7%	7%	7%	6%	7%	6%	6%	7%	5%	6%

I1: To what extent would you support or oppose the following policies designed to help encourage the consumption of AP's and reduce animal meat/fish consumption.