Thailand

Audience Strategy Research

October-December 2023

Research commissioned by Madre Brava

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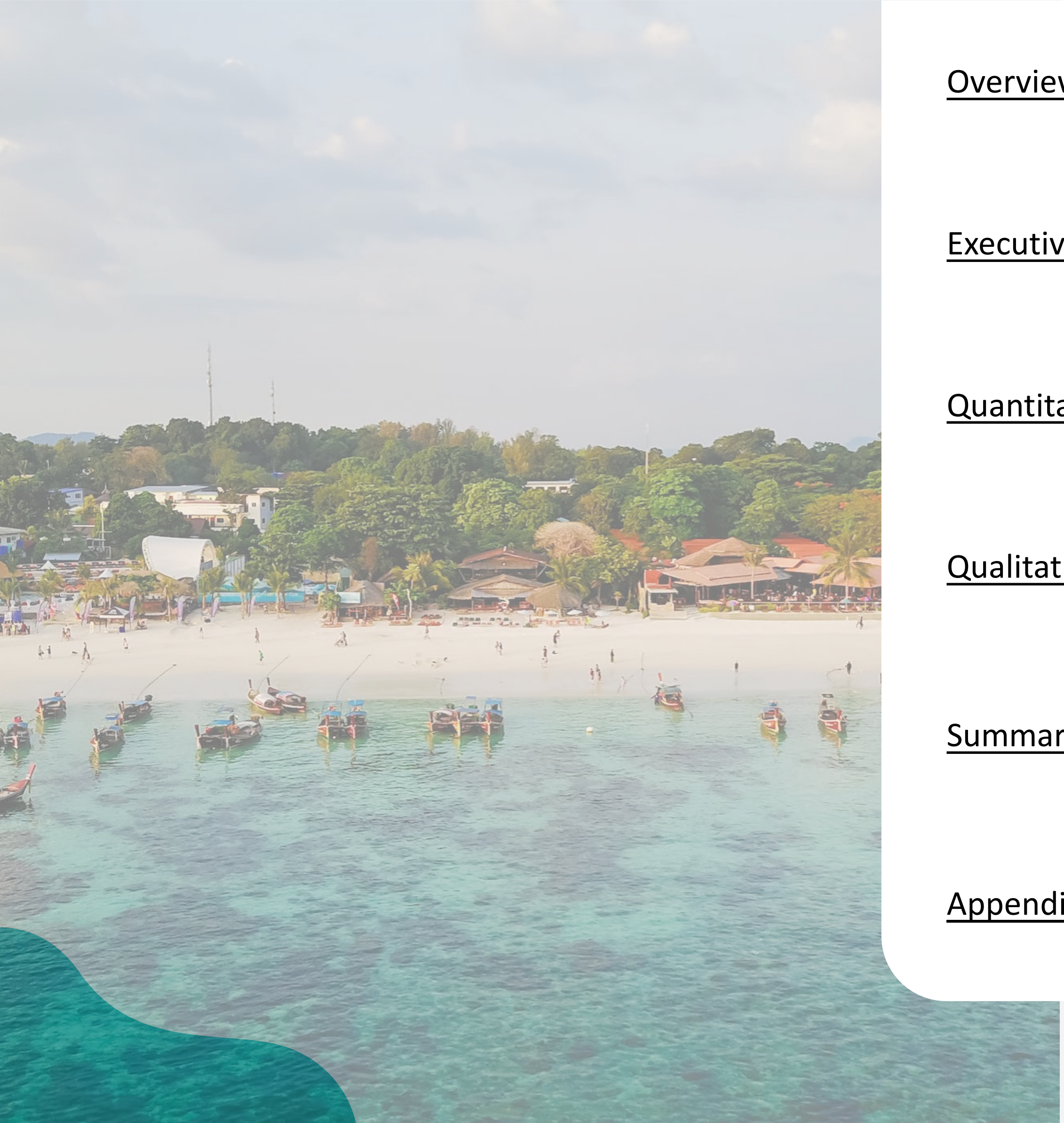


This report is made up of the final 2 stages of this research:

This report:

Stage 1: Market Trends Research

What was it?

Desk Research

What did it deliver?

An initial understanding of the current Thai market dynamics.
Meat, Conventional and Alternative Proteins consumption, retail, development and regulation landscape.

Previous report

Stage 2: Quant Audience and Message Identification

What was it?

15min survey with n=1,586 nationally representative* adults from Thailand

What did it deliver?

Defined, sized and profiled a target audience, understood what the resonant issues are and measured the potential effectiveness of solutions and policies

Starts on slide 5

Stage 3: Qualitative Refinement

What was it?

5 x in depth interviews with the identified target audience

What does it deliver?

The ability to refine messaging, identify effective framings and fine tune potential policy positionings

Starts on slide 51

*See nationally representative breakdown on slide 103

Executive Summary

- Meat consumption in Thailand is widespread – however two thirds of the population surveyed revealed they would like to reduce their meat consumption in the next two years, with a greater focus on reduction as opposed to complete elimination of meat.
- Top motivators for the reduction in meat consumption; *health and wellness, followed by environmental and animal welfare concerns.*
- More than half of those who intend to reduce their meat consumption, plan to replace it with alternative proteins and/or a mix between alternative proteins and conventional plant-based proteins.
- However, barriers to alternative protein consumption are significant. Consumers believe alternative proteins are currently too expensive, too processed as well as there being a lack of availability to purchase and a lack of variety in products.
- Without addressing these barriers, the growth in consumers transitioning their meat consumption to alternative protein consumption is limited.
- The target audience for alternative proteins show strong support for investment into R&D, farmer livelihoods and job transitions, tax reform to reduce the price of alternative proteins, increasing consumer awareness and education and greater access to health and environment information through produce labelling.
- Recommendations:
    - Increase investment into R&D and greater support for SME's and start-ups
    - Tax reform to make alternative proteins cheaper
    - Public awareness and education of the possible benefits alternative proteins could have, including, health, environment and economical.

madre brava: Thailand

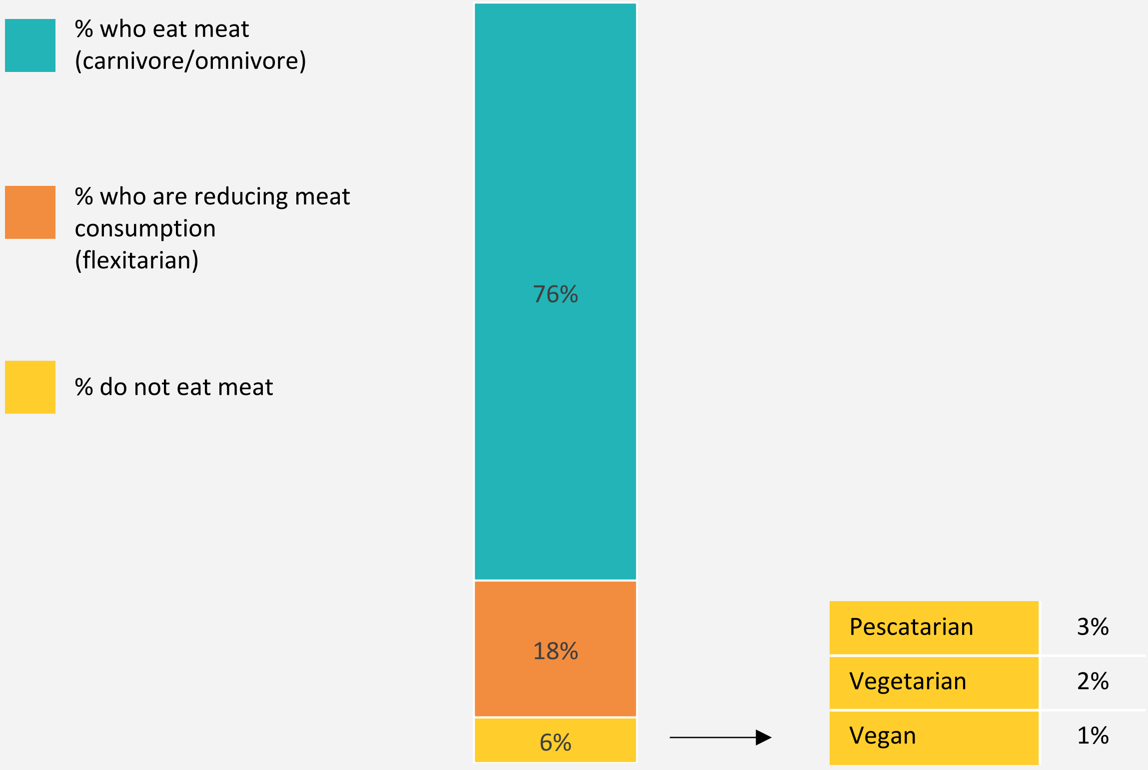
Stage 2: Quantitative Audience and Message Identification

October 2023

Consumption habits in Thailand

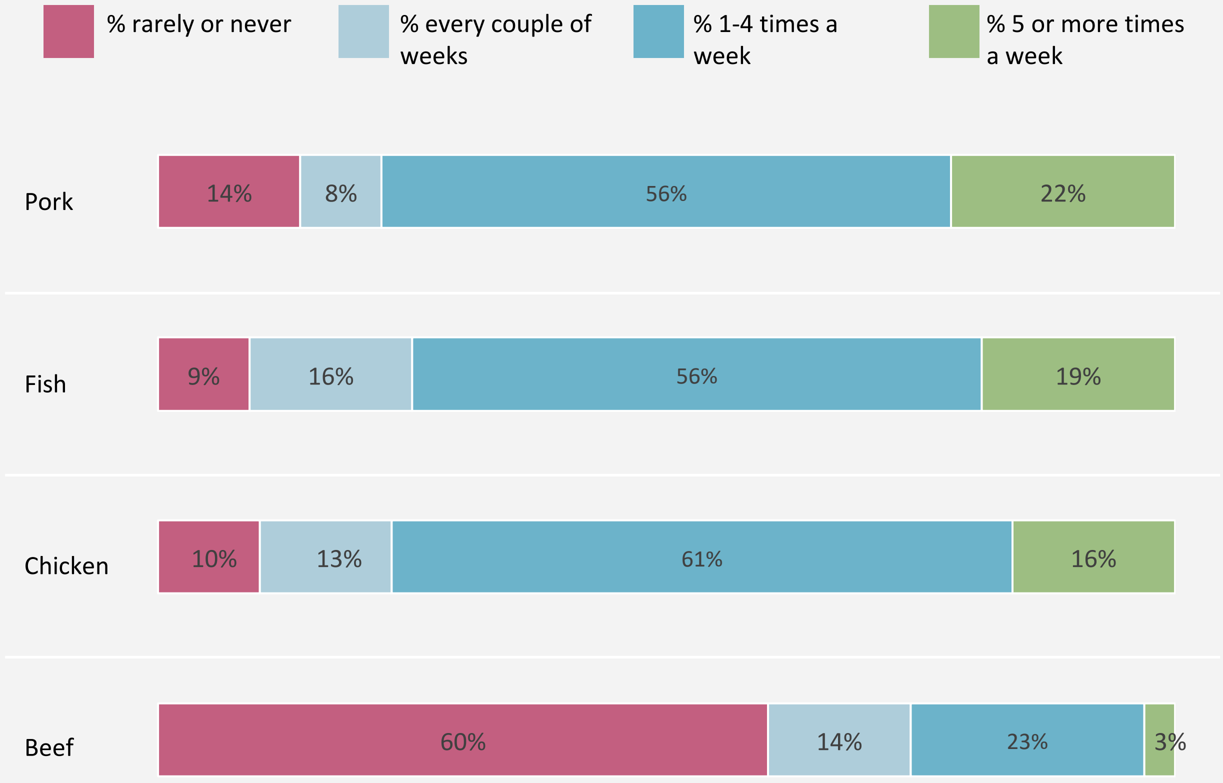
Meat consumption is widespread in Thailand, with most people eating Pork, Fish or Chicken at least once a week

Diet and overall meat consumption
(Among total population)



*Definitions of diet type shown in footnotes

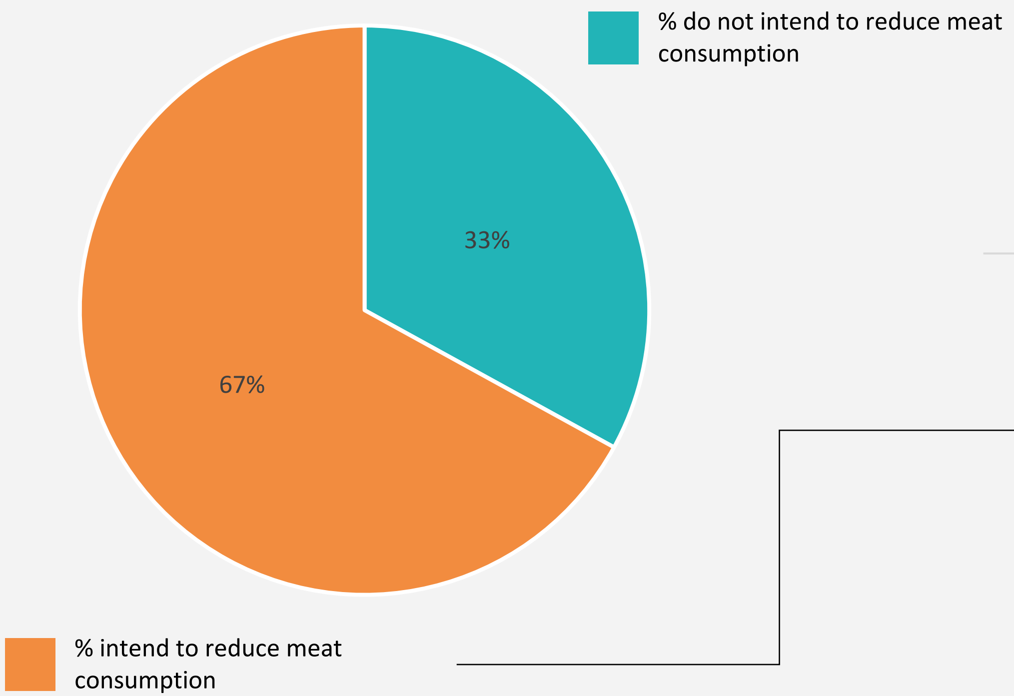
Frequency of meat/fish consumed
(Among total population)



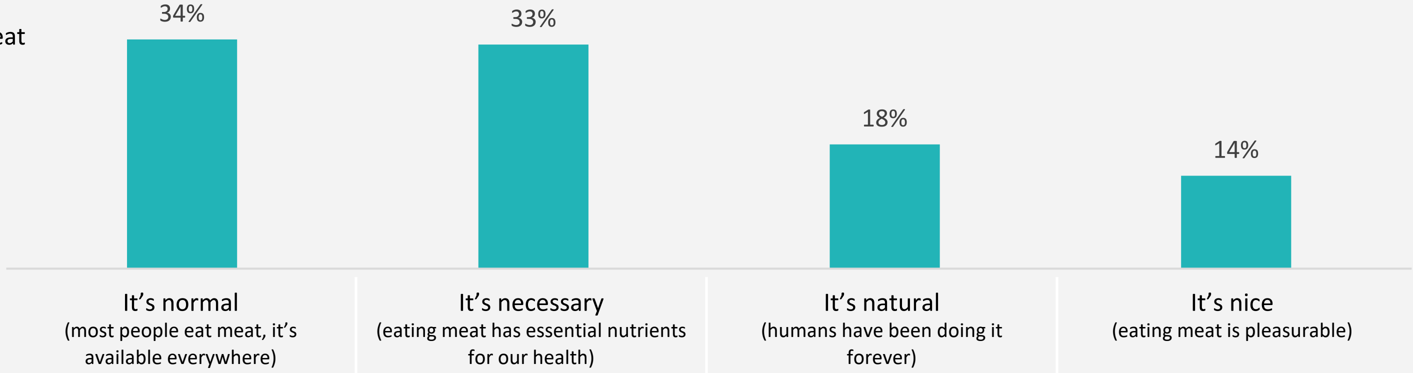
Flexitarians are defined as 'actively reducing meat consumption' and display a lower consumption of meat e.g. 13% of Flexitarians eat pork 5+ times a week, compared to 26% of moderate/heavy meat eaters.

