



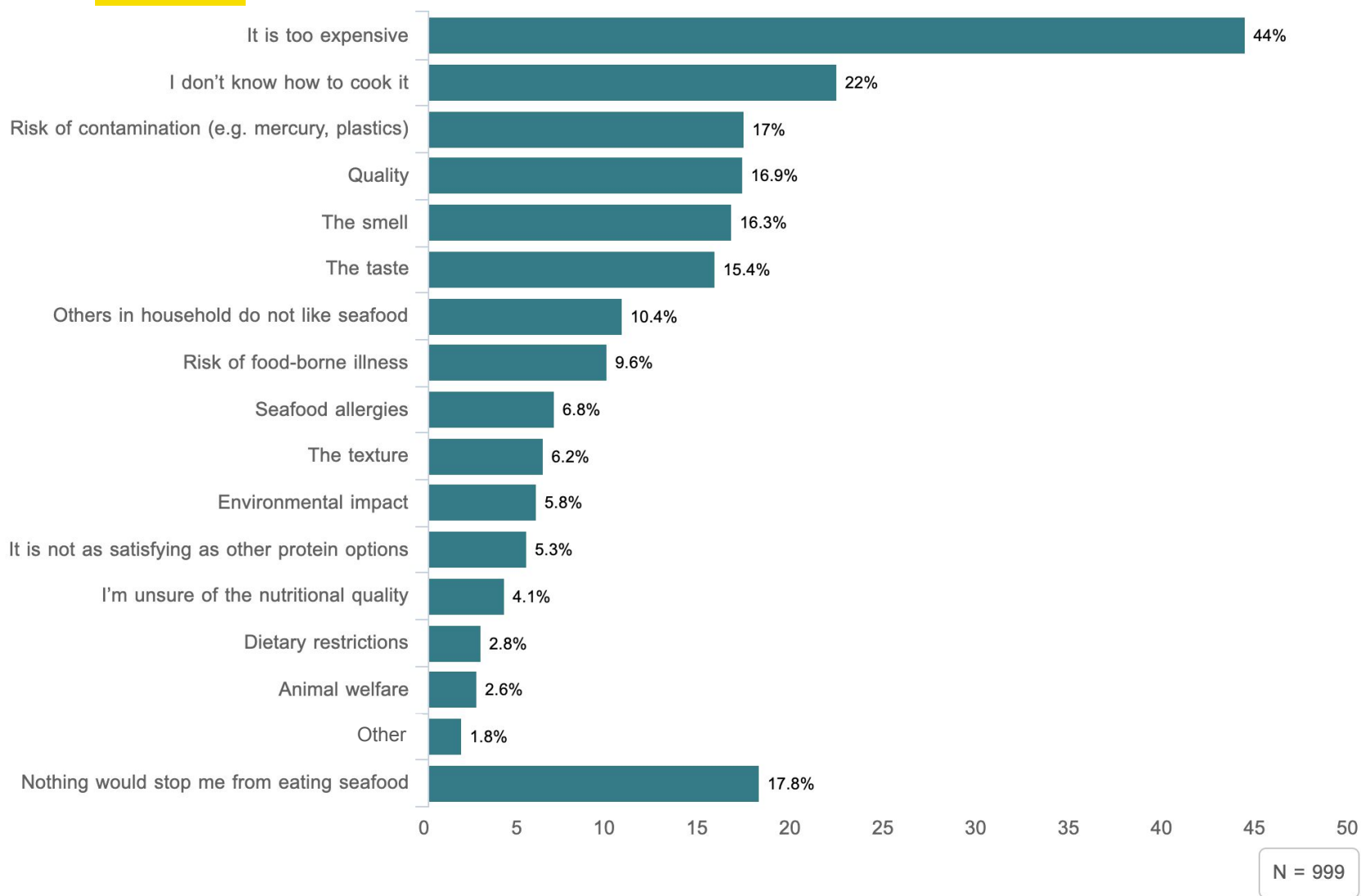
Alternative seafood consumer research

Japan

Research conducted by GFI and Getwizer

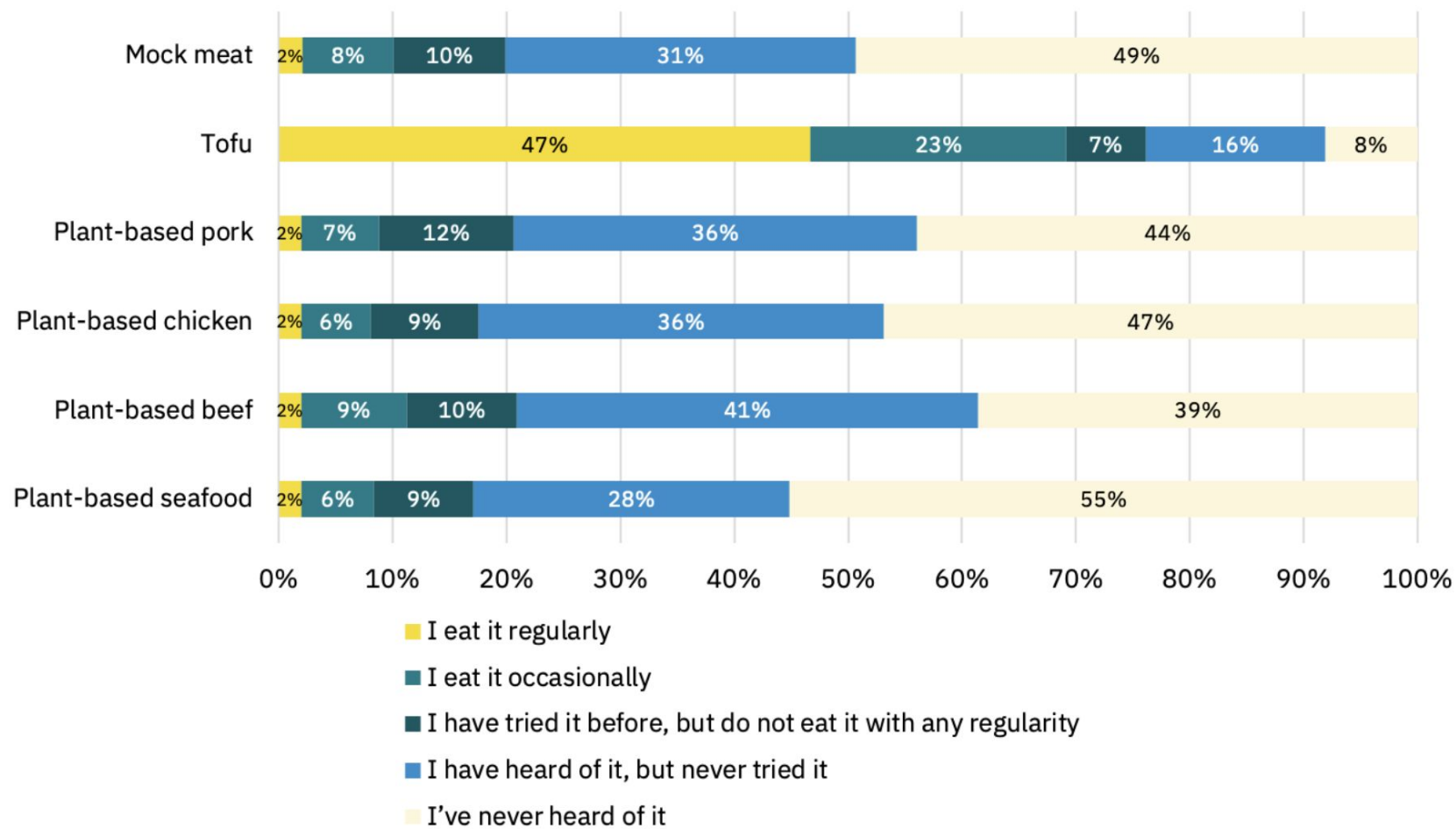
Conventional seafood consumption barriers

