



Study: Cambodian Market Seafood Purchase Intent

November 1, 2023



Agenda

1. Project Overview
2. Survey Results
3. Discussion and Follow-up



Project Overview

Goal: To sample Maine seafood (specifically Grey Sole/Witch Flounder and Small Dabs/American Plaice) at the Lowell Southeast Asian Water Festival in Summer 2023 to determine purchase intent and pattern while better understanding consumer behavior related to seafood purchase in key multicultural segments.

Project Overview

Program – Part I:

Individuals attending the Lowell Southeast Asian Water Festival were surveyed using intercept interviews. Research interns and language interpreters were trained to conduct interviews and support survey completion. The survey was available in English and Khmer. Each interview lasted about 5 minutes and assessed:

- Basic demographic and psychographic data
- Current seafood purchase and consumption patterns
- Current shopping habits
- Potential seafood purchase and consumption patterns (related to Maine seafoods)

There were 311 completed surveys over the festival weekend. Participants completing the survey received a sample of frozen fish to try at home along with a follow-up survey.

Project Overview

Program – Part II:

Participants who received free fish were asked to try the fish and complete a follow-up survey.

Participants received the follow-up survey in English and Khmer along with a self-addressed envelope to return the survey. This survey assessed:

- Taste preferences and familiarity with fish being tasted
- Likelihood of purchase and estimate of demand
- Likelihood family would eat the fish being tried
- Point and place of purchase
- Promotional and awareness channels

There were 153 surveys returned with 132 valid surveys. Surveys were returned over a six week period. An email reminder was sent to prompt return.



Project Overview

Program Part III:

Interns conducted the first survey again in Portland, Maine, intercepting people on their way to the Farmer's Market and downtown. The goal of this part of the program was to give us intel on market segment to compare with Lowell.

There were 100 completed surveys over the research weekend. Participants in this survey were not given free fish samples.

Part I Results: Lowell, MA

Demographic Profile:

Language of Survey Completion: 53.3% English | 46.7% Khmer

Average age: 51.6 years old

Gender: 43.7% Female | 26.7% Male | 0.3% Non-binary |
29.3% Prefer not to specify

Part I Results: Lowell, MA

Demographic Profile:

- African / African American / Black = 1.3%
- Asian / Asian American = 37.0%
- Cambodian = 63.7%
- Caucasian / White = 4.8%
- Chinese = 1.3%
- Hispanic / Hispanic American = 1.3%
- Indian = 0.3%
- Japanese = 0.3%
- Korean = 0.6%
- Pilipino = 1.0%
- Thai = 0.6%
- Vietnamese = 2.3%

Part I Results: Lowell, MA

Demographic Profile – Where You Live/Reside:

- Andover = 1.0%
- Ayer = 0.3%
- Billerica = 0.3%
- Boston / Cambridge = 2.0%
- Chelmsford = 2.3%
- Dracut = 2.6%
- Haverhill = 0.3%
- Lawrence = 2.3%
- Lowell = 67.1%
- Lynn = 0.6%
- Methuen = 1.6%
- Worcester = 1.3%
- Connecticut = 1.6%
- Maine = 4.0%
- New Hampshire = 1.3%
- Rhode Island = 3.9%
- USA outside of New England = 5.6%
- Canada = 1.3%
- Rest of the World = 0.6%



Part I Results: Lowell, MA

Demographic Profile:

Average Household Income: \$44,347

Average size of household: 3.13 people

Have you arrived in the US in the past 3-years: 37.2% Yes | 62.8% No



Part I Results: Lowell, MA

Shopping Profile:

Average Monthly Spending on Groceries: \$932

Number of times your eat fish at home each month: 12.8 times

Average Monthly Spending on Seafood: \$171

Number of times your eat fish at restaurants each month: 2.0 times

Part I Results: Lowell, MA

Shopping Profile:

Where do you buy fish:

- Grocery store: 62%
- Fish market: 34%
- Asian market: 69%
- Specialty food store: 5%
- Farmer's or local market: 7%

Part I Results: Lowell, MA

Shopping Profile:

Do you prefer the fish you eat:

- Fresh: 37%
 - Frozen: 3%
 - Both: 60%
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- Filet: 16%
 - Whole fish: 17%
 - Both: 67%

Part I Results: Lowell, MA

Shopping Profile:

Average number of fish species consumed: 7.8 out of 19 species

Have you heard of Grey Sole or Small Dabs:

- Yes: 16%
- No: 39%
- Not sure: 45%

Part I Results: Lowell, MA

Shopping Profile – Types of Seafood Consumed:

- Clams = 47%
- Crab = 60%
- Eel = 16%
- Flounder = 32%
- Grey Sole = 14%
- Haddock = 11%
- Halibut = 30%
- Lobster = 59%
- Mussels = 28%
- Oysters = 32%
- Pollock = 6%
- Salmon = 51%
- Sea Bass = 30%
- Scallops = 29%
- Shrimp = 51%
- Small Dabs = 8%
- Tilapia = 36%
- Trout = 21%
- Tuna = 32%
- Other = 3%

Part I Results: Lowell, MA

Shopping Profile:

What is important when purchasing fish:

