



The Potential for Sustainable Diet Transitions: Insights from a Perception Survey of Plant-Based and Cultivated Meat

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01

SURVEY OVERVIEW

Survey Purpose and Design



1-1. Survey Purpose

A type test and questionnaire were conducted among visitors to the 2026 Vegan Festa & Green Festa, exploring the relationship between diet and the climate crisis, as well as perceptions of alternative proteins (plant-based and cell-cultivated meat).

01 Type Test

Type Classification Based on 6 Questions

- Level of concern about the climate crisis
- Perceived impact of the climate crisis
- Plant-based dietary orientation
- Perception of low-carbon diet
- Willingness to consume alternative proteins
- Attitude towards government intervention

02 Alternative Protein Perception Survey

Alternative Protein Perception Survey Items

- Perception of the term “alternative foods” (by type/age)
- Plant-based meat consumption frequency (by type/age)
- Reasons for consuming plant-based meat (by type/age)
- Barriers to regular consumption of plant-based meat (by type/age)
- Willingness to consume more plant-based meat in the future (by plant-based meat consumption frequency/type/age)
- Conditions driving consumption of plant-based meat (by type/age)
- Awareness of cell-cultivated meat (by type/age/plant-based meat consumption frequency)
- Willingness to try cell-cultivated meat (by type/age/awareness/plant-based meat consumption frequency)
- Reasons for willingness to try cell-cultivated meat (by type/age)
- Barriers to trying cell-cultivated meat (by type/age)

1-2. Survey Design

Organization

Solutions for Our Climate (SFOC)

Respondents

Visitors of the 2026 Vegan Festa & Green Festa

Method

① Run event booth → ② Booth visitors scan QR code → ③ Mobile type test & questionnaire

Period

March 27 (Fri) ~ 29 (Sun), 2026 (3 days total)

Sample

After removing insincere and duplicate responses, **1,324 respondents in total**

What's Your Planet-Friendly Diet Level?



02

Survey Results

Respondent Characteristics, Type Test,
and Key Findings



2-1. Responsible Characteristics — Gender / Age

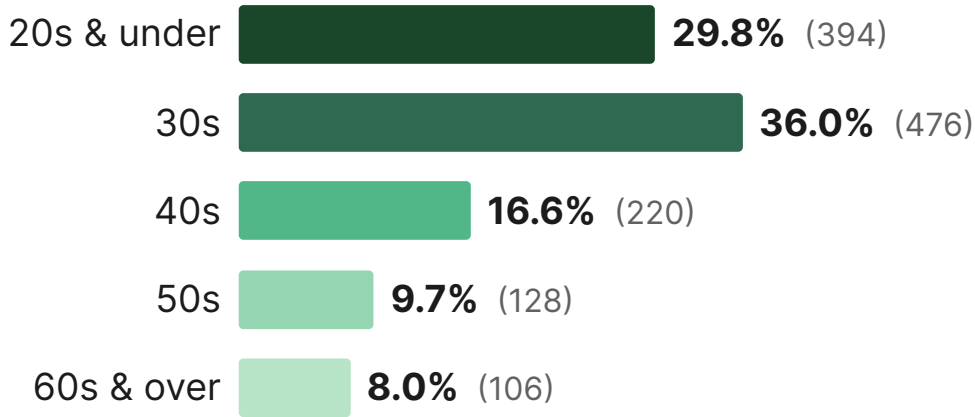
Total Respondents **1,324**

Gender



● Female 84.0% (1,112) ● Male 13.8% (183) ● N/A 2.2% (29)

Age



Summary & Interpretation: Respondent Characteristics

- Female respondents form a large majority at 84.0% (1,112), while men account for a relatively small share at 13.8% (183).
- Respondents in their 30s account for the largest share at 36.0% (476), followed by those aged 20 and under at 29.8%. In total, approximately 66% of respondents are in their 30s or younger.

2-2. Type Test Overview

Type Test Questions & Scores

Question Topic	Option 1 (1 pt)	Option 2 (2 pts)	Option 3 (3 pts)
Climate crisis priority	Top priority	Interested	Other social issues come first
Perceived climate impact	Feels threatening	Felt occasionally	Feels distant
Plant-based dietary orientation	Actively pursue	Somewhat interested	Rarely consider it
Low-carbon diet attitude	Actively practice it	Conditional support	Skeptical
Willingness to consume alternative proteins	Happy to try	Considering it	Won't eat it
Government intervention	Strongly support	Industry support first	Oppose intervention

Type Classification Criteria

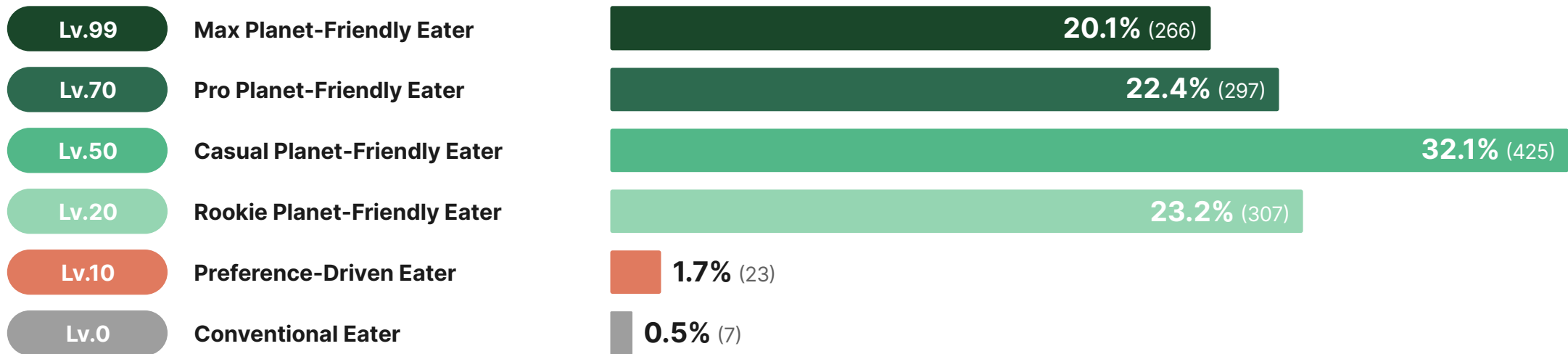
Score Range	Level	Type Name
6 – 7 pts	Lv.99	Max Planet-Friendly Eater
8 – 9 pts	Lv.70	Pro Planet-Friendly Eater
10 – 11 pts	Lv.50	Casual Planet-Friendly Eater
12 – 14 pts	Lv.20	Rookie Planet-Friendly Eater
15 – 16 pts	Lv.10	Preference-Driven Eater
17 – 18 pts	Lv.0	Conventional Eater

What is a Planet-Friendly Eater?

Someone who practices and consumes a 'sustainable, eco-friendly diet' to protect the planet and cut carbon emissions.

2-3. Respondent Types

Total respondents **1,324**



Result Summary & Interpretation: Respondent Types

- Max Planet-Friendly Eater (Lv.99) makes up 20.1% (266), the most active core segment driving the climate action and dietary transition.
- Pro Planet-Friendly Eater (Lv.70, 22.4%) and Casual Planet-Friendly Eater (Lv.50, 32.1%) together account for 54.5% (722) of respondents. Over half of respondents fall into this mid-level segment—while they are aware of the link between diet and the climate crisis, their behaviors have not yet fully shifted, indicating strong potential for transition toward more sustainable diets.
- Rookie Planet-Friendly Eater (Lv.20) makes up 23.2% (307), an early-stage group interested in climate and diet but with little hands-on practice.
- Preference-Driven Eater (Lv.10) and Conventional Eater (Lv.0) together account for just 2.2% (30), so only a tiny fraction of respondents show limited engagement with climate and diet issues.

Alternative Foods

Note: In South Korea, the term “alternative foods” is commonly used to refer to what is internationally known as “alternative proteins.”

What are Alternative Foods?

Foods made from plant-based ingredients, microorganisms, edible insects, or cell cultures, designed to replicate the taste, texture, and format of conventional meat, dairy, and seafood.

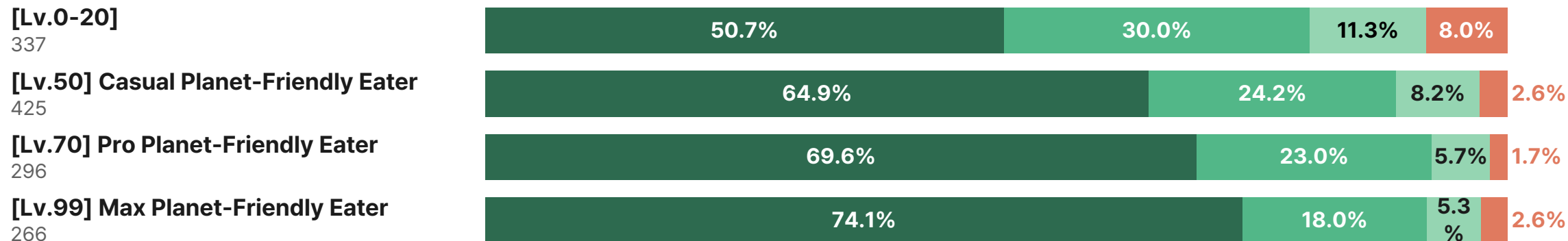
** In this survey, the term “alternative foods” was intentionally left undefined to capture respondents’ pre-existing perceptions.*

2-4. Perceptions of the term “alternative foods” - by Type

● Easy to understand ● Feels unfamiliar ● Not sure ● Feels negative



By Type



Result Summary & Interpretation: Perceptions of the term “alternative foods”

- The Lv.0-20 group answered ‘unfamiliar/unsure/negative’ a combined 49.3% — about half perceive a barrier with the term ‘alternative foods.’ Notably, their negative perception (8.0%) runs about 3–4 times higher than other groups, signaling relatively strong aversion and psychological barriers to the term.
- Comprehension rises with type level (Lv.0-20: 50.7% → Lv.99: 74.1%), yet even in the top Lv.99 group 25.9% answered ‘unfamiliar/unsure/negative,’ showing that the term ‘alternative foods’ itself has limits to being understood intuitively.

2-4. Perceptions of the term “alternative foods” — by Age

● Easy to understand ● Feels awkward ● Not sure ● Feels negative

Total

(n=1,324)

64.2%

24.2%

7.9%

3.8%

By Age

20s & under

394

67.8%

20.6%

8.1%

3.6%

30s

476

59.2%

29.0%

8.2%

3.6%

40s

220

61.4%

25.5%

6.8%

6.4%

50s

128

68.8%

20.3%

7.8%

3.1%

60s & over

106

73.6%

17.9%

7.5%

0.9%

Result Summary & Interpretation: Perceptions of the term “alternative foods”

- The 20s show higher comprehension than the 30s and a pattern similar to the 50s. From the 30s onward, comprehension tends to increase with age.
- Comprehension is relatively high among those in their 50s and older (68.8–73.6%), likely reflecting a more health- and plant-conscious sample. This finding contrasts with the common assumption that older individuals have lower comprehension of new terms or concepts.
- Those in their 40s show the highest negative perception (6.4%) of any age group, suggesting the term ‘alternative foods’ may trigger more resistance in this group, indicating the need for careful consideration of terminology in communication.

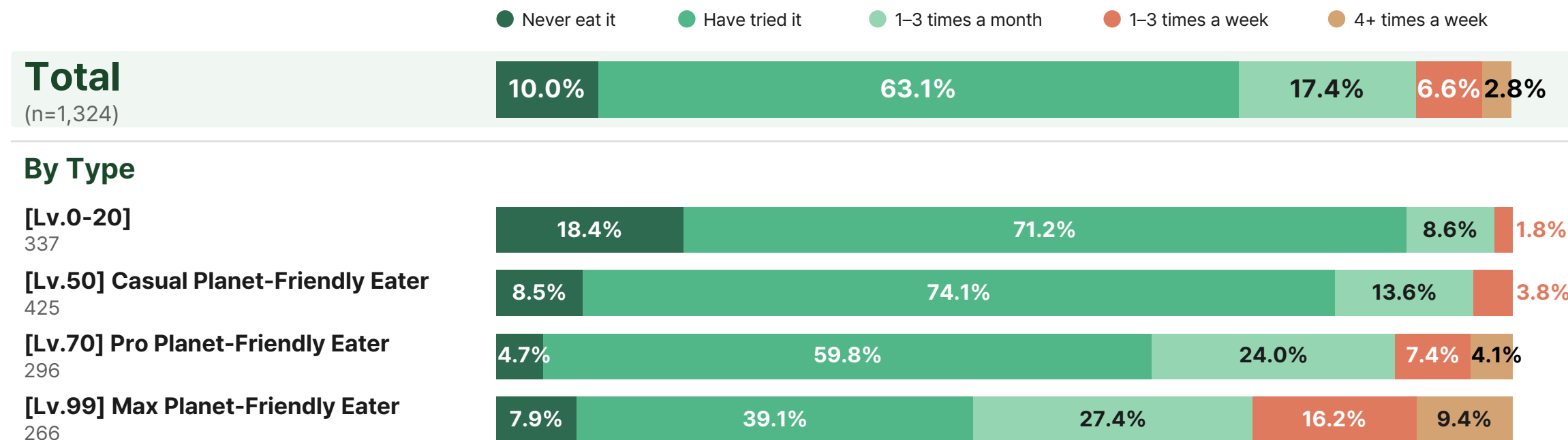
Plant-Based Meat Alternatives

What is Plant-Based Meat Alternatives?

Alternative meat made from ingredients such as soy, wheat, and peas to replicate the taste, texture, and appearance of conventional meat.

** In this survey, it was described as “one type of ‘alternative foods’ made using protein obtained from plants such as soy or wheat to closely resemble the taste, texture, and form of meat (e.g., plant-based Bulgogi, vegan chicken, plant-based eggs).”*

2-5. Plant-Based Meat Consumption Frequency — by Type

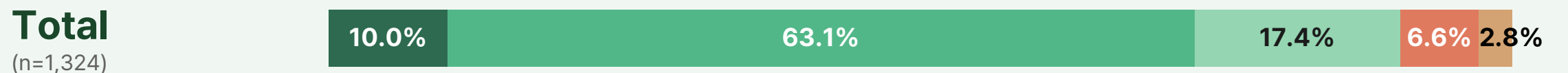


Result Summary & Interpretation: Plant-Based Meat Consumption Frequency

- 63.1% of all respondents report having tried plant-based meat alternatives, indicating that while most are aware of and have experience with them, this has not yet translated into regular consumption.
- For the Lv.99 group, 25.6% report consuming at least once per week, showing a clear difference in consumption levels compared to other groups.
- As higher planet-friendly-eating levels increase, the share of regular consumers (at least 1–3 times per month) rises, while the proportion of those with only trial experience declines.

2-5. Plant-Based Meat Consumption Frequency — by Age

● Never eat it
● Have tried it
● 1–3 times a month
● 1–3 times a week
● 4+ times a week



By Age

20s & under

394



30s

476



40s

220



50s

128



60s & over

106

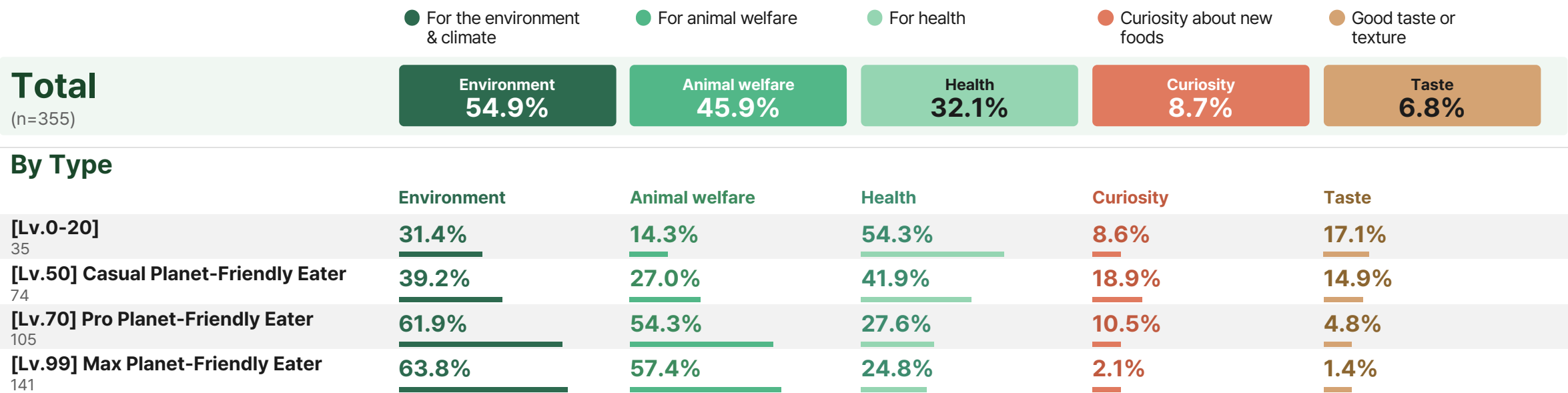


Result Summary & Interpretation: Plant-Based Meat Consumption Frequency

- Experience with plant-based meat is fairly even across ages, but the 60s & over most often 'never eat it' (16.0%) — a generational access gap.
- Regular weekly-or-more consumption is highest among the 60s & over (16.1%), followed by the 20s & under (11.7%); experience is concentrated in certain segments, with regular eating relatively active among both younger and older groups.
- The 30s–50s show similar weekly-or-more eating (around 7–8%) and a high 'tried it' share (64–70%), indicating that interest hasn't yet translated into habitual behavior.

2-6. Reasons for Consuming Plant-Based Meat — by Type

* Among respondents who consume plant-based meat at least once a month; up to 2 responses allowed

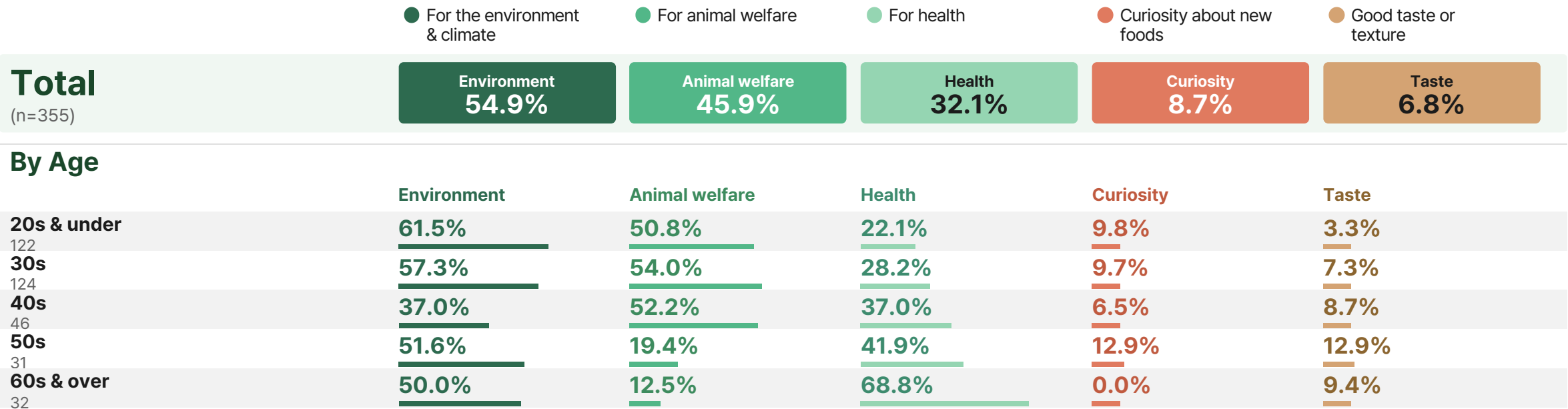


Summary & Interpretation: Reasons for Consuming Plant-Based Meat

- Across all respondents, the main reasons for consuming plant-based meat are the environment & climate (54.9%) and animal welfare (45.9%) — these ethical-value motives outweigh health (32.1%), showing value-driven consumption is a key driver.
- Lv.0-20 ranks health (54.3%) first, while Lv.99 is driven mainly by the environment & climate (63.8%) and animal welfare (57.4%). There are clear differences in the main reasons for consumption across consumer types.
- Taste/texture is low overall (6.8%) but higher for Lv.0-20 (17.1%). Curiosity peaks at Lv.50 (18.9%), suggesting this group explores plant-based meat experimentally.

2-6. Reasons for Consuming Plant-Based Meat — by Age

* Among respondents who consume plant-based meat at least once a month; up to 2 responses allowed

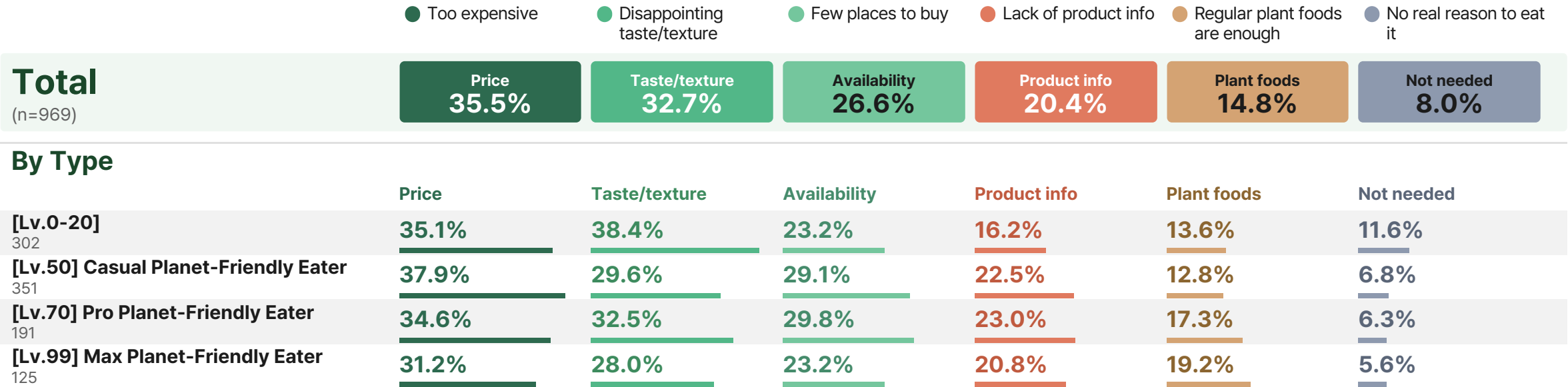


Summary & Interpretation: Reasons for Consuming Plant-Based Meat

- Among those in their 20s–30s, the environment & climate (61.5%, 57.3%) and animal welfare (50.8%, 54.0%) are the main motives, showing strong value-driven consumption. On the other hand, animal-welfare motives fall below 20% from the 50s on, so value factors vary greatly by age.
- Those 60 and older overwhelmingly rank health (68.8%) first, and the health motive rises steadily with age (22.1% in their 20s → 28.2% in 30s → 37.0% in 40s → 41.9% in 50s → 68.8% for 60+).
- These results suggest ethical values are the main driver among younger people, while health becomes a key purchase factor for middle-aged and older consumers.

2-7. Barriers to Regular Consumption of Plant-Based Meat — by Type

* Among respondents who answered 'I never eat it' or 'I've tried it' on the consumption-frequency question; up to 2 responses allowed

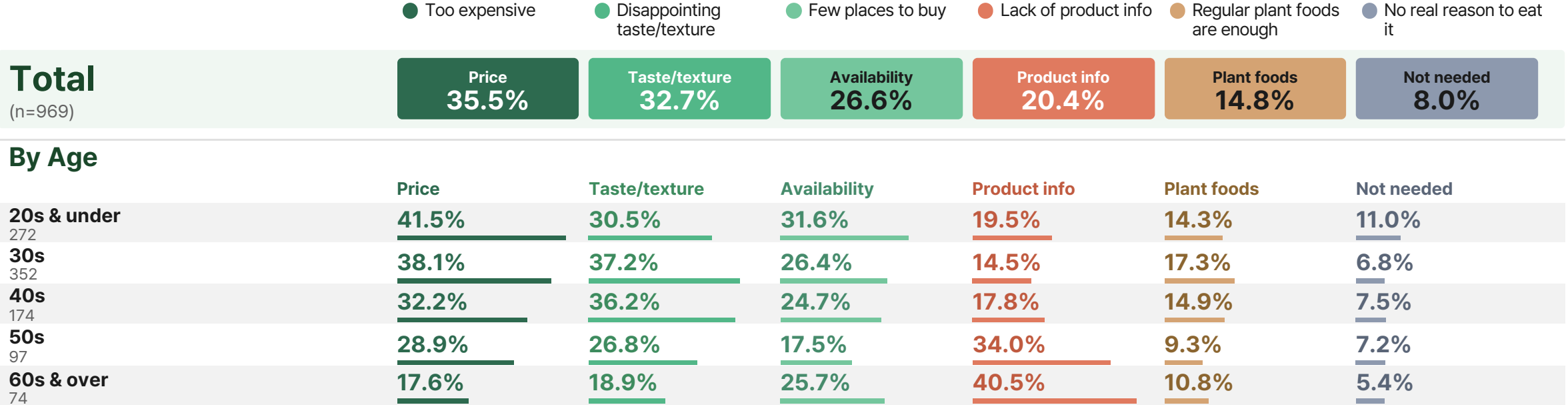


Summary & Interpretation: Barriers to Regular Consumption of Plant-Based Meat

- Overall, price (35.5%) and taste/texture (32.7%) are the biggest barriers to consuming plant-based meat, so improving price competitiveness and taste/texture are the key tasks for expanding consumption.
- Reasons differ clearly by type: 'no reason to eat it' is highest for Lv.0-20 (11.6%), 'plant foods are enough' for Lv.99 (19.2%), and 'few places to buy' for Lv.50 (29.1%) and Lv.70 (29.8%).
- These differences suggest each consumer group needs a different strategy: raising awareness for lower levels, improving access for mid levels, and offering the distinct value of plant-based meat for higher levels.

2-7. Barriers to Regular Consumption of Plant-Based Meat — by Age

* Among respondents who answered 'I never eat it' or 'I've tried it' on the consumption-frequency question; up to 2 responses allowed

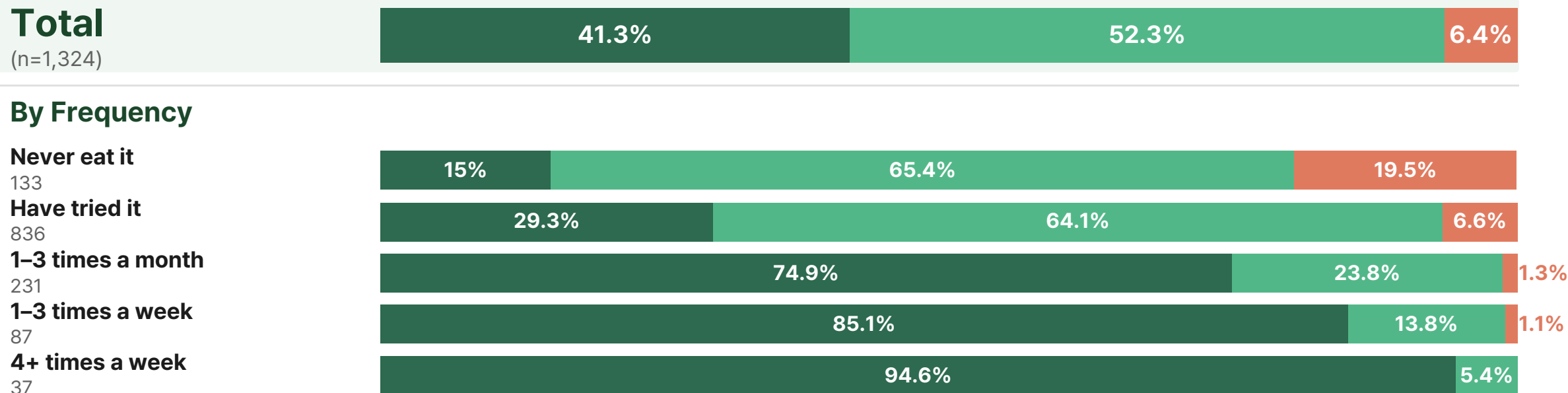


Summary & Interpretation: Barriers to Regular Consumption of Plant-Based Meat

- Those in their 20s–30s report price as the top barrier (41.5% in their 20s, 38.1% in 30s), reacting more to cost than other factors.
- For those 50 and older, lack of product information is a major barrier (34.0% in their 50s, 40.5% for 60+) and peaks among the 60+ group, suggesting poor information access and product understanding are key obstacles for older consumers.
- Dissatisfaction with taste/texture is relatively high among those in their 30s–40s (37.2%, 36.2%), while few places to buy stand out most for those 20 and under (31.6%).

2-8. Willingness to Consume More Plant-Based Meat in the Future — by Frequency

● Yes, I'll eat it more often ● Still considering ● No

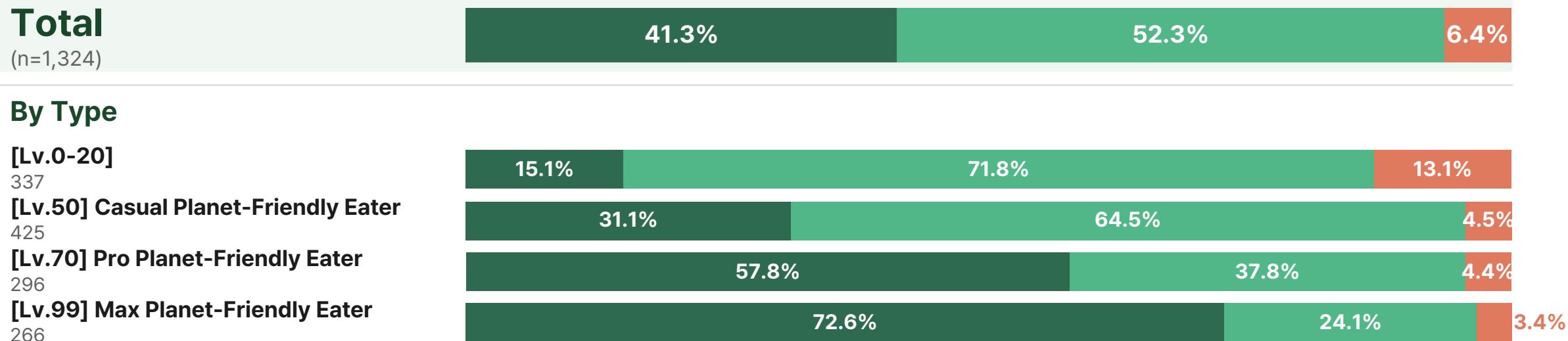


Summary & Interpretation: Willingness to Consume More Plant-Based Meat in the Future

- The higher the current consumption frequency, the clearly higher the future intention to eat it. The Lv.99 group (72.6%) shows approximately 4.8 times higher willingness compared to the Lv.0–20 group (15.1%).
- Among non-eaters, 65.4% say they are 'still considering' future consumption. This result suggests that more respondents are open to exploring rather than rejecting, indicating that trial opportunities or first-purchase strategies could help expand acceptance.
- Among regular consumers (1–3+ times a week), rejection rates are very low, around 1%. This finding suggests that once plant-based foods become a habit, consumers are unlikely to drop them and likely to keep eating them.

2-8. Willingness to Consume More Plant-Based Meat in the Future — by Type

● Yes, I'll eat it more often ● Still considering ● No



Summary & Interpretation: Willingness to Consume More Plant-Based Meat in the Future

- Willingness to consume plant-based meat rises steeply as the type level increases: the Lv.99 group (72.6%) shows about 4.8 times higher willingness than the Lv.0-20 group (15.1%).
- 'No' responses are highest in the Lv.0-20 group (13.1%).
- From Lv.50 upward, the 'No' share stays below 5%, remaining low overall.

2-8. Willingness to Consume More Plant-Based Meat in the Future — by Age

● Yes, I'll eat it more often ● Still considering ● No

Total

(n=1,324)

41.3%

52.3%

6.4%

By Age

20s & under

394

44.4%

50.5%

5.1%

30s

476

37.2%

55.7%

7.1%

40s

220

34.1%

56.8%

9.1%

50s

128

46.9%

48.4%

4.7%

60s & over

106

56.6%

38.7%

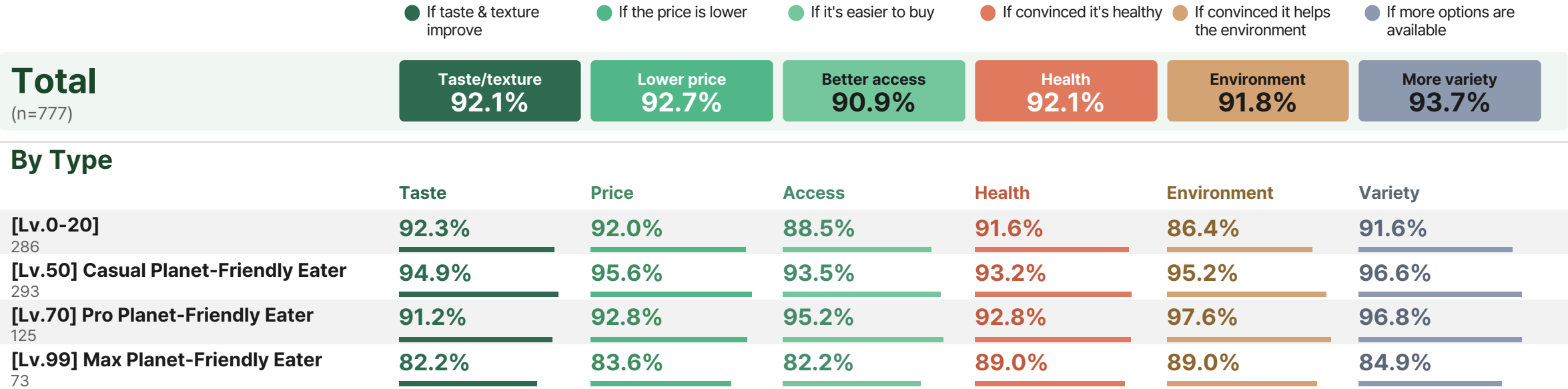
4.7%

Summary & Interpretation: Willingness to Consume More Plant-Based Meat in the Future

- Those in their 20s and under show a higher share of responses indicating they would consume more frequently than those in their 30s-40s, and a lower share of 'No' responses, suggesting relatively higher acceptance.
- Those in their 30s-40s have the highest 'still considering' share, showing more caution in forming willingness than other age groups.
- From the 50s onward, the share of 'still considering' responses declines, while willingness to consume more rises. Among those aged 60 and over, the share indicating they would 'eat it more often' reaches 56.6%.

2-9. Conditions Driving Consumption of Plant-Based Meat — by Type

* Among respondents who answered 'Still considering' or 'No'; % representing those willing to consume plant-based meat if each condition were met



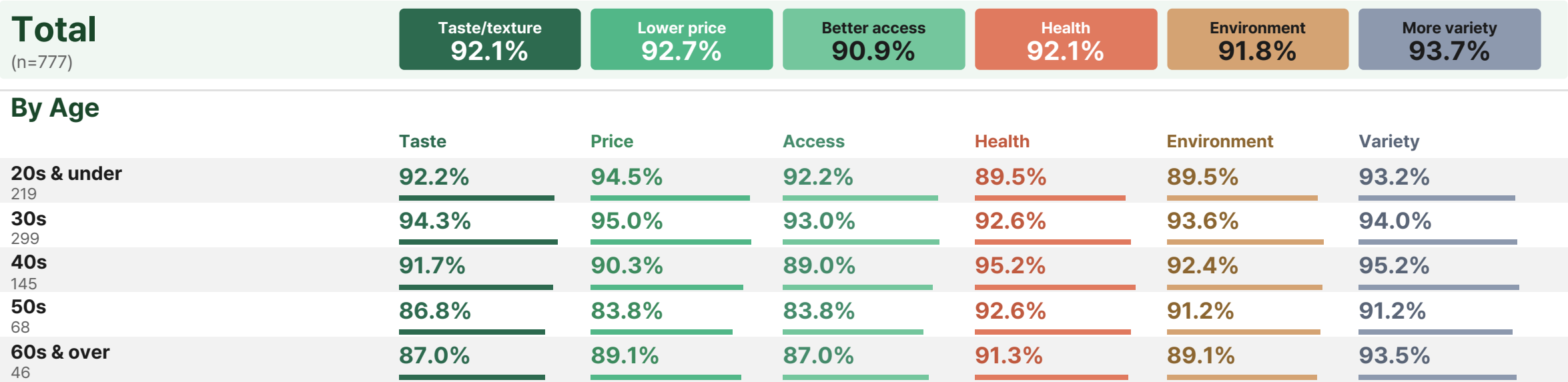
Summary & Interpretation: Conditions Driving Consumption of Plant-Based Meat

- Overall, more variety (93.7%), a lower price (92.7%), and improved taste/texture (92.1%) are the strongest motivators to switch.
- Lv.0-20 responds strongly to tangible conditions (taste, price, health), while Lv.50 & Lv.70 respond relatively highly across all items, emerging as the core switching segment.
- Lv.99 has the lowest willingness across all conditions (82–89%), implying they already consume enough, so extra consumption is less likely.

2-9. Conditions Driving Consumption of Plant-Based Meat — by Age

* Among respondents who answered 'Still considering' or 'No'; % representing those willing to consume plant-based meat if each condition were met

● If taste & texture improve
● If the price is lower
● If it's easier to buy
● If convinced it's healthy
● If convinced it helps the environment
● If more options are available



Summary & Interpretation: Conditions Driving Consumption of Plant-Based Meat

- Those in their 20s–30s respond strongly to practical product and purchase conditions such as taste/texture, price, access, and more variety.
- Those in their 30s, in particular, show consistently high willingness to consume across all conditions, suggesting they are a key age group that responds broadly to improvements and is more likely to increase consumption if conditions are met.
- Those in their 50s–60s respond more to health confidence (50s) and more variety (60+) than to product improvements, suggesting older consumers value supporting information and broader choices over quality upgrades.

Cell-Cultivated Meat

What is Cell-Cultivated Meat?

Meat produced by culturing cells collected from an animal, without slaughtering the animal.

** In this survey, it was described as 'meat made by growing an animal's cells rather than raising the animal'.*

2-10. Awareness of Cell-Cultivated Meat — by Type

● Know it well ● Have heard of it ● First time hearing of it

Total

(n=1,324)

30.9%

51.1%

18.1%

By Type

[Lv.0-20]

337

21.4%

57.6%

21.1%

[Lv.50] Casual Planet-Friendly Eater

425

23.3%

55.1%

21.6%

[Lv.70] Pro Planet-Friendly Eater

296

32.1%

51.0%

16.9%

[Lv.99] Max Planet-Friendly Eater

266

53.8%

36.5%

9.8%

Summary & Interpretation: Awareness of Cell-Cultivated Meat

- Awareness rises clearly as type level increases: Lv.99's 'Know it well' rate (53.8%) is about 2.5 times that of Lv.0-20 (21.4%).
- Lv.0-20 and Lv.50 show the highest 'First time hearing of it' rates (21.1% and 21.6%), indicating the greatest need for awareness-building.
- Overall, 'Have heard of it' (51.1%) is the majority, so basic awareness exists but deeper understanding remains limited.

2-10. Awareness of Cell-Cultivated Meat — by Age

● Know it well ● Have heard of it ● First time hearing of it

Total

(n=1,324)

30.9%

51.1%

18.1%

By Age

20s & under

394

35.3%

51.0%

13.7%

30s

476

27.9%

52.1%

20.0%

40s

220

30.0%

47.3%

22.7%

50s

128

28.1%

58.6%

13.3%

60s & over

106

33.0%

45.3%

21.7%

Summary & Interpretation: Awareness of Cell-Cultivated Meat

- The 20s and younger lead with the highest 'Know it well' rate (35.3%) and lowest 'First time hearing of it' (13.7%), indicating the most aware age group.
- Those in their 40s and 60s show 'First time hearing of it' near 22%, suggesting less exposure to cell-cultivated meat information.
- Those in their 50s show the lowest share of 'First time hearing of it' (13.3%), indicating relatively higher baseline awareness among this age group.

2-10. Awareness of Cell-Cultivated Meat — by Plant-Based Meat Consumption Frequency

● Know it well ● Have heard of it ● First time hearing of it

Total

(n=1,324)

30.9%

51.1%

18.1%

By Frequency

Never eat it

133

24.8%

48.1%

27.1%

Have tried it

836

23.9%

56.1%

20.0%

1–3 times a month

231

46.3%

46.3%

7.4%

1–3 times a week

87

52.9%

29.9%

17.2%

4+ times a week

37

62.2%

27.0%

10.8%

Summary & Interpretation: Awareness of Cell-Cultivated Meat

- The more frequently people eat plant-based meat, the better they understand cell-cultivated meat. Those eating it 4+ times a week (62.2%) understand cell-cultivated meat 2.5 times better than non-eaters (24.8%). Regular eaters (1–3 times a month or more) also show 'Know it well' rates above 46%.
- Even among those who have tried plant-based meat, only 23.9% say they know cell-cultivated meat well. Within this group, the share who have heard of it is about 8 percentage points higher than among non-consumers.

2-11. Willingness to Try Cell-Cultivated Meat — by Type

● Definitely want to try it ● Would try it once ● Not sure ● Don't want to eat it

Total

(n=1,324)

20.6%

59.0%

14.6%

5.8%

By Type

[Lv.0-20]

337

8.3%

62.9%

22.3%

6.5%

[Lv.50] Casual Planet-Friendly Eater

425

15.5%

68.2%

12.2%

4.0%

[Lv.70] Pro Planet-Friendly Eater

296

26.7%

59.5%

9.8%

4.1%

[Lv.99] Max Planet-Friendly Eater

266

37.6%

38.7%

13.9%

9.8%

Summary & Interpretation: Willingness to Try Cell-Cultivated Meat

- 79.6% of all respondents show positive willingness ('Definitely want to try it' + 'Would try it once'), indicating high consumer acceptance of cell-cultivated meat.
- Strong willingness ('Definitely want to try it') rises sharply with type level. The Lv.99 group (37.6%) shows a rate about 4.5 times higher than the Lv.0-20 group (8.3%). However, Lv.99 also has the highest rejection rate at 9.8%, suggesting strong interest alongside firm established dietary preferences.
- Lv.0-20 shows the highest combined 'Not sure' and 'Don't want to eat it' rates at about 30%, pointing to a potential non-adopter segment needing both awareness -building and perception improvement.

2-11. Willingness to Try Cell-Cultivated Meat — by Age

● Definitely want to try it ● Would try it once ● Not sure ● Don't want to eat it

Total

(n=1,324)

20.6%

59.0%

14.6%

5.8%

By Age

20s & under

394

20.8%

61.7%

12.2%

5.3%

30s

476

19.7%

59.9%

14.1%

6.3%

40s

220

16.4%

58.2%

18.6%

6.8%

50s

128

21.1%

56.3%

15.6%

7.0%

60s & over

106

32.1%

50.0%

16.0%

1.9%

Summary & Interpretation: Willingness to Try Cell-Cultivated Meat

- Those in their 60s and older show the highest share of 'definitely want to try it' responses (32.1%) and the lowest rejection rate (1.9%), indicating that they are the most open age group.
- Those in their 40s show the lowest share of "definitely want to try" responses (16.4%) and the highest share of "not sure" responses (18.6%), indicating relatively low acceptance.
- Those in their 20s and 30s show consistently high levels of positive willingness (82.5% and 79.6% for "definitely want to try it" or "would like to try at least once"). However, strong willingness remains around the 20% range, indicating that most are still at the trial stage.

2-11. Willingness to Try Cell-Cultivated Meat — by Awareness Level

● Definitely want to try it ● Would try it once ● Not sure ● Don't want to eat it

Total

(n=1,324)

20.6%

59.0%

14.6%

5.8%

By Awareness

Know it well

409

38.1%

45.7%

7.3%

8.8%

Have heard of it

676

14.1%

66.4%

15.5%

4.0%

First time hearing

239

9.2%

60.7%

24.3%

5.9%

Summary & Interpretation: Willingness to Try Cell-Cultivated Meat

- 83.8% of respondents who know cell-cultivated meat well show positive willingness to try, yet this group also has the highest rejection rate (8.8%), suggesting that greater understanding brings both stronger acceptance and stronger rejection.
- Among respondents who have heard of it (n=676), 80.5% express positive willingness to try cell-cultivated meat, while the rejection rate is the lowest at 4.0%, indicating that this group represents a key target with strong conversion potential if provided with additional information.
- Among those hearing of cell-cultivated meat for the first time, the share of “not sure” responses is highest at 24.3%, indicating that lower awareness is associated with less clearly formed willingness.

2-11. Willingness to Try Cell-Cultivated Meat — by Plant-Based Meat Consumption Frequency

● Definitely want to try it ● Would try it once ● Not sure ● Don't want to eat it

Total

(n=1,324)

20.6%

59.0%

14.6%

5.8%

By Frequency

Never eat it

133

12.0%

49.6%

25.6%

12.8%

Have tried it

836

17.3%

64.4%

14.4%

3.9%

1–3 times a month

231

30.3%

55.4%

10.0%

4.3%

1–3 times a week

87

33.3%

43.7%

11.5%

11.5%

4+ times a week

37

35.1%

29.7%

16.2%

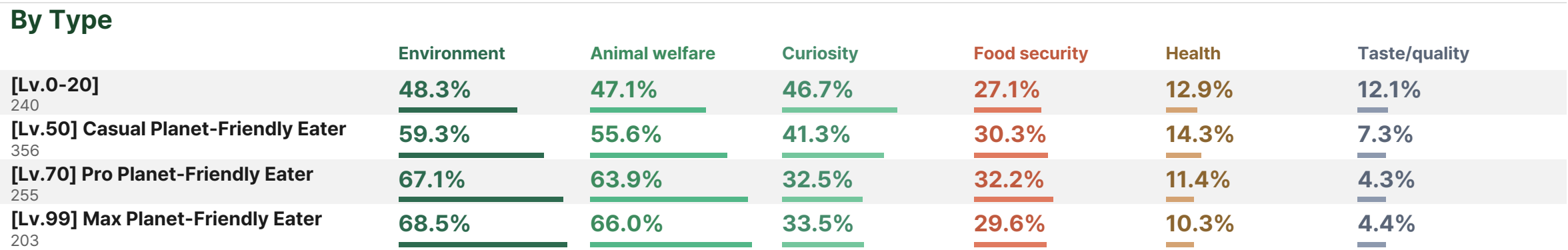
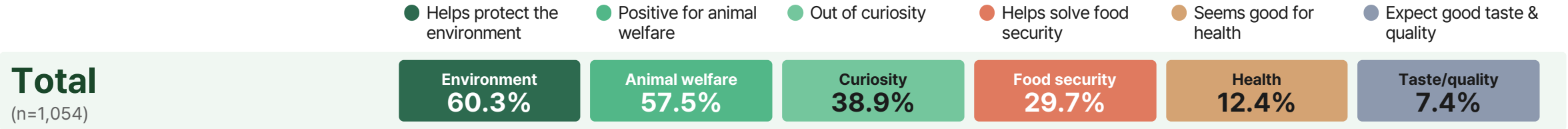
18.9%

Summary & Interpretation: Willingness to Try Cell-Cultivated Meat

- The more experience people have with plant-based meat, the higher their willingness to try cell-cultivated meat. Strong willingness among those eating it 4+ times a week is about 3 times that of non-eaters, suggesting alternative-protein experience raises openness to new food technologies.
- Among those who have tried plant-based meat (n=836), 81.7% express positive willingness to try cultivated meat, with the lowest rejection rate (3.9%), indicating that they represent a highly receptive group.
- Both non-eaters and high-frequency eaters of plant-based meat show high rejection rates of 12–19%, confirming resistance at both extremes: non-eaters are less familiar with cell-cultivated meat, while frequent eaters tend to feel existing plant-based options already suffice.

2-12. Reasons for Willingness to Try Cell-Cultivated Meat — by Type

* Among respondents who answered 'Definitely want to try it' or 'Would try it once'; up to 3 responses allowed

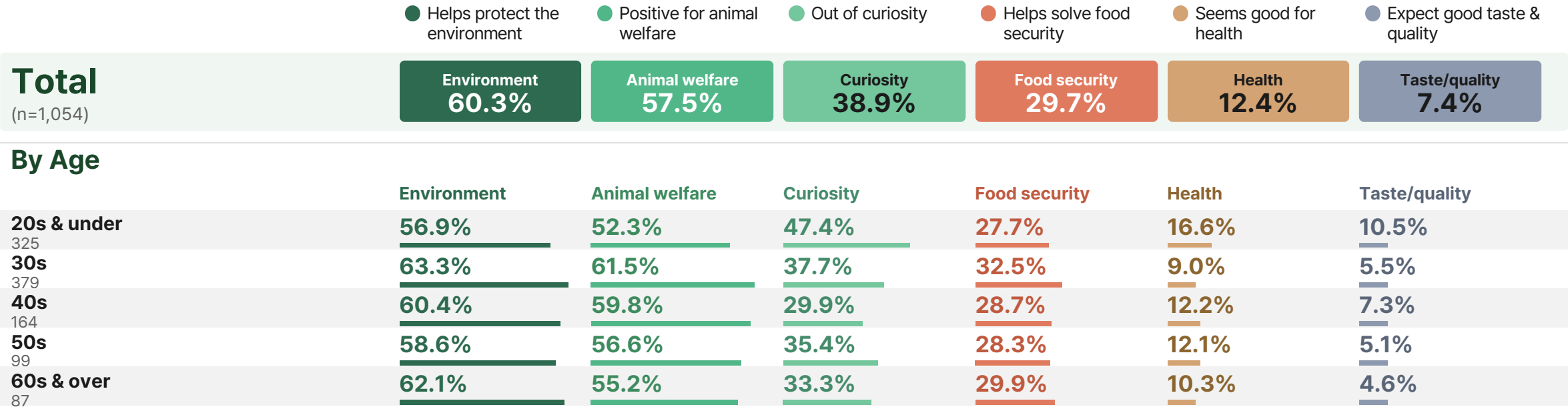


Summary & Interpretation: Reasons for Willingness to Try Cell-Cultivated Meat

- Overall, environment (60.3%) and animal welfare (57.5%) are the top purchase motivators, making ethical and environmental values the core drivers.
- As type level increases, the shares citing environmental and animal welfare reasons rise (from 48.3% in Lv.0–20 to 68.5% in Lv. 99), while curiosity-driven consumption declines.
- Expectations for the taste and quality of cell-cultivated meat peak among Lv.0-20 (12.1%) , suggesting that lower-level groups place relatively greater importance on the taste and quality experience.

2-12. Reasons for Willingness to Try Cell-Cultivated Meat — by Age

* Among respondents who answered 'Definitely want to try it' or 'Would try it once'; up to 3 responses allowed

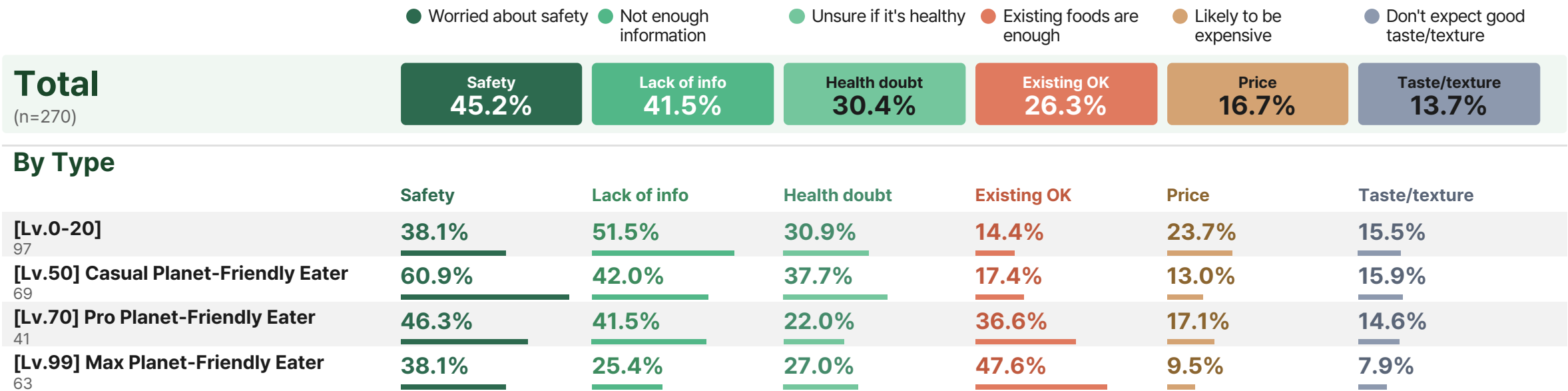


Summary & Interpretation: Reasons for Willingness to Try Cell-Cultivated Meat

- Across all ages, environment (60.3%) and animal welfare (57.5%) rank first and second, indicating that these are universal motivations shared across generations.
- Curiosity (47.4%) and taste/quality (10.5%) are notably higher among those 20s and younger, suggesting that experiential marketing may be particularly effective for this group.
- Among those in their 30s, helping address food security (32.5%) ranks highest, suggesting that socially driven value-based messaging may resonate with this group.

2-13. Barriers to Trying Cell-Cultivated Meat — by Type

* Among respondents who answered ‘Don’t really want to’ or ‘Don’t want to at all’; up to 3 responses allowed

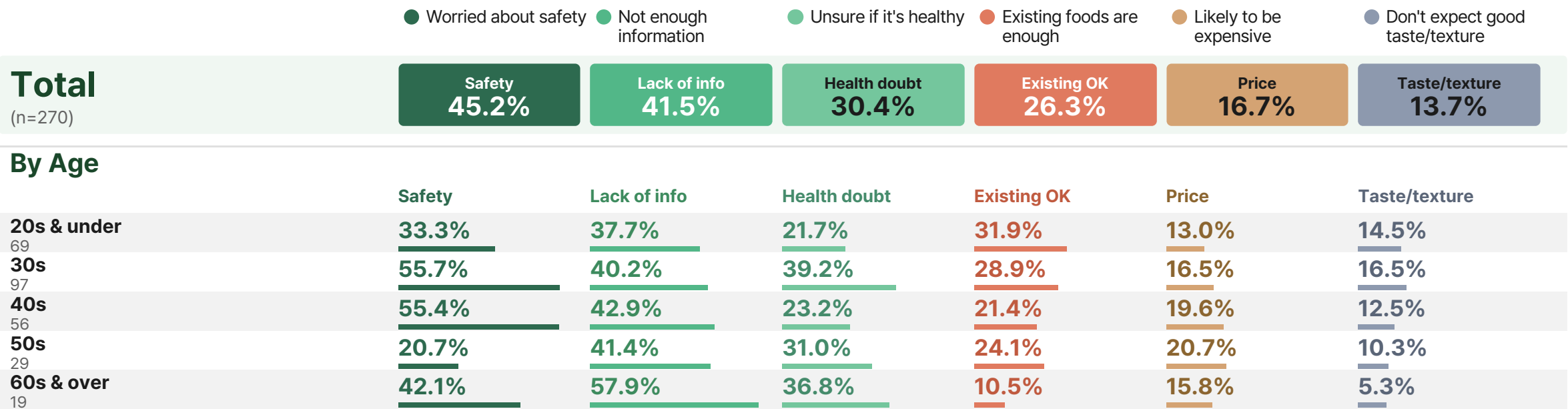


Summary & Interpretation: Barriers to Trying Cell-Cultivated Meat

- Safety concerns peak at Lv.50 (60.9%), while lack of information is highest at Lv.0–20 (51.5%), indicating that limited information access is the main barrier for low-er-level groups, whereas safety concerns are more prominent among middle-level groups.
- Lv.99 (47.6%) and Lv.70 (36.6%) most frequently cite that existing options are sufficient, suggesting that higher-level groups are more satisfied with their current plant-based diets.
- Price concerns are highest at Lv.0-20 (23.7%) and lowest at Lv.99 (9.5%), indicating that price sensitivity varies by type level.

2-13. Barriers to Trying Cell-Cultivated Meat — by Age

* Among respondents who answered 'Don't really want to' or 'Don't want to at all'; up to 3 responses allowed



Summary & Interpretation: Barriers to Trying Cell-Cultivated Meat

- Safety concerns are highest among those in their 30s (55.7%) and 40s (55.4%), so trustworthy information on production and safety is essential.
- Those aged 60 and over most frequently cite lack of information (57.9%), while those under 20 are more likely to say that existing options are sufficient (31.9%).
- Doubts about health benefits are highest among those in their 30s (39.2%) and those aged 60 and over (36.8%), although the underlying drivers of these perceptions are likely to differ by age group.

The Potential for Sustainable Diet Transitions: Insights from a Perception Survey of Plant-Based and Cultivated Meat

Published Date **July 2026**

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