

# Alternative seafood consumer research

Singapore

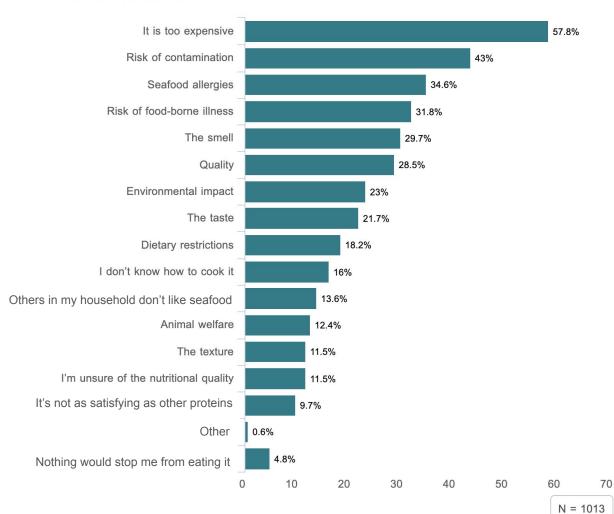
Research conducted by GFI and Getwizer



## Conventional seafood consumption barriers

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

#### **Seafood Consumers**

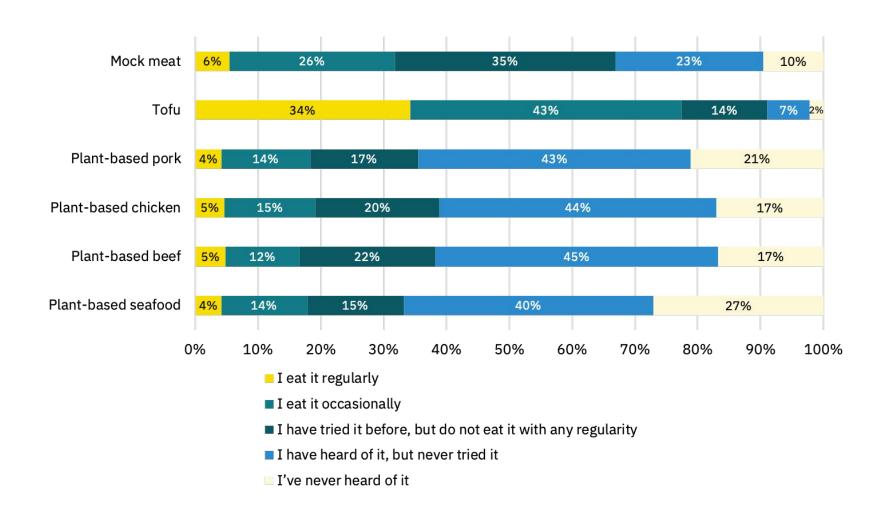






## **Alternative protein familiarity**

How familiar are you with the following alternative protein options?