Two thirds of meat eaters intend to reduce their consumption in the next 2 years

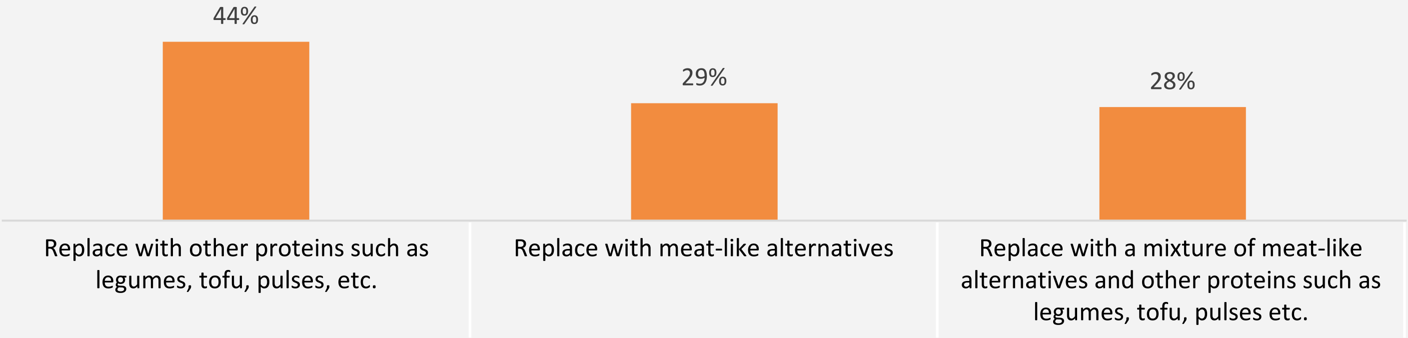
Intention to reduce meat consumption (in the next 2 years)
(Among current meat eaters)



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



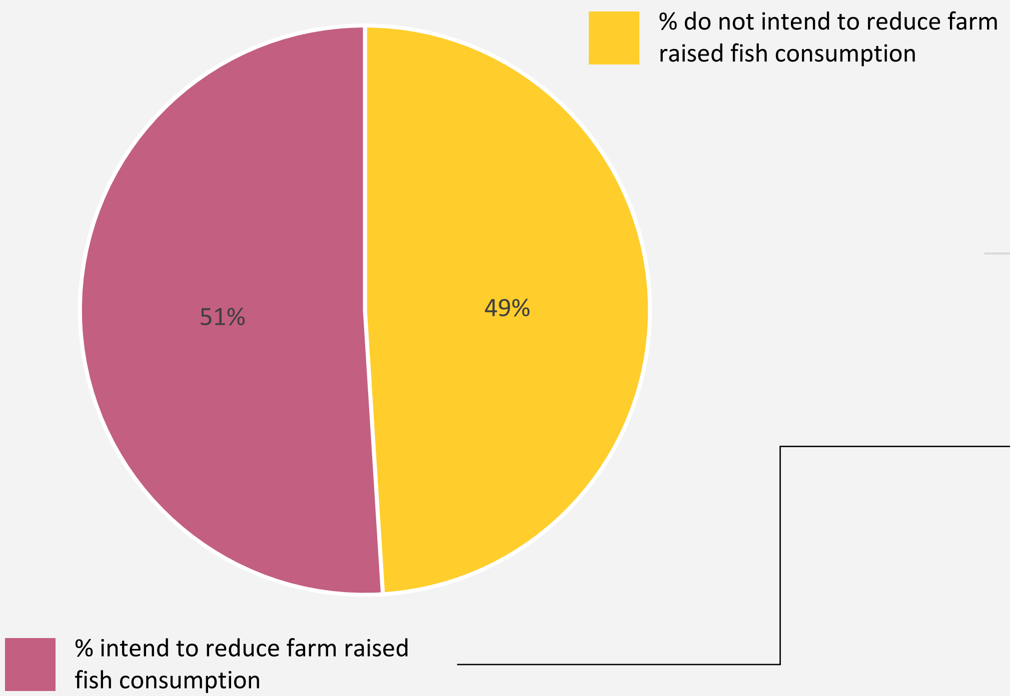
Ways to reduce meat consumption
(among those intend to reduce meat consumption)



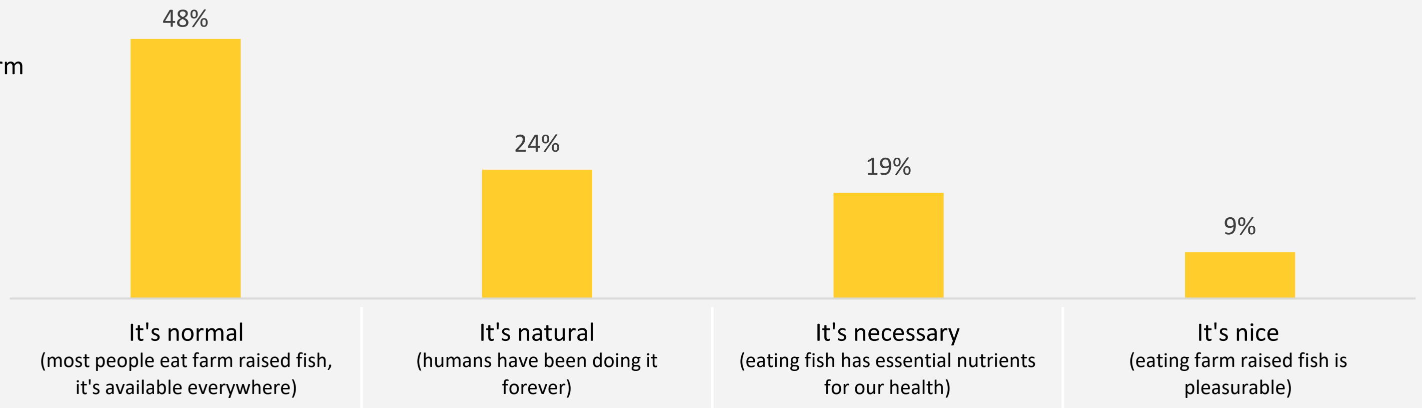
E3b: Which of the below best describes how your relationship with meat might change in the next 2 years? (N=1497) E3c: In what way do you intend to replace your current meat consumption with alternatives? (N=1024) E3e: What is it about meat that makes you most reluctant to cut down on current consumption? (N=473)

Whereas half intend to reduce their farm-raised fish consumption

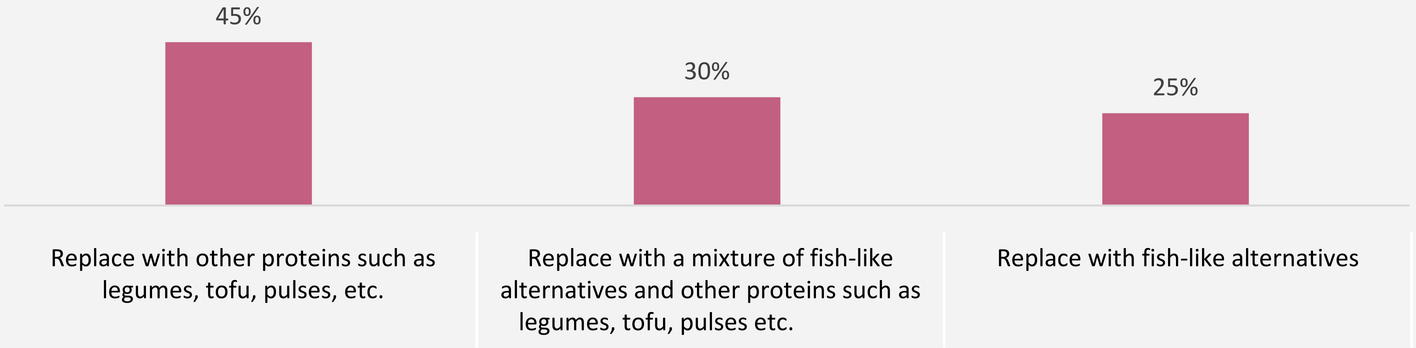
Intention to reduce farm raised fish consumption (next 2 years)
(Among current fish eaters)



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 those who intend to reduce farm raised fish consumption)

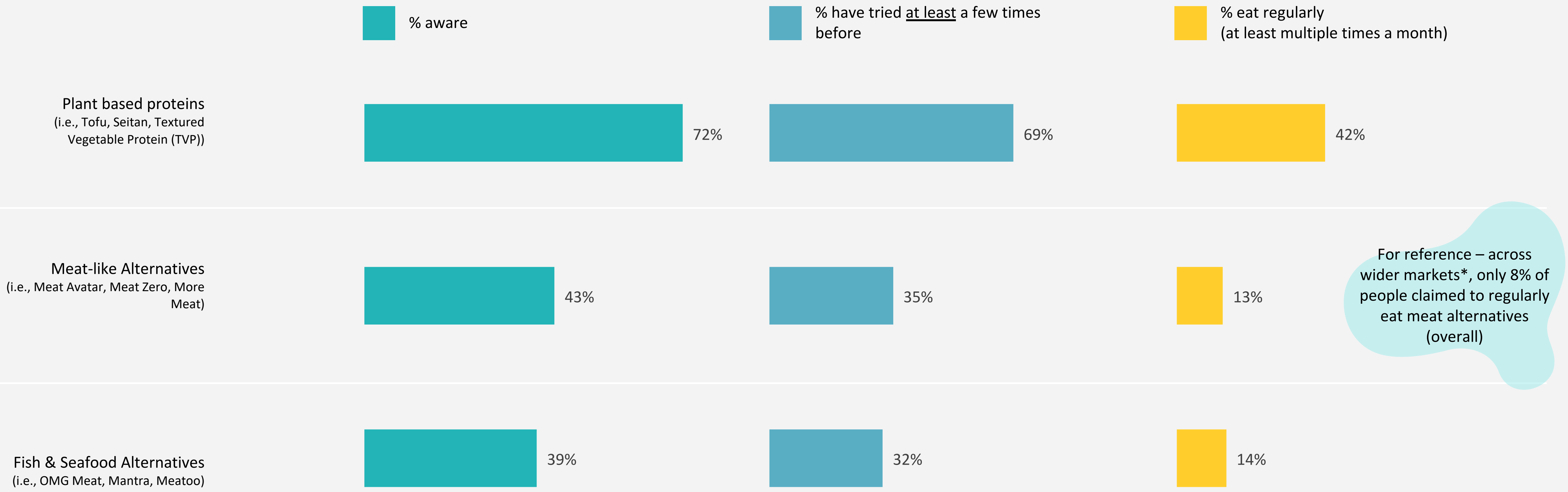


E4b: Which of the below best describes how your relationship with farm raised fish might change in the next 2 years? (N=1547) E4c: In what way do you intend to replace your current farm raised fish consumption with alternatives? (N=789) E4e: What is it about farm raised fish that makes you most reluctant to cut down on current consumption? (N=758)

Awareness of Alternative Proteins* (APs)

Awareness and regular consumption is highest for plant-based proteins. Only 4 out of 10 people are aware of meat & fish alternatives causing a low consumption rate

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



northstar harrisx

F1: Which of the following food items are you aware of? (N=1587) F2: And how often do you eat these items? (N=1587)

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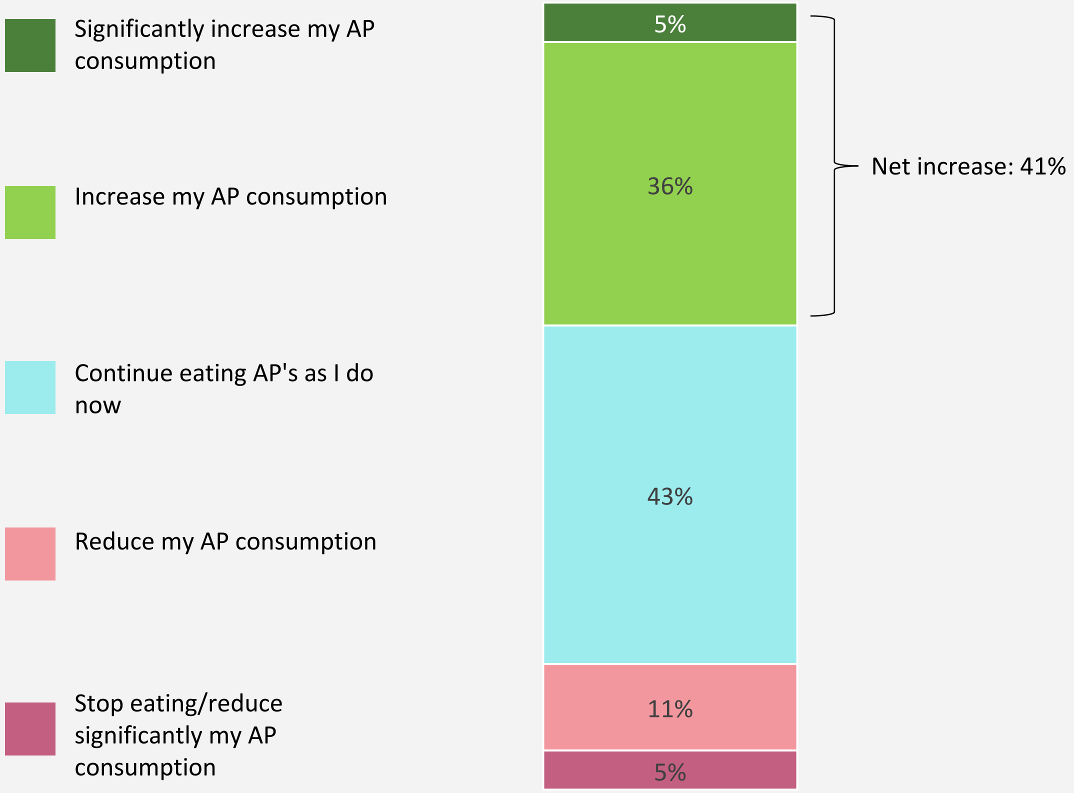
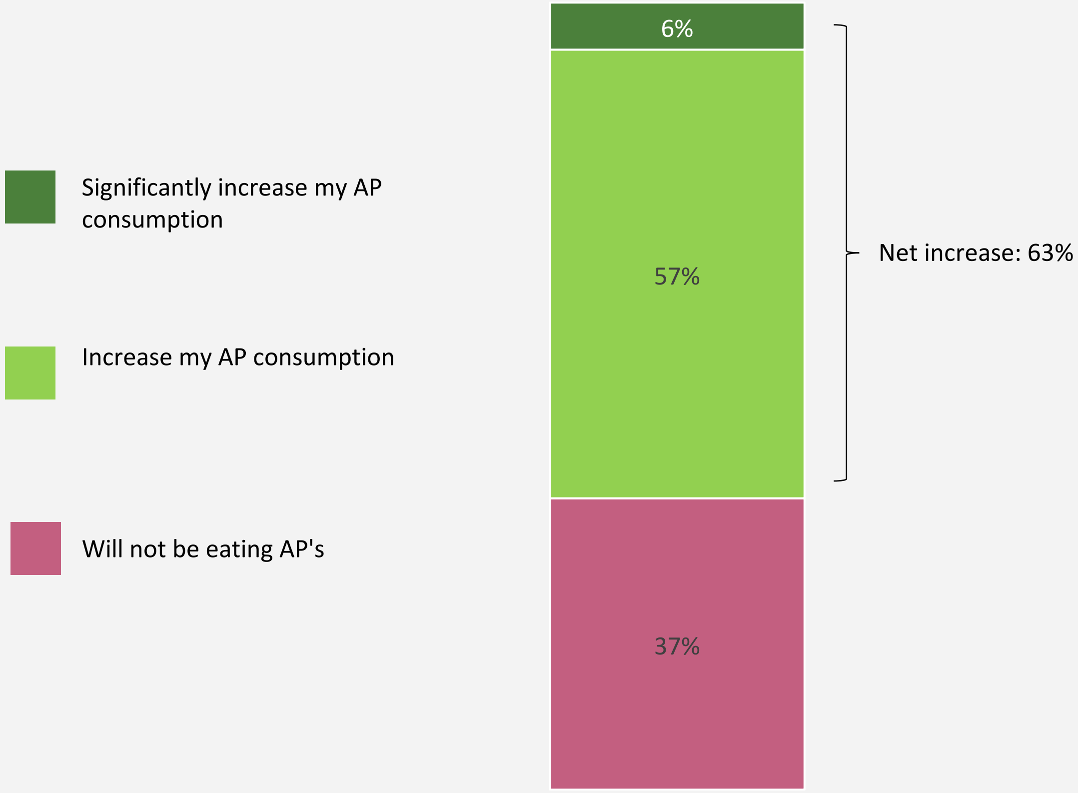
There is a strong intention to increase consumption of AP's. This is especially true among those who have not tried AP's – which suggests intention isn't a significant barrier

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)



northstar harrisx

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

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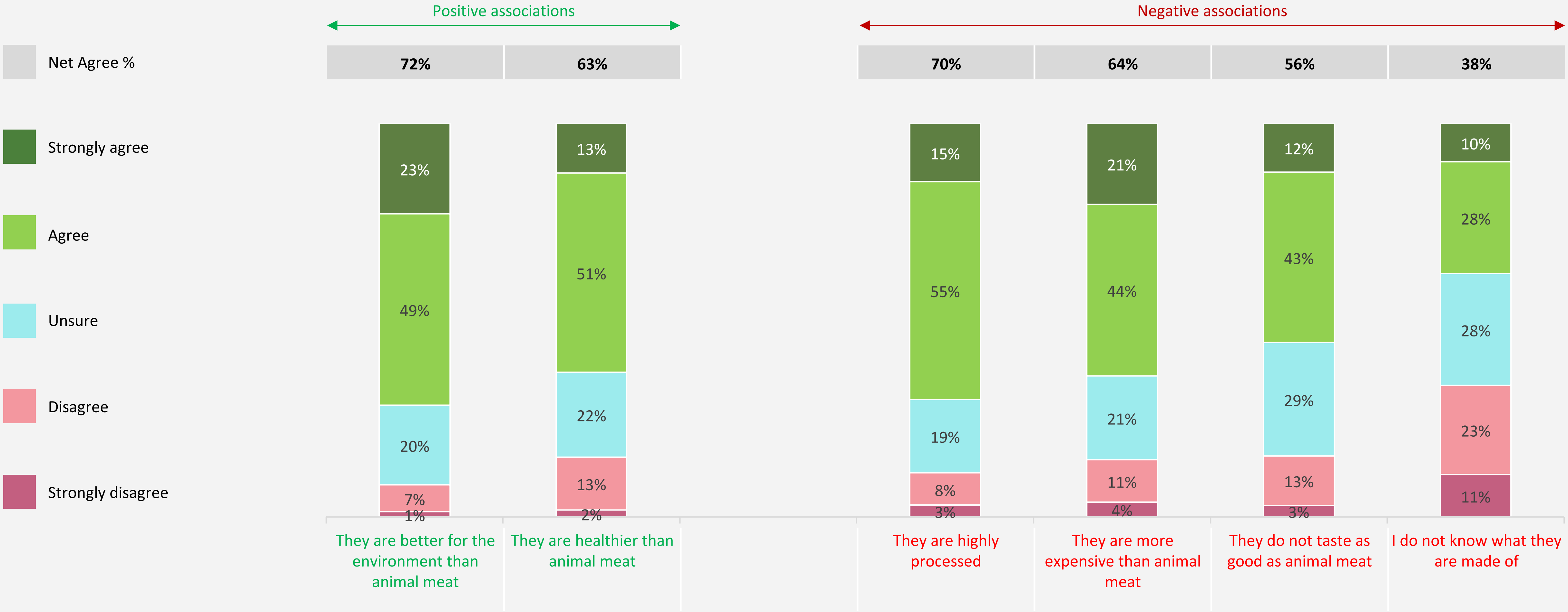
Despite the environmental and health benefits being recognised, AP's are also perceived as processed and expensive (significant barriers to overcome)

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

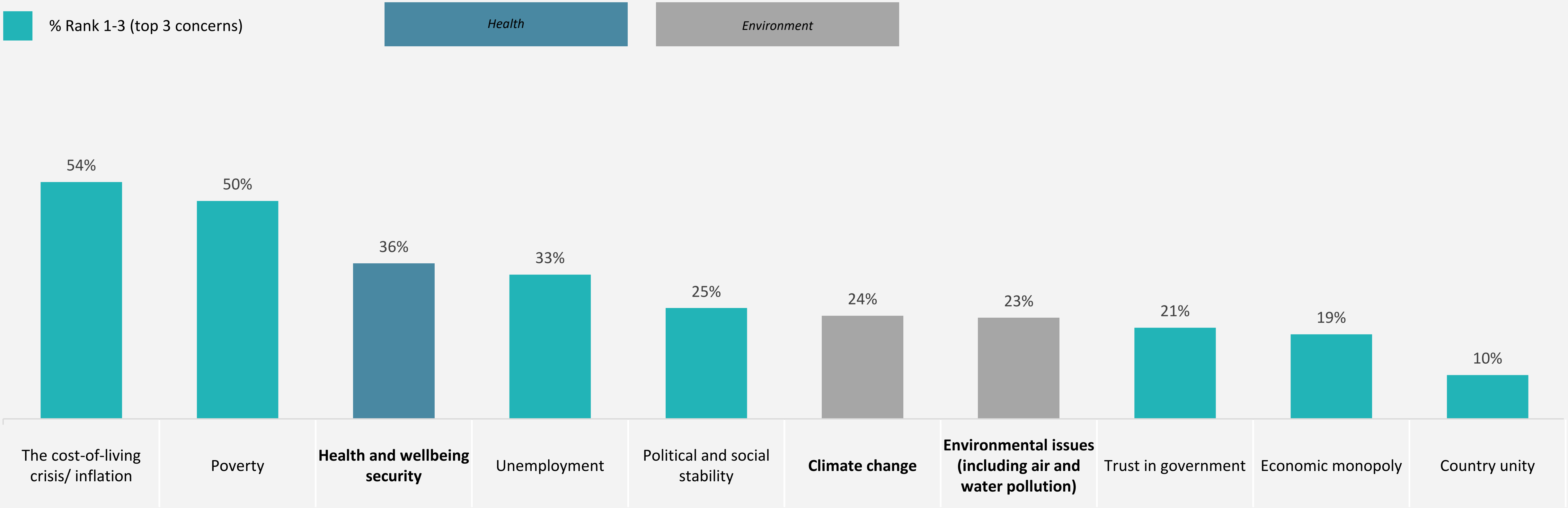


F3: To what extent do you agree or disagree with the following statements regarding AP’s? (N=1587)

