



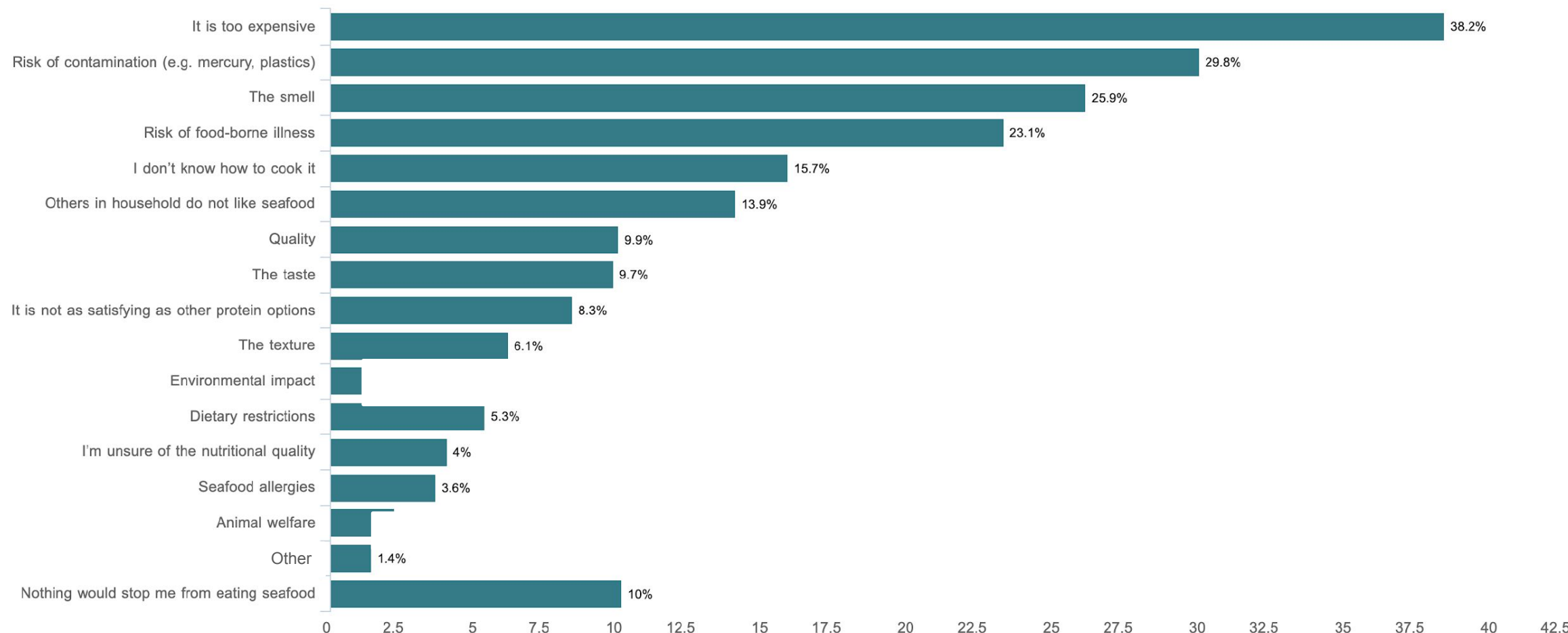
# Alternative seafood consumer research

South Korea

Research conducted by GFI and Getwizer

# Conventional seafood consumption barriers

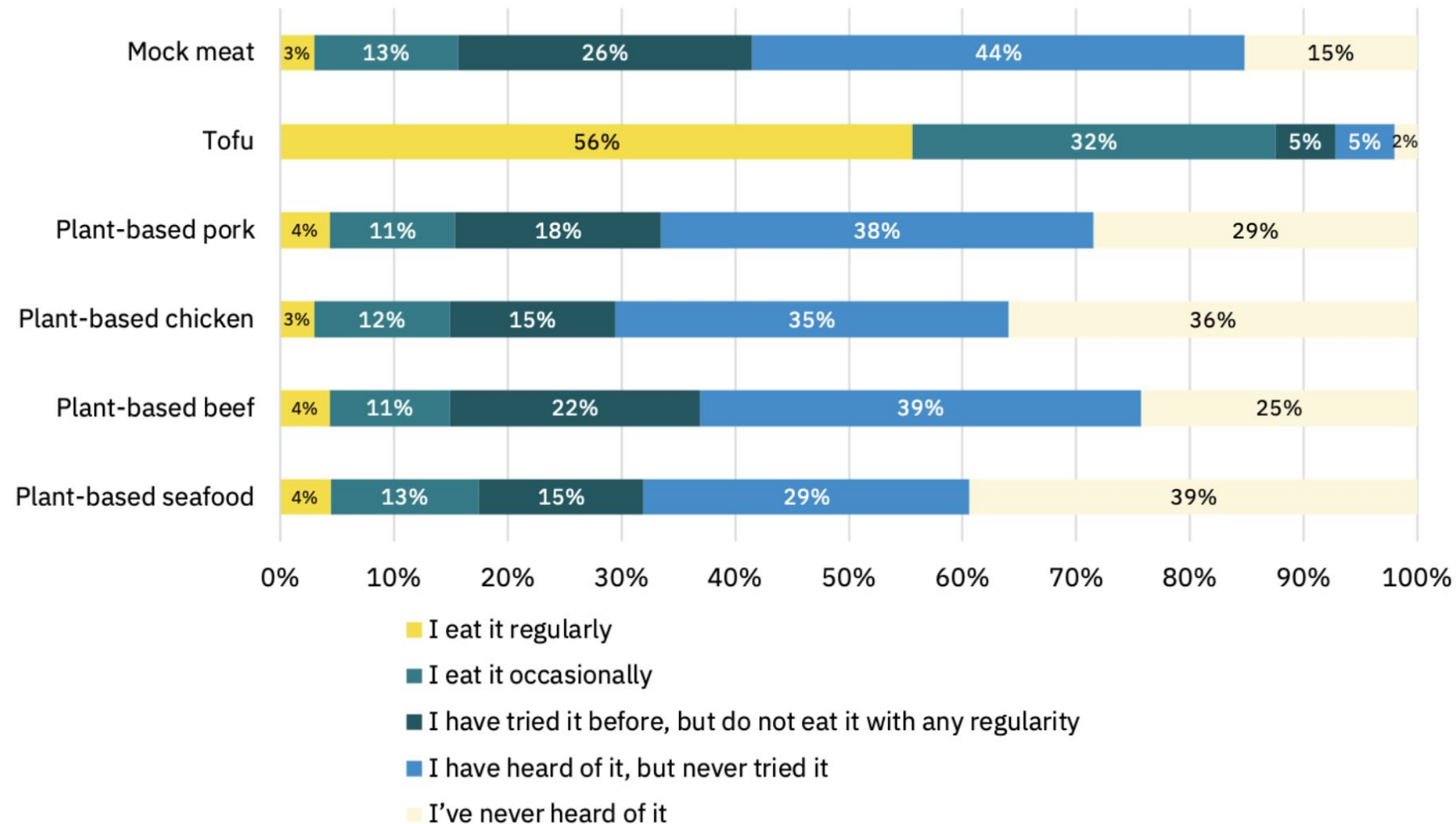
Which of the following reasons, if any, would stop you from eating conventional seafood regularly?