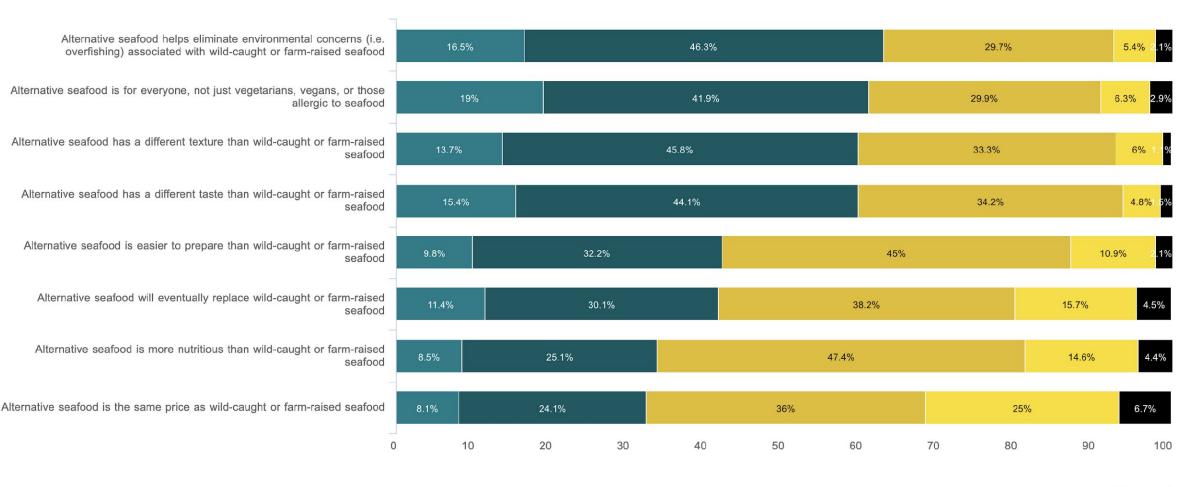


#### Singapore

## Alternative seafood perceptions

Completely agree

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



Neutral

Somewhat disagree

Completely disagree

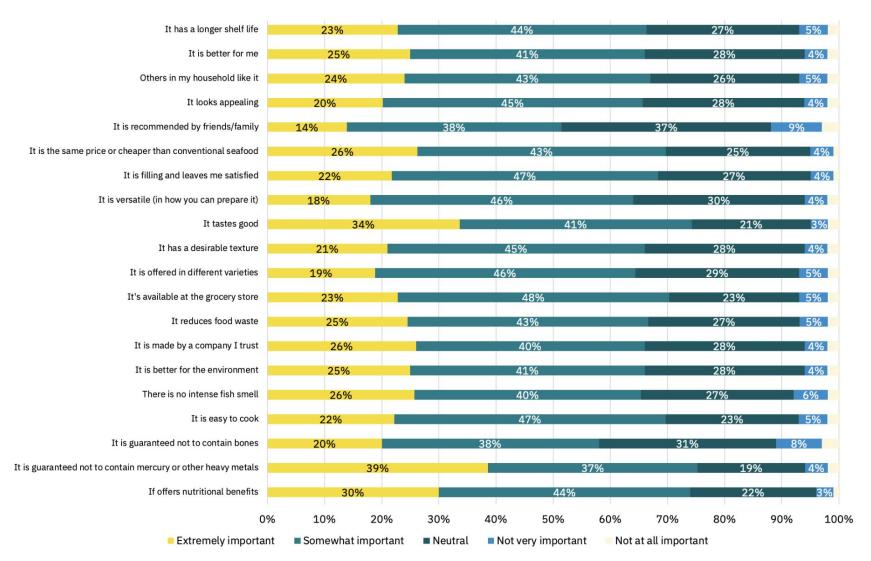
Somewhat agree





#### Alternative seafood drivers

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