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



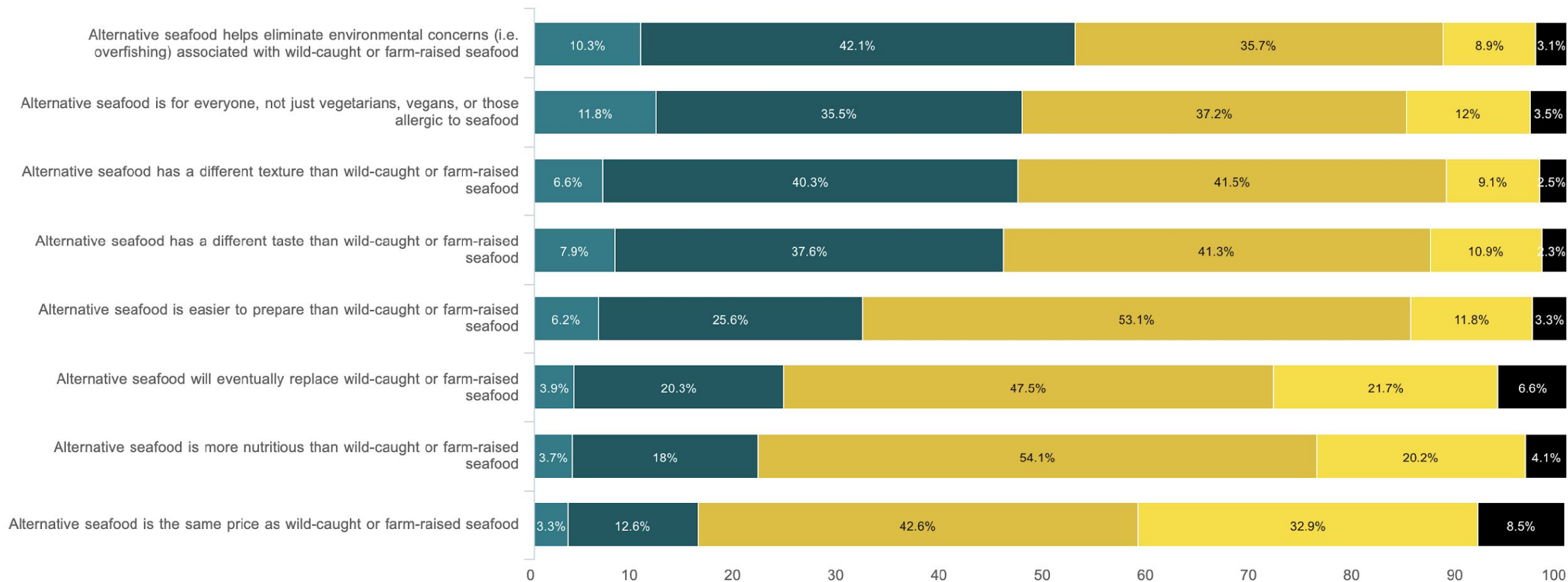
Alternative protein familiarity

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?



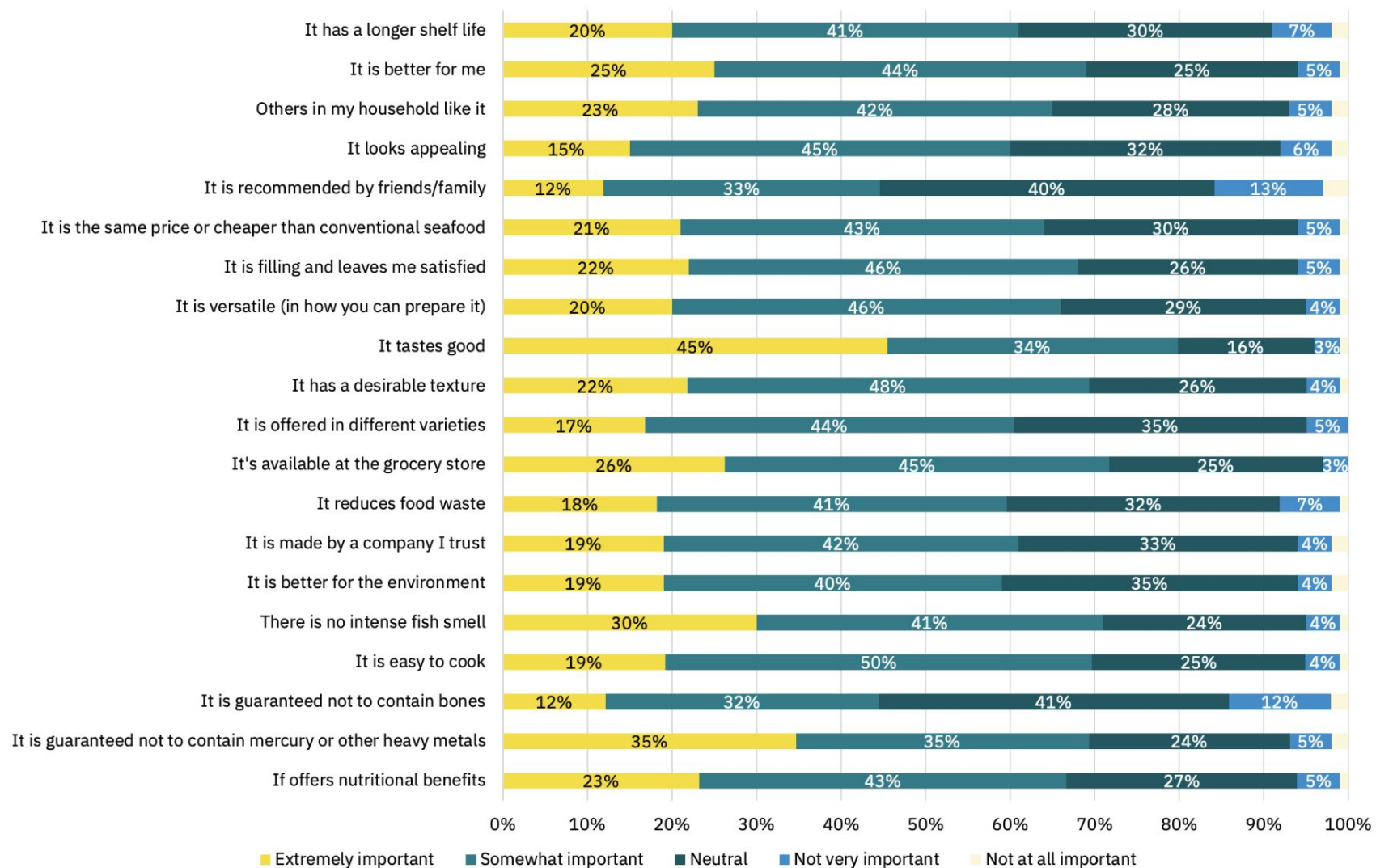
■ Completely agree
 ■ Somewhat agree
 ■ Neutral
 ■ Somewhat disagree
 ■ Completely disagree

