

Changing Food Choices: Consumers' Responses to COVID, Cost of Living and Climate (Americas)

November 17, 2022



Today's Agenda



1 Welcome

2 Consumer trends –

- *MSC GlobeScan Seafood Consumer Insights 2022*
- *GlobeScan Healthy & Sustainable Living Survey 2022*

3 Q&A



Meet the Team



Sylvain Charlebois

Professor, Food Distribution and Policy,
Senior Director, Agri-Food Analytics Lab
at Dalhousie University



Kristen Stevens

Senior Marketing Manager at
MSC (US Team)



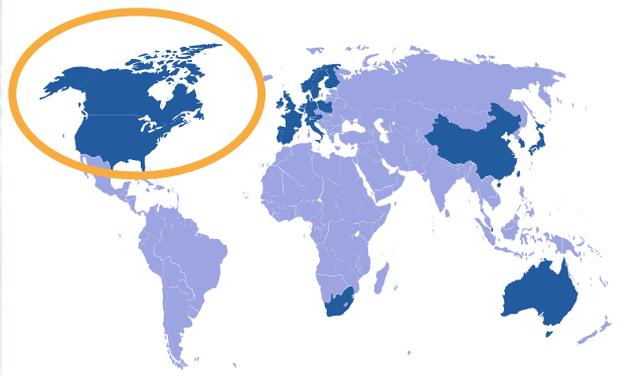
Christine LaMontagne

Associate Director at
GlobeScan

Introduction to consumer trends



The Marine Stewardship Council partnered with GlobeScan for their fourth **MSC Seafood Consumer Perceptions** study



In field: End of January – mid March

Type of consumer	Sample
N. American General public	<i>n</i> =5,769
Global sample	<i>n</i> =25,869



GlobeScan's findings from the 2022 **Healthy and Sustainable Living** study.



In field: June - July

Type of consumer	Sample
N. American General public	<i>n</i> =2,490
Global sample	<i>n</i> =29,293

Close to nine in ten agree that current environmental, social, and economic challenges are the largest the world has ever faced, compared to three-quarters one decade ago

Current environmental, social, and economic challenges are the largest the world has ever faced



2012



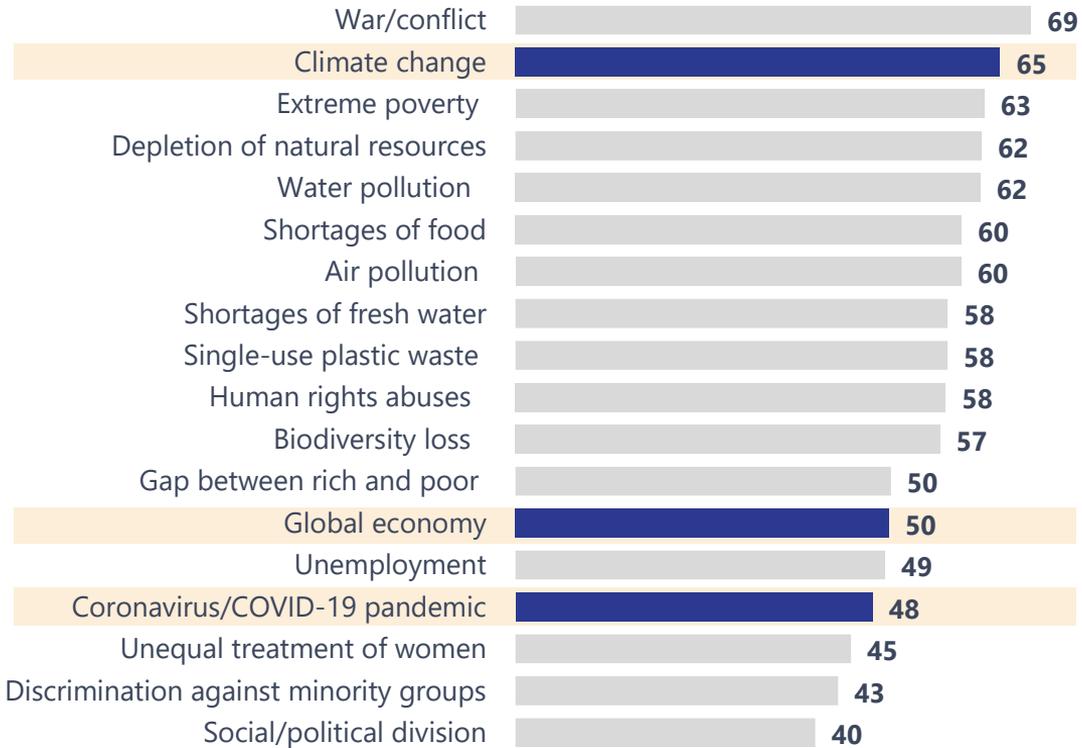
2022

↑ +12%
rise

Concern about climate change follows closely behind concerns about war and conflict; half of global citizens think the global economy and COVID are very serious concerns