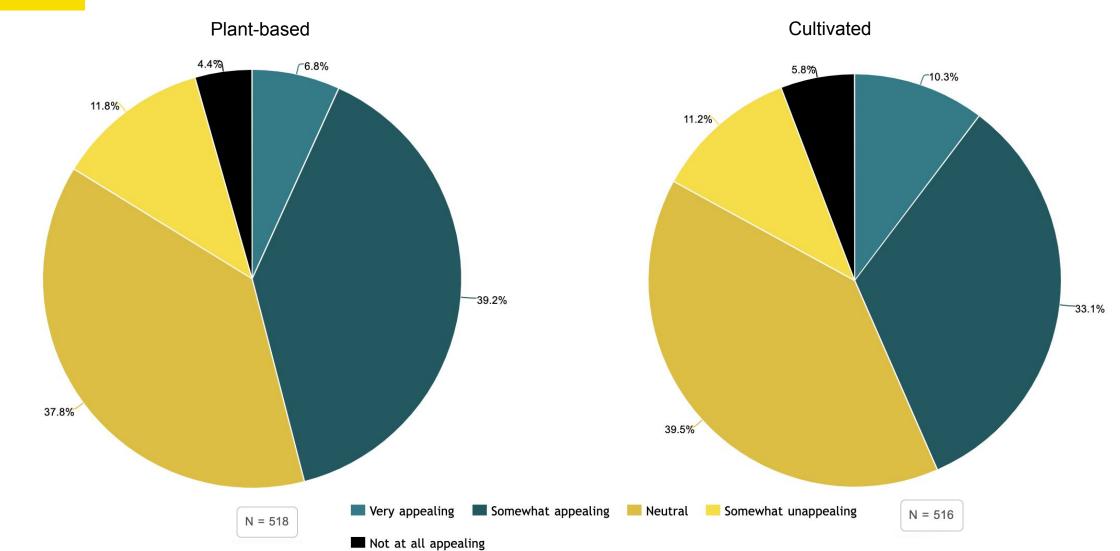






## **Appeal**

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

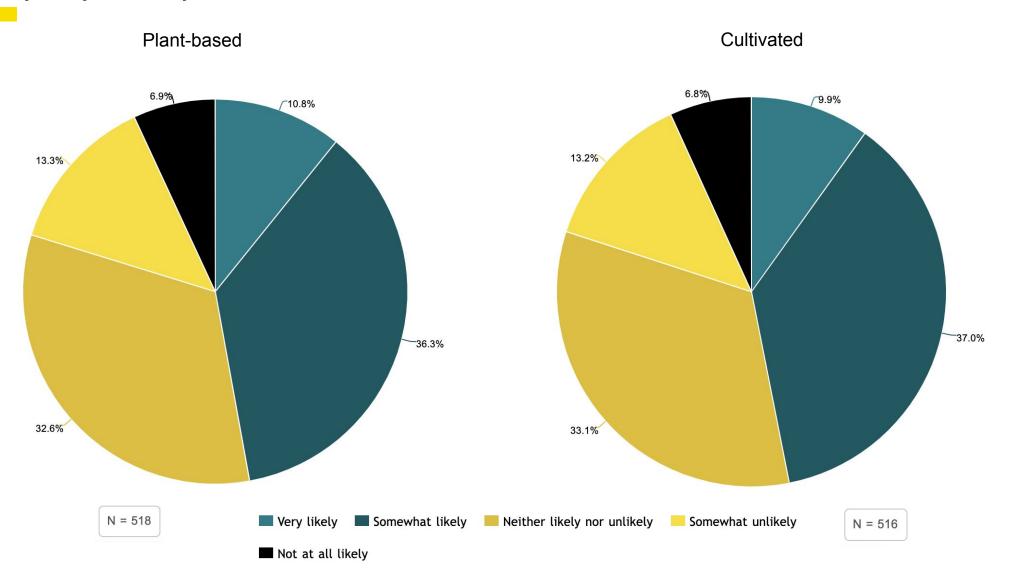






## **Future consumption**

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

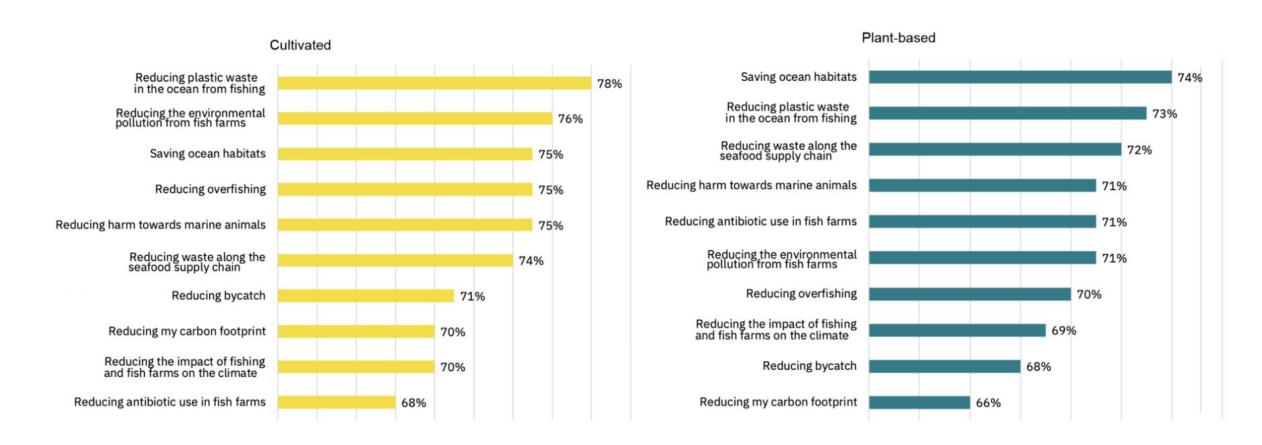




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#### **Environmental benefits**