N = 997

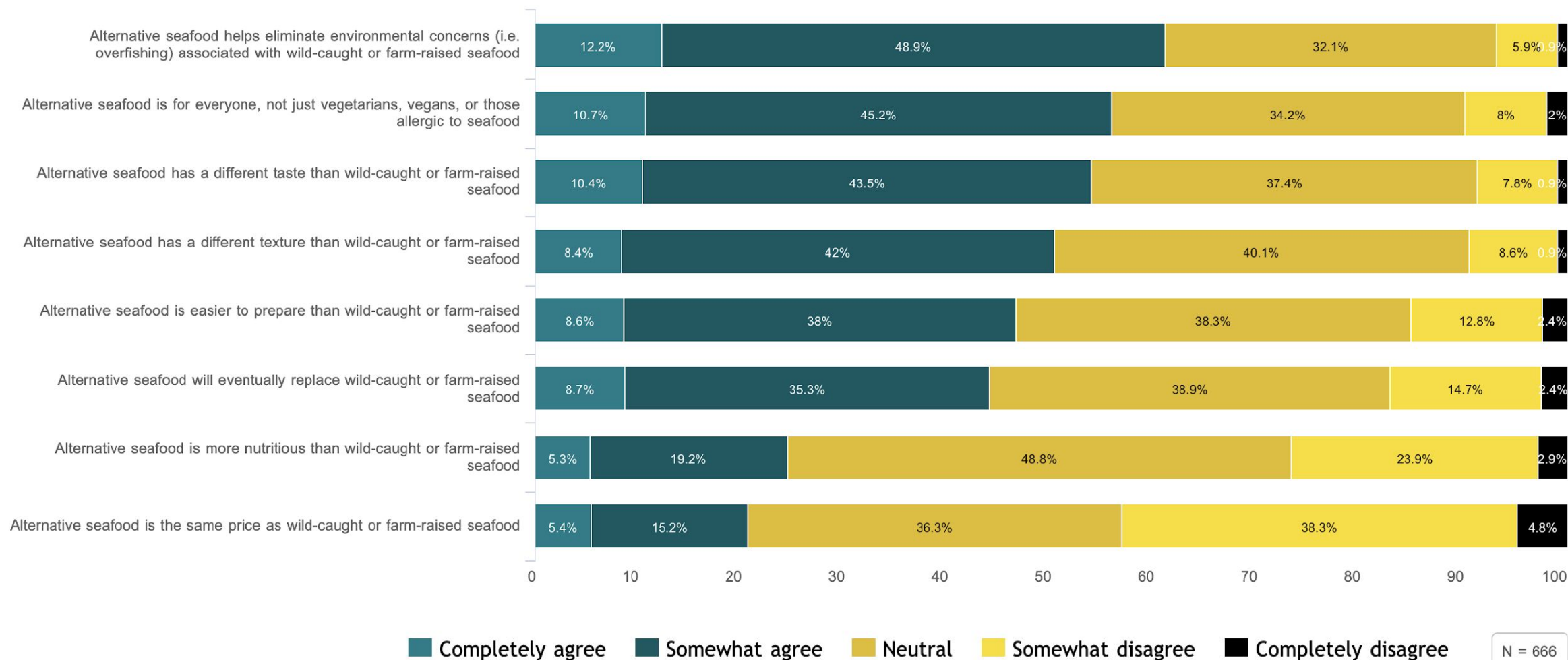
# Alternative protein familiarity

How familiar are you with the following alternative protein options?