Concern towards the environment and industrial meat industry

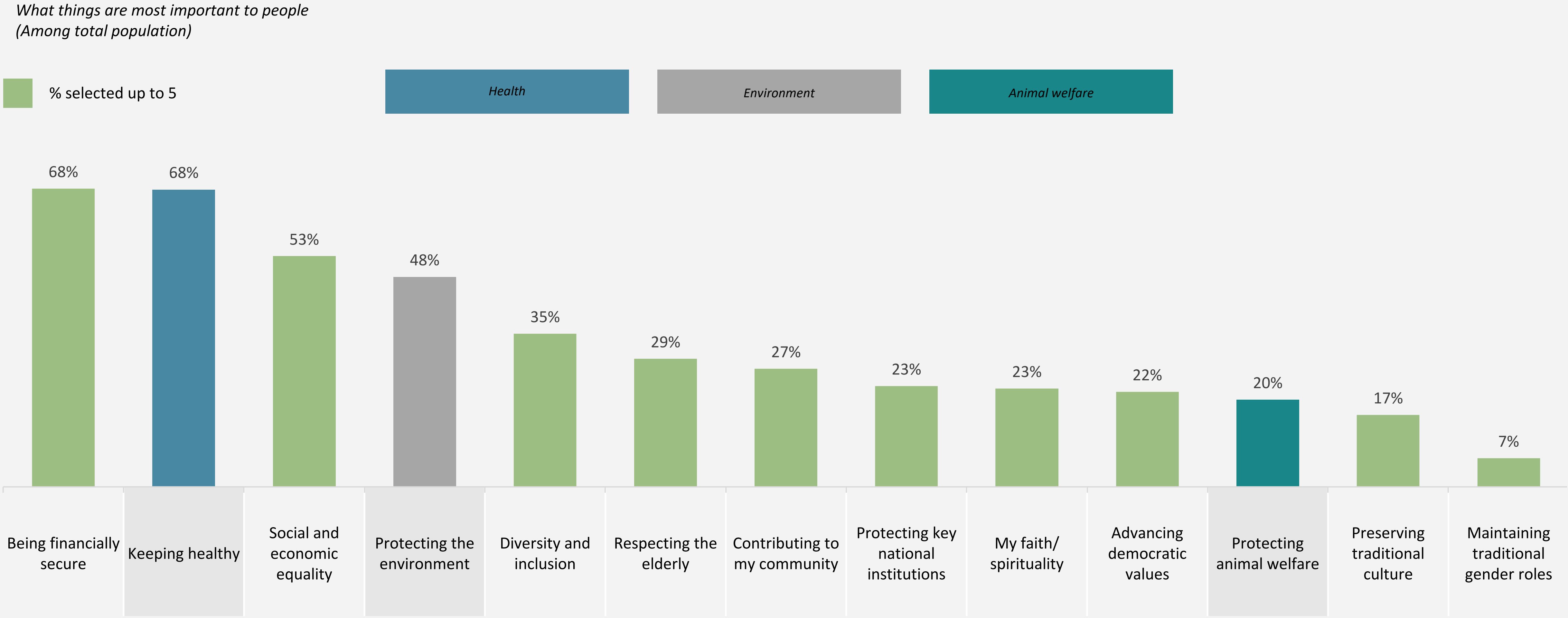
Climate change and environmental issues are less of a concern in Thailand vs. health and wellbeing. Cost of living and poverty are top concerns

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. (N=1587)

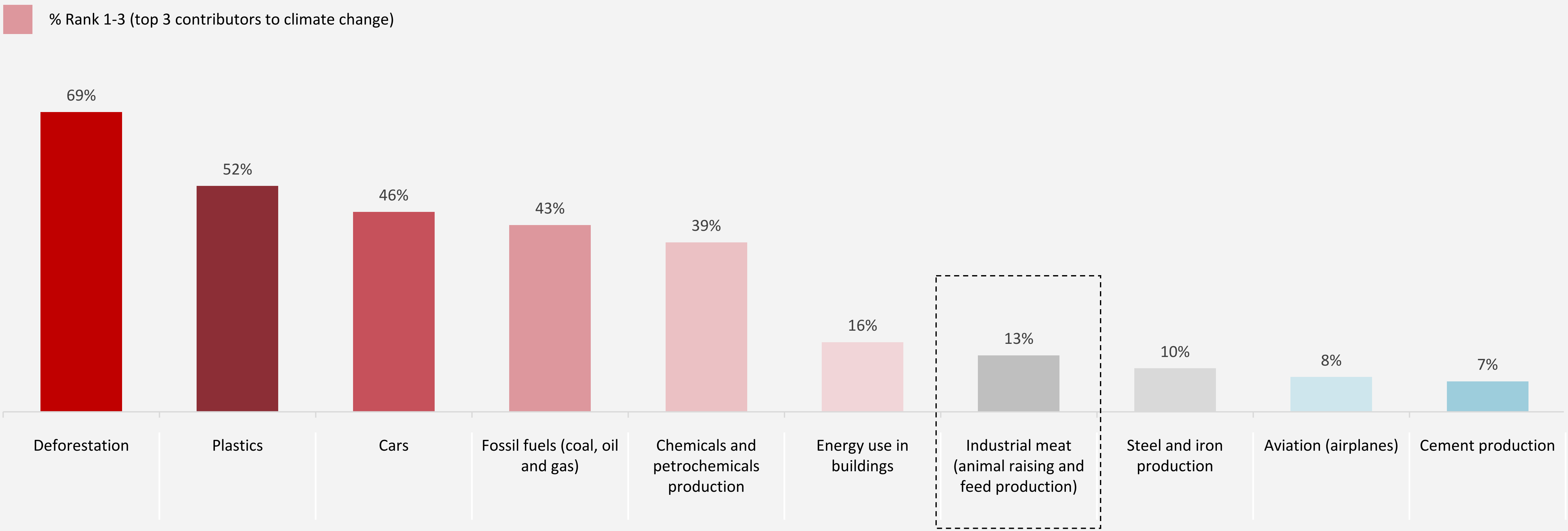
This is supported by what's most important to people – with financial security and keeping healthy top priorities



C1: Which of the following things are most important to you? (N=1587)

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

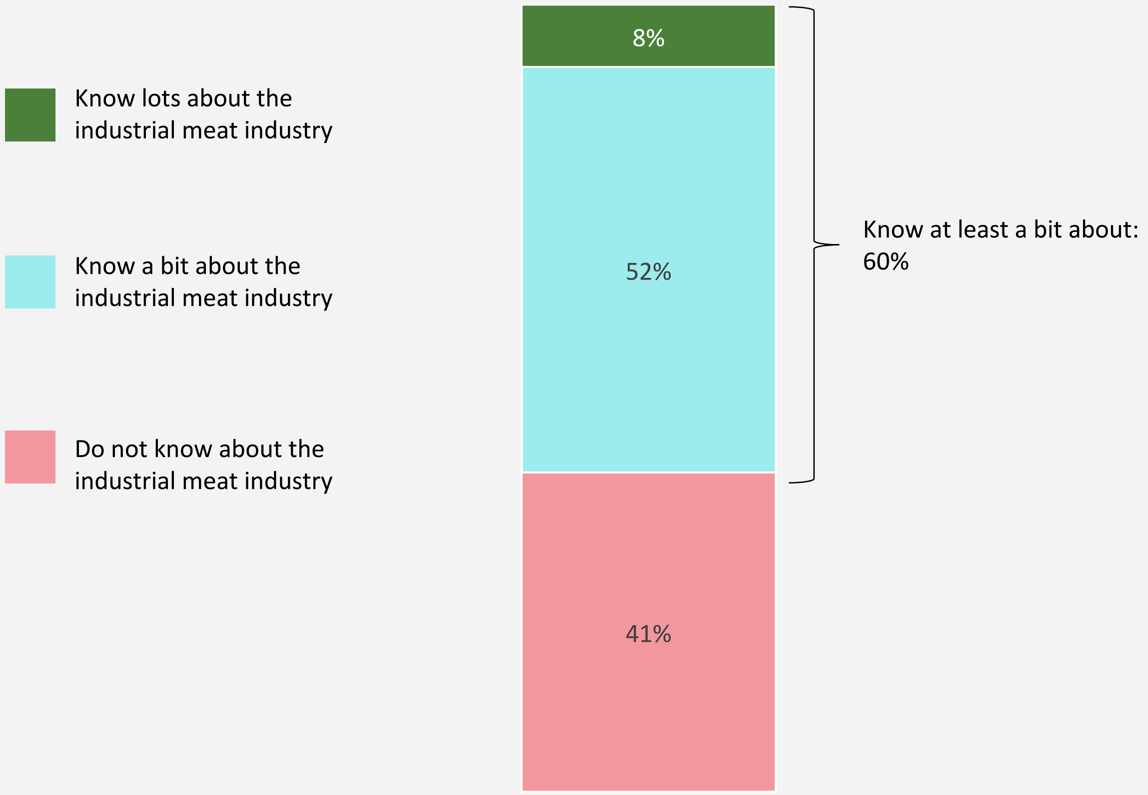
Perceived biggest contributors to climate change
(Among total population)



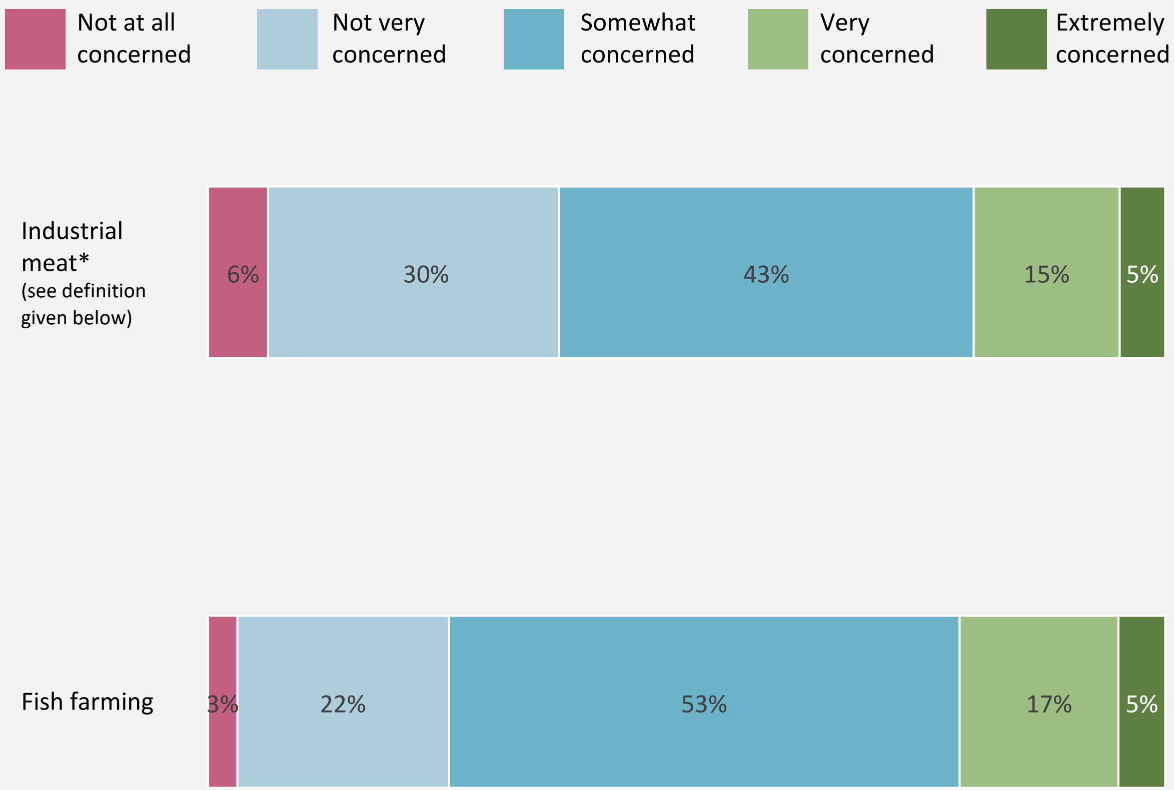
D4: Out of the list below, which are the biggest contributors towards global warming worldwide? (N=1587)

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? (N=1587) D6: How concerned or unconcerned are you with the impact of industrial meat on the environment, people's health, and animals? (N=1587)

How does Thailand compare vs. other markets?

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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 wider markets (UK, France, Germany, US, Brazil) 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:

- Wider market average – 46%
- US – 38%

- Thailand – 67%

Thai people 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:
- Wider markets – 17%
- Thailand – 32%

It's nice:
- Wider markets - 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:

- Wider market average – 27%
- US – 34%
- France - 32%

- Thailand – 9%

Now let's turn our attention to audience strategy…

How we've identified potential audiences...

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There is far less strong scepticism to change and stronger support for change in Thailand vs. the wider markets* researched in 2022 – meaning a slightly refined audience classification is needed

Level of support/scepticism
(Among total population of each piece of research)

The audience classification for the wider research 2022 used a scoring system based on the strength of support for change vs. the strength of scepticism for change

Because there is much lower levels of strong scepticism in Thailand (vs. the global research), the same scoring system leads to a very skewed distribution. Therefore, we have refined the audience classification approach for Thailand (see next slide)

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 SCEPTICISM

The level of scepticism to support change + the level of scepticism for alternative proteins (bottom 2 box)

(score out of 24)

=

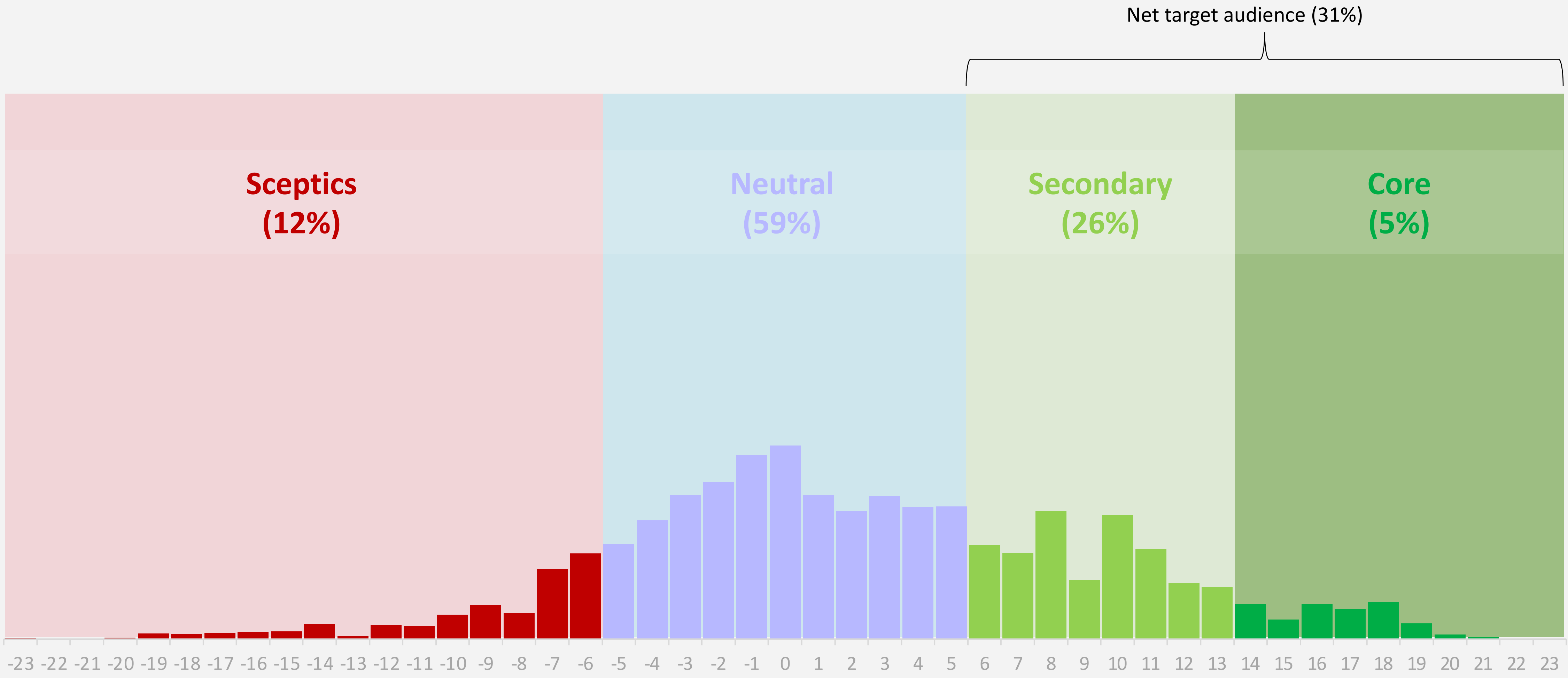
INDIVIDUAL’S NET LIKELIHOOD TO SUPPORT THE CAUSE

(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 scepticism 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
Sceptics	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

The core audience are ready to support the cause. They 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.

Secondary

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.

Neutral

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.

Sceptics

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)

Sceptics

- 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)

The Core

Highly educated and engaged with environmental sustainability. Recognise the negative impacts of industrial meat and find it very concerning. They see the positives of AP and will see a strong increase in consumption with majority already eating regularly.