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

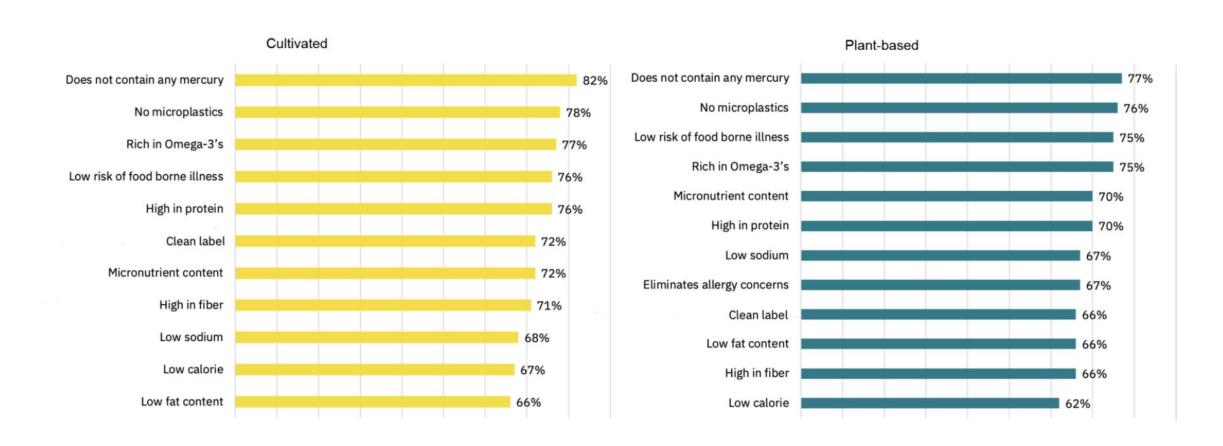




#### **Health benefits**

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

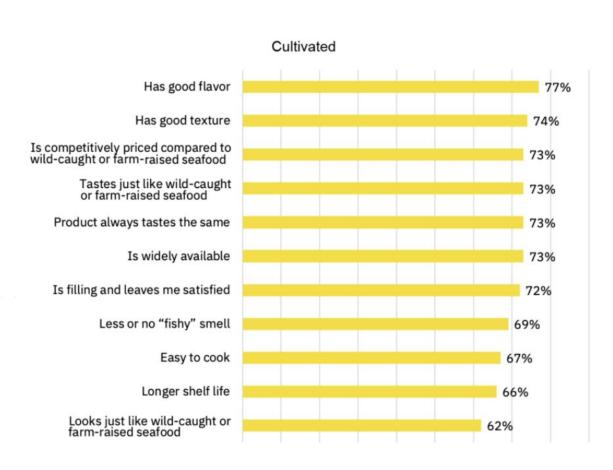


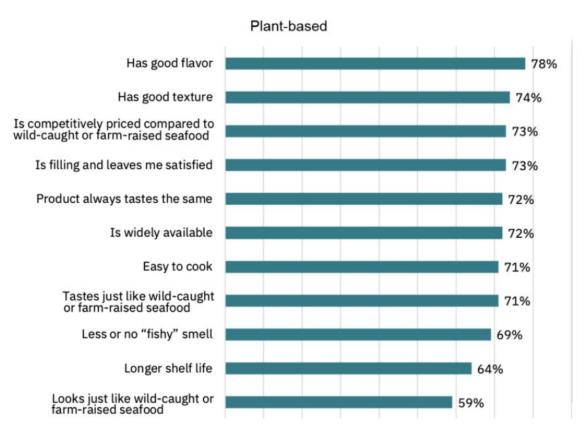


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#### **Product benefits**

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



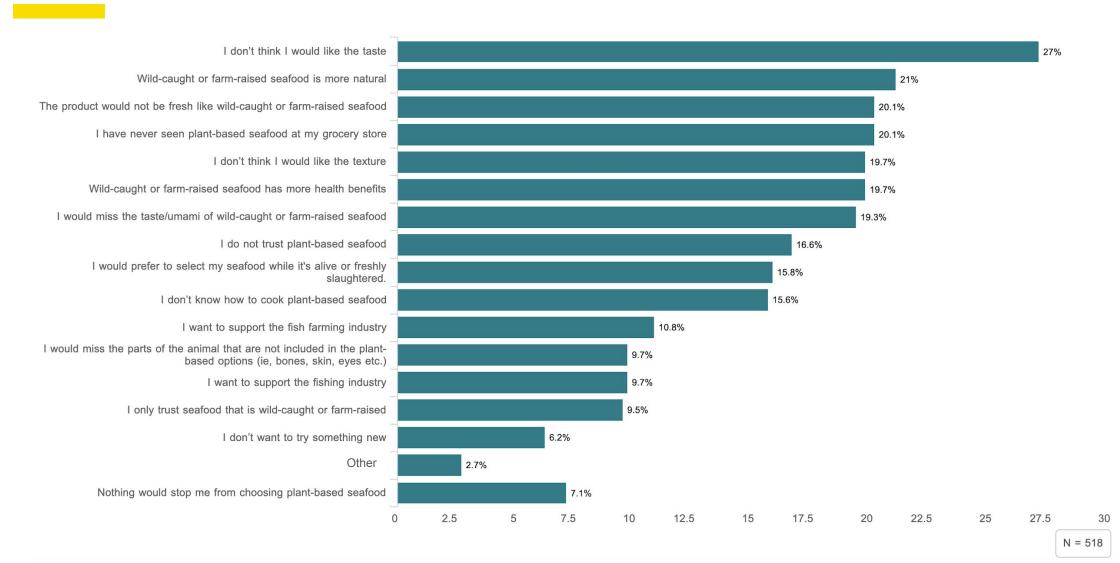