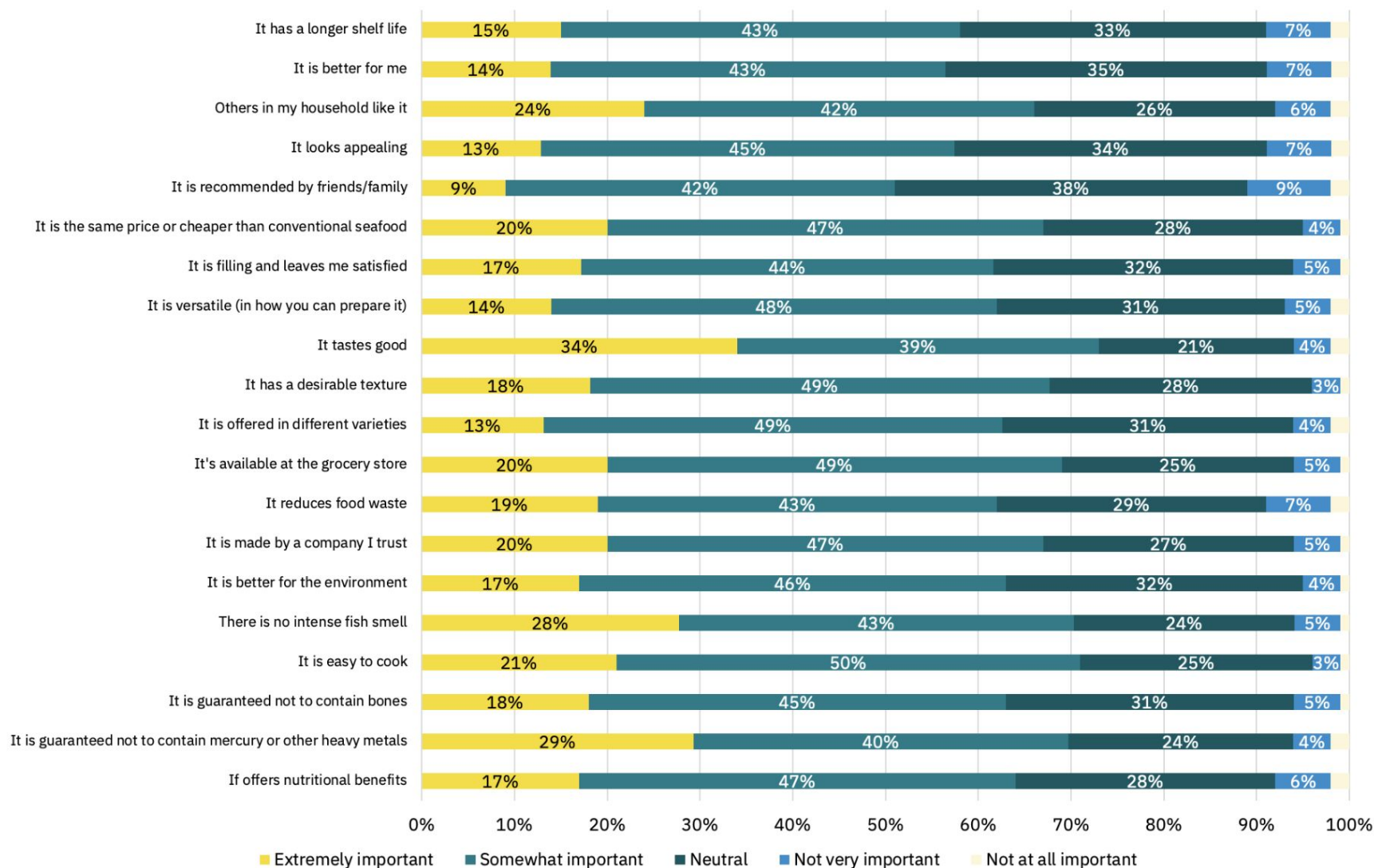
# Alternative seafood perceptions

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



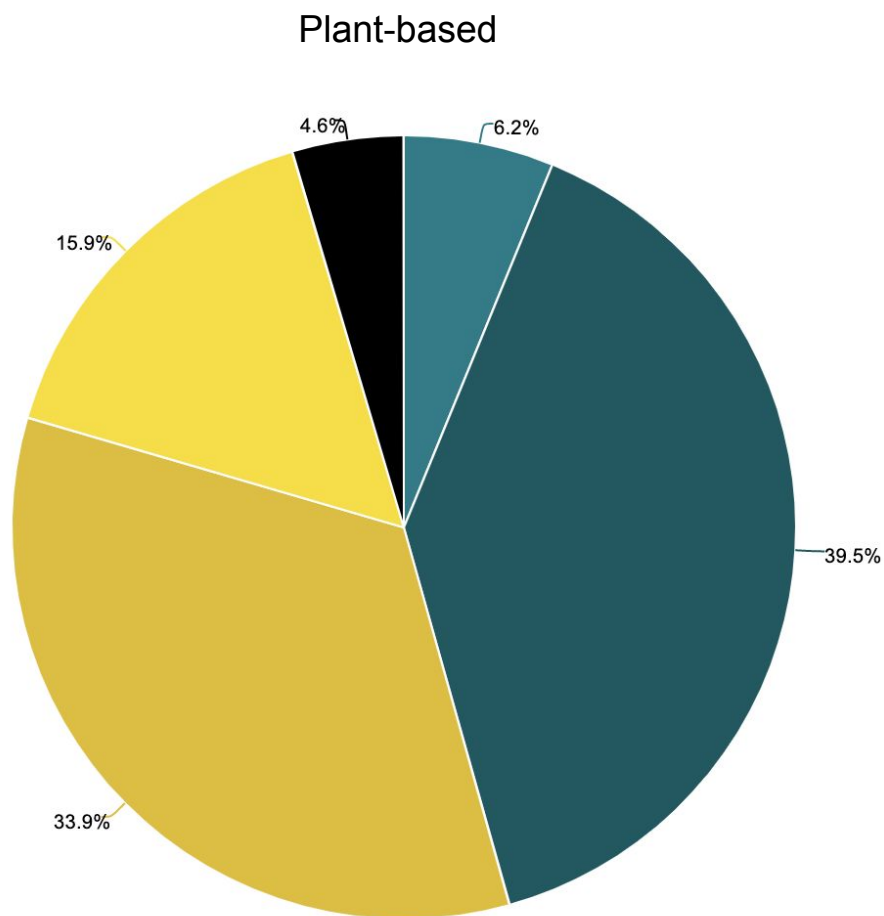
# Alternative seafood drivers

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

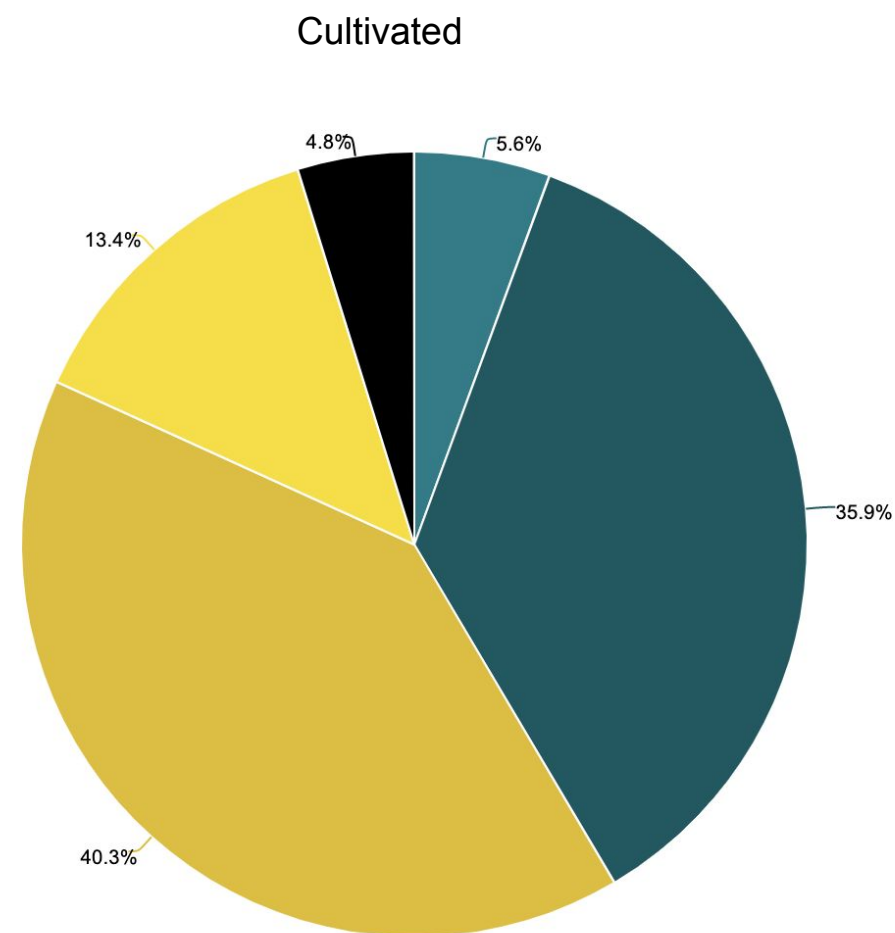


# Appeal

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



N = 504



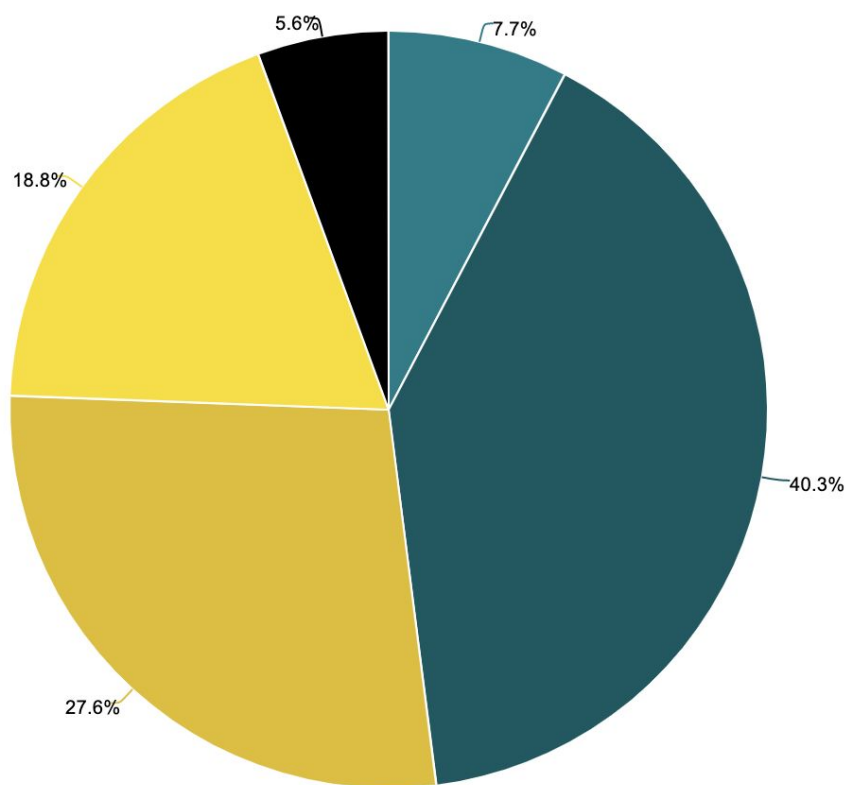
N = 501

Very appealing   Somewhat appealing   Neutral   Somewhat unappealing   Not at all appealing

# Future consumption

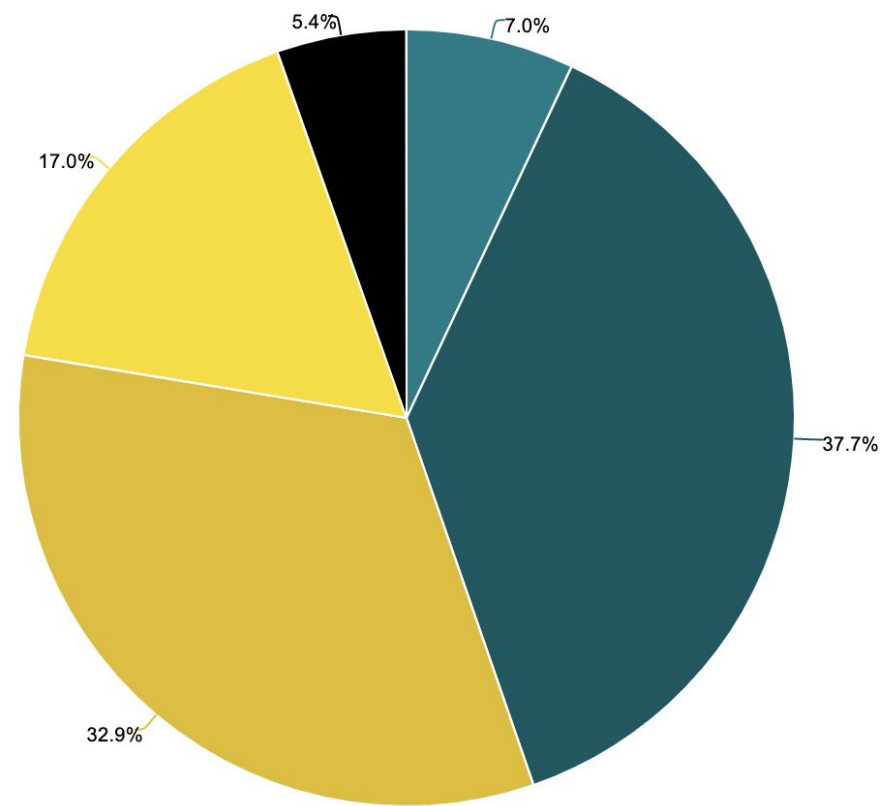
How likely are you to buy alternative seafood in the future?