Demographics	Meat consumption habits and attitudes	The wider concerns and priorities facing them today	Awareness, understanding and level of concern of industrial meat	Alternative meat awareness & perception
• No sig gender difference • Middled aged (40% 30-44 years) • Have the highest income (Upper-Mid Income – 38%) • Living with partner & kids (57%) • Majority have a Bachelor's / Master's degree (78%)	• Most Flexitarian (40%) and Omnivore (46%) • Lowest proportion eating Chicken, Pork, Beef 5+ times per week (~5%) • Highest proportion eating Fish, (25% consuming 5 + times a week) • Highest proportion that hate/don't like eating meat (27%) • Greatest intention to reduce eating meat/stop (95%) • More likely to mind eating farm raised fish (46%) but intend to reduce future consumption (68%) with a mixture of fish-like alt. and other proteins - legumes tofu… (44%) • Consume homecooked meals 6+ time a week (57%) but also purchase Fast food 1-2 times a week (58%) • Partake in the Vegetarian Festival (82%)	• Mains concerns are of Climate change (43%), Environmental issues (36%) and Health and wellbeing security (47%) • Least concerned with Poverty (36%) and Unemployment (22%) • Most likely to think they are very environmentally conscious (86%)	• Most likely to know lots about industrial meat (28%) • Most likely to be concerned about the impact of industrial meat (57%) • Most concerned fish farming (both fresh water and sea) on the environment and people's health and animals (54%)	• Highest aware of alt. meat products: Alt meat (65%) Fish & Seafood (67%) and Cultivated meat (38%) • Higher weekly consumption of alt. meat: meat alt (18%), fish alt. (22%) and plant-based proteins (48%) • Less likely to replace meat alt. with plant-based proteins (33%) • More likely to replace farmed fish with a mixture of fish alt. and plant-based proteins (44%) • Perceive alt. meat to be 'healthier than animal meat' (44%) and 'better for the environment than animal meat' (70%), but also perceive it as 'highly processed' (26%) • Strong purchase consideration toward alt. meat (63% - very likely to buy)

The Secondary

Aware of APs with some regular consumption. Some awareness of industrial meat's impact, but small relative . Are open to meat reduction/AP's in the future.

Demographics	Meat consumption habits and attitudes	The wider concerns and priorities facing them today	Awareness, understanding and level of concern of industrial meat	Alternative meat awareness & perception
• Mostly aged 45-64 years (45%) • More female (55%) • Have the highest income (Upper-Mid Income – 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%) • Largely consuming Pork every 1-2 times a week (38%) , but more regularly consuming Fish 3-4 times a week (31%) • Most state 'I don't mind eating meat' (48%) • Strong intention to reduce/stop eating meat (75%) • Have regular home cooked meals at least 3 -5 times a week (81%) • Partake in the Vegetarian Festival (64%)	• More likely to prioritise protecting animal welfare (25% selecting as important) • More concerned with environmental issues (including air and water pollution) (28%) • More likely to think they are very sustainable (54%), but would like to be environmentally conscious (27%)	• More likely to know a bit about industrial meat (61%) • More likely to be concerned about the impact of industrial meat (34%) • Concerned about farmed fish impact on people and environment (33%)	• High aware of alt. meat products: Alt meat (56%) Fish & Seafood (53%) ,Cultivated meat (30%) and 'Plant based proteins (79%) • Meat alt. (Meat Avatar, Meat Zero, More Meat) consumed mostly multiple times a monthly (32%), but more often consuming Plant based proteins (72%: 22% multiple times a week and 50% multiply time a month) • Strong appeal toward plant-based proteins (81%) • Perceive alt. meat to be 'healthier than animal meat' (24%) and 'better for the environment than animal meat' (35%) • Strong purchase consideration toward alt. meat (27% - very likely to buy)

The Neutrals

Are broadly concerned about sustainability, but it's not a priority and they don't actively engage with it. They are happy eating meat however many are likely to cut down consumption with some increasing their AP consumption

Demographics

- No diff in age groups vs nat rep. (33% 18-29 yrs., 28% 30-44 yrs. and 39% 45-64 yrs.)
- Parity gender balance (52% males)
- Higher proportion live in rural areas (20%)
- Higher proportion with lower income (26%)
- Less likely to live with my partner / spouse (with children (28%)
- Lower levels of education

Meat consumption habits and attitudes

- Majority are Omnivore (75%) with lowest levels of Flexitarian (13%)
- Meat consumption in line with national averages
- Higher than average intend to continue eating meat as I do now (34%)
- Often tend to purchase from street markets or vendors a minimum of 3 times a week (47%)
- Less likely to be cook primarily responsible for cooking meals (50%), with a higher proportion of 'Parent(s)/ Grandparent(s) responsible for cooking meals (20%)
- Less likely to partake in the Vegetarian Festival (56%)

The wider concerns and priorities facing them today

- Primary concerned about poverty (54%) and sig. less concerned about climate change (21%)
- Less likely to be 'environmentally conscious' (33%), but recognise that they would like to be a bit more environmentally conscious than they are currently (41%)
- Majority see plastics as the biggest contributors towards global warming (78%)

Awareness, understanding and level of concern of industrial meat

- Less likely to know industrial meat, but are willing to take a guess (30%)
- Majority are 'Somewhat concerned/ Not very concerned' of the impact of industrial meat (82%) on the environment, people's health, and animals
- Majority are 'Somewhat concerned/ Not very concerned' of the impact of fish farms (81%) on the environment, people's health, and animals

Alternative meat awareness & perception

- Low aware of alt. meat products: Alt meat (37%) Fish & Seafood (33%) and Cultivated meat (20%)
- Low consumption of alt. meat products, but most have tired it a few times (meat alt. 56% and fish & seafood alt 53%)
- Less likely to perceive advantages of alt. meat: 'healthier than animal meat' (6%) and 'better for the environment than animal meat' (17%)
- Low purchase consideration toward alt. meat (13% - very likely to buy)

The Sceptics

They love eating meat and are not prepared to change their habits. They are largely dismissive of alternative proteins and do not have positive perceptions of them.

Demographics

- More 18-29 yrs (39%)
- A skew towards male (56%)
- Have lower income (78% lower to mid-low income)
- Less likely to live with my partner / spouse (with children (21%)

Meat consumption habits and attitudes

- Most are Omnivores (71%) with lowest levels of Flexitarians (11%)
- Majority rarely consume beef (49%)
- Less likely to consume fish regularly (67% consume fish no more than 2 times a week) and least likely to reduce consumption of farm raised fish (36%)
- Majority love/ like eating meat (63%) and intend to continue eating meat as they do now (52%)
- Are considerably less likely (rarely/never) purchase form a street vender (20%), fast food (44%) or from a dine-in restaurants (34%)
- Do not partake in the Vegetarian Festival (66%)

The wider concerns and priorities facing them today

- Lower than average priority of climate(35%), keeping healthy (60%) & being financially secure (59%), but prioritise higher than average on 'Respecting the elderly'
- Mostly concerned about unemployment (43%) and trust in government (16%)
- 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%)
- Perceive Industrial meat to be the lowest contributor to global warming (23%)

Awareness, understanding and level of concern of industrial meat

- Lowest awareness about industrial meat (62% - It's not something I know about)
- Least likely to be concerned about the impact of <u>industrial meat</u> (43% - not very/ not at all concerned)
- Least likely to be concerned about the impact of <u>industrial fishing</u> (48% - not very/ not at all concerned)

Alternative meat awareness & perception

- Low awareness of alt. meat products: Alt meat (35%) Fish & Seafood (29%) and Plant based proteins (58%)
- Low consumption of alt. meat products, driven by a higher proportion of individuals that have never tried alt meat (36%) and alt fish (33%) vs national average
- Less likely to perceive advantages of alt. meat: 'healthier than animal meat' (3%) and 'better for the environment than animal meat' (5%)
- Alt meat products appeal is perceived to be 'Slaughter-free meat' (54%) and 'Mock meat' (39%)
- Low purchase consideration toward alt. meat (9% - very likely to buy)

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

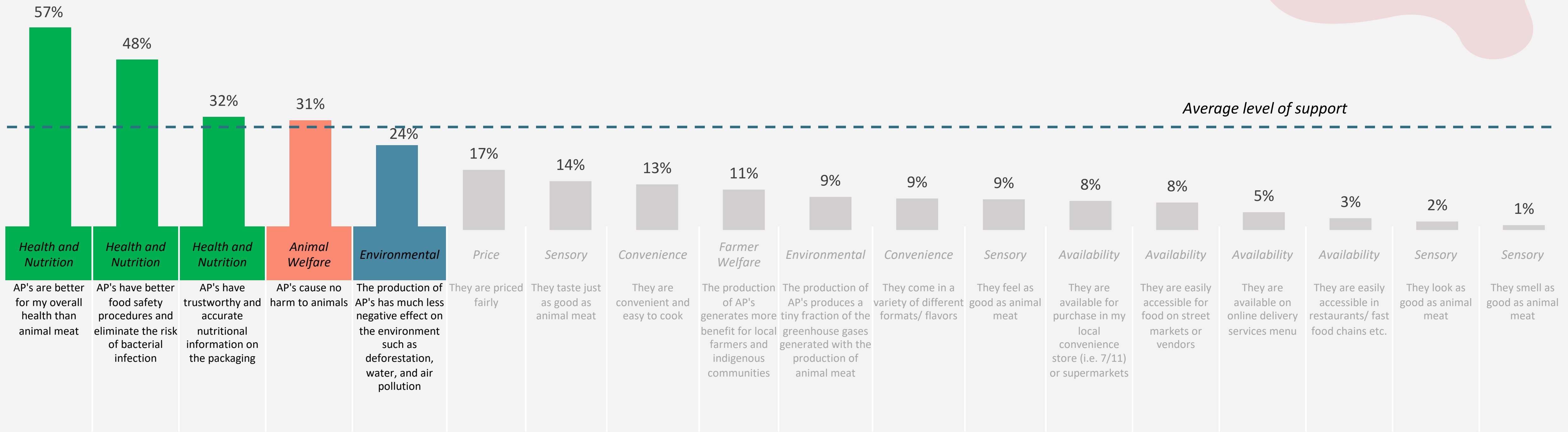
Health & Nutrition	Environmental	Farmer Welfare	Animal Welfare	Price	Sensory	Convenience	Availability
Are better for my overall health than animal meat	Less harmful to the environment (e.g. deforestation, water, and air pollution)	Can benefit local farmers/indigenous communities (more than animal meat 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/ flavours	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.

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

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

Health and Nutrition | *Animal Welfare* | *Environmental*

This aligns with health as a concern prioritised over climate change and environmental issues.

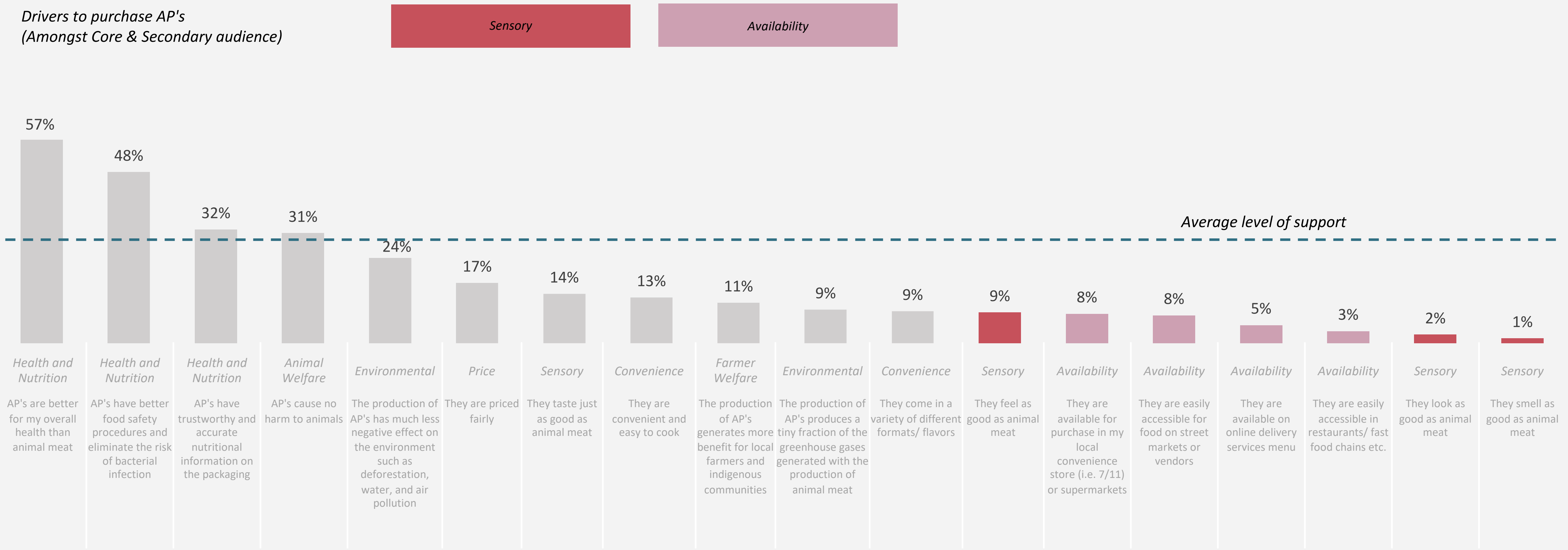


Among Total Audience

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. (N=503)

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



Among Total Audience

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

northstar harrisx

G1. Select the MOST and LEAST relevant reasons as to why you may consume AP’s (N=503)

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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, processing and lack of availability are key barriers to AP consumption

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%	50%	30%	19%	24%	16%	20%	16%	18%	16%	13%	13%	9%	7%	4%

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

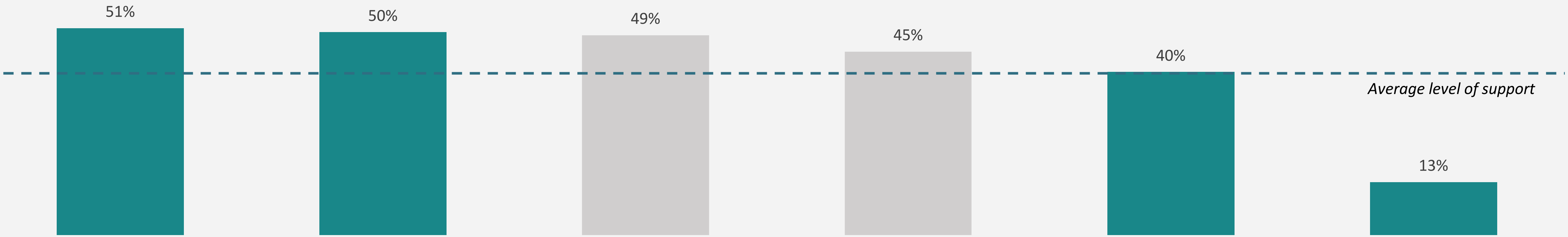
Measuring potential support for calls to action

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)

Meat reduction

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%

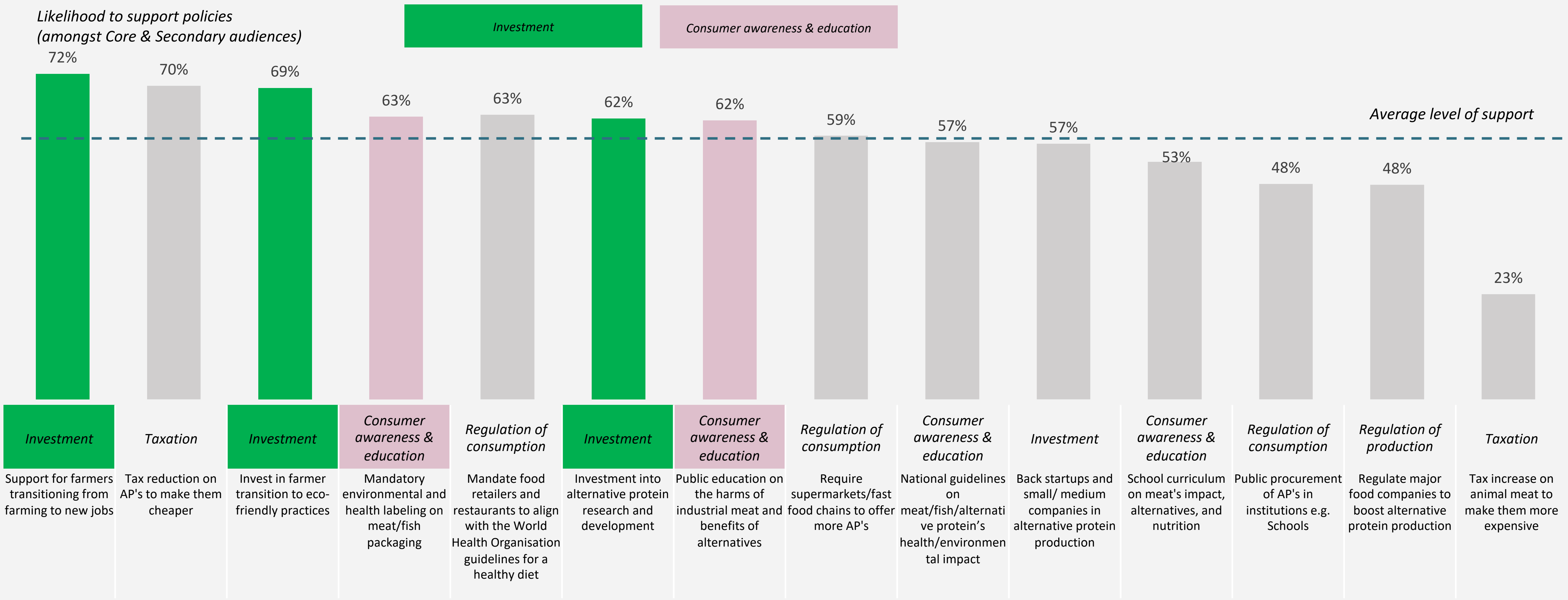
Measuring likelihood to support policies

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 labelling 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 alongside a push for growth in consumer awareness