N = 516



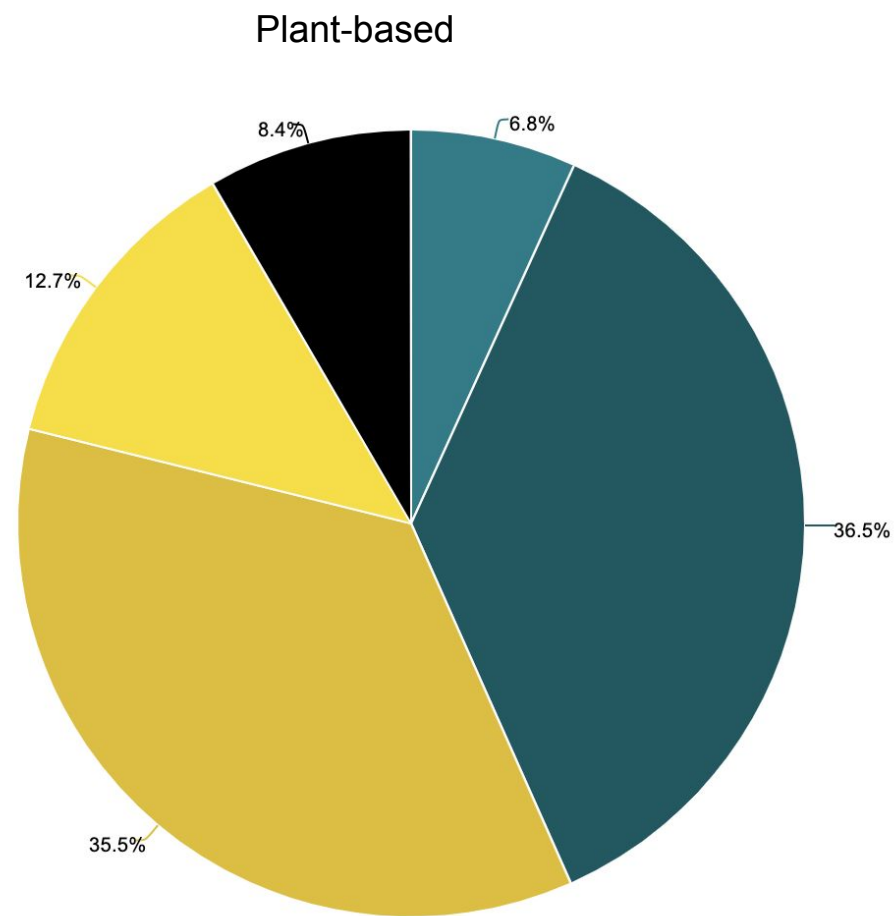
Alternative seafood drivers

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

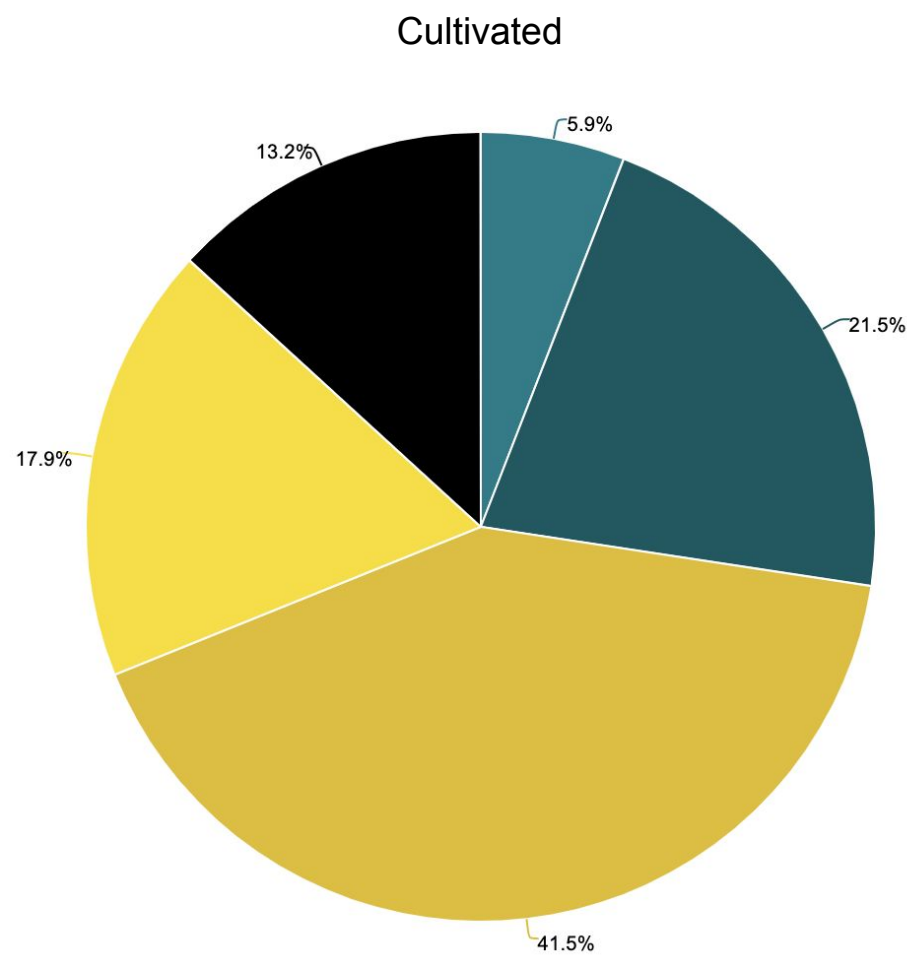


Appeal

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



N = 512



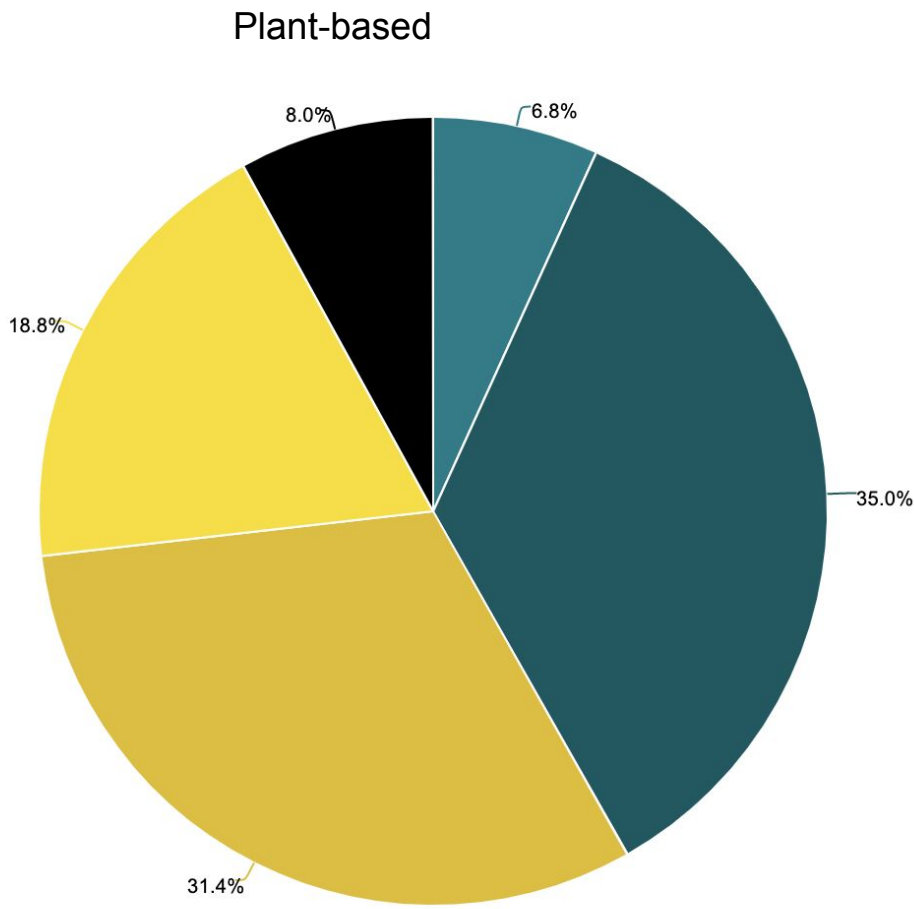
N = 508

■ Very appealing
 ■ Somewhat appealing
 ■ Neutral
 ■ Somewhat unappealing
 ■ Not at all appealing

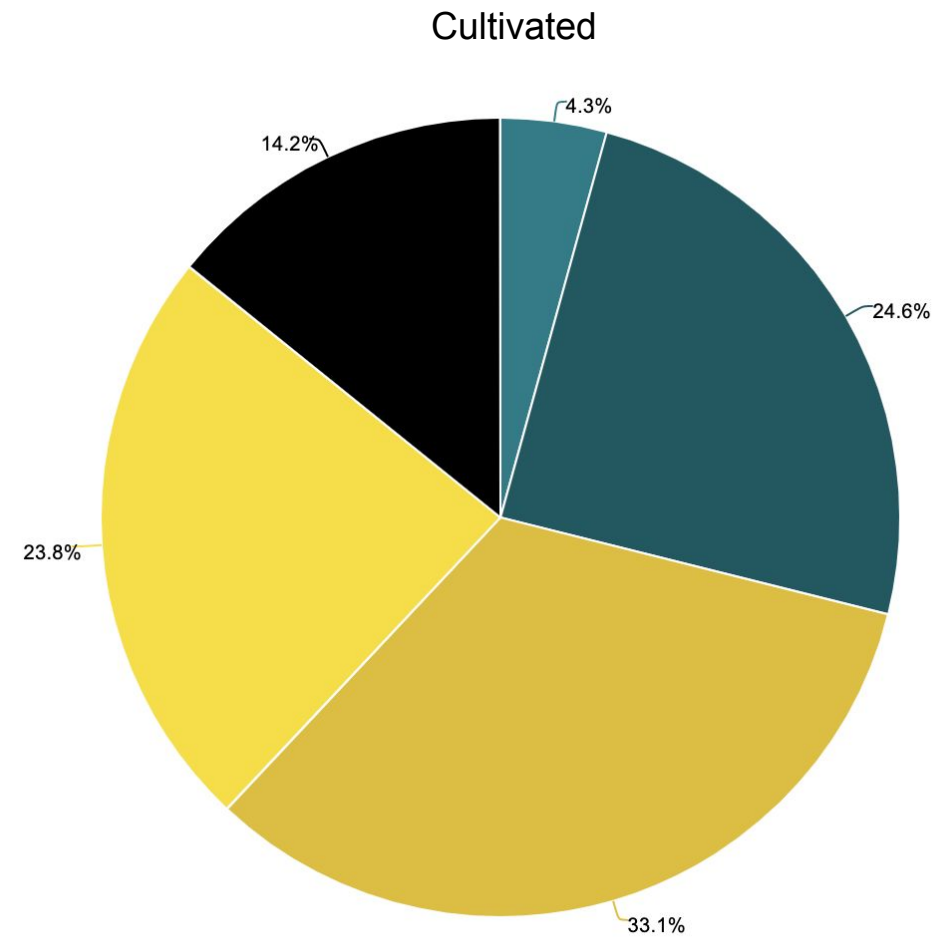


Future consumption

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



N = 512



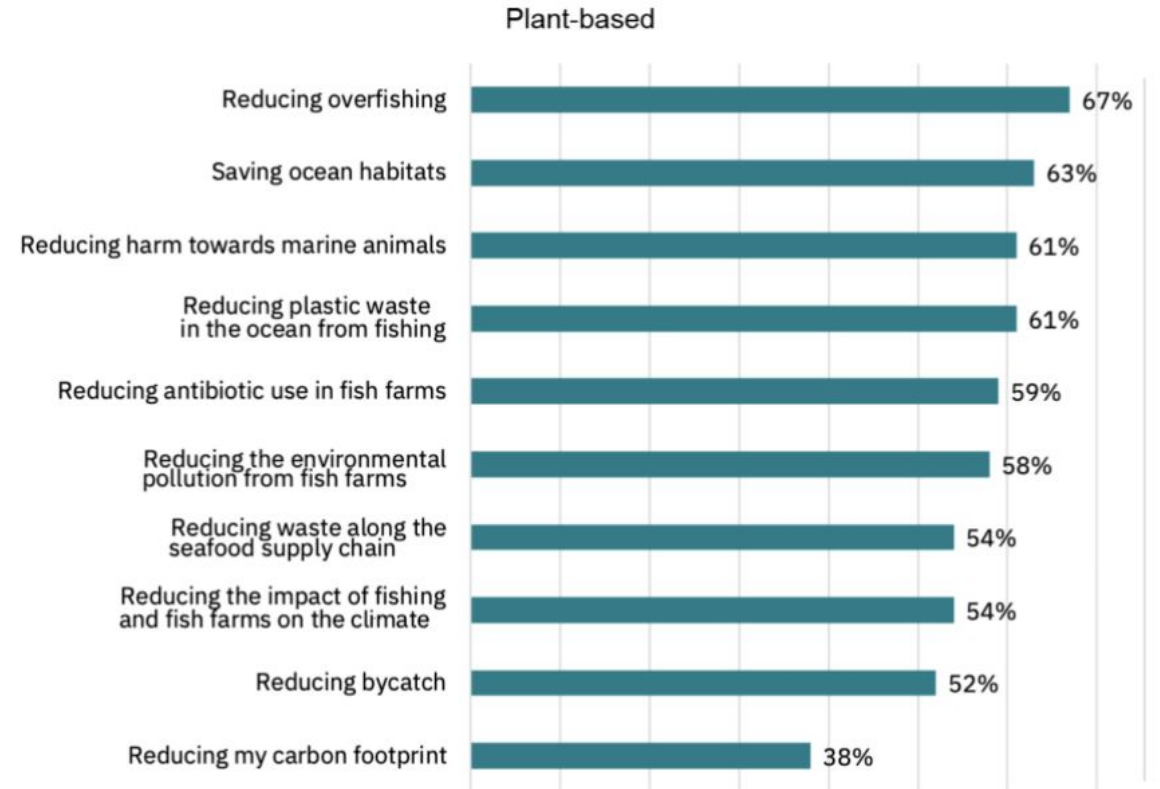
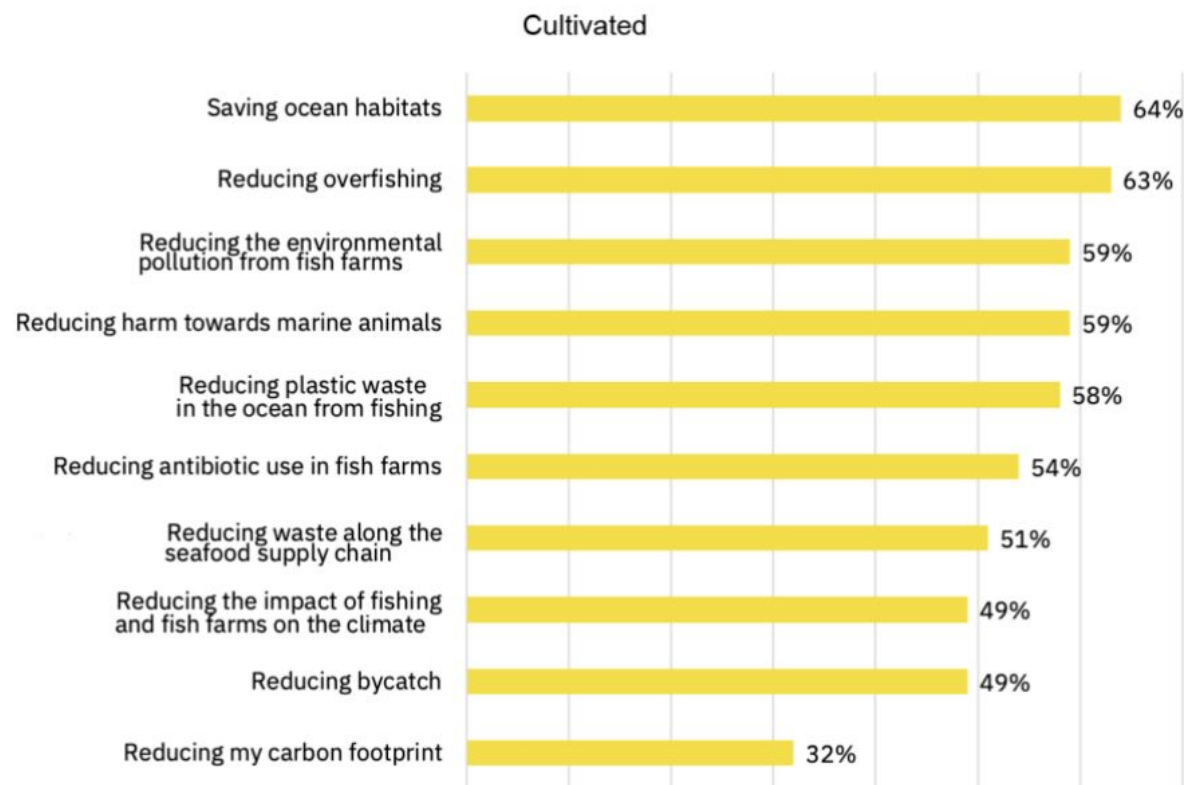
N = 508

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



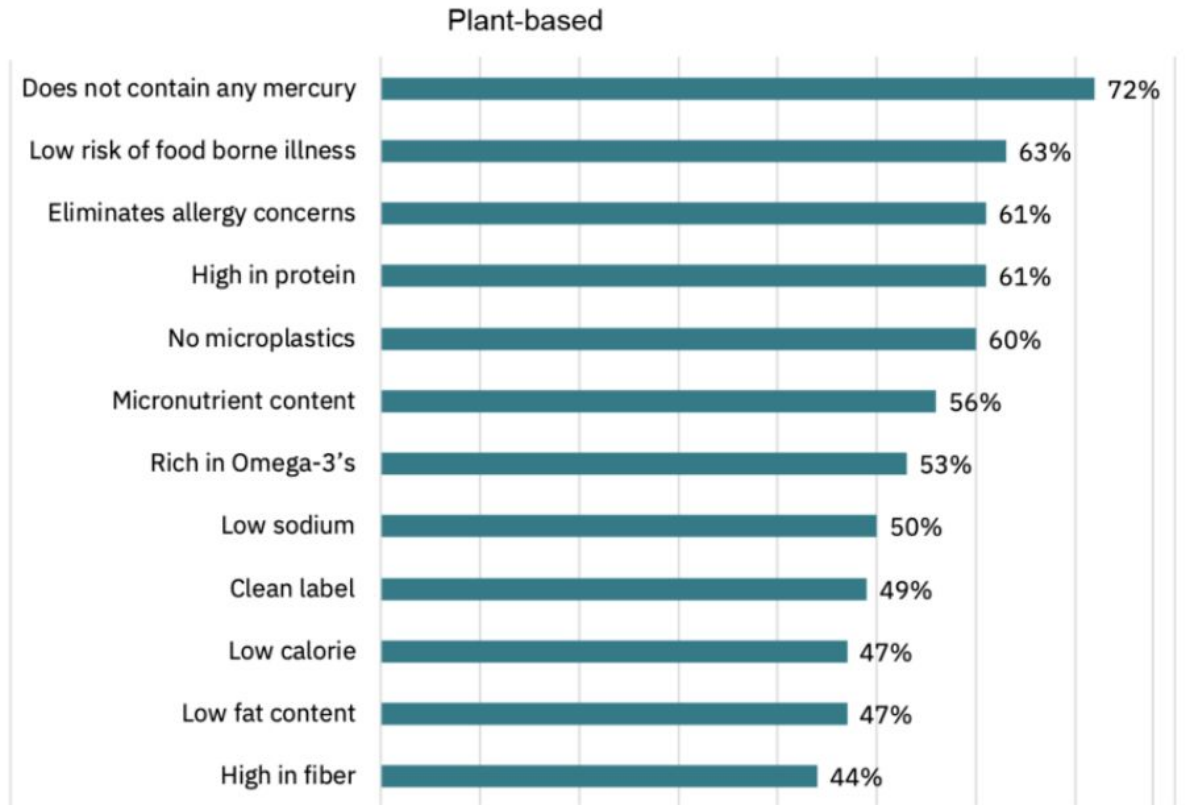
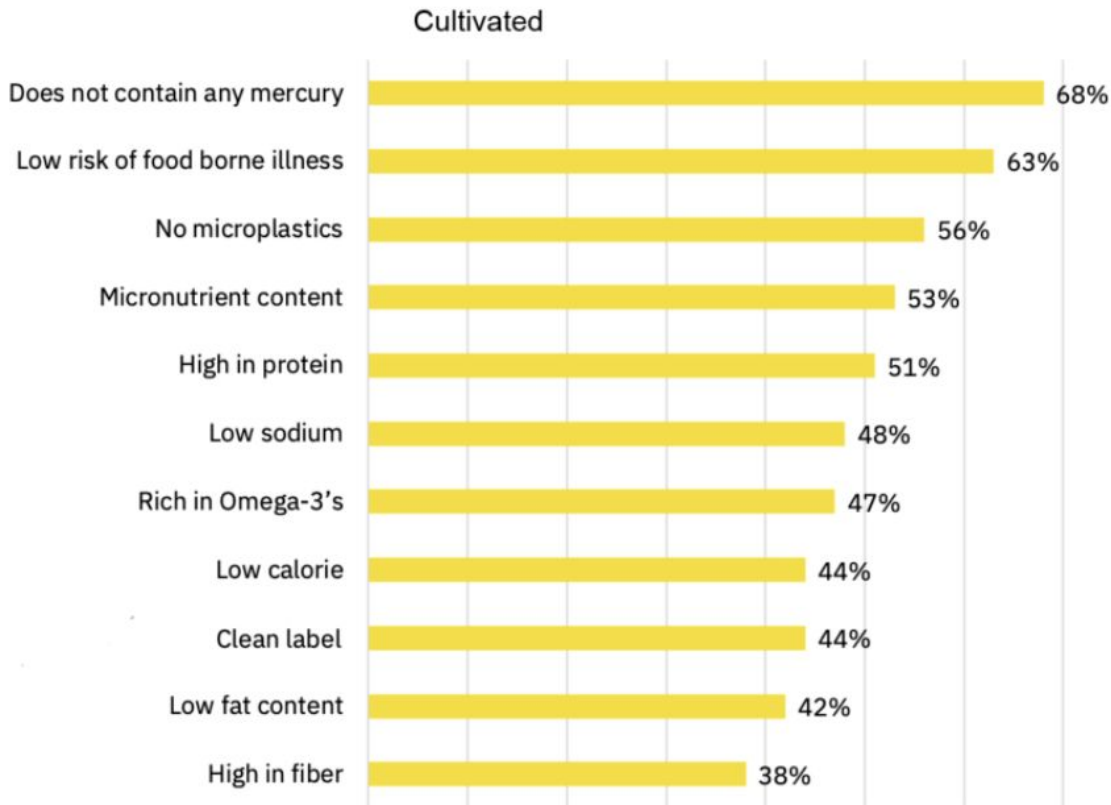
Environmental benefits

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?



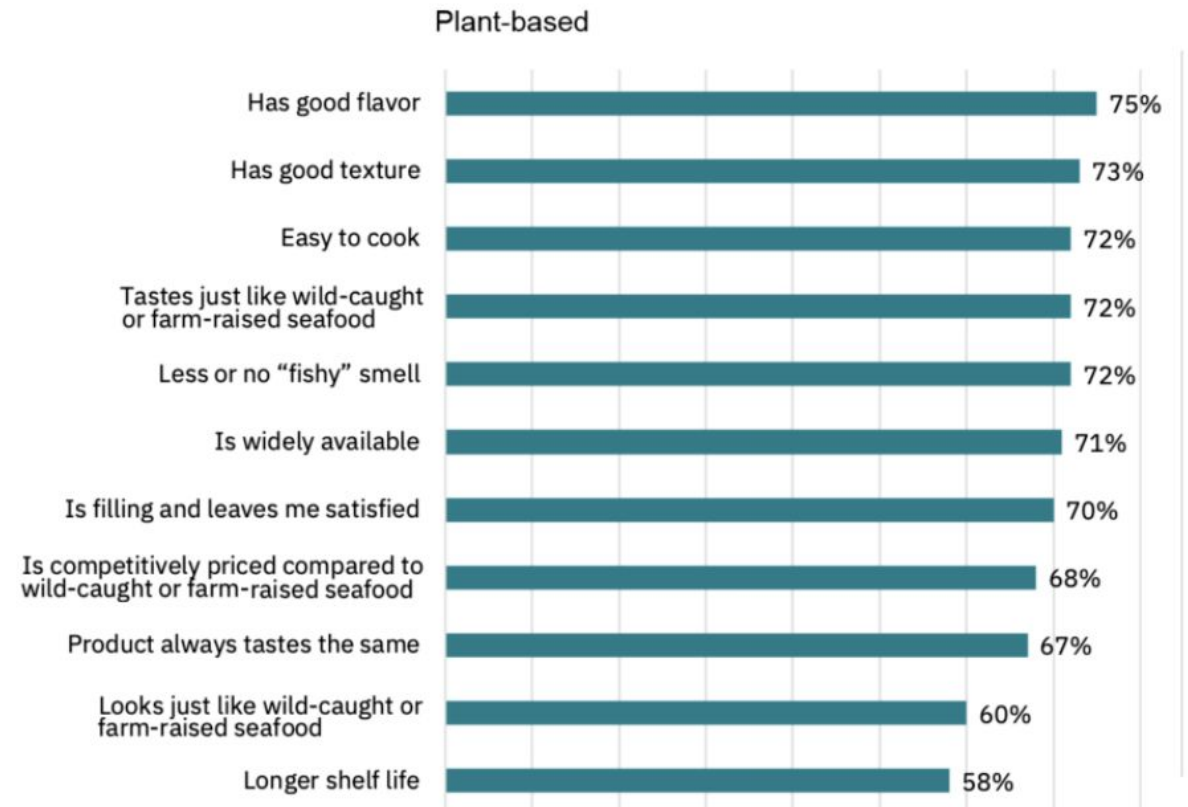
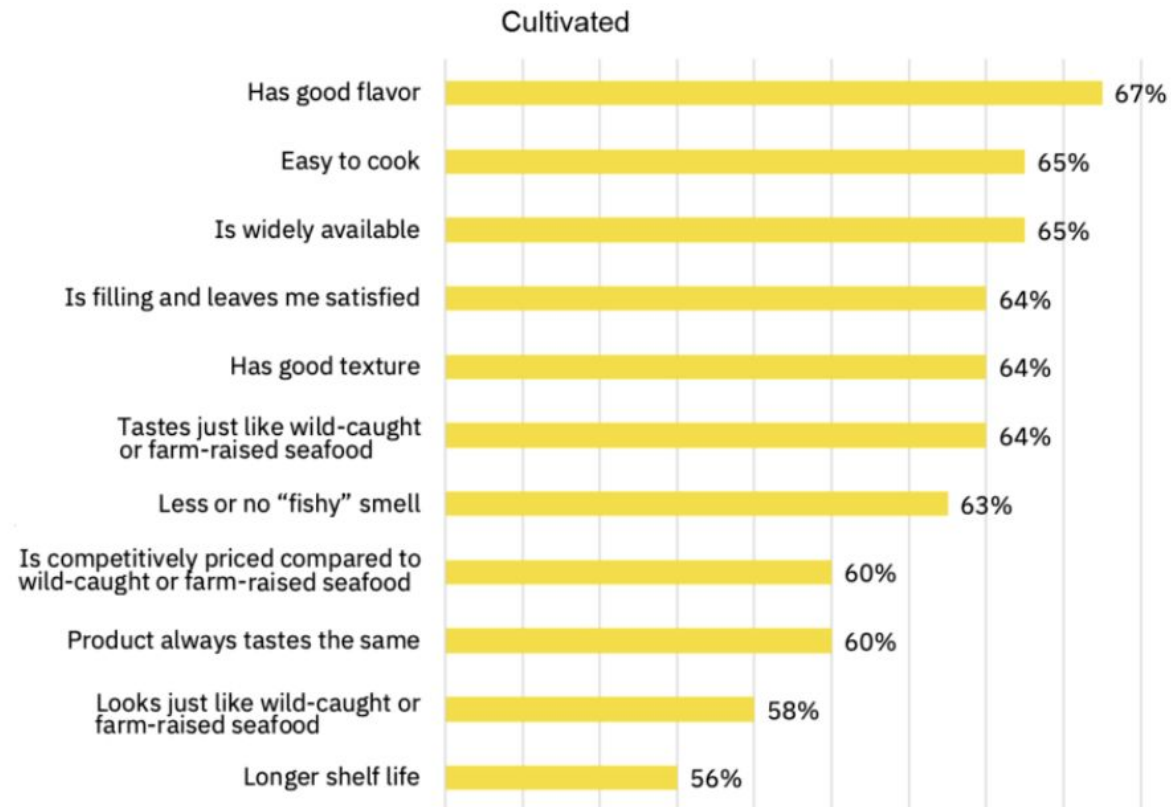
Health benefits

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?



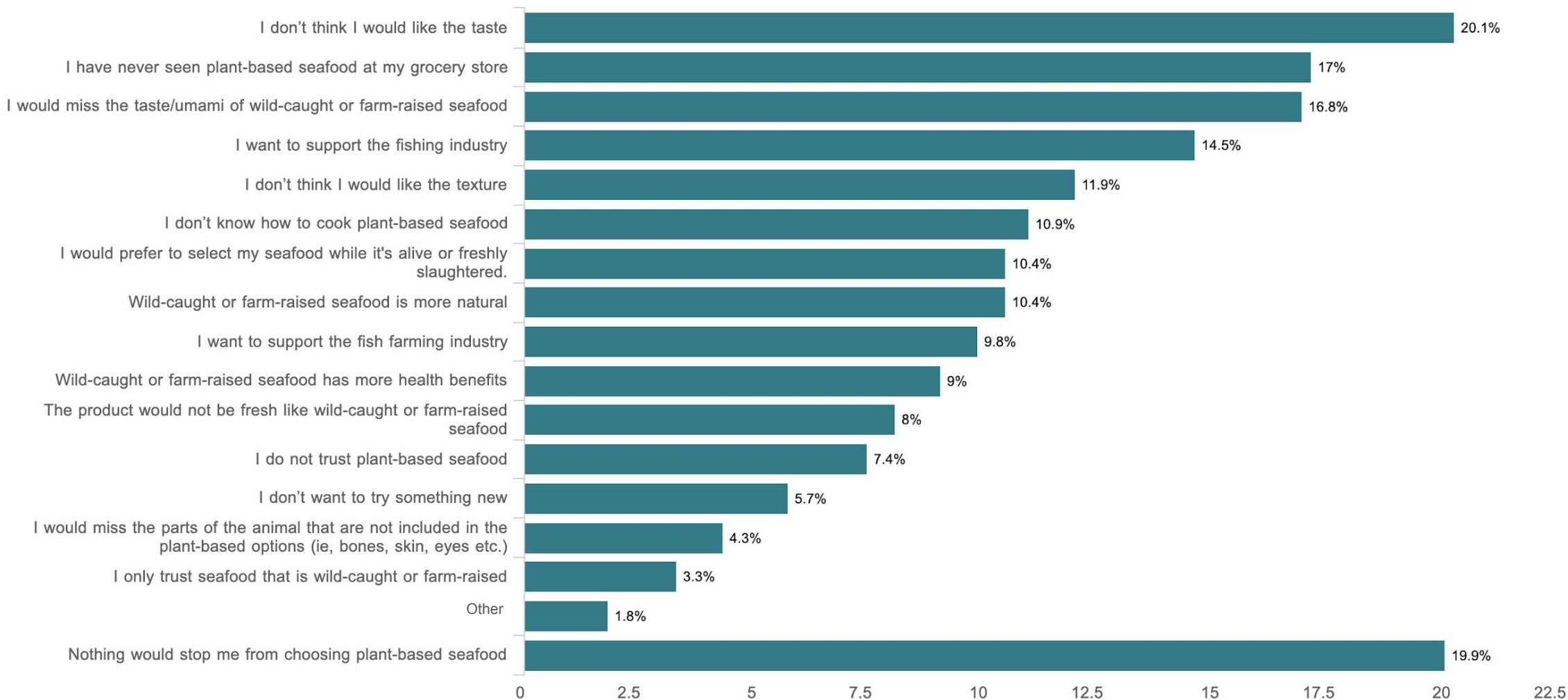
Product benefits

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?

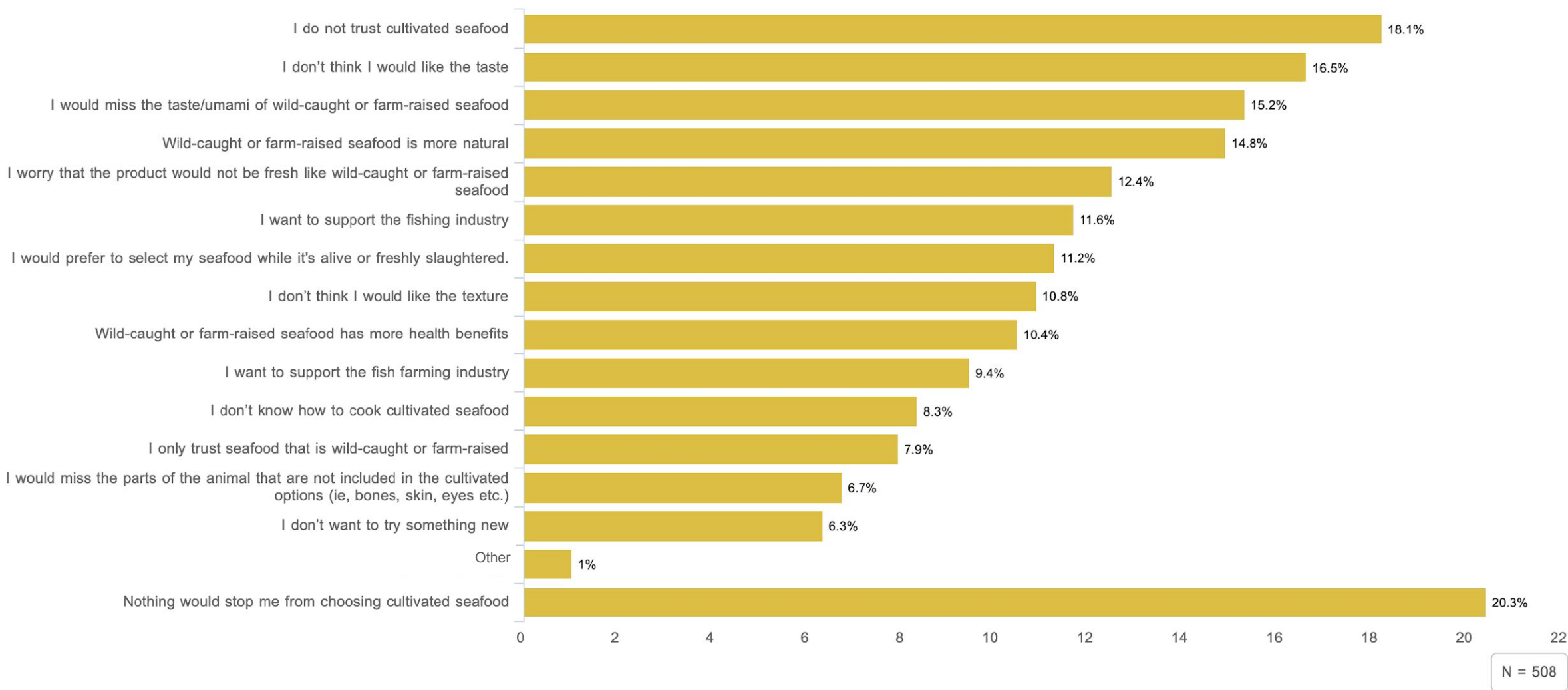


N = 512



Consumption barriers: cultivated

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



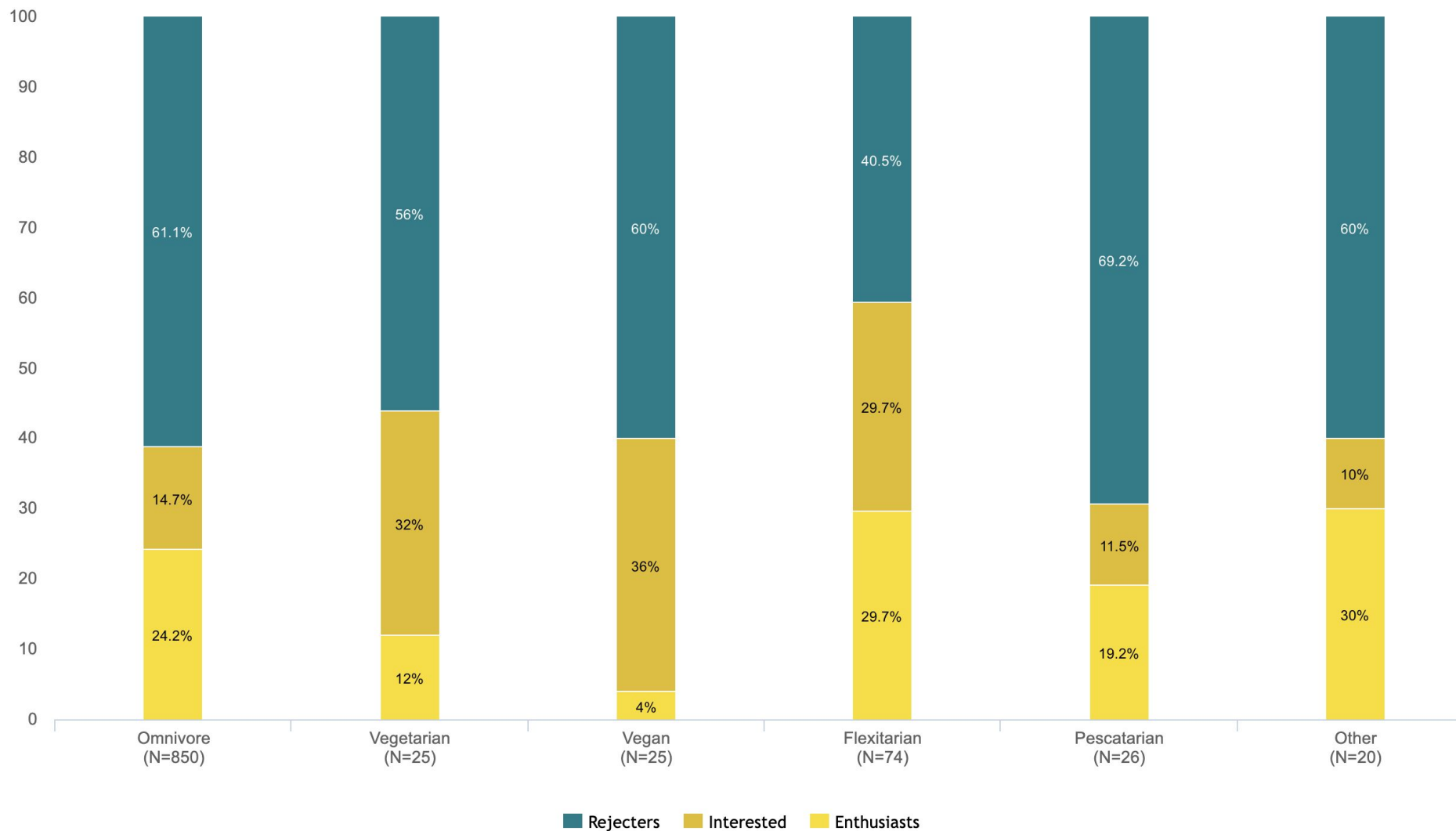
Consumer segmentation by demographic

The vast majority (99.3 percent) of people surveyed were Japanese in nationality, with Chinese, Korean, and Filipino comprising the remaining 0.7 percent.

Demographic	Alt seafood enthusiasts (24%)	Alt seafood interested (17%)	Alt seafood rejectors (59%)
Average age	40: <ul style="list-style-type: none"> • 41% Millennials • 33% Gen Xers 	40: <ul style="list-style-type: none"> • ~70% are Millennials or Gen Xers 	42: <ul style="list-style-type: none"> • Highest representation of Gen Xers and Boomers (combined 70%)
Female/male ratio	46/53	46/53	52/48
Monthly household income information (national average was 307k yen in 2021)	Average income: 513k yen	Average income: 417k yen	Average income: 430k yen

Dietary preference by consumer type

What is your dietary preference?

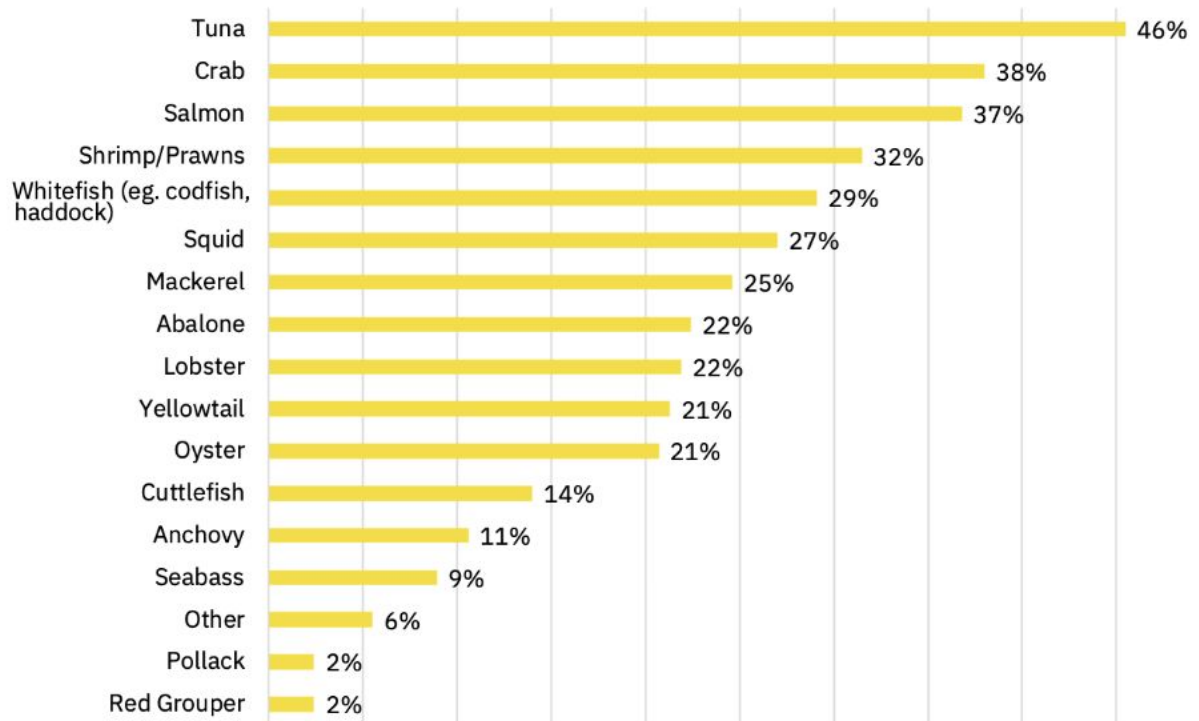


Species preference

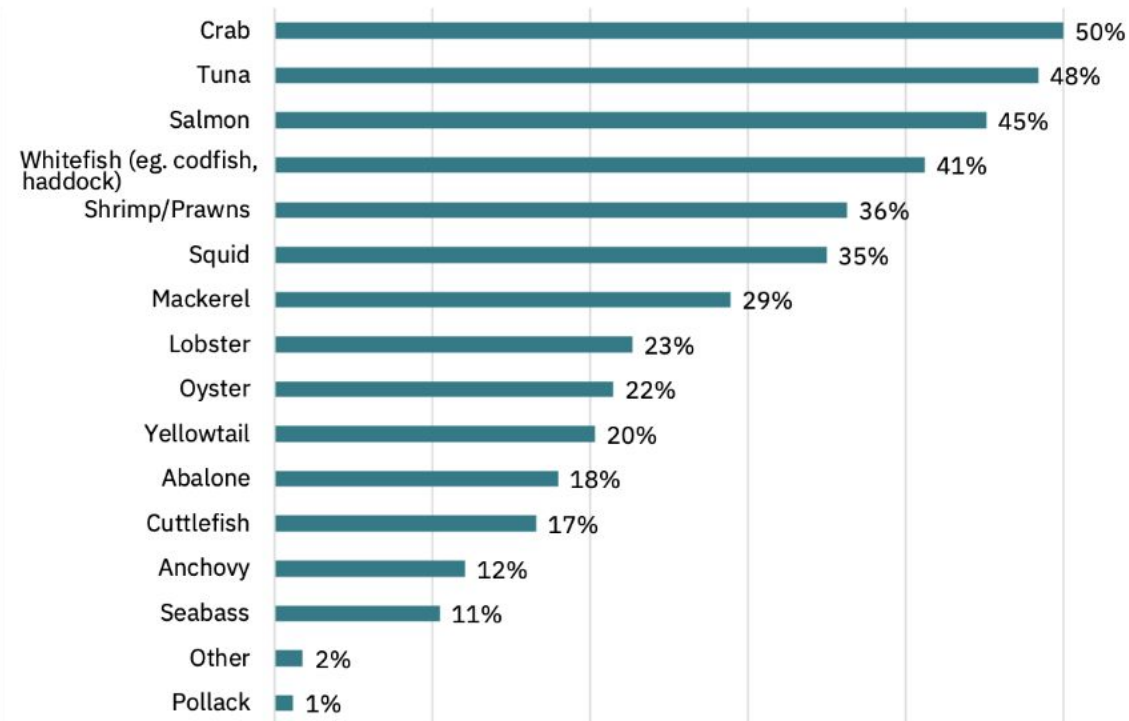
Imagine that alternative versions of the following species of fish and shellfish were available to you. Which would you be interested in purchasing?



Cultivated



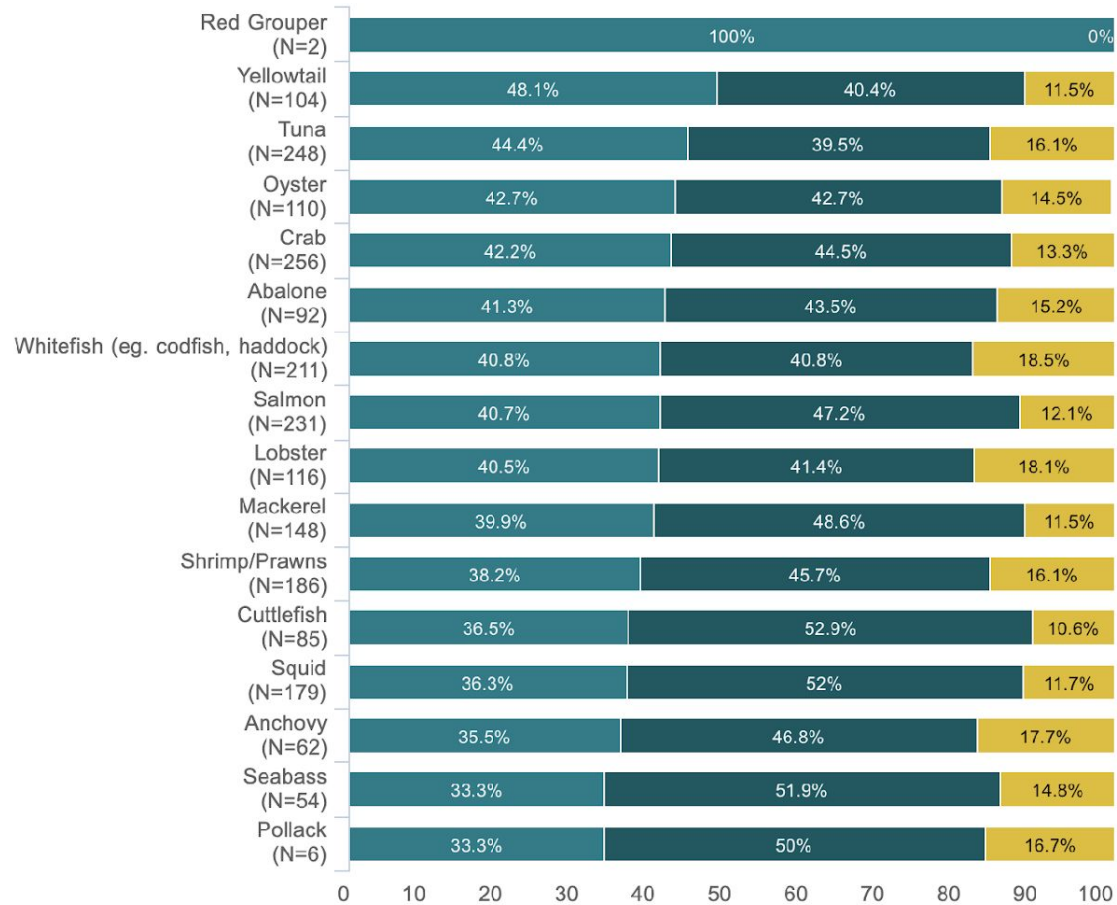
Plant-based



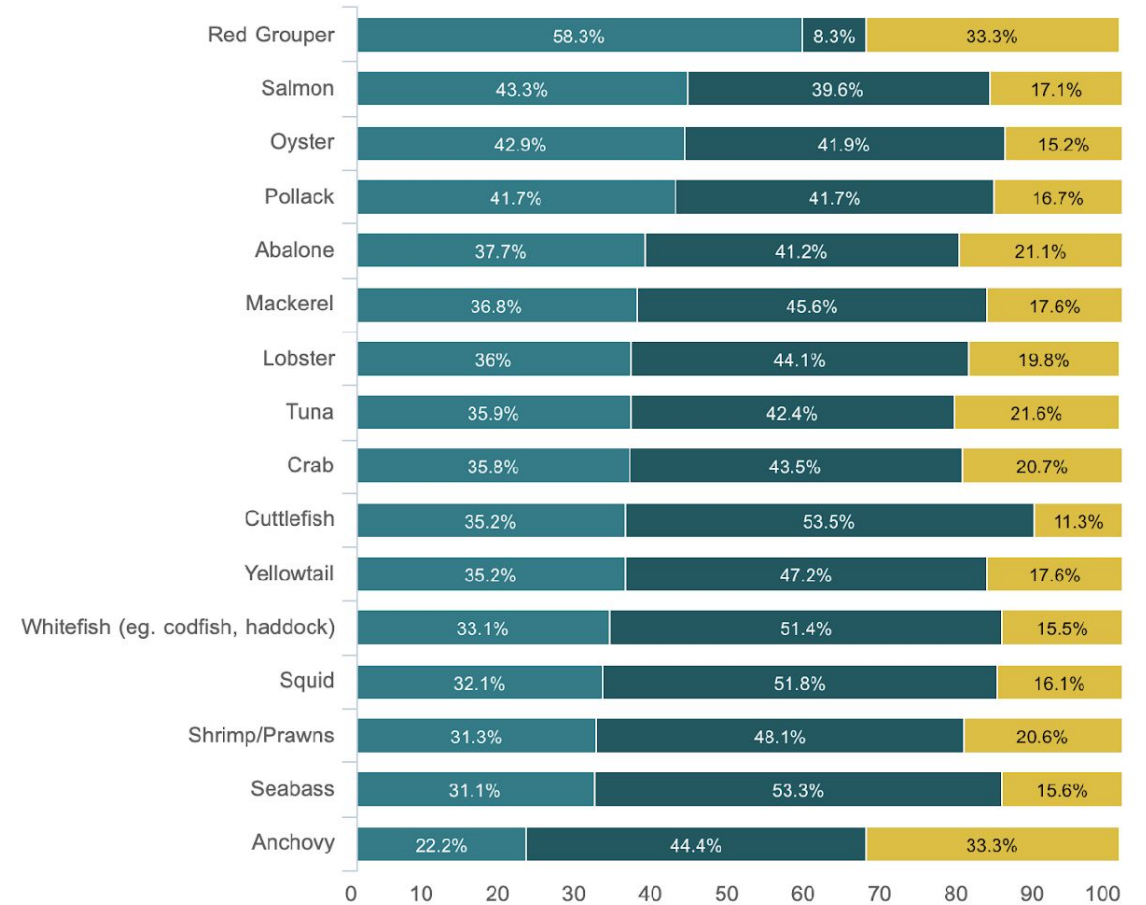
Purchase intent

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

Plant-based



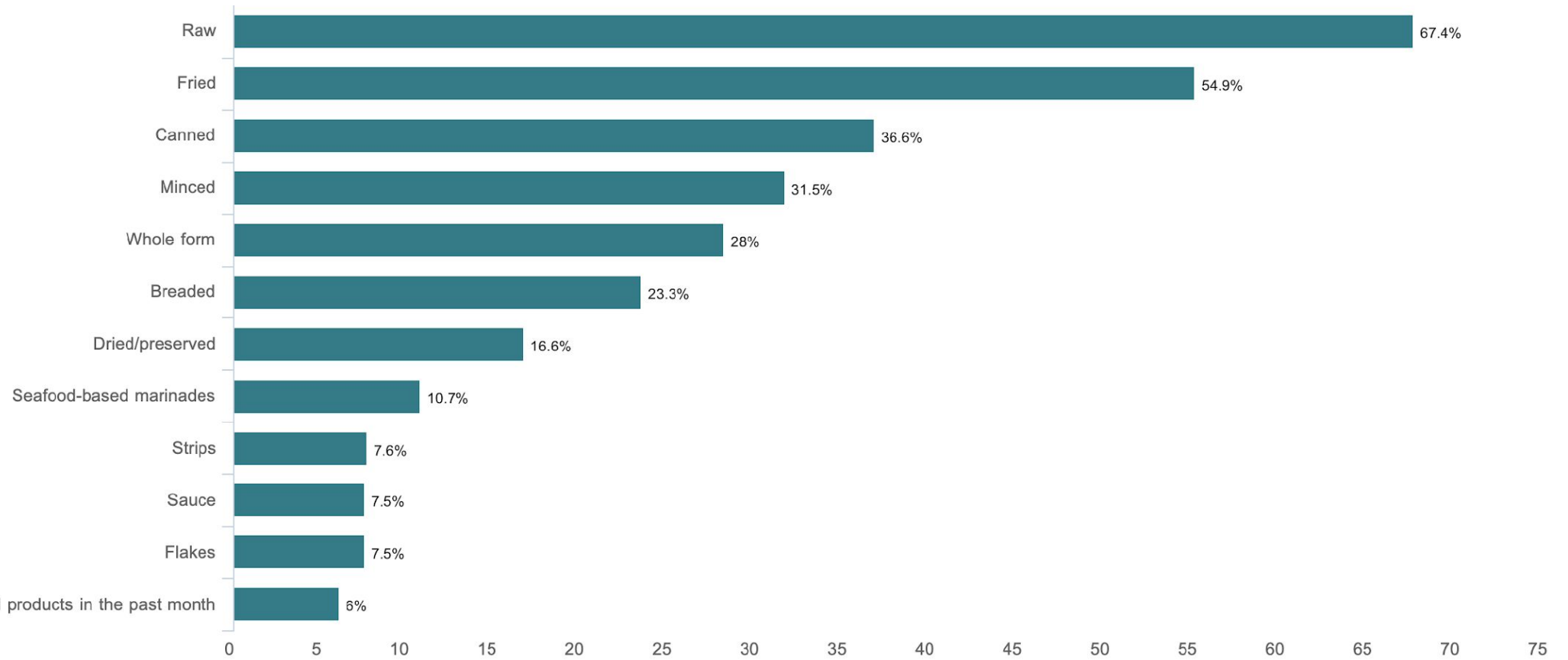
Cultivated



Extremely interested Moderately interested Slightly interested

Seafood form

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



Food attitudes