Plant-based



N = 504

Cultivated



N = 501

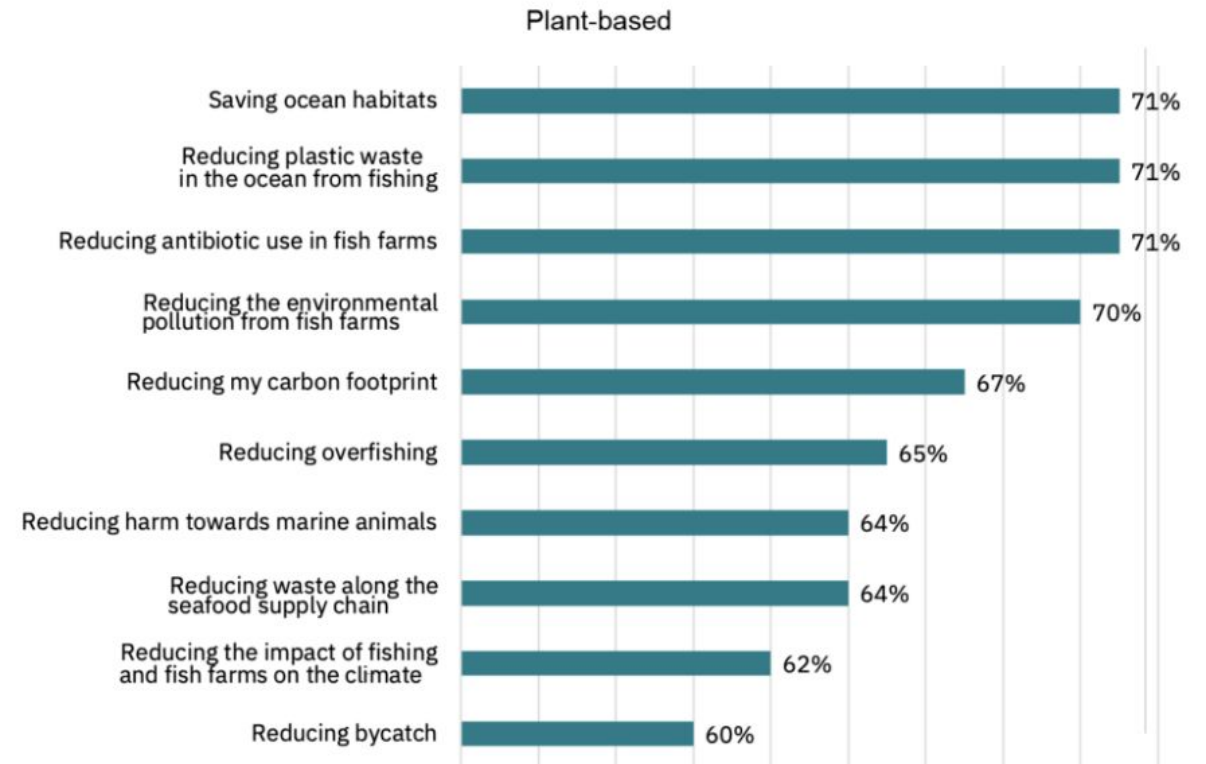
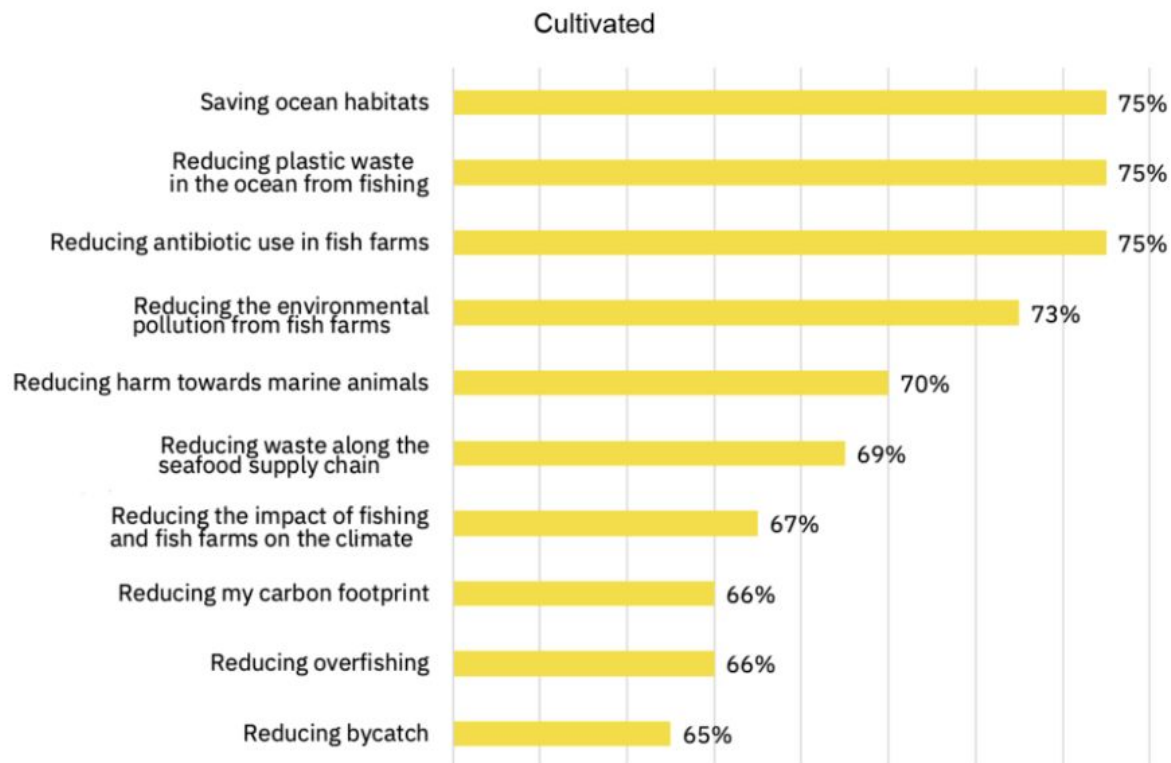
Very likely   Somewhat likely   Neither likely nor unlikely   Somewhat unlikely   Not at all likely

# Environmental benefits

S. Korea

8

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?