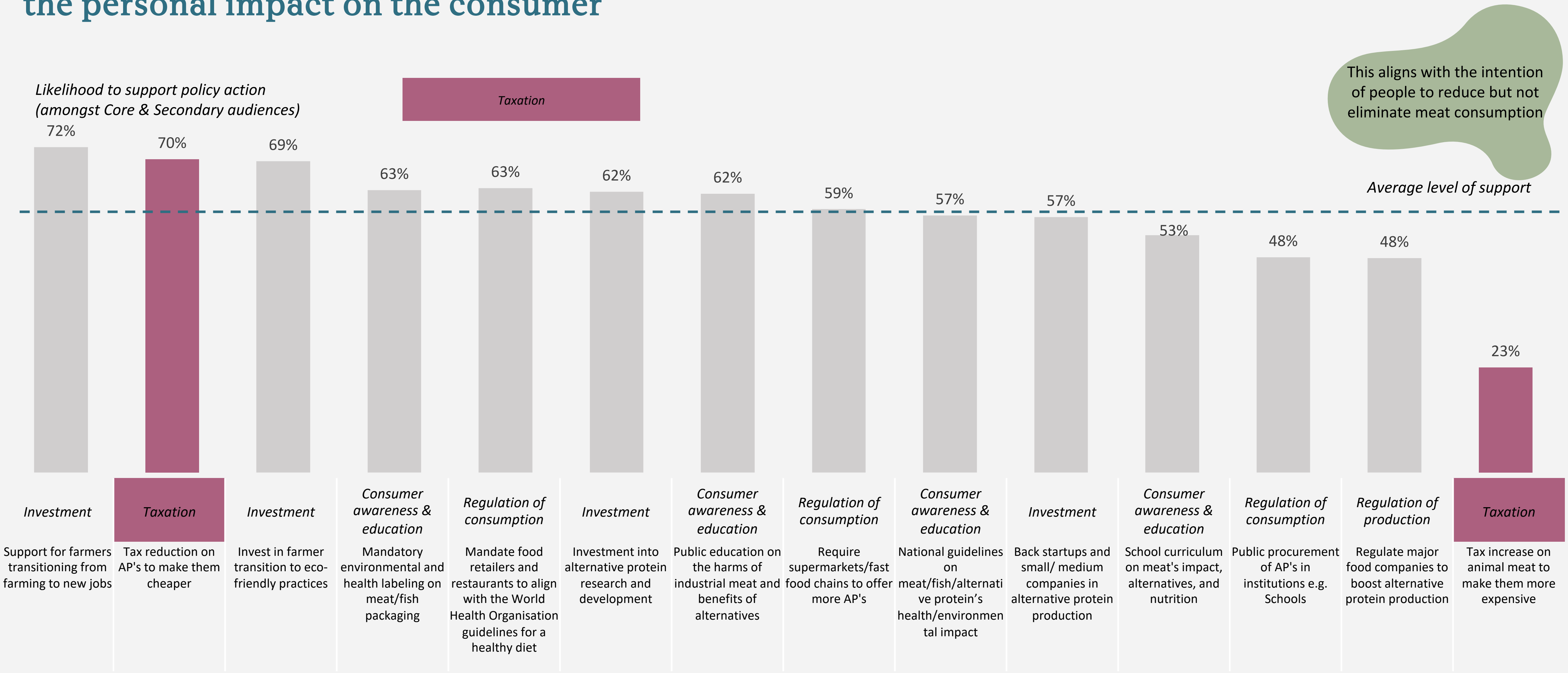


Among Total Audience

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. (N=503)

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



Among Total Audience

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

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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. (N=503)

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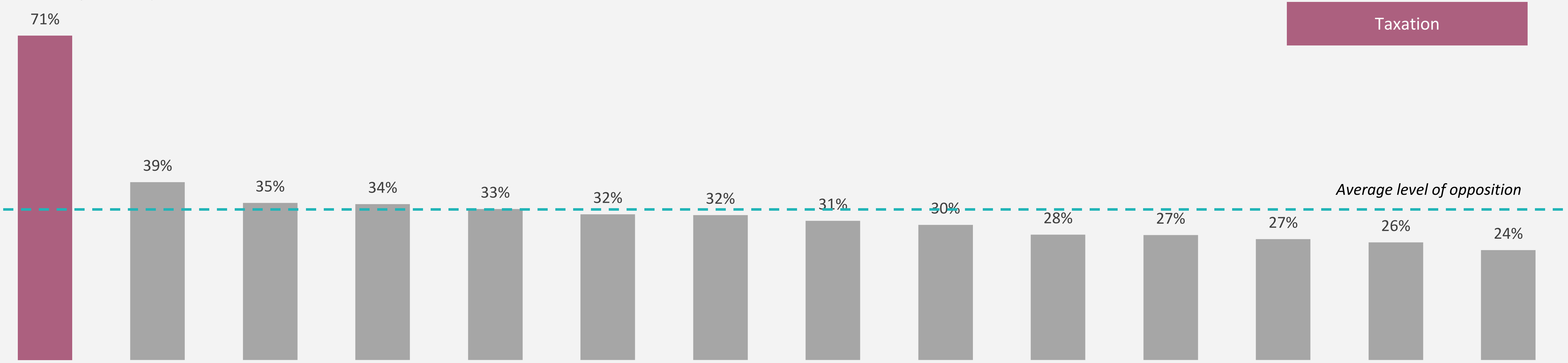
Measuring likelihood of policy opposition

Scepticism focuses strongly on the increased taxation of animal meat

Likelihood to oppose policies (Bottom Box)
(amongst the sceptics)



			Among Total Audience
Taxation	Tax increase on animal meat to make them more expensive	71%	45%
Regulation of consumption	Public procurement of AP's in institutions e.g. Schools	39%	10%
Regulation of production	Regulate major food companies to boost alternative protein production	35%	9%
Consumer awareness & education	School curriculum on meat's impact, alternatives, and nutrition	34%	8%
Regulation of consumption	Require supermarkets/fast food chains to offer more AP's	33%	7%
Regulation of consumption	Mandate food retailers and restaurants to align with the World Health Organisation guidelines for a healthy diet	32%	7%
Investment	Back startups and small/ medium companies in alternative protein production	32%	7%
Investment	Investment into alternative protein research and development	31%	6%
Consumer awareness & education	National guidelines on meat/fish/alternative protein's health/environmental impact	30%	7%
Consumer awareness & education	Public education on the harms of industrial meat and benefits of alternatives	28%	6%
Investment	Support for farmers transitioning from farming to new jobs	27%	6%
Taxation	Tax reduction on AP's to make them cheaper	27%	7%
Investment	Invest in farmer transition to eco-friendly practices	26%	5%
Consumer awareness & education	Mandatory environmental and health labeling on meat/fish packaging	24%	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. (N=503)

madre brava: Thailand

Stage 3: Qualitative Refinement

December 2023

harrisx
A STAGWELL COMPANY

Objectives and methodology

Objectives

Message refinement: Taking the most resonant messages identified in Stage 2 and unpacking them further

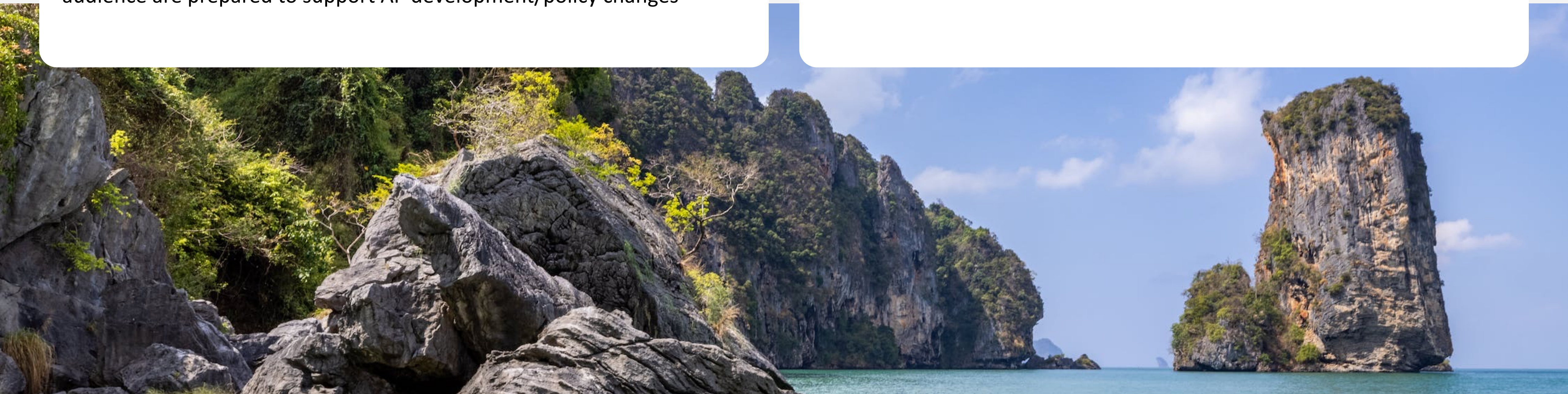
Message framing: To understand the best ways to frame these messages with your target audience

Policy support refinement: To unpack the ways in which your target audience are prepared to support AP development/policy changes

Methodology

5 x 60-minute depth interviews over Zoom

As we spoke to consumers who already have some experience with alternative proteins and are interested in incorporating more into their diet, this sample represents a specific niche in Thai society, and may not represent the attitudes of the general population.



Understanding the meat consumption landscape

Meat today plays a pivotal role in Thai cuisine for 5 main reasons

Meat holds a key role within the Thai diet, making the menu multiple times per week both in and out of home (even if that may not be a large percentage of plate-share per meal for some) – with chicken and pork most popular. It is the variety of perceived positives that help explain its continued dominance:

#1 Part of a healthy diet:
Due to its vitamin and protein content, meat is seen as an essential component for children and adults alike.

#2 Taste:
Widely recognized as the 'tastiest' option out there, nothing else is felt to quite measure up.

#3 Versatility:
The variety offered by incorporating meat alongside diversity in meals that can be prepared and created is a real positive.

#4 Demonstrating care:
Cooking for loved ones is emotive, leading to demands for the tastiest and most nourishing ingredients around in order to delight.

#5 Accessibility and convenience:
In a hectic world, ease of buying, preparing and cooking a flavour-guaranteed meal makes the process simpler.

However, there is an appetite for change

Despite Thai consumers' enjoyment of meat, desire to reduce consumption is strong. This is consistent with the findings from the quantitative research.

Many are taking steps to move away from meat, slowly incorporating a range of alternative proteins more widely into their diet.

Whilst historically familiar with vegetable proteins as part of Thai cooking, these often took the role of an accompaniment rather than as the hero of the dish. Fast-forward to today and consumers are beginning to explore meat-free meals with more gusto, whether it be on a weekly or monthly basis.

So what are the drivers behind this change?

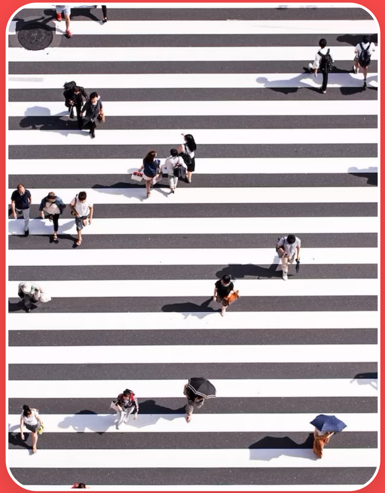
What's influencing the desire to reduce meat consumption?

There is a clear hierarchy of importance for consumers

Health & nutrition

Weight loss

Influence of others



The environment

Animal welfare

More important

Less important

1. Personal health resonates strongly

Within the quantitative research, health and nutrition was found to be the biggest driver for meat reduction – and is echoed here.

Health demands are an emotionally compelling reason to look at personal lifestyle choices and, for many, meat reduction is a core tenet of the ‘path to health playbook’ (alongside things like exercising more and reducing alcohol). It is something they already know how ‘easily’ to do without the need for excessive research or effort!

There are 2 drivers at play:

Preventative measures: Anxiety for my future self

Meat reduction is seen as a way to avoid high cholesterol or digestion issues as they age – driven further by the highly emotionally charged relationship with older family members who have suffered from health issues such as strokes and cancer.

Health optimisation: Make me even healthier

For younger consumers improving health is something they strive to be the best version they can be. The pandemic, when health concerns were at the fore, helped spur on the exploration of alternative proteins for many in this pursuit.

For older consumers, medical advice has compelled them to optimise – a need rather than a choice.

2. Optimising my aesthetic

Consumers both young and old take pride in their appearance, taking pains to maintain a trim and polished aesthetic. This is likely to be more pronounced thanks to the proliferation of fitness influencers on social media. Meat reduction is seen as a way of maintaining or reducing weight as well as increasing muscle, particularly when replaced with alternative protein sources.

However, this goal is impacted by gender nuances:

Female consumers

For females in general, avoiding weight gain is a priority. This can go beyond looks for older women, who have potential joint and health problems that can be exacerbated by excess weight.

Male consumers

Males are often more concerned about building muscle and ‘fitting in’ at the gym. For some, this can present a barrier as animal protein is an understood quality but the gym can also be an important source of education as well.

3. The influence of others plays a role

Outside influence is two-fold:

#1

Cultural trends:

Eating less meat is becoming more of a trend, often seen on social media. Consumers can risk being labelled as outmoded if they don't emulate this behaviour.

#2

The perspectives of others:

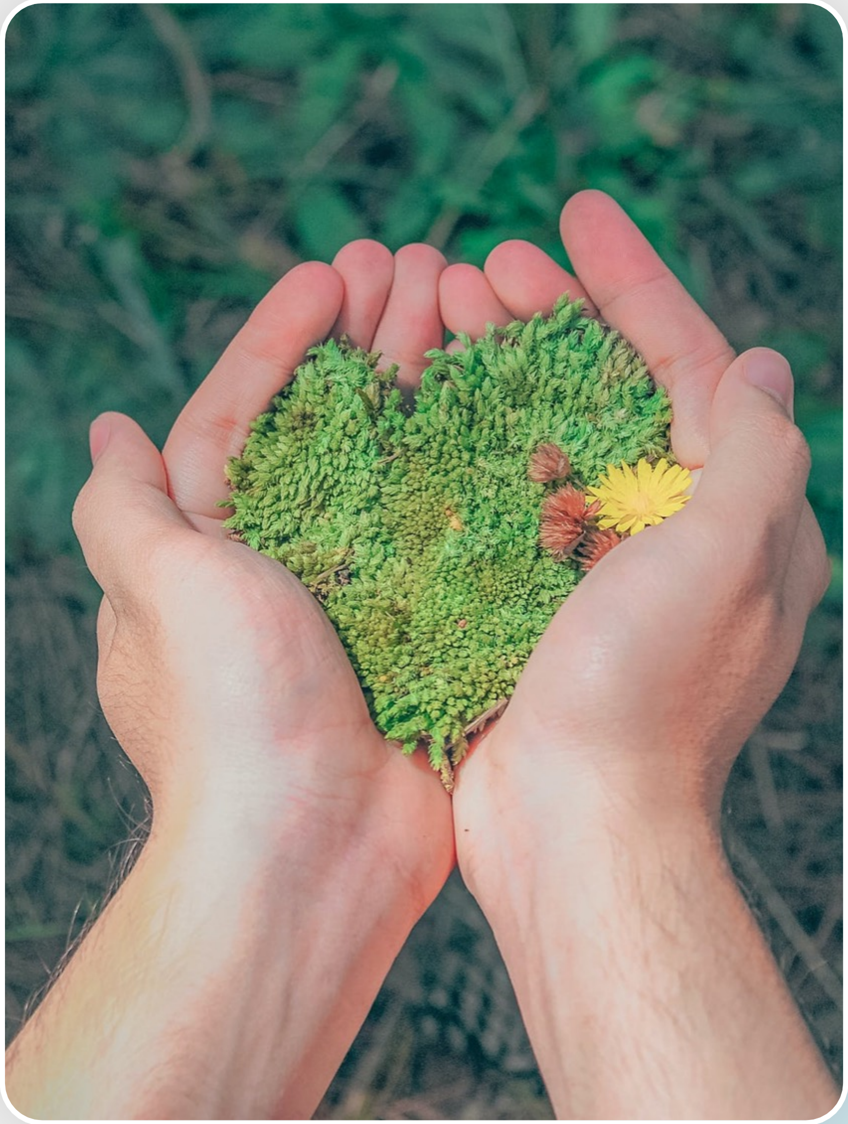
Engagement with the alternative protein category is often encouraged when consumers hear about the benefits from others (often those in an influential sphere such as a guy in good shape at the gym or a woman who talks wellness on social media).

The gym is a common setting to be given such advice – and this is where an even clearer link between health and wellbeing and decreased meat consumption is forged.

4. Environmental care matters less

As also seen in the quantitative research, the environment is not a top-of-mind concern for consumers. Despite being aware of some of the harms of meat production, they are not highly educated on the matter. Many people are unaware of the connection between, for example, deforestation and industrial meat production.

While sustainability is a consideration, it is never the key motivation for reducing meat consumption. Critically, seeking alternatives is a means of assuaging guilt and making themselves feel they are contributing to a cause in some way, rather than being part of a crusade for more environmentally friendly production processes.



5. Animal welfare appears the least important consideration, not mentioned spontaneously

Animal welfare is the least important aspect for consumers wishing to reduce their meat consumption.

Some still believe that killing animals for food is ‘natural’ and just the way things are, and the majority are simply not exposed to it. Unless they live near a farm, they are unlikely to connect the two.

Again, any concerns over animal welfare tend to be driven by guilt - which only ever arises if they drive by a slaughterhouse, and is not a constant in their minds.

What does this mean?

The most compelling reasons for moving away from meat are anchored in self-gain.

Justifications are self-serving and not altruistic: having a healthy diet, avoiding health problems, gaining the approval of others, and allaying guilt.

It will be important in communications to focus on messages and framing that focus on the benefits to consumers as **individuals**.

Entering Alternative Proteins

This desire to reduce meat consumption opens up the world of alternative proteins - but how do they see the category?

Consumers have a clear and consistent definition of AP: Anything that does not come from an animal. There is no great thought given to categorisations within this definition, with ‘conventional plant-based proteins’ and ‘alternative proteins’ falling under the same umbrella until prompted – either way, they are all seen as protein sources that don’t come from animals.

This means that there is a great level of variety and flexibility that can be explored within the category and harnessed in comms, as consumers don’t feel the need to limit themselves to one or the other to reduce their meat consumption.

Once given the definitions of conventional plant-based proteins and alternative proteins, consumers note several key differences…

Conventional plant-based protein	Alternative protein
Natural	Potentially highly processed
Unprocessed	Convenient to cook
Straight from the earth	A clear protein source
Familiar/ understandable	Less creativity needed for tastiness

A reminder of definitions seen by consumers…

Conventional plant-based protein: A meaningful source of protein which comes from plants. This group can include pulses, tofu, legumes, soya, tempeh, seitan, nuts, seeds, certain grains and even peas.

Alternative protein: Substitutes made from plant ingredients that resemble meat in taste, look and eating experience such as Meat Avatar, More Meat and OMG Meat.

So, what are consumers striving for?

There is no clear preference for one type of alternative protein over the other. While many express concern over alternative proteins being processed, which is a large barrier towards consumption, the need for convenience, variety and protein usually wins out.

Consumers are seeking overall balance and moderation in their diets, and appreciate the benefits of mixing conventional plant-based proteins, alternative proteins and animal meat.

Diversity is seen as the winning ticket.

What does this mean?

Ultimately, the difference between conventional plant-based proteins and alternative proteins appears to be their utility.

Plant-based is closer to a category of snacks and accompaniments (e.g. oat milk, legumes, pulses, vegetables), whereas alternative meat is the star attraction of the meal.

This is a differentiator that can be deployed in comms - show the potential diversity and enjoyment that can be achieved through the combination of all 3 types of protein (animal, plant and meat-alternatives), all of which have a place in consumers' lives and can suit different moments and scenarios.