Global problems rated 'Very Serious'

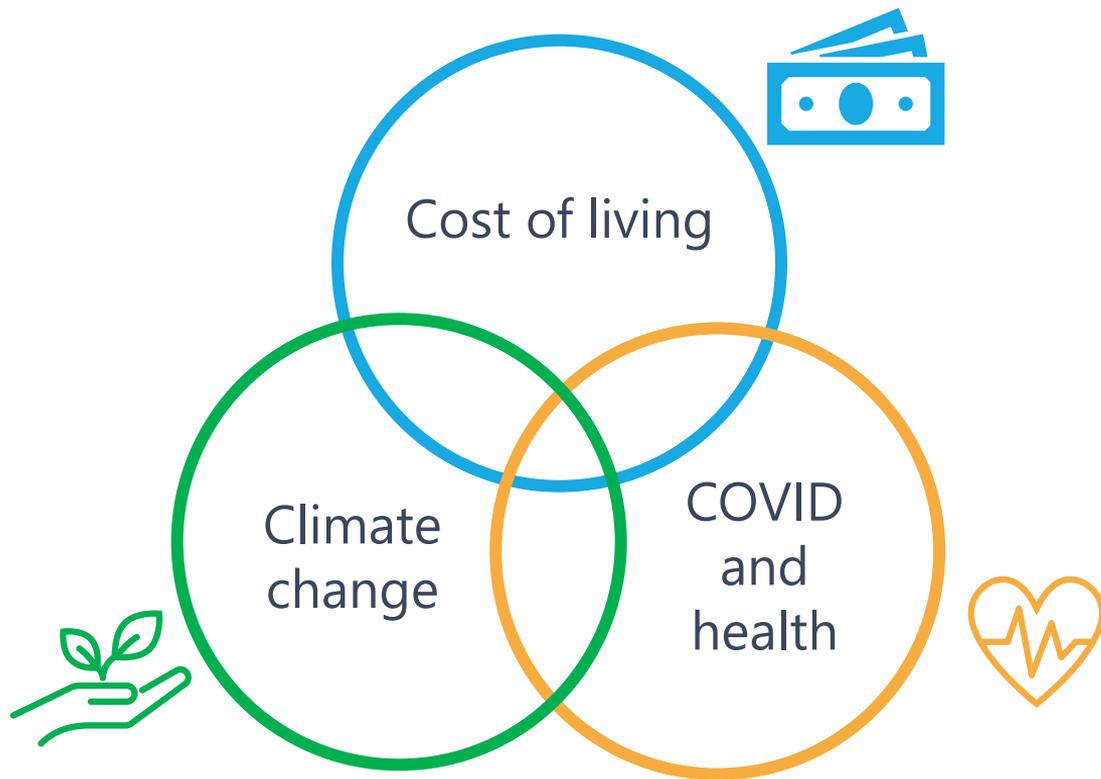


 = Issues we are addressing in this webinar

Base: Global
T1. For each of the following possible global problems, please indicate if you see it as a very serious, somewhat serious, not very serious, or not at all serious problem.



This webinar covers the intersection of three challenges – greater health concerns since COVID, climate change, and the growing cost-of-living crisis – and the effects on consumers