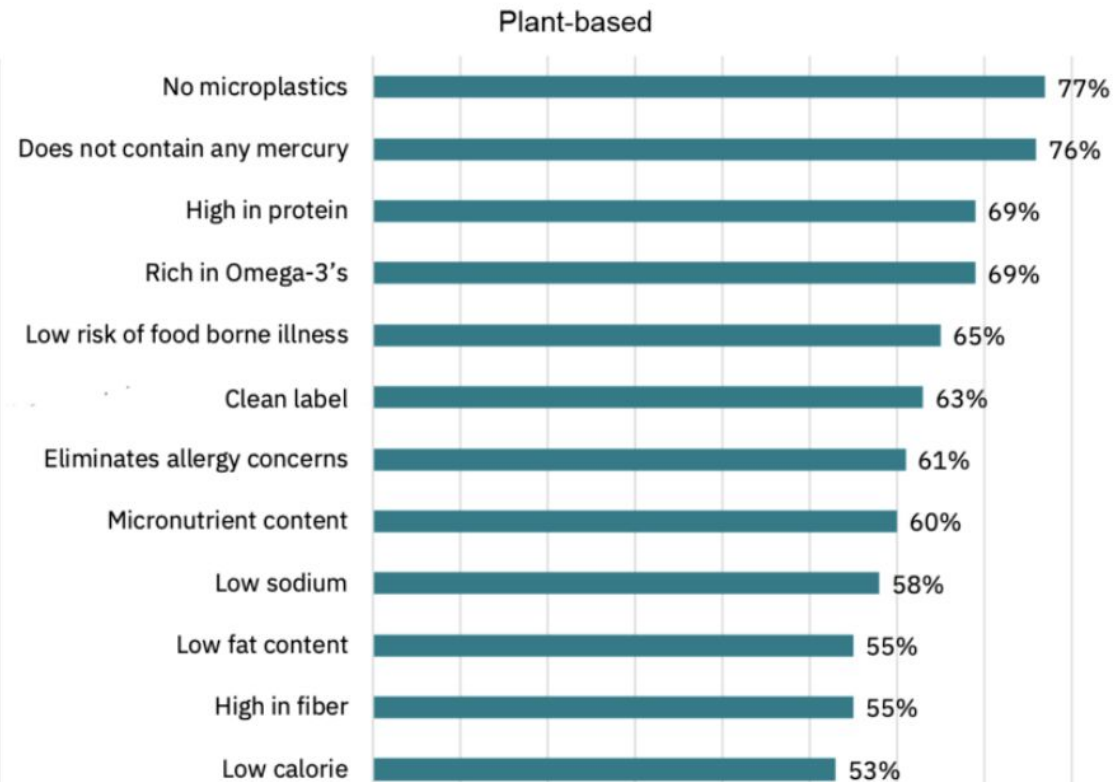
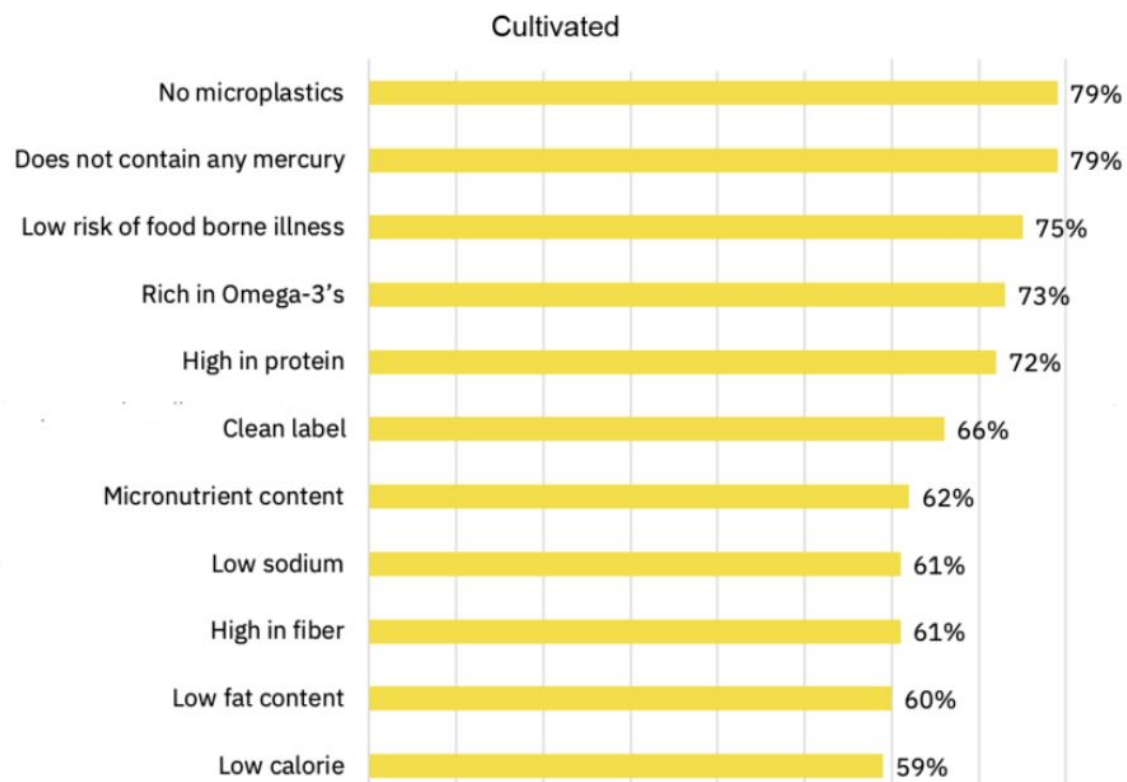


# Health benefits

S. Korea

9

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?

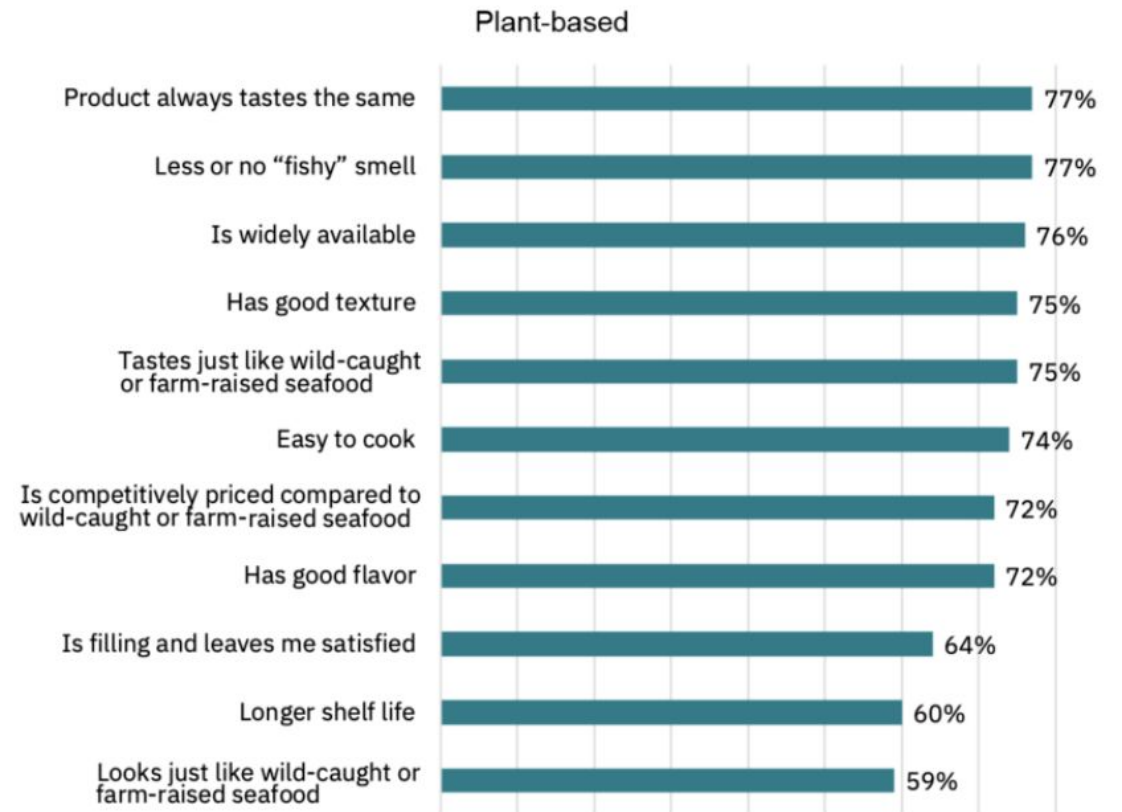
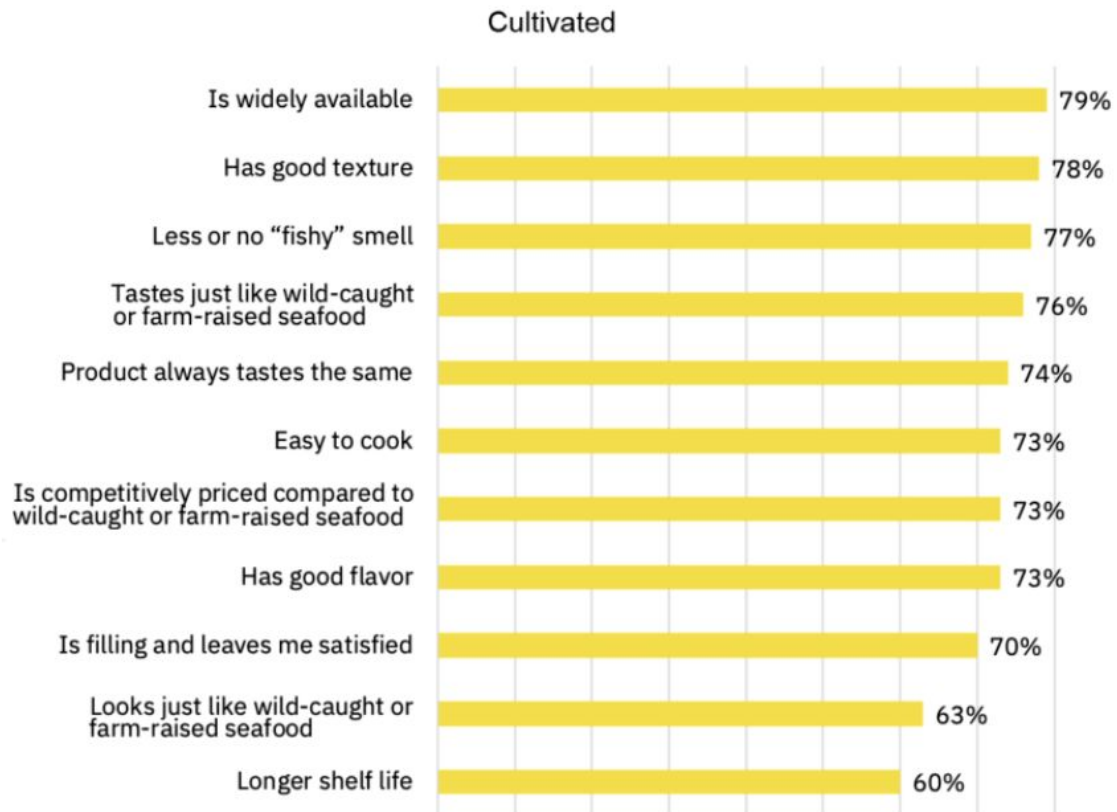


# Product benefits

S. Korea

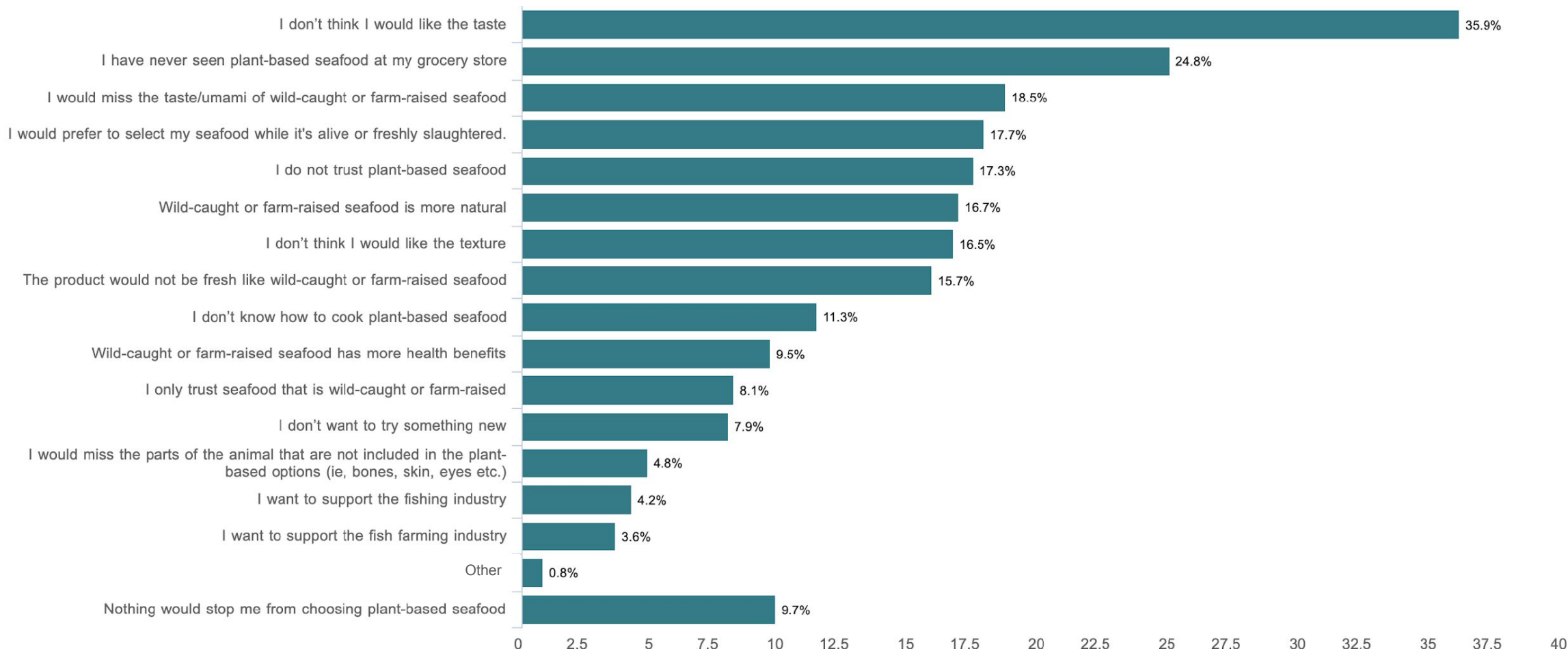
10

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

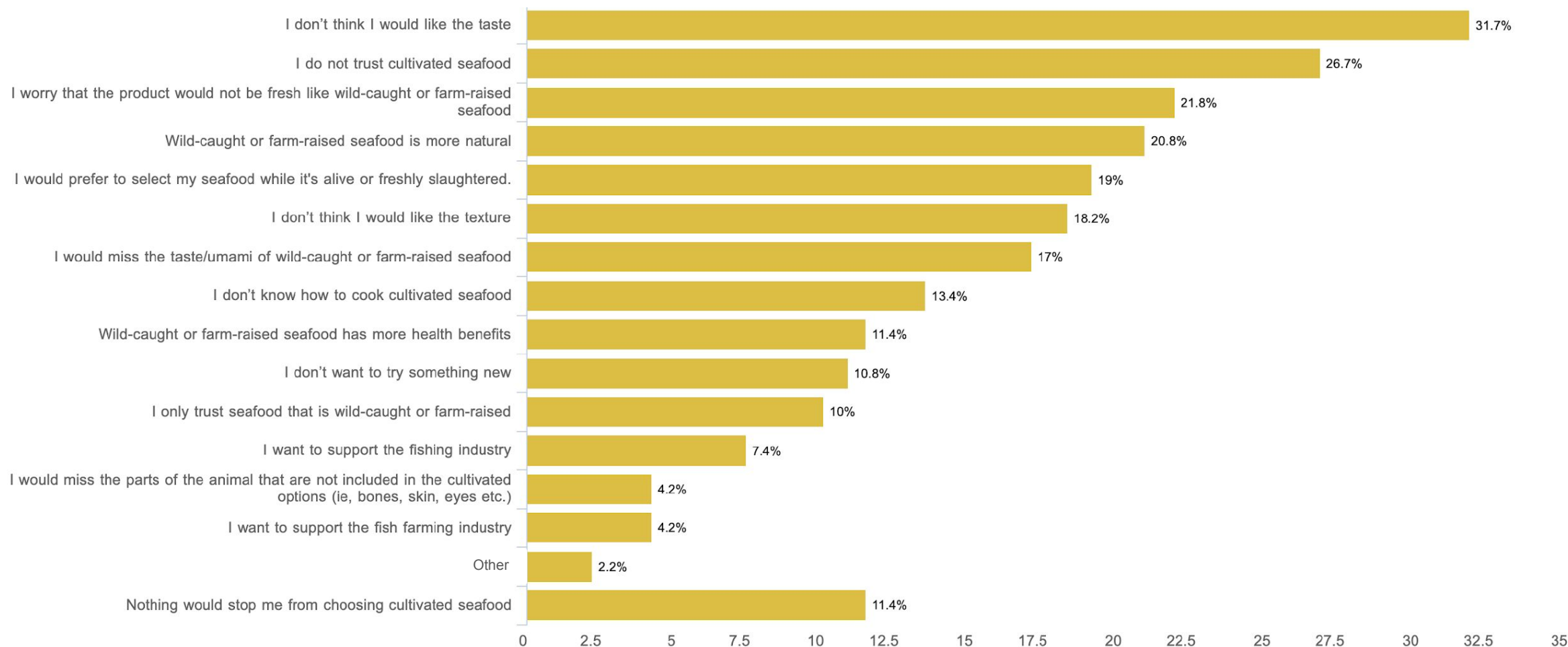
Which of the following might stop you from choosing plant-based seafood?



N = 504

# Consumption barriers: cultivated

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



N = 501

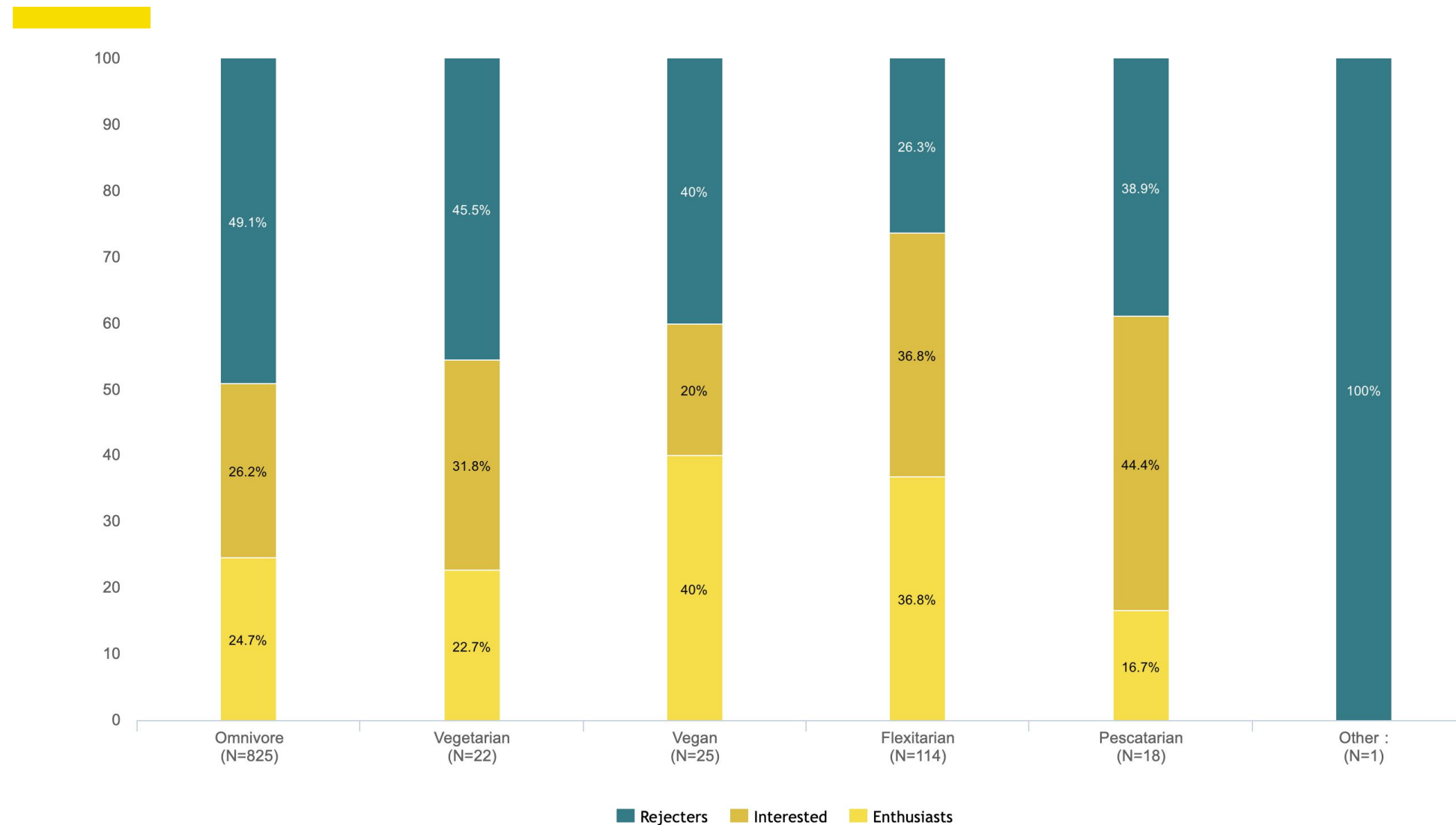
# Consumer segmentation by demographic

98.6 percent of respondents were ethnically Korean. Chinese, Vietnamese, and American respondents comprised the remaining 1.4 percent.

Demographic	Alt seafood enthusiasts (26%)	Alt seafood interested (28%)	Alt seafood rejectors (46%)
Average age	41: <ul style="list-style-type: none"><li>• 41% Millennials</li><li>• 44% Gen Xers</li></ul>	43: <ul style="list-style-type: none"><li>• Highest representation of Gen Xers (46%)</li></ul>	43: <ul style="list-style-type: none"><li>• Highest representation of Boomers (18%)</li></ul>
Female/male ratio	52/48	49/51	50/50
Monthly household income information (national average was 3M won in 2021)	Average income: 5.8M won	Average income: 5.9M won	Average income: 5.3M won

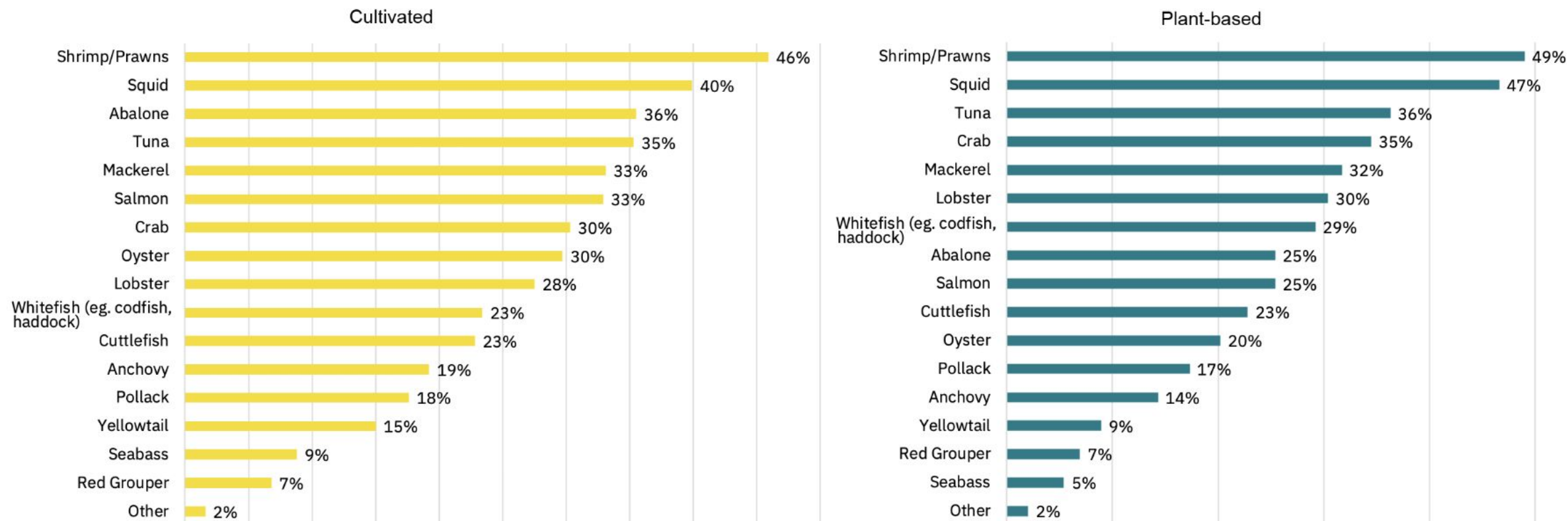
# Dietary preference by consumer type

What is your dietary preference?



# Species preference

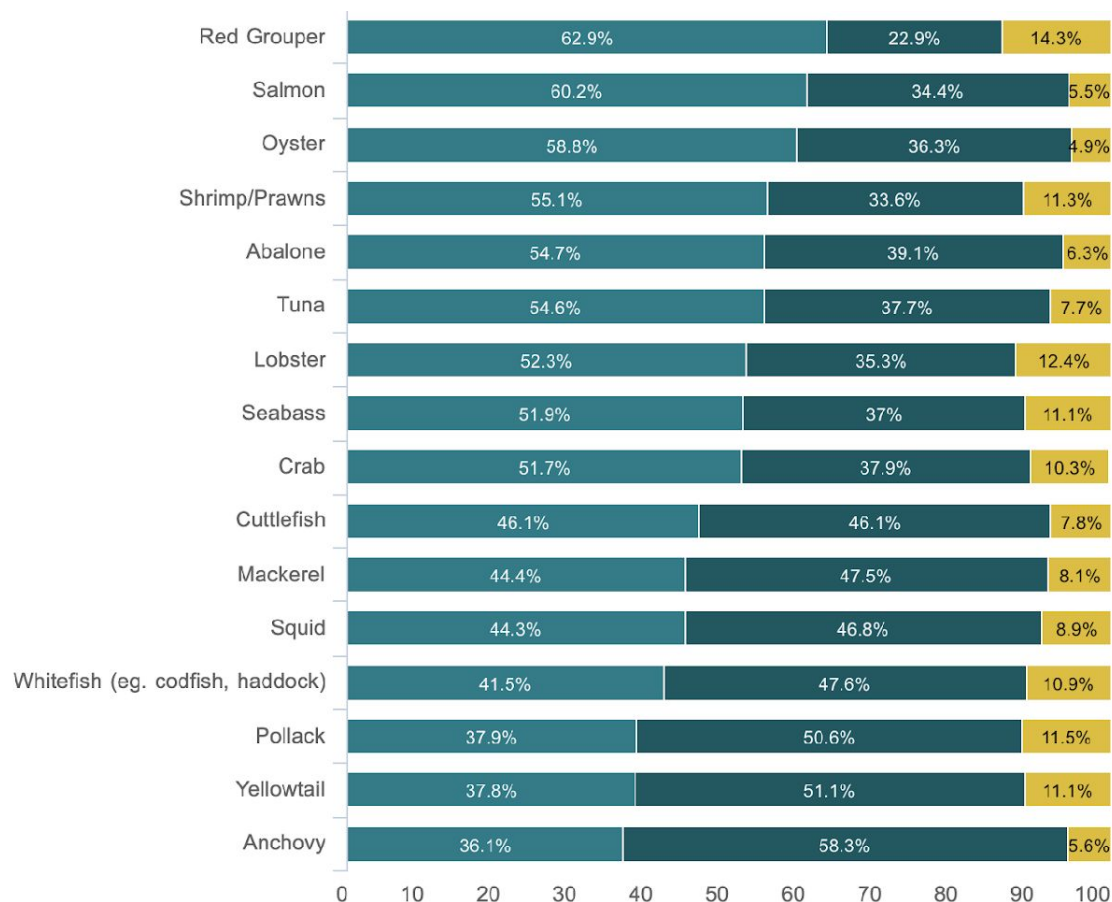
Imagine that alternative versions of the following species of fish and shellfish were available to you. Which would you be interested in purchasing?



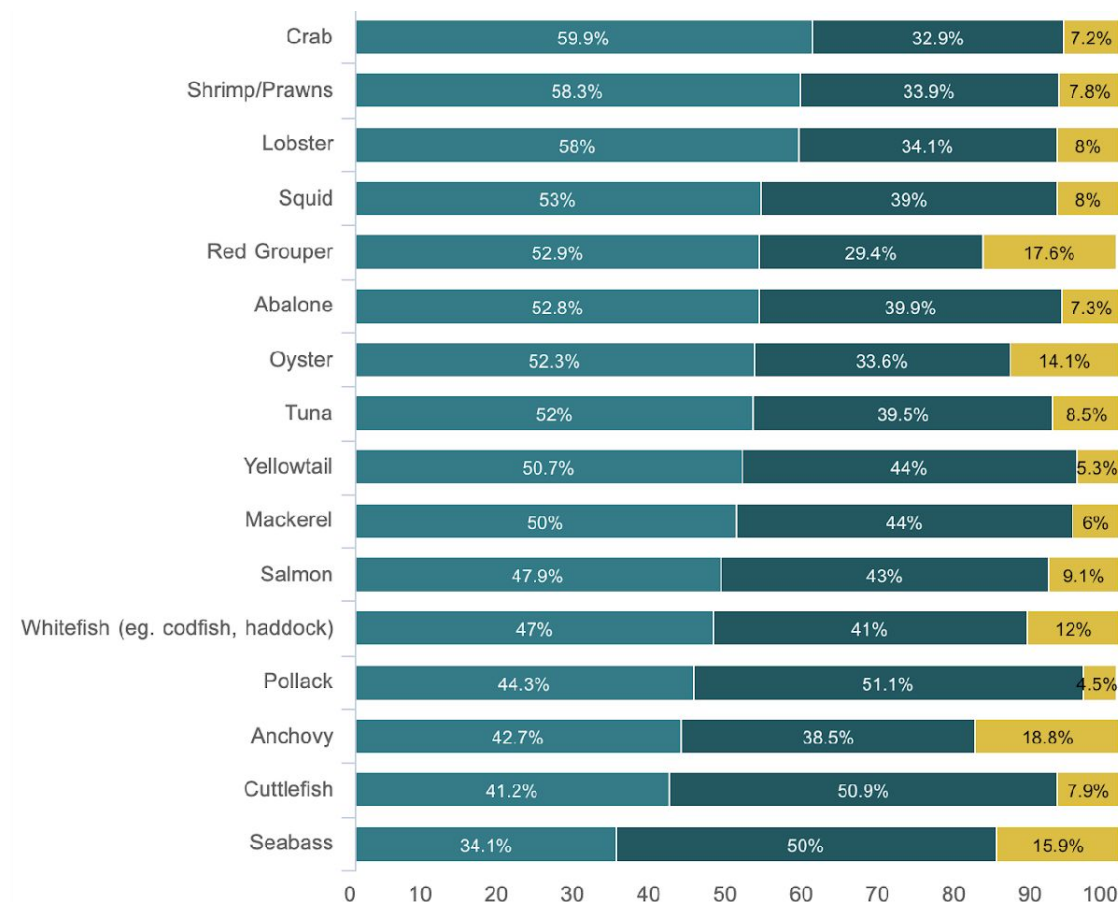
# Purchase intent

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

## Plant-based



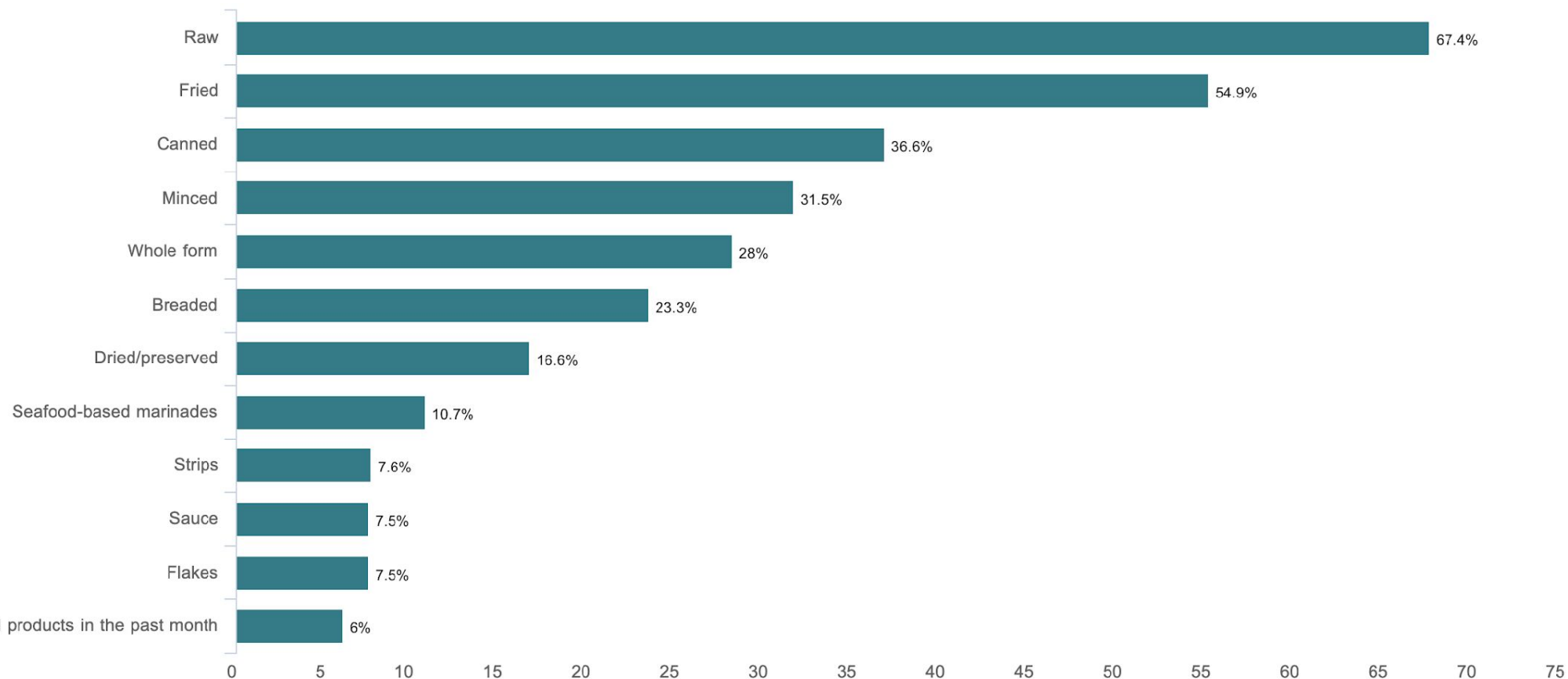
## Cultivated



Extremely interested Moderately interested Slightly interested

# Seafood form

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



# Food attitudes