In the pursuit of meat reduction consumers begin to explore options

Plant-based proteins are an easier entry-point as they are understood – meat alternatives instead require guidance

Conventional plant-based proteins already make up a large part of the Thai diet, so consumers do not require encouragement to experiment with these – they are a familiar and uncomplicated choice for many – even if making them tasty can be a challenge if they are to be the hero of the meal.

Alternative proteins, on the other hand, are new and there is a lack of experience or information. Often consumers first hear about them from their social circle, read about them in magazines, or see adverts on social media. This means there is a need for a little extra push towards exploration.

Once they are aware of them though, they are more than willing to experiment and curiosity and exploration follow.

Importantly, consumers are primed before they step in-store to make their first purchase

Once they have alternative proteins in the back of their mind, the tipping point behind purchase is often variety. Consumers get bored easily and actively seek variety in their diet, wanting to reduce their meat intake without having to rely on conventional plant-based proteins alone. This takes them in store.

With the diverse array of alternative proteins on offer, they can find a substitute without being hemmed in. Their eyes are now opened to what is on-shelf, which they may well have previously completely overlooked.

It should be noted that those living outside of Bangkok have less choice which acts as a significant pain point.

Products that pique initial interest are then selected – starting them on their experimentation journey

Products that pique initial interest tend to:

Convey familiarity: The gateway is usually mince or pork belly alternatives with which they can replicate classic Thai dishes such as Krapow, which increases confidence over usage.

Give a point of comparison: By selecting something 'well-known' such as pork mince alternatives, they can assess the product for tastiness, quality, ease, etc.

Require little effort to create a tasty meal: The first trial is a tentative and safe step which must requires little effort – experimentation within the realms of acceptability.

Be cheaper: Consumers prioritise products which provide value for money – cheap without compromising on taste and, importantly, nutrition.

Suggest cleaner eating: In order to allay anxiety around overly processed or less 'natural' food, they search for known elements they recognise from their wider diet. Reduced salt and fat content is another important factor in the quest for healthier choices.

Looks tasty: For those whose first trial is out-of-home, it must look and smell as alluring as the meat-based option.

What does this mean?

A strong social media strategy is paramount to raise awareness of and engagement with all alternative proteins, specifically those replicating traditional meat.

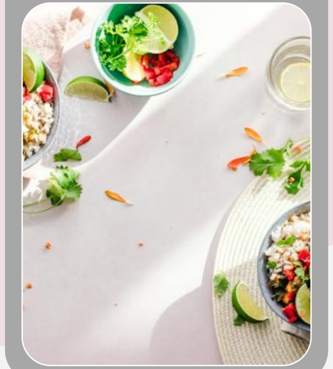
Given the interest in wellness and fitness, influencer engagement in this space is important, particularly when interest in alternative protein is garnered through word of mouth.

Education is the key to widespread engagement, as consumers rely on those who are deemed more knowledgeable than them rather than exploring options themselves. To make alternative proteins further accessible, easy recipes which guide and reassure that it can be just as good as meat will be greatly beneficial.

Motivations & barriers to alternative protein engagement

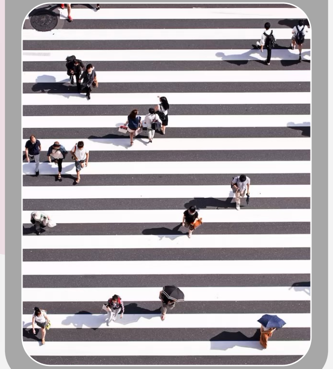
Motivations to engage are the same as those for meat reduction, with two additional compelling factors

Health & nutrition



Weight loss

Perception of others



The environment

Animal welfare

Variety

A meat experience without guilt

These two additional components create a further pull towards the alternative protein category

Variety

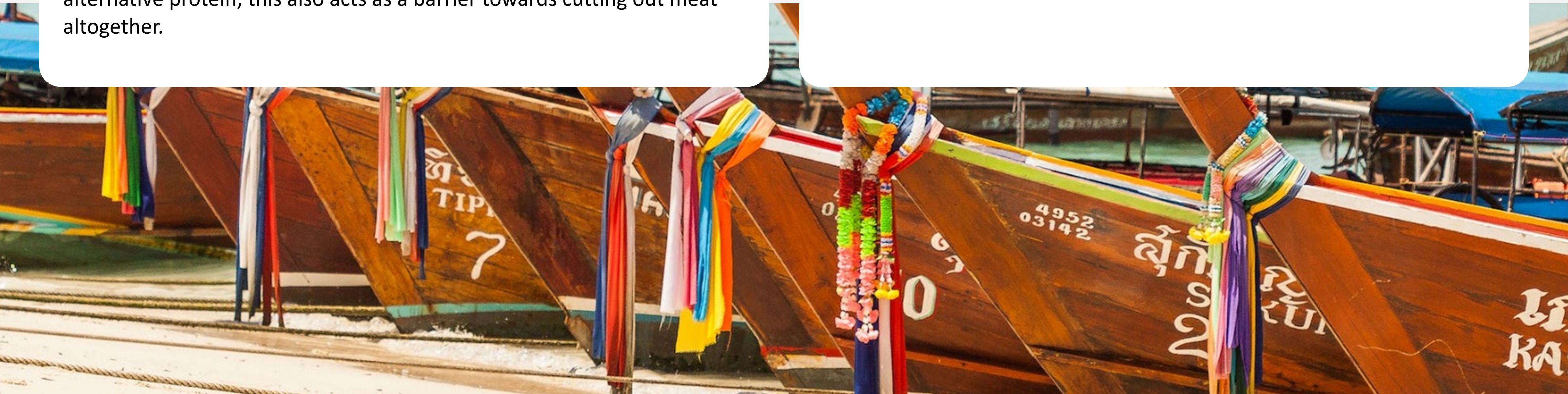
Despite wanting to cut down on meat, Thai consumers place great importance on having a varied diet, desiring the ability to create and eat a wide range of dishes. For some, the need for experimentation and aversion to boredom is what compels them to try out alternative proteins, trying to shake up their usual meat-based diet.

Thai cuisine is full of flavour and vibrance, and consumers won’t tolerate ingredients which limit them. As well a motivation for incorporating alternative protein, this also acts as a barrier towards cutting out meat altogether.

A meat experience without guilt

Consumers concede that while alternative proteins are clearly not ‘the real thing’, once they’ve gotten used to them, they are sensorially close enough to meat to be able to replicate the consumption experience.

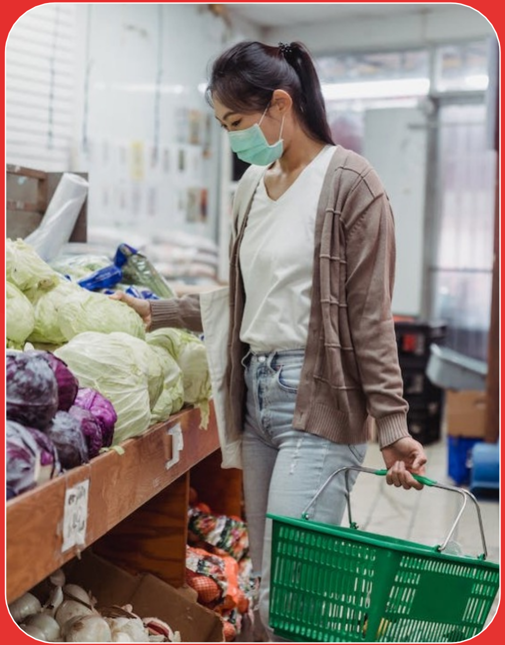
It is therefore easy enough to prepare favourite dishes and indulge with less guilt over their health.



Barriers to continued engagement are strongly off-putting and take commitment to overcome

Cost

Accessibility



Effort

Mistrust

These four barriers to consumption are centered around making life as easy and pain-free as possible

01

Cost

The price of alternatives is at the forefront of consumers' minds, particularly as the global cost of living crisis and inflation continue. The high cost of alternative proteins leads them to question why they should pay more for a product that, ultimately, is a 'compromise' compared to meat.

02

Accessibility - *a meat alternative issue

Alternative proteins are less readily available than meat (and conventional plant-based proteins), with consumers based outside of Bangkok commenting that sometimes they can't even find them outside of Vegetarian Week. Others complain of having to drive longer distances to a supermarket which stocks alternative proteins as their local 7-11 doesn't have them. Critically, they are rarely, if ever, available from street vendors, restaurants or delivery services, a further hurdle to easy access.

03

Effort

Compared to meat, alternative protein is seen as having an involved preparation and cooking process. Not only is the purchase process often more arduous, more inspiration and culinary know-how to make it tasty is required. Alternative proteins are slightly better here as there are a few readymade options which one can simply heat up in the microwave, making it a more viable option for busy parents and students who have neither the time to spend in the kitchen, nor the inclination.

04

Mistrust

Consumers wonder what's *really* in meat analogue, leading to questions around how nutritious it actually is. This also means they have to scrutinise packaging labels to inform themselves on any additives, salt content, fat content, etc., further adding to the impression of an effortful shopping and preparation experience and potentially compromising on health promises.

Evaluating the potential policies

Policies which elicit real interest focus on incentivisation, encouragement and spreading knowledge. Anything seen as forceful is shunned

Positively received

- **Tax reduction on alternative proteins to make them cheaper**
  Seen as reducing the financial burden on the consumer at a difficult time.
- **Public education on the benefits of alternative proteins, especially when compared to industrial meats, is essential.**
  Seen as spreading awareness and making knowledge accessible, enabling people to make informed choices.
- **Investment into alternative protein research and development**
  Seen as encouraging companies to find options superior to those in the current market.
- **Back startups and small/ medium companies in alternative protein production**
  Seen as promoting healthy competition to drive up quality, purity and variety, and drive down prices.

Negatively received

- **Tax increase on animal meat to make them more expensive**
  Seen as an unfair punitive measure, not only affecting die-hard meat-eaters but also those already exploring alternative proteins. It also undermines the diversity people are seeking in their diets.
- **Mandate food retailers and restaurants to align with the World Health Organisation guidelines for a healthy diet**
  Seen as unachievable and taking an authoritarian stance, benefits are questioned even if this was a possibility.
- **Require supermarkets/fast food chains to offer more alternative proteins**
  Seen as unrealistic and authoritarian – despite lack of availability in supermarkets being a concern, consumer balk at the idea of applying pressure (from the authority) to rectify this.

A note on policies shown but not explored

These policies were not evaluated as they did not resonate either positively or negatively with consumers

- Mandatory environmental and health labelling on meat/fish packaging
- National guidelines on meat/fish/alternative protein’s health/environmental impact
- Public procurement of alternative proteins in institutions e.g. Schools
- Support for farmers transitioning from farming to new jobs
- Invest in farmer transition to eco-friendly practices
- School curriculum on meat's impact, alternatives, and nutrition
- Regulate major food companies to boost alternative protein production

These policies were not selected for discussion by consumers. It is important to note that many are environment-led, which as we know is not a key driver for alternative protein consumption for our cohort

Overcoming the barriers

So, what can we do to help consumers overcome these barriers?

We suggest taking a two-tier approach when building a strategy, combining educational and financial elements to create a resonant and compelling message.

Consumers point to a lack of knowledge of the benefits of alternative protein as a critical obstacle which must be addressed to increase consumption.

Policies which spread awareness of the category and implement campaigns with an educational angle should be prioritised – but always remembering that this should take an encouraging tone about a journey rather than dictatorial or shaming.

Furthermore, any policies which reduce the financial or purchase process burdens on the consumer will be welcomed as well.

It is important to remember that consumers do not advocate stopping eating meat altogether. The perceived cons of meat do not trump the need for variety or the importance of protein. Mixing and matching is the preferred approach – encouraging people to slowly cut down their meat intake while incorporating a range of alternative protein.

And a note on tone

It is crucial that consumers don’t feel their hand is being forced. Success lies in championing variety and encouraging experimentation with exciting new options which have added health benefits thrown in. There is a balance to be struck between informative and light-hearted and comms should not incite guilt or declare that one route is superior to the other.

Rather, all options should be laid out and consumers encourage to pick the one they feel is best for them and their lifestyle and personal goals.

A two-pronged strategy for success will help build category love: Financial

Make it an affordable option:
Tax cuts on alternative protein provides the most tangible consumer benefit as cost is a highly dominant reason for leaving the category.

Invest in startups and/or research:
Dilute a perceived monopoly by incentivizing companies to come up with higher quality or healthier options and provide consumers with a sense of both variety and greater value for money through diverse choice.

Don’t force engagement through financial pressure:
Avoid raising taxes on meat as this is currently seen as a means of dictating choice and forcing them down a defined path.

Pair financial incentives with practical access:
Ensure alternative protein products are available in a wide range of local supermarkets, 7-11s, street vendors, restaurants or delivery services to remove a key point of friction currently impeding category engagement.

A two-pronged strategy for success will help build category love: Educational

Spread knowledge and awareness in a collaborative manner: Teach and inform by highlighting the benefits of alternative protein, not by admonishing people for making the ‘wrong’ choice by eating meat.

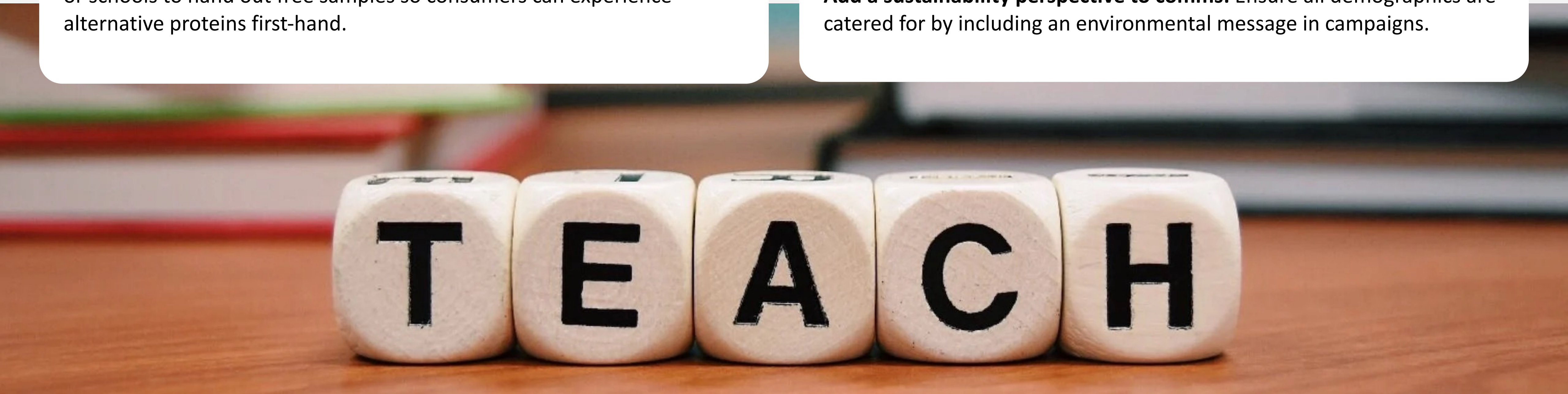
Utilise social media to spread awareness: Partner with health and fitness influencers to spread the word and attract people to the category by aligning alternative protein with youthful wellness.

Help people try for themselves: Send brand ambassadors to trade fairs or schools to hand out free samples so consumers can experience alternative proteins first-hand.

Reassure consumers of the benefits of alternative proteins: Provide reassurance that they cans supplement meat with a healthy, nutritious and flavourful substitute.

Inspire people to experiment in the kitchen: Showcase the variety that alternative proteins can bring to their lives, dispelling the idea that cooking them takes time and effort with simple, delicious recipes designed for those less confident cooks.

Add a sustainability perspective to comms: Ensure all demographics are catered for by including an environmental message in campaigns.



Summary and recommendations

The context in Thailand

- Currently high incidence of meat consumption today, but also a strong intention of meat reduction (next 2 years)
- Although consumption of AP regularly is quite low, it's higher vs. other markets. And there is clear positive intention to increase consumption over the next 2 years:
- Qualitatively the main reasons for this are:

1. Health and nutrition – avoidance of health problems e.g. cancer in old age, optimising health
2. Weight loss – maintaining a healthy weight, or putting on muscle
3. Perception of others – avoiding meat is seen as 'trendy', the benefits are spread through word of mouth
4. The environment – not high in consumers' priorities, sustainability concerns is driven by wishing to lessen guilt
5. Variety – Thai consumers value variety in their diet, which compels some to try AP in the first place
6. A meat experience without guilt – the sensorial similarities of AP to meat make it easy enough to prepare favourite dishes and indulge with less guilt over their health

The context in Thailand

- Consumers are already undertaking steps to limit their meat consumption, and starting to add a range of APs into their diet. However, in recent months, sales of alternative proteins has not been growing as anticipated
- Current perceptions of APs are mixed: healthier and better for the environment, but highly processed and more expensive than traditional meat. Further, meat analogues are less familiar than plant-based whole foods, and are perceived as requiring a certain level of cooking know-how, making them a less attractive option
- Consumers note several key differences between conventional plant-based alternatives and meat-like alternative proteins: plant-based alternatives are perceived as natural, unprocessed and familiar, whereas meat-like alternatives are suspected to be highly processed, convenient to cook, and a good source of protein. Further, the preparation and cooking process is less effortful
- Broader dynamics that will influence AP adoption : the cost of living and poverty – which remain top concerns for people in Thailand, followed by health and wellbeing. There is a much smaller concern for climate change and environmental issues (making it a secondary driver of AP adoption)
- Knowledge of the industrial meat industry is low, with only a moderate level of concern
- Most Thais claim to be ‘environmentally conscious’ with majority wanting to be more than they are today

Note: built from quantitative and qualitative insights

Target audience

- Target audience has been defined based on their net likelihood to support (rather than oppose) a campaign to drive AP growth

- The ‘Target audience’ includes a Core and Secondary audiences – together they account for 31% of people in Thailand

- The Core (5%)
  - The core audience are ready to support the cause. They 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 (26%)
  - The secondary audience will need more convincing but are warm and supportive of the cause. They have good awareness of APs, however only a small proportion eat them regularly. The majority intend to reduce meat consumption and increase AP consumption within the next 2 years.

- The Neutral (57%)
  - Most people are neutral. It’s unlikely that they’ll support the cause, despite being generally sympathetic to at least some of the issues. They have moderate awareness of APs 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.

- The Sceptics (12%)
  - There is a minority of people who would either passively or actively oppose. 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 APs regularly as very few of them have positive associations with AP's.