## Consumption barriers: plant-based

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

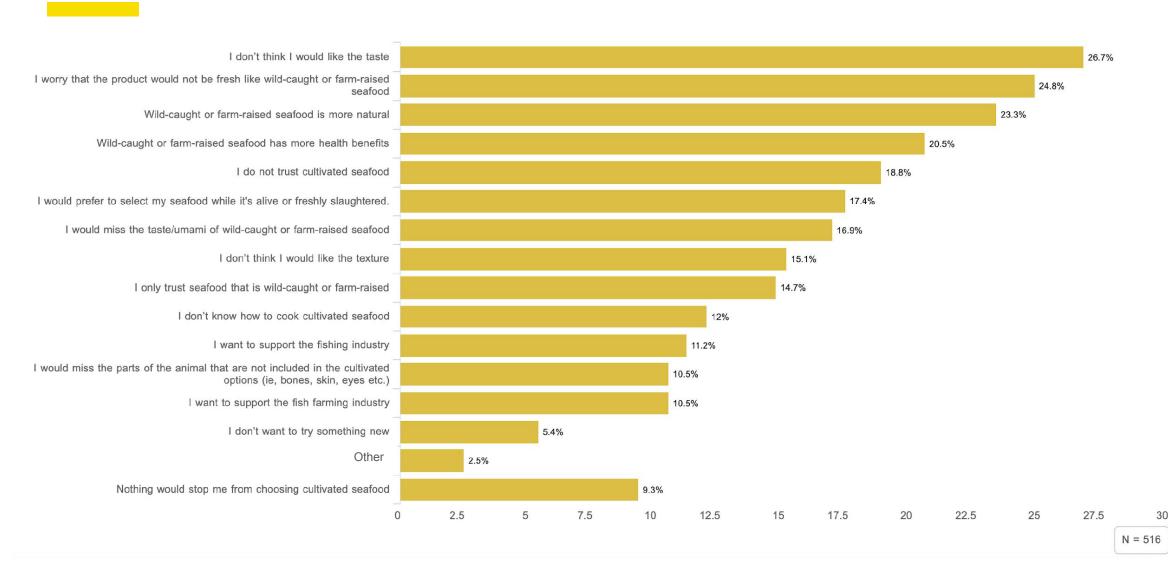






## **Consumption barriers: cultivated**

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





## Consumer segmentation by demographic

The majority (82.4 percent) of respondents were ethnically Chinese, 8.4 percent were Malay, 5.2 Indian, and 4 percent were from other groups.

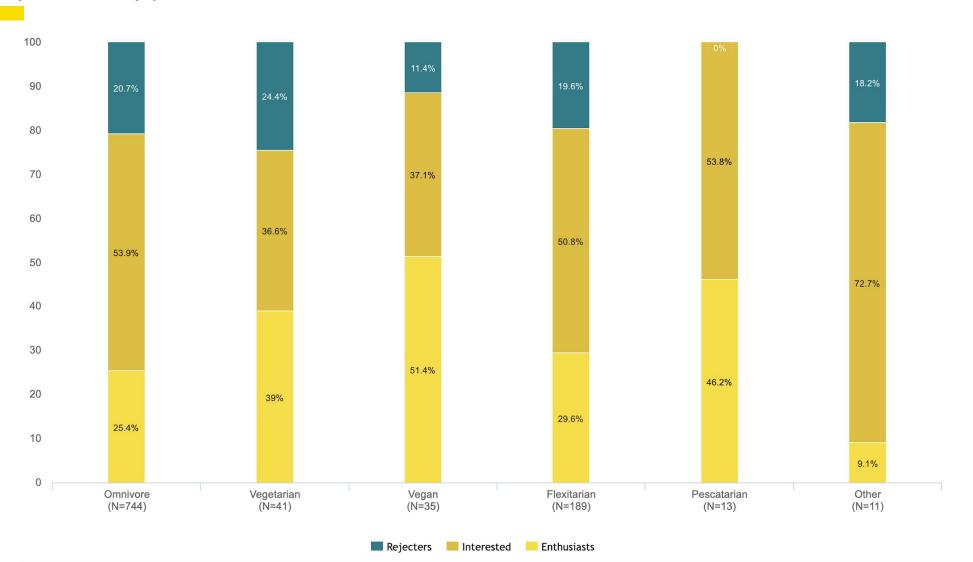
Demographic	Alt seafood enthusiasts (28%)	Alt seafood interested (52%)	Alt seafood rejectors (20%)
Average age	39: • 37% Millennials • 33% Gen Xers	40: • Even split between generations	<ul><li>42:</li><li>Highest representation of Boomers (39%)</li></ul>
Female/male ratio	52/48	55/44	39/61
Monthly household income information (national average was \$5,783 Singapore dollars [SGD] as of January 2022)	Average income: \$9,888 SGD	Average income: \$8,365 SGD	Average income: \$8,065 SGD





## Dietary preference by consumer type

What is your dietary preference?