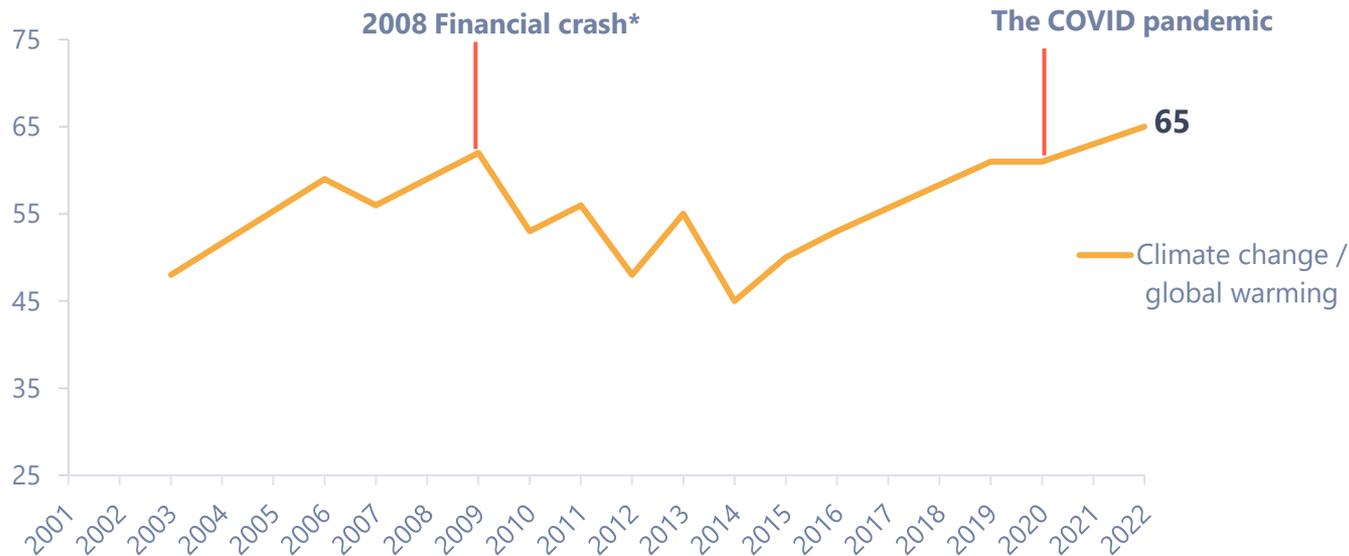




Climate change and the environment

Concern about climate change continues to rise even with economic pressure; during the last financial crisis there was a decrease in concern about climate change

Climate change is very serious



N. America specific data

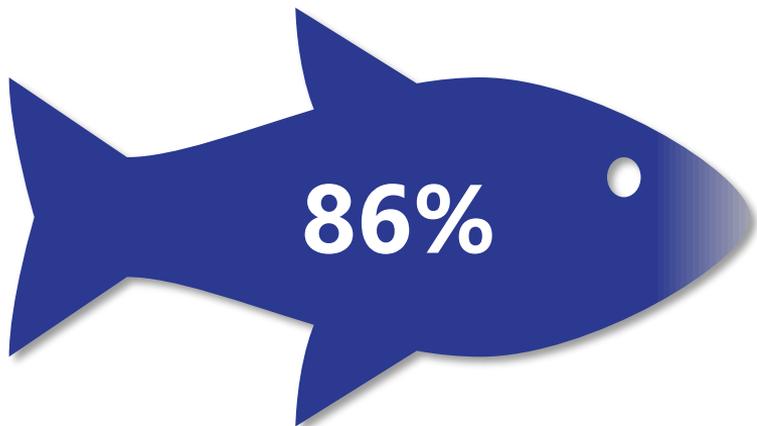
56%

of North Americans say climate change is very serious. This is a similar score to 2021.

A very large majority in North America feels worried about the state of the world's oceans



I feel worried about the state of the world's oceans



I feel more worried about the state of the oceans compared to two years ago



Base: Seafood consumers, North America

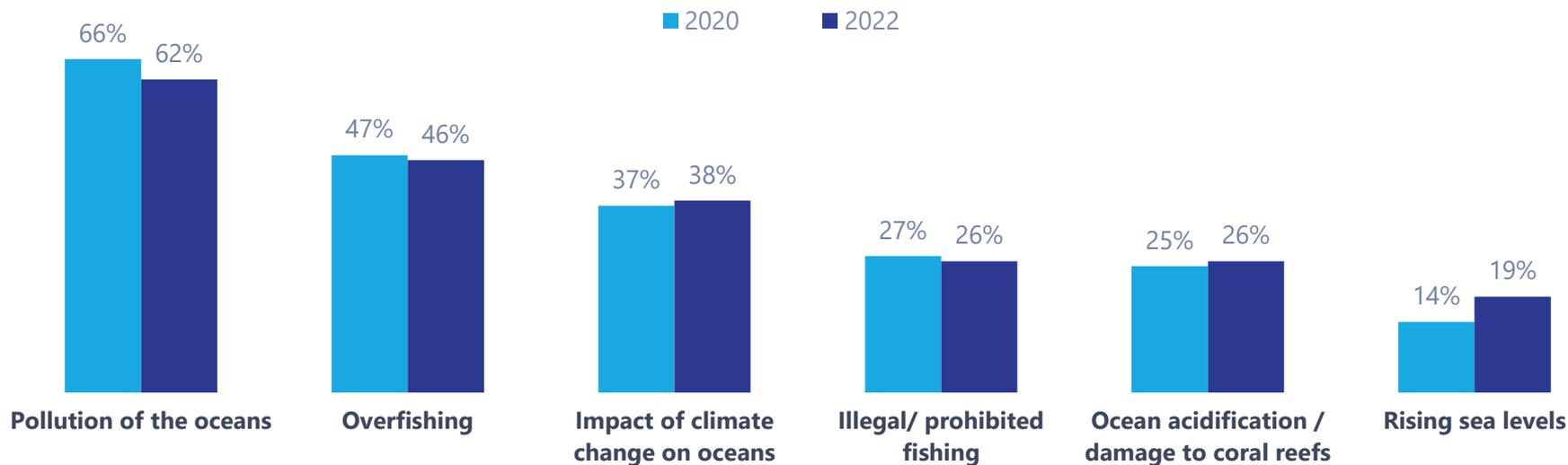
Q105.1: Please indicate how much you agree or disagree with the following statement: I feel worried about the state of the world's oceans

Q106: Which of the following statements best describes how your feelings about the state of the oceans have changed, if at all, in the last two years?. Top two on a four-point scale

Pollution and overfishing remain the two biggest concerns; people are increasingly worried about rising sea levels



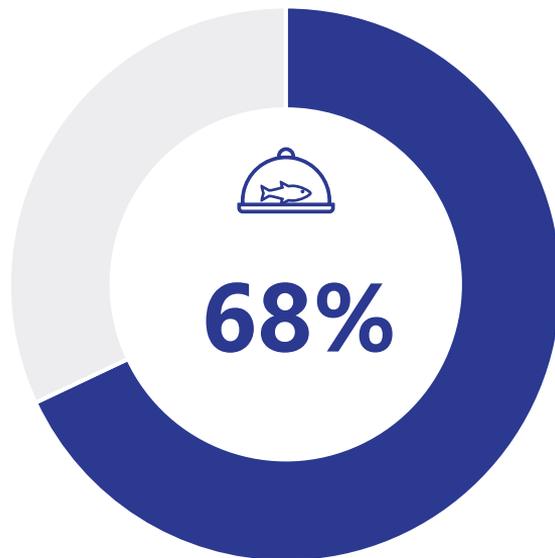
Most concerning ocean issues

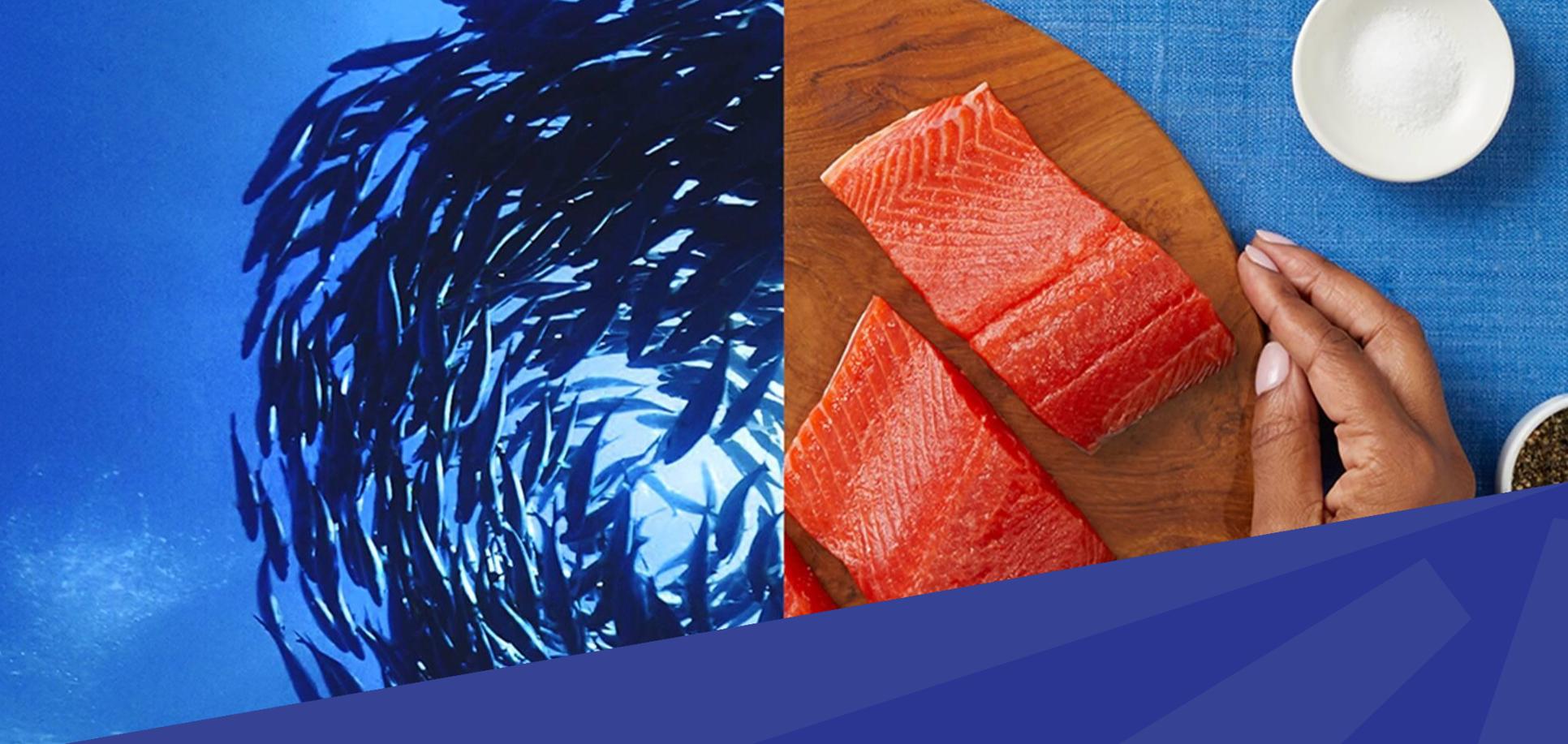


Nearly seven in ten North Americans agree they will need to eat seafood from a sustainable source in order to save the ocean



In order to save the ocean, we have to consume seafood only from sustainable sources





COVID, health, and changes in diet

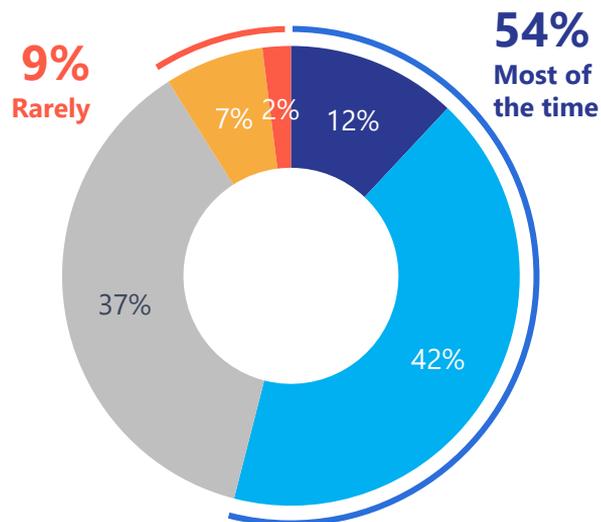
Compared to before the pandemic, people are now more likely to say they are trying to improve their own health and well-being

Trying to improve own health and wellbeing

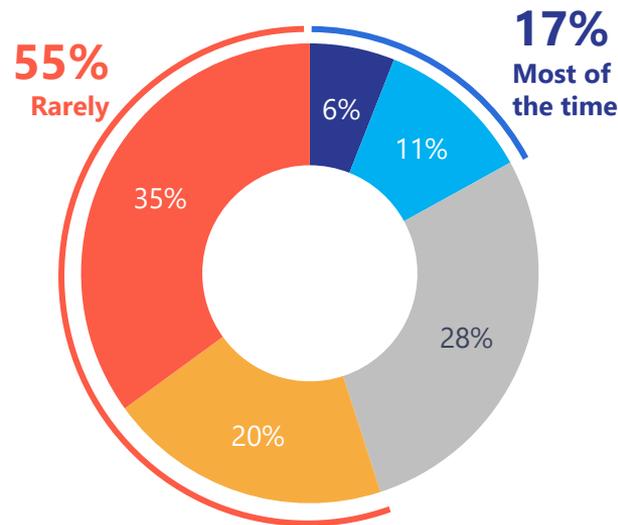


North Americans often say they eat healthy food; however, this does not mean they are turning to vegetarian or vegan food

I eat healthy food



I eat vegetarian and vegan food

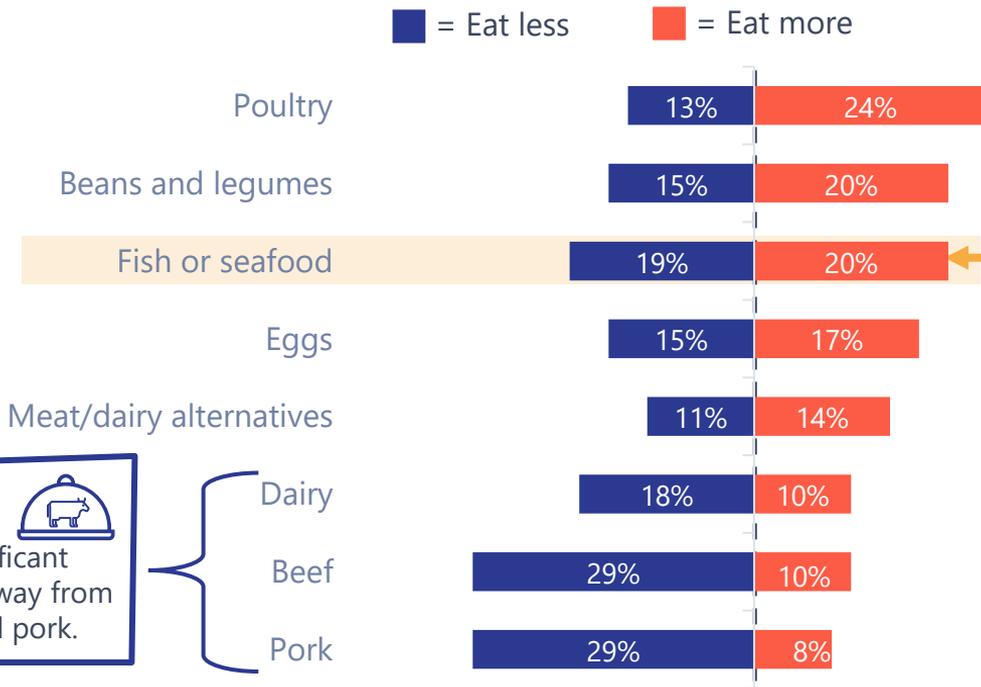


- All of the time
- Most of the time
- Sometimes
- Rarely
- Never

Among actual diet changes made, poultry has seen the largest increase while pork and other red meat have seen the largest decreases



Changes in food consumption compared to two years ago



A similar number of people are eating more seafood as are eating less seafood.

There is a significant claimed shift away from beef, dairy, and pork.

Health is the main reason consumers have changed their diet in the past two years, while 32 percent say they changed their diet because of an environmental reason



People make diet changes for a range of reasons

59%

To be **healthier**



37%

To **save money**



32%

For **environmental** reasons





Atlantic Salmon, Fillet
Wild, previously frozen
Canada, West Coast
Mild flavour
Bake, broil, deep-fry, pan-fry,
auté, grill

Cod, Fillet
Wild, previously frozen
Canada, West Coast
Mild flavour
Bake, broil, deep-fry, pan-fry,
auté, grill

CERTIFIED
SUSTAINABLE
SEAFOOD
MSC
www.msc.org

Sockeye Salmon, Fillet
Wild, fresh
USA, West Coast
Medium mild flavour
Bake, broil, grill, steam

CERTIFIED
SUSTAINABLE
SEAFOOD
MSC
www.msc.org

Haddock, Fillet
Wild, previously frozen
Canada, East Coast
Delicate, mild flavour
Bake, broil, deep-fry, pan-fry



Cost-of-living crisis

Nearly three in five North Americans feel greatly affected by the increased cost of living; but less so when it comes to COVID and climate change



Affected by personal issues

■ Greatly ■ Moderately ■ A little ■ Not at all



Global data

Global results are similar to N. America for those greatly affected by the increased cost of living at 60%. However, more people globally are greatly affected by climate change (38%) and COVID-19 (42%).

What motivates consumers when purchasing seafood?



Fresh

Preferred brand

Price

Safe to eat

Taste

Easy to cook

Good for health

A type of fish I've always eaten

Caught in the wild

Dolphin/turtle friendly

Organic

Fairly traded

Fishing method

Sustainably sourced

Independently certified/verified

Is not GMO

Clearly marked country of origin

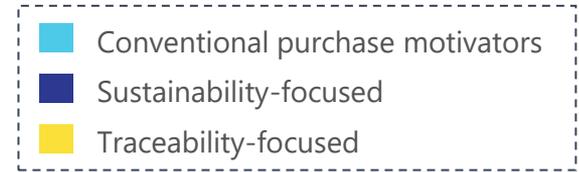
Sourced locally

Knowing where the product originally comes from

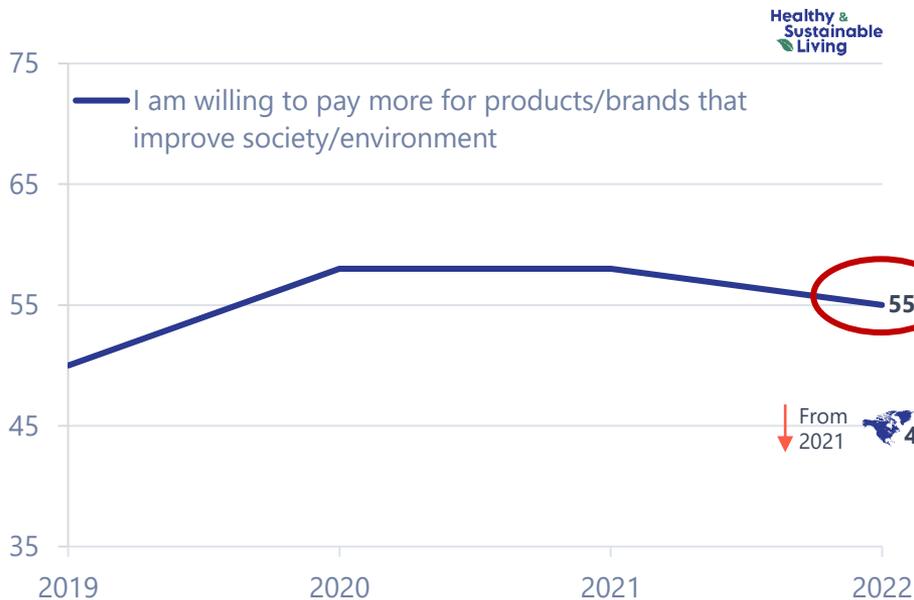
Price is a strong consideration for people buying seafood, ahead of sustainable sourcing in North America



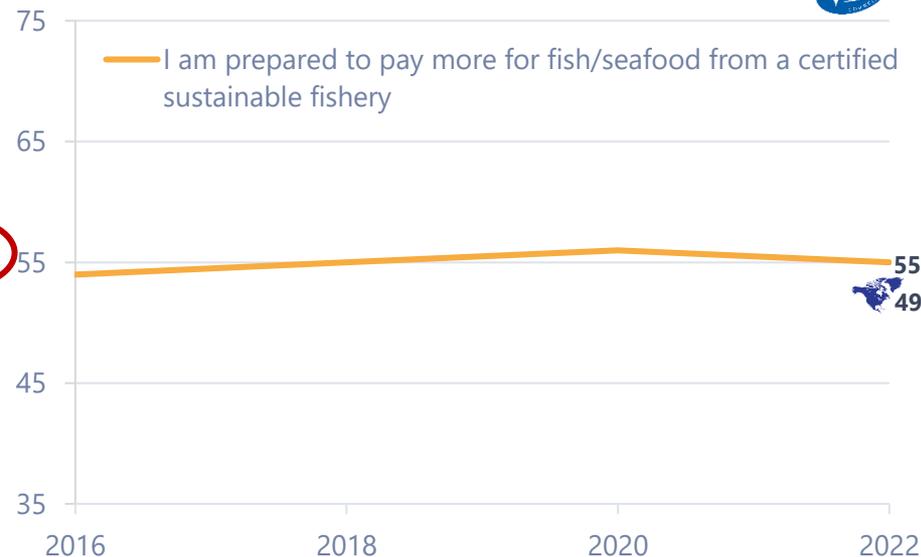
Motivators in seafood purchase



People's willingness to pay more for sustainability has declined slightly – but more than half of consumers still say they will pay more for certified sustainable fish



“Strongly” and “Somewhat Agree”



“Describes opinion well,” top three (5+6+7 on a 7-pt scale)

Base: Global
 Q6. Please indicate whether you strongly agree, somewhat agree, neither agree nor disagree, somewhat disagree, or strongly disagree with each of the following statements.
 Base: Seafood consumers, global
 Q8.1: How well does each of the following statements describe your opinions about ecolabels?



Certifications and future intent

Certifications are a major reason that North Americans consider a product to be environmentally responsible