Drivers of AP growth in Thailand

- Primary drivers for the consumption of APs among your target audience are inward-looking, and revolve around health and nutrition, where there is clear self-gain to be had:
  - Production of APs have better food safety procedures and limit the risk of infections
  - Packaging of APs contain trustworthy and accurate nutritional information
  - And the perception that APs are healthier than animal meat – reduces risk of cancer and other illnesses, and contain less fat

- Secondary drivers focus on Animal and Environmental welfare
  - APs cause no harm to animals
  - Much lower negative impact on the environment – however, it should be noted that concern about the environment is still rooted in self-gain: to assuage feelings of guilt

- An additional driver is variety:
  - Thai consumers value diversity in their diets, aiming to enjoy a wide array of dishes, as they are driven by a desire for culinary exploration and a dislike of monotony. This leads some of them to experiment with alternative protein sources in an effort to diversify
  - As well as being a motivation for incorporating alternative protein, this also acts as a barrier towards cutting out meat altogether

Note: built from quantitative and qualitative insights

Barriers to AP growth in Thailand

- Barriers include:
  - Price:
    - APs are considered too high a price point, leading consumers to question why they should pay more for what is essentially a ‘compromise’ during a time of high costs of living and rising inflation
  - Perceptions of being ‘processed’
    - APs are often seen as processed, with consumers wondering what’s really in them and potential negative health impacts
  - Lack of availability
    - APs are often not available where people do their shopping, particularly outside of metropolitan hubs like Bangkok.
  - Lack of cooking/preparation knowledge
    - APs are seen as having a more involved and labour-intensive preparation and cooking process – not only are they often more difficult to procure, but they also require inspiration and a higher level of culinary knowledge to create tasty meals with
  - Taste
    - While not considered to be one of the main barriers to AP consumption, sensorial aspects such as taste, sense, and texture are found to be very low drivers to AP consumption, suggesting that these also play a considerable barrier to consumption
    - Changing perceptions of AP from an inferior meat substitute to a tasty and satisfying alternative can be done through providing free samples in supermarkets or trade shows, and giving consumers recipes to prove that AP can legitimately replace their favourite meat without requiring a compromise on sensorial enjoyment and satisfaction

Action support for change

- The personal actions your target audience would be willing to take revolve around one overarching area: Meat reduction
  - They'll do this by eating more plant-based proteins such as legumes, tofu etc
  - And by consuming more meat-like alternatives
  - However, people are not willing to cut out meat out altogether. The perceived negatives of meat do not outweigh the recognised importance of a varied diet and the importance of protein, which is deemed an essential part of a healthy and nutritious diet for both children and adults
  - Mixing and matching is the preferred approach, and people should be encouraged to gradually cut down their meat intake while incorporating a range of APs

- Secondly, the target audience is somewhat willing to provide support or be an advocate for AP growth:
  - Specifically on a smaller scale such as encouraging friends and family to reduce meat intake or to support communicating with the government

- The relative willingness to support most of these actions remains consistent across both the Core and Secondary audience
  - However, the Core audience is willing to go further – being more likely to support the cause or communicating with local stores

Policy support

- The target audience shows strong support towards the various potential policy actions

- Policies around investment garner the strongest support:
    - Investment into farmers (either to transition to new jobs or to invest in eco-friendly practices)
    - Investment in start-ups and research to incentivise companies to come up with higher quality meat-free options, as well as provide the variety that Thai consumers are seeking

- Tax reductions to reduce the cost of AP is also strongly supported, as prohibitive costs are frequently mentioned as a barrier to AP uptake/increase
- Public education on the benefits of alternatives and the challenges of industrial meat is well received for spreading awareness and enabling people to make informed choices

- However, there is little to no support for taxing animal meat to make it more expensive, as this is seen as dictating choice and forcing engagement
- Measures deemed as 'authoritarian' and unrealistic, such as mandating food retailers to align with WHO guidelines, and requiring supermarkets to offer more AP, are also rejected

- The relative order of support across policies is consistent between the Core and the Secondary audiences
- But the Core group is much more likely to support all policies

Recommended strategies to overcome barriers to APs

Intention to reduce meat consumption and increase AP consumption are strong, however given the recent declining AP growth, it is clear the current barriers are too strong and preventing the transition. The following strategies are recommended to overcome these barriers:

- Policies and campaigns that educate and raise awareness about APs should be prioritised, maintaining an encouraging and non-authoritative tone
- Education would help overcome the barriers around 'processed' perceptions and lack of familiarity with using/cooking APs
- However, policies that ease the financial and availability barriers for consumers are also essential. It must be easy for consumers to buy APs or they won't – even if they want to
- Product development to improve taste, texture and smell will be a key action to improve perception and increased consumption
- Educational and financial elements are the core tenets of a successful strategy:
    - Make it affordable
    - Invest in research/startups
    - Avoid financial pressure to force engagement
    - Increase practical access
    - Spread knowledge collaboratively
    - Encourage experimentation
    - Help people try for themselves
    - Strong social media strategy leveraging health and wellness cues

How does behavioural and societal change happen, at scale?

Upstream-Downstream model of behaviour

Downstream

How individuals make choices as a function of their preferences, values and biases

Midstream

The influence of the surrounding environment.
Price, convenience, salience and norms

Upstream

The overarching system
Commercial incentives, policy and regulation, investment and infrastructure

What did we learn about Thailand as a market ?

Upstream-Downstream model of behaviour

Downstream

Heavy meat eaters but a strong intent to reduce consumption within 2 years
Keeping healthy is important. Cost of living crisis and poverty are leading concerns.
Moderate awareness of AP's but little regular consumption

Midstream

AP's are considered too expensive.
AP's are highly processed and are not considered as healthy as other whole plant foods
AP's are not readily available to purchase from grocery stores

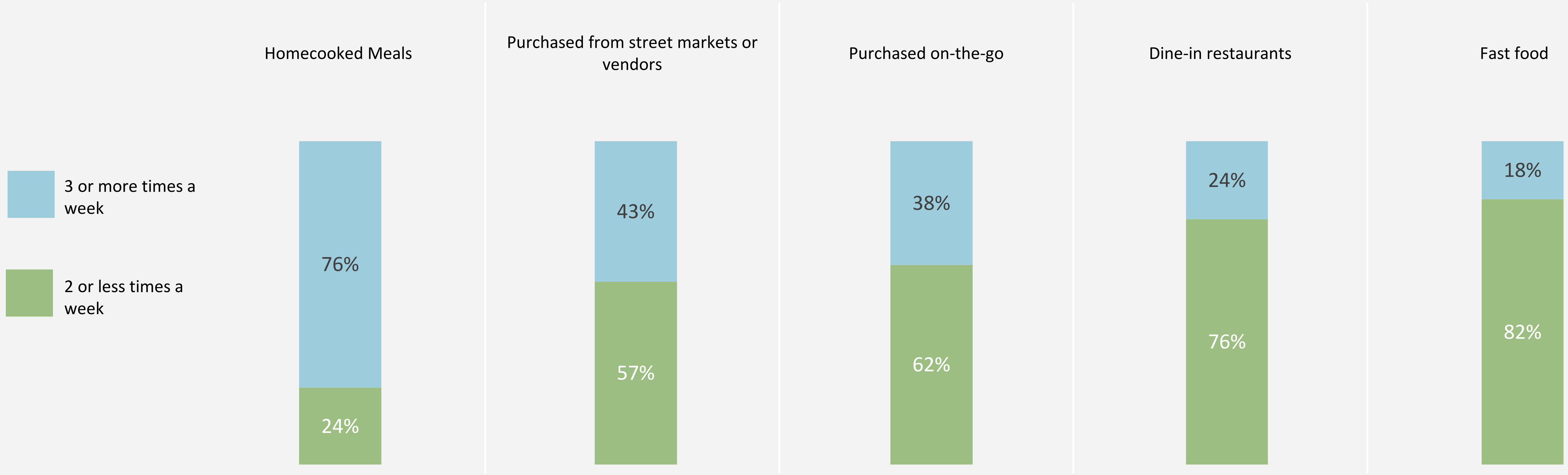
Upstream

Likely strong support to reduce tax to make AP's cheaper. Strong opposition to increase tax on animal meat
Support in investment into farmer transition to new jobs or eco-friendly practices

Appendix

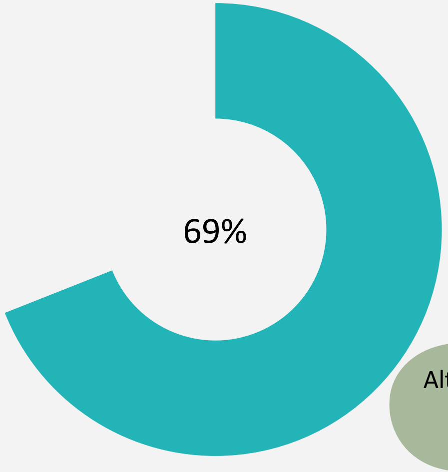
Homecooked meals are the most frequent way of meal consumption, however, 1 in 4 have homecooked meals less than twice a week

Frequency of how main meals are typical consumed (among total population)



Purchase intention for 'Blended' APs is strong, with over two thirds likely to purchase. This would be encouraged by including at least 50% animal meat with clear and informative labelling

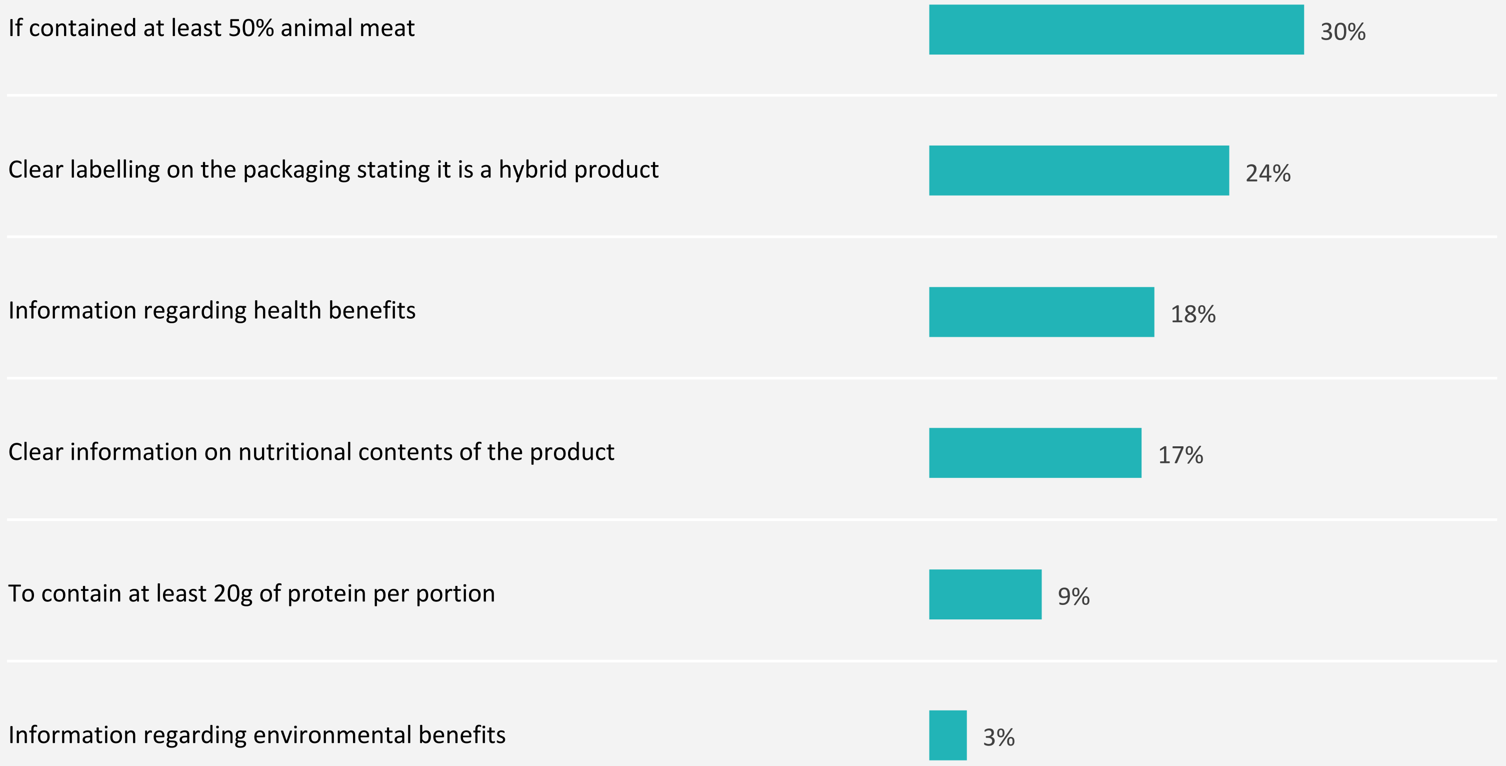
Likelihood to buy blended AP's
(Among current meat/fish eaters)



Although only 19% are very likely!

of people would be likely to buy blended AP's

Reasons for buying blended AP's
(Among those who said they would buy blended APs)

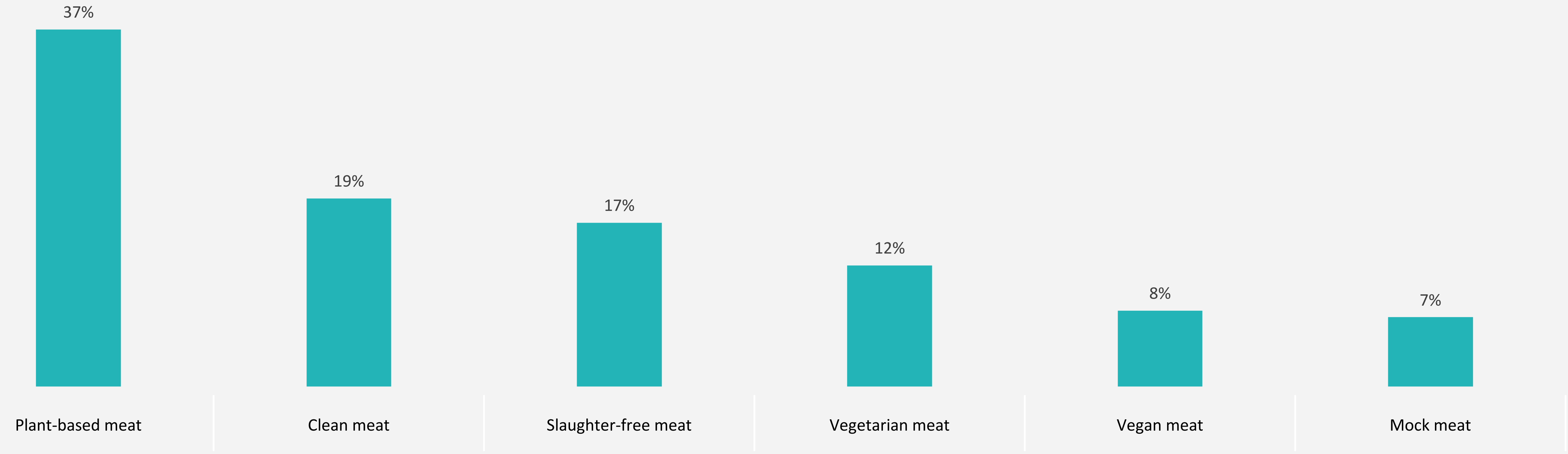


<u>Definition shown</u>: "Blended AP's are products that are made up of both meat and AP's. i.e., Meatballs made from 50% pork and 50% plant protein."

J1: How likely are you to consider buying blended AP's? (N=1547) J2: What would make you buy blended AP's? Please rank the following factors (N=1547)

‘Plant-based meat’ is the overall preference for the naming of meat like APs.

Preference for different names for AP's
(Among total population)



There are several contextual factors that make the 18–29-year-olds unique and could be impacting their lower propensity to support APs

18-29 year olds...

Are slightly more rural

	18-29	30-44	45-64
Urban	49%	52%	50%
Suburban	30%	33%	36%
Rural	21%	14%	14%

Are poorer (lower HH income) (THB)

	18-29	30-44	45-64
< 20,000	33%	18%	17%
20,001-50,000	45%	46%	44%
50,001-100,000	19%	29%	33%
> 100,001	4%	7%	7%

Are less likely to live in HH with kids

	18-29	30-44	45-64
Live with children	36%	57%	64%

Are less likely to be highly educated

	18-29	30-44	45-64
Bachelor's degree or higher	51%	65%	66%

Are more likely to eat meals away from the home regularly

	18-29	30-44	45-64
Homecooked meals	74%	77%	77%
Street food	48%	44%	40%
Dine-in restaurants	29%	25%	20%
Food on the go	46%	40%	31%
Fast food	22%	19%	14%

Are the biggest meat-eaters

	18-29	30-44	45-64
Carnivore	12%	5%	4%
Omnivore	75%	67%	67%
Flexitarian	9%	22%	22%
Pescatarian	2%	4%	4%
Vegetarian / Vegan	2%	2%	4%

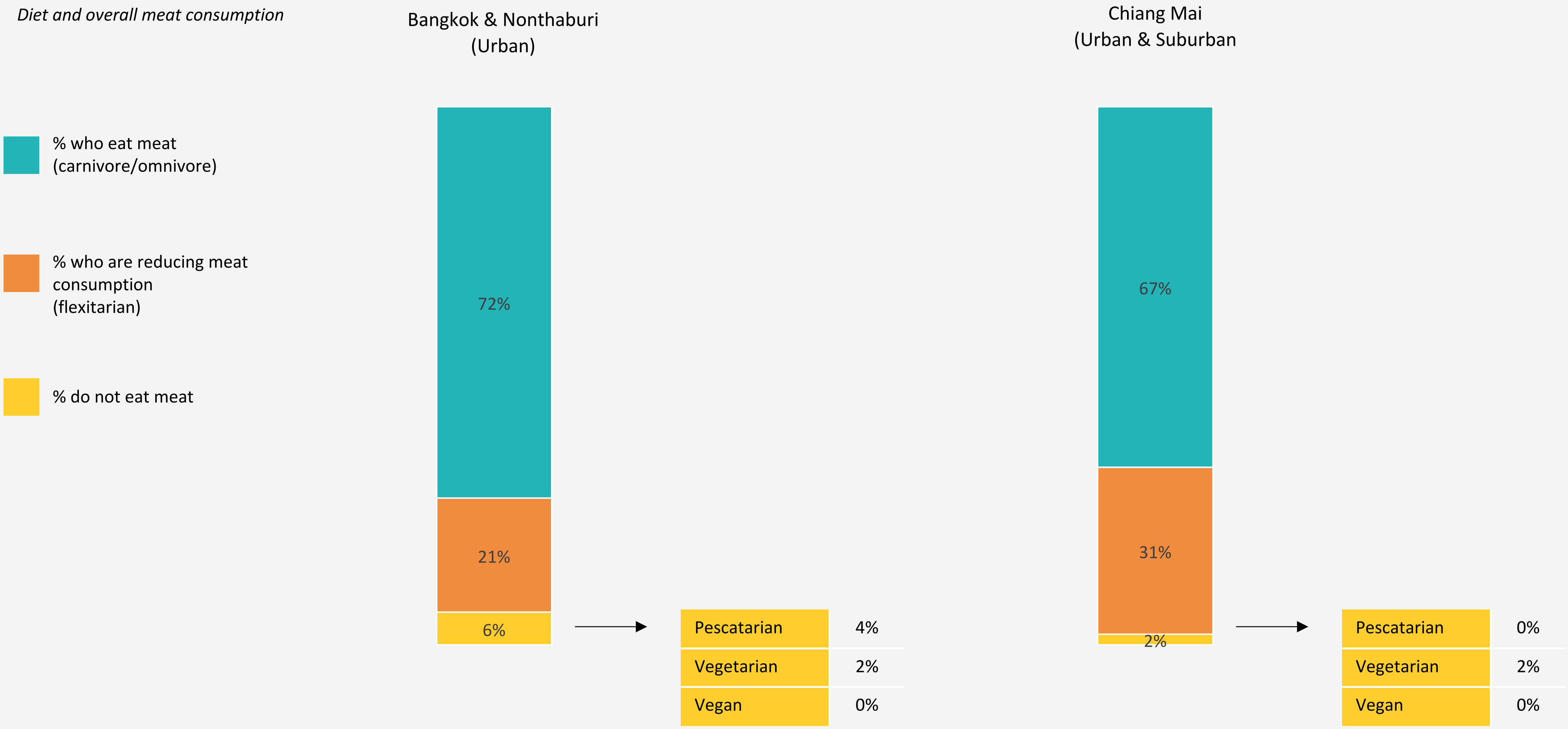
Nationally representative sample breakdown

Age		Gender		Region		Community		Income (Household)	
18-29	25%	Male	49%	Central	30.4%	Urban	56%	Low Up to 20,000 THB p/m	19%
30-44	33%	Female	51%	Eastern	5.5%	Suburban	31%	Mid-Low 20,001-50,000 THB p/m	43%
45-64	42%			Northeast	33.1%	Rural	13%	Upper-Mid 50,001-100,000 THB p/m	30%
				Northern	15.3%			High 100,001 THB + p/m	8%
				Southern	14.3%				
				Western	1.4%				

Geographic Spotlight

Bangkok, Nonthaburi & Chiang Mai

Chiang Mai has a greater population of people actively reducing their meat consumption



E1: How would you best describe your diet? E3: On average, how regularly do you eat the following...?
Base: Bangkok & Nonthaburi N=446, Chiang Mai N=106

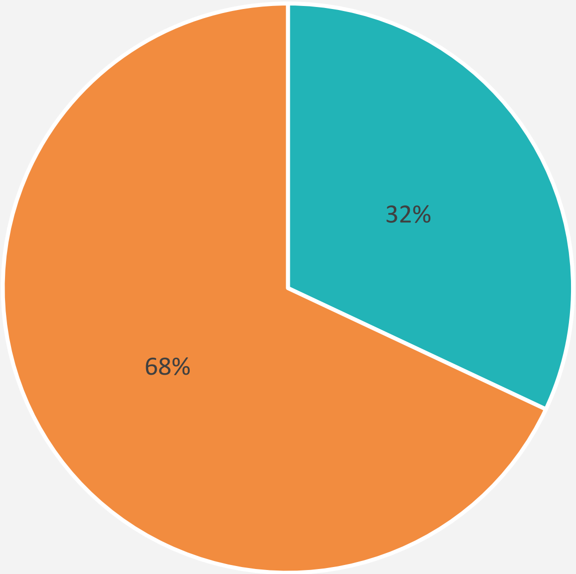
However, those in Bangkok & Nonthaburi have greater intention to reduce their current meat consumption

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

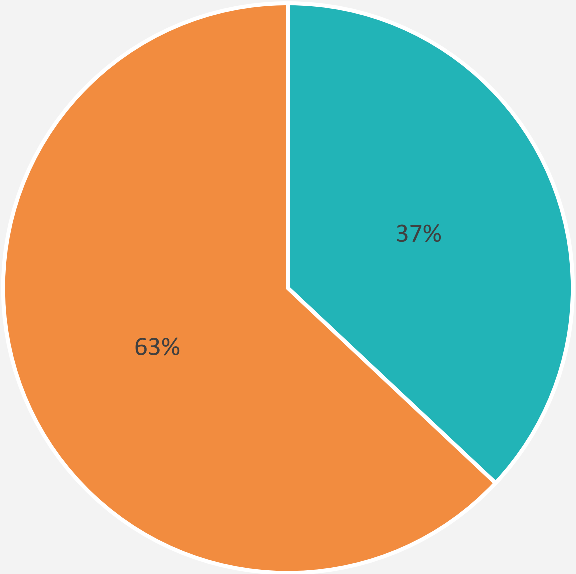
% intend to reduce meat consumption

% do not intend to reduce meat consumption

Bangkok & Nonthaburi
(Urban)



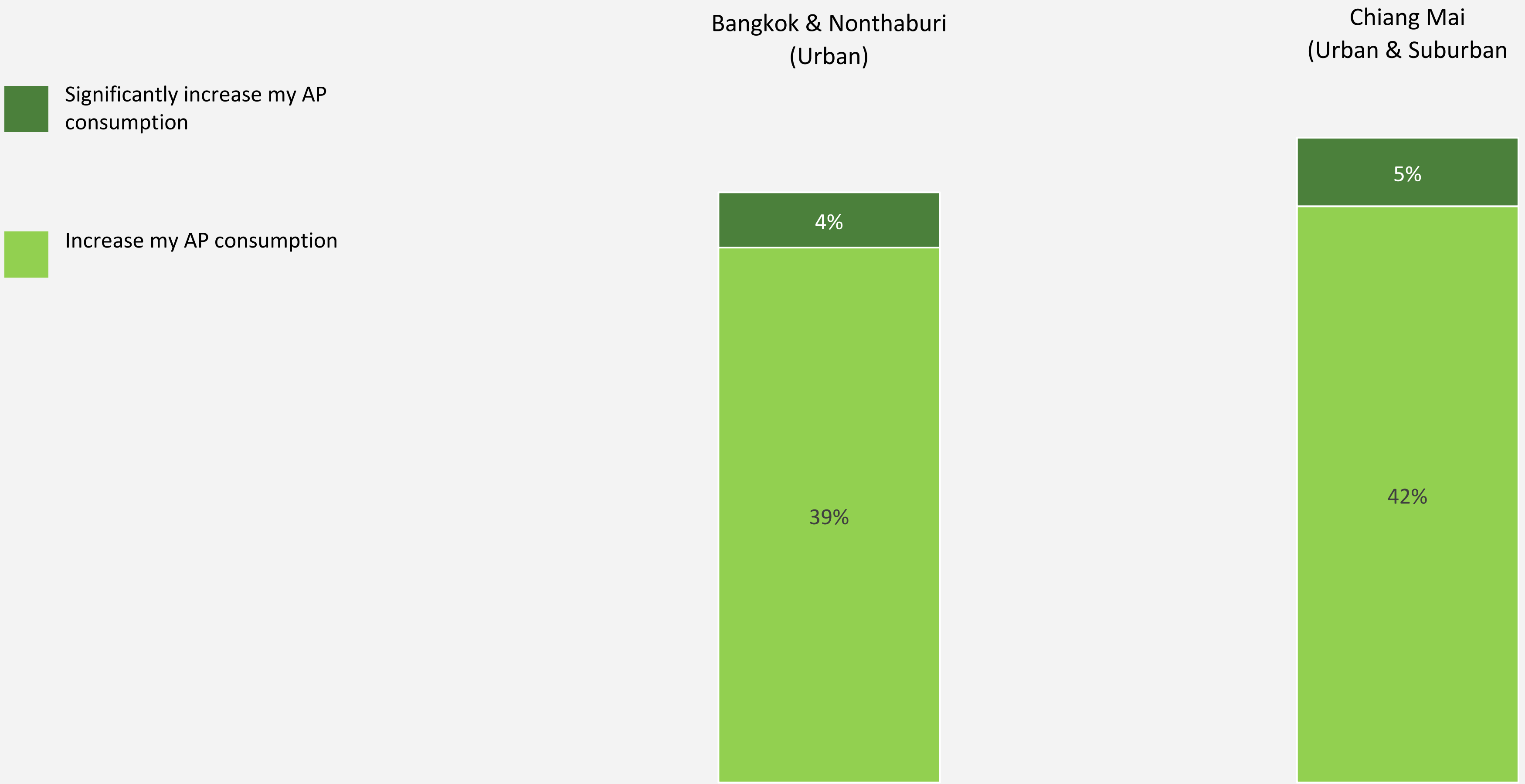
Chiang Mai
(Urban & Suburban)



E3b: Which of the below best describes how your relationship with meat might change in the next 2 years?
Base: Bangkok & Nonthaburi N=418, Chiang Mai N=104

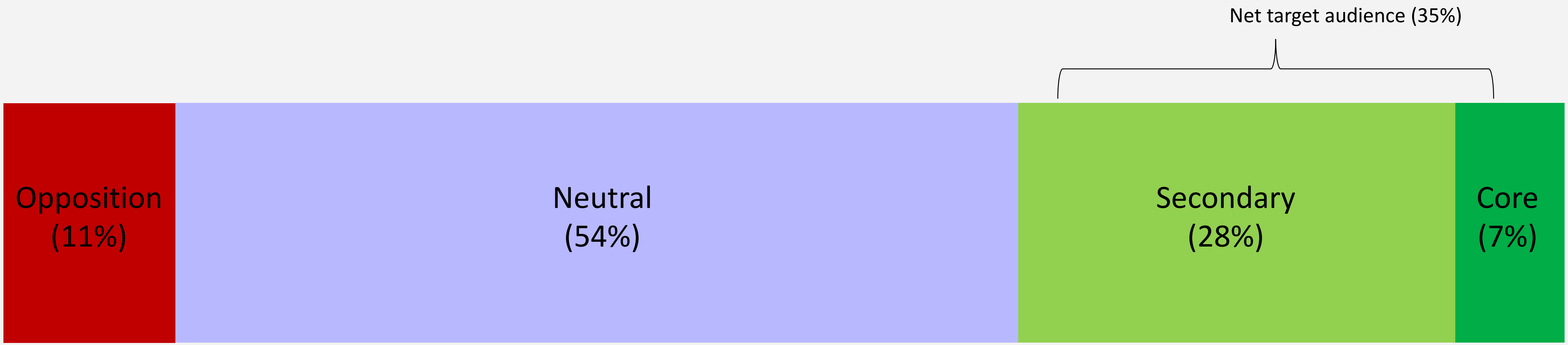
Chiang Mai residents have a stronger intention to increase their AP consumption

Intention to consume more AP's
(Among people who currently eat AP's)

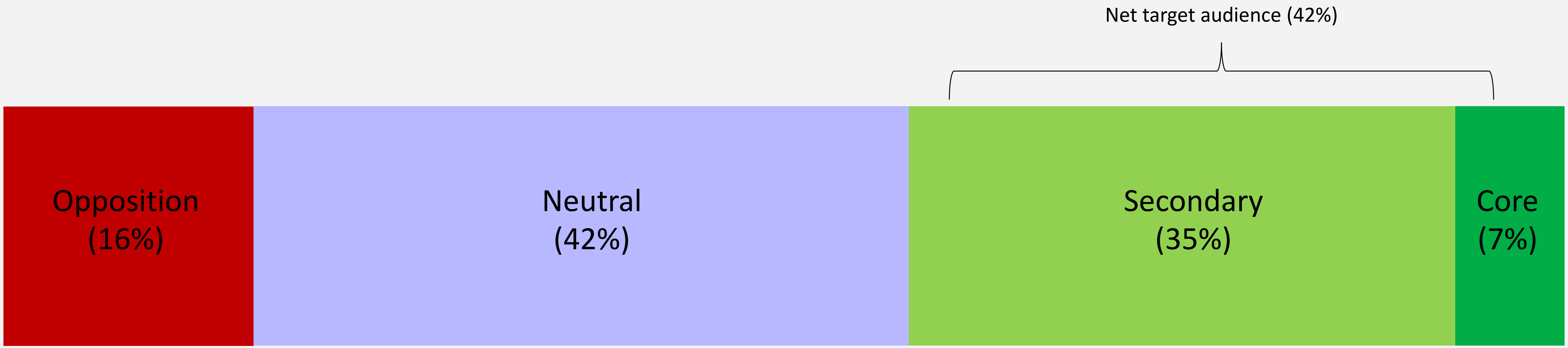


F4a: How regularly do you think you'll be eating AP's, if at all, in 2 years' time?
Base: Bangkok & Nonthaburi N=424, Chiang Mai N=98

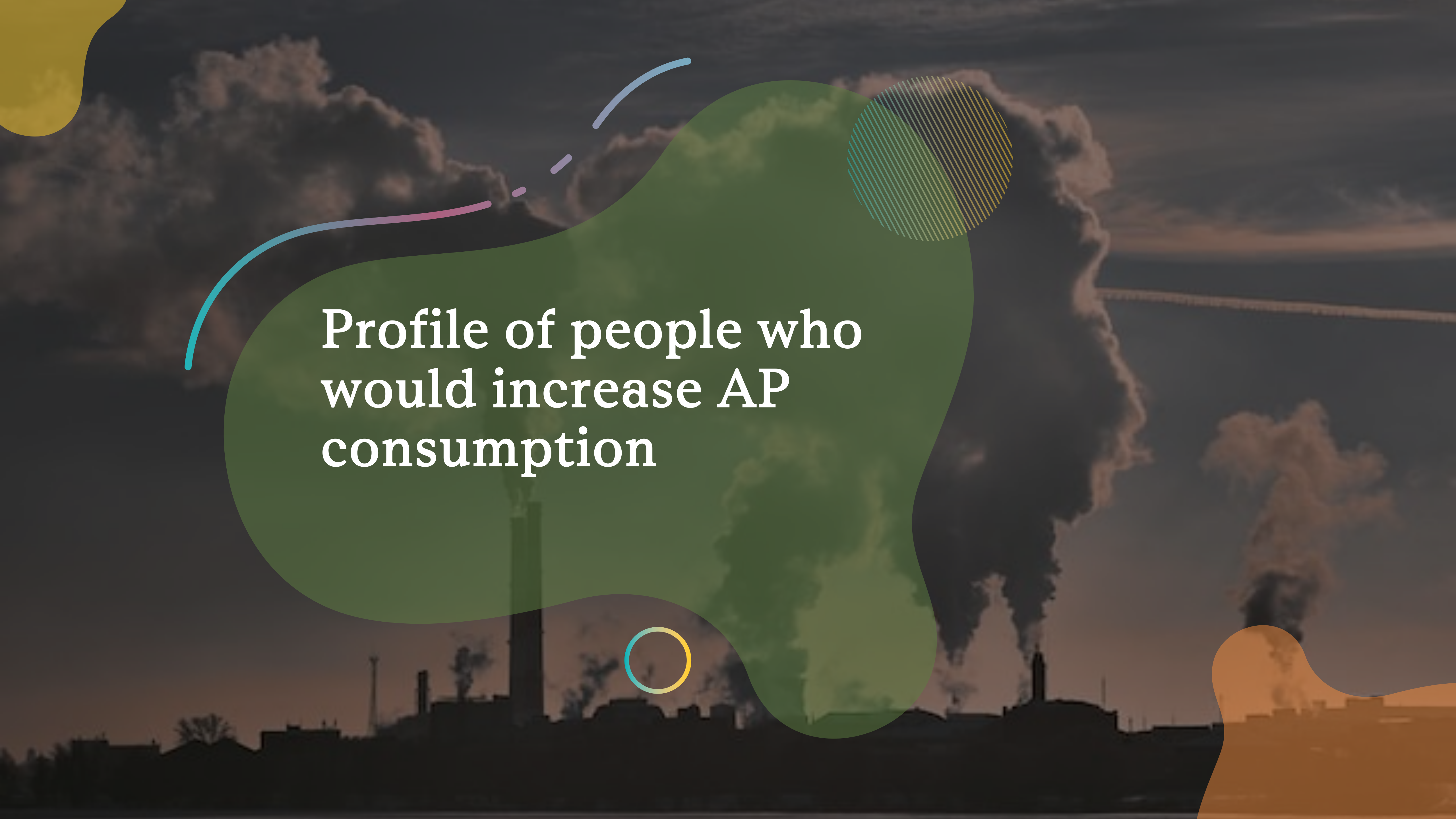
Audience fall out in Bangkok and Nonthaburi



Audience fall out in Chiang Mai (Urban & Suburban)



Base: Bangkok & Nonthaburi N=446, Chiang Mai N=106



Profile of people who would increase AP consumption

The demographic profile of people in Thailand who intend to increase their AP consumption vs. those that do not

	Intend to increase AP consumption	Do not intent to increase AP consumption
18-29	28%	35%
30-44	32%	25%
45-64	40%	40%
Male	46%	52%
Female	53%	47%
Other	1%	1%
Central	31%	28%
Eastern	5%	7%
Northeast	33%	32%
Northern	15%	17%
Southern	14%	15%
Western	1%	1%
Bangkok	*20%*	*16%*
Chiang Mai	*8%*	*7%*
Urban	51%	48%
Suburban	33%	29%
Rural	16%	23%

	Intend to increase AP consumption	Do not intent to increase AP consumption
Up to 20,000 THB	19%	36%
20,001-50,000 THB	42%	39%
50,001-100,000 THB	32%	20%
100,001 THB and above	7%	5%
I live on my own (never had children)	9%	14%
I live on my own (children have left home)	2%	2%
I live on my own with children	3%	5%
I live with my partner / spouse (never had children)	8%	10%
I live with my partner / spouse (children have left home)	2%	2%
I live with my partner / spouse (with children)	38%	24%
I live with other adults (e.g., flat mates)	2%	3%
I live with my parents and/or relatives (with children)	14%	18%
I live with my parents and/or relatives (never had children)	21%	20%
Early Childhood Education	1%	1%
Primary Education	2%	3%
Secondary Education	19%	33%
Vocational Education and Training	13%	16%
Bachelor's degree	59%	42%
Master’s degree or higher	8%	5%

Meat eating profile of flexitarians vs. carnivore/omnivore

Meat consumption profile of Flexitarians in Thailand who intend to increase their AP consumption vs. those that do not

	Flexitarian (actively reducing meat consumption)	Omnivore (moderate meat eater)	Carnivore (heavy meat eater)
Practice vegetarianism during the annual Vegetarian Festival - Yes %	76%	44%	36%
At least weekly consumption of chicken	36%	46%	62%
At least weekly consumption of pork	32%	54%	67%
At least weekly consumption of beef	7%	10%	22%
At least weekly consumption of fish	48%	46%	37%
I love eating meat	3%	7%	33%
I like eating meat	23%	41%	48%
I don’t mind eating meat	53%	40%	17%
I don’t like eating meat	20%	10%	1%
I hate eating meat	2%	1%	0%

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