- Affordability = 58%
- Availability = 33%
- Convenience = 18%
- Freshness = 41%
- Local = 19%
- Price = 32%
- Quality = 34%
- Sustainability = 11%
- Variety = 11%

Part I Results: Lowell, MA

Shopping Profile:

Where do you learn about new foods that you try:

- At the grocery store or fish market = 54%
- Facebook = 25%
- From community = 10%
- From family and friends = 41%
- From television program = 5%
- Instagram = 8%
- Online / search = 13%
- Twitter = 3%
- YouTube = 32%
- Other = 5%

Part II Results: Lowell Mail Survey

Ethnicity of Survey Respondents:

- Asian / Asian American = 27%
- Cambodian = 64%
- Caucasian / White = 8%
- Vietnamese = 1%

Part II Results: Lowell Mail Survey

Did you eat the fish you received at the Water Festival: 91% Yes | 9% No

When you tried the fish, did you like it: 97% Yes | 3% No

If you shared the fish with someone else, did they like it: 82% Yes | 18% No

Part II Results: Lowell Mail Survey

What did you like about the fish:

- Ease of cooking or prep = 27%
- Freshness = 64%
- Quality = 45%
- Taste = 73%
- Texture = 18%

Part II Results: Lowell Mail Survey

What is the likelihood you would purchase this fish:

- Very unlikely = 2%
- Unlikely = 3%
- Neutral = 20%
- Likely = 18%
- Very likely = 55%

Part II Results: Lowell Mail Survey

What is the likelihood you would recommend this fish to family or friends:

- Very unlikely = 27%
- Unlikely = 0%
- Neutral = 9%
- Likely = 27%
- Very likely = 37%

Part II Results: Lowell Mail Survey

If you were purchasing the fish, how many pounds would you purchase in a month:

- Mean (average) = 6.88 pounds
- Median = 6.17 pounds
- Mode = 7.50 pounds

Part II Results: Lowell Mail Survey

What would you pay per pound / what would a fair price be for this fish:

- Mean (average) = \$4.77 per pound
- Median = \$4.49 per pound
- Mode = \$3.99 per pound

Part II Results: Lowell Mail Survey

Where would you want to buy/purchase this fish:

- Grocery store: 45%
- Fish market: 55%
- Asian market: 64%
- Specialty food store: 0%
- Farmer's or local market: 18%

Part II Results: Lowell Mail Survey

Where do you want to find out more information about this fish:

- At the grocery store or fish market = 73%
- Facebook = 9%
- From family and friends = 36%
- Online / search = 18%
- YouTube = 36%
- Try in restaurant = 9%

Forecast:

- Estimated number of Cambodians in Lowell, MA = 32,500
- Average number of people = 3.13
- Estimated number of Cambodian households = 10,383

Forecast:

- Percent very likely to buy Grey Sole or Small Dabs = 55%
- Estimated buying households = 5,711
- Value of fish (pounds x price) = $6.88 \times \$3.99 = \27.45
- Species times per month = eat 12.8 per month / 7.8 species consumed = 1.6 times

Forecast:

Annual Estimated Value of Lowell, MA Market:

- Estimated buying households = 5,711
- Estimated value of purchase per month = \$27.45
- Estimated purchases per year = 12
- Estimated annual sales = \$1,881,200

Part III Results: Portland, ME

Key Demographics of Portland, Maine surveys:

- Ethnicity: 81% Caucasian
- Average household income: \$67,988
- Average size of household: 3.76



Part III Results: Portland, ME

Average Monthly Spending on Groceries: \$1,211

Number of times your eat fish at home each month: 2.8 times

Average Monthly Spending on Seafood: \$68

Number of times your eat fish at restaurants each month: 3.6 times

Part III Results: Portland, ME

Average number of fish species consumed: 3.1 out of 19 species with Salmon, Tuna, Lobster, Shrimp, and Haddock being top choices.

There is a strong preference for frozen fish and filets.


Summary

- The Cambodian / Cambodian American market segment in Lowell, MA represents a significant opportunity for the sale of under utilized fish.
- This segment's preferences and consumer behaviors are very different than those of the traditionally marketed to Caucasian / White market segment.
- The Cambodian segment eats fish at home 4.5 more times per months than the Caucasian segment. In addition, the Cambodian segment consumes 2.5 times more species of fish per person on average.

Summary

- The Cambodian / Cambodian American market learns about new foods/fish in the grocery store, from family and friends, and on YouTube. These channels should drive future promotional efforts.
- The Cambodian / Cambodian American market is open to trying new fish. The more important factors in fish purchase are affordability and freshness.
- Based on recent prices from Portland Fish Exchange, the wholesale to retail pricing model should work.

Wholesale Reference

**Portland Fish Exchange**
Price & Landing Tool

[Home](#) [News](#) [Weather](#) [Fisheries](#) [Links](#) [Calendar](#) [About](#) [Contact](#) [Board of Directors](#)

[Pier Cam](#) [Price & Landing Tool](#)

Choose Report Parameters

Start Date End Date

[Limit to specific species](#)

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Item		Weight Consigned	Sold	Low	Prices Average	High
FPWS	Dab small		43,960	\$0.51	\$1.27	\$2.03
FWWS	Greysole small		20,402	\$0.78	\$1.92	\$3.27
		0	64,362			