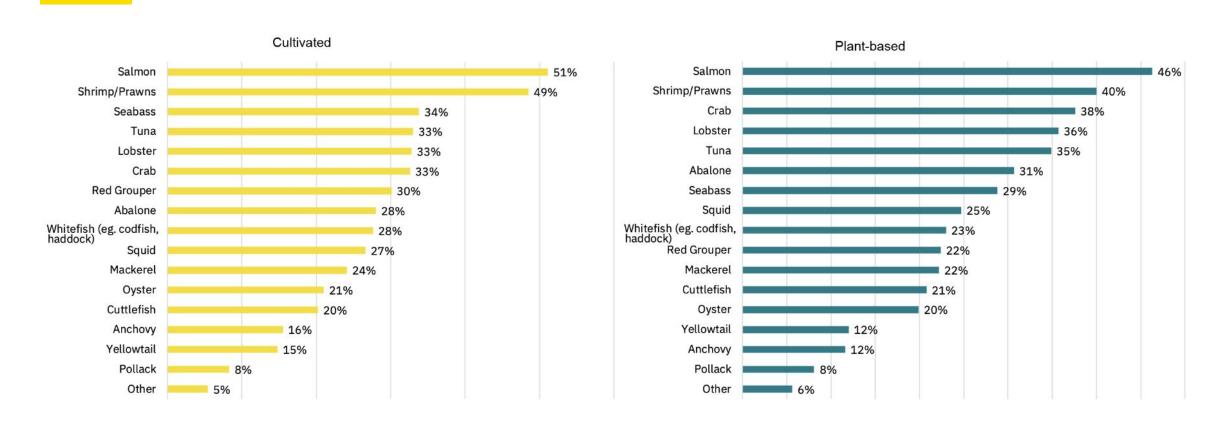






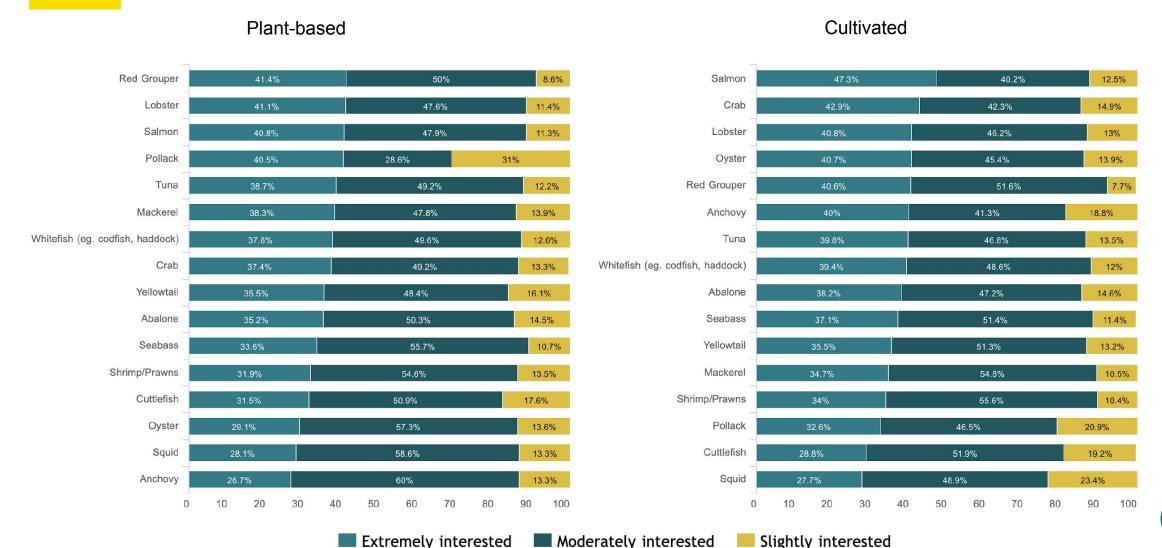
## **Species preference**

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



#### **Purchase intent**

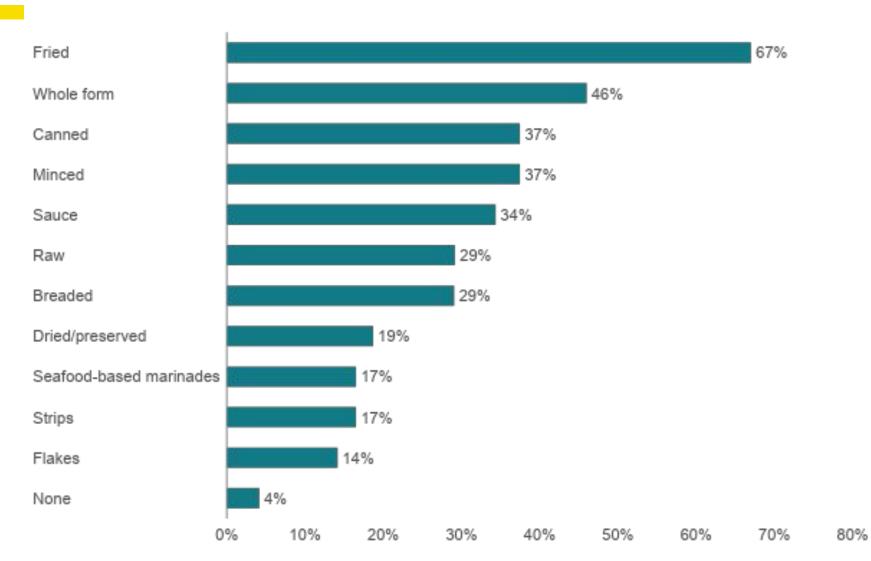
How interested would you be in purchasing the following species of alternative fish or shellfish?





### **Seafood form**

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





#### **Food attitudes**

▲ Total

(N=1033)

Alternative Seafood Enthusiast

(N=286)

When it comes to food, I stick to what I know When it comes to food, I always look to try something new I follow a strict regimen when it comes to what I eat I eat whatever I want Food is about maximizing my satisfaction Food is about maximizing my nutrition I am knowledgeable of health & nutrition trends I am not knowledgeable when it comes to health & nutrition trends I do not consider the environmental impact food has when deciding what to I consider the environmental impact food has when deciding what to eat I am confident in knowing which foods are 'healthy' or 'unhealthy' for me I'm not confident in knowing which foods are 'healthy' or 'unhealthy' I prefer eating the dishes I love more frequently by making healthy ingredient I'd rather eat the dishes I love in their true form (i.e., no healthy substitutions) less frequently I frequently substitute / replace ingredients in the food I eat (in recipes, in my I rarely substitute / replace ingredients in the food I eat (in recipes, in my order at restaurants) order at restaurants) When I grocery shop, my family's preferences come first When I grocery shop, my preferences come first

Alternative Seafood Interested

(N=540)

Alternative Seafood Rejectors

(N=207)