Reasons consumers knew that the product was environmentally responsible



I notice eco-labeled products when I'm shopping

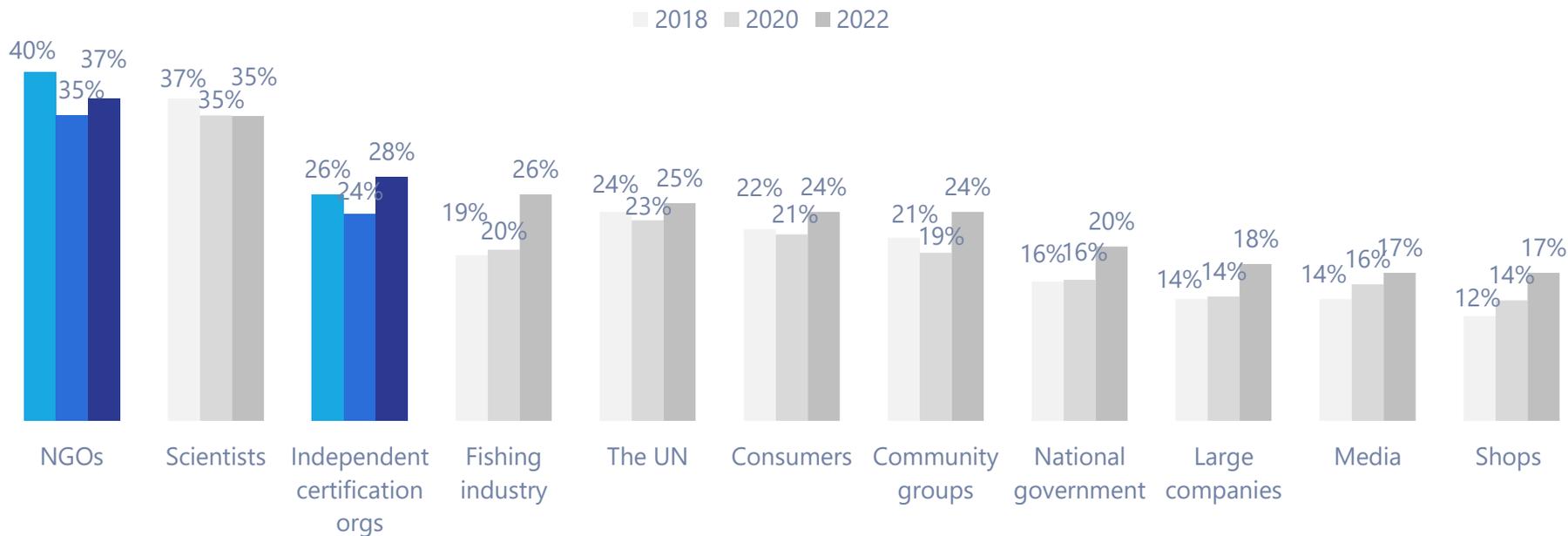


31%

Independent certification organisations are becoming more important as they are increasingly more trusted in protecting the ocean



Contributing 'Very Well' to protecting the ocean environment



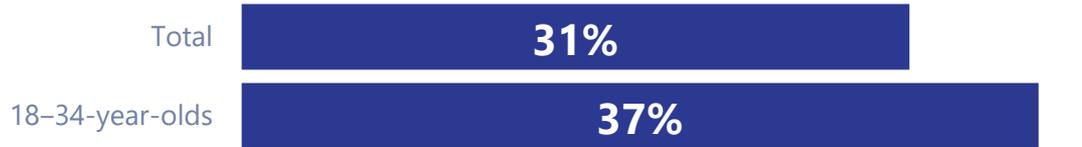
Younger audiences are more likely to buy ecolabeled fish and seafood products



I like to stand out from the crowd by buying products with ecolabels



I notice ecolabeled products when I'm shopping

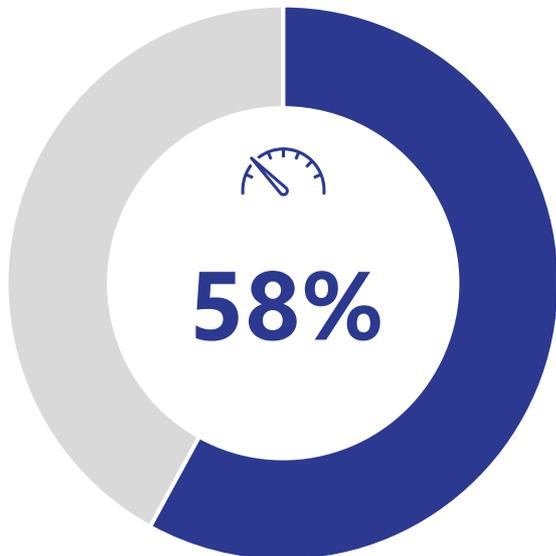


I buy ecolabeled fish or seafood products often or occasionally

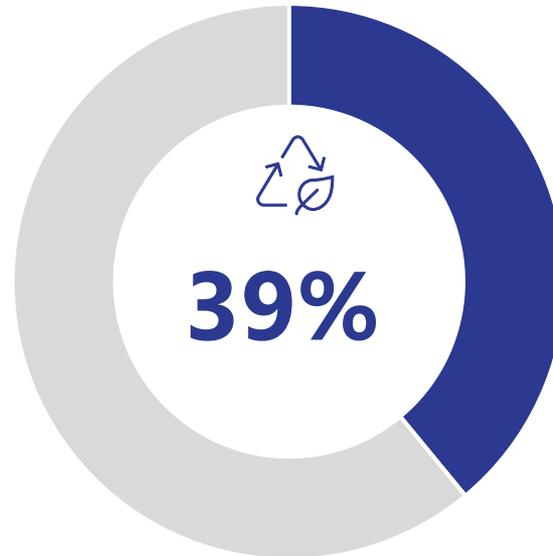


North Americans are willing to reduce their consumption, but they are less optimistic about whether other people will be living in an environmentally friendly way

I would be willing to reduce my consumption by half to avoid environmental damage and climate change



Most people will be living environmentally friendly lifestyle in the next decade



 Global data

Global results show 54% think people will be living a more environmentally friendly lifestyle

Base: N. America

Q6. Please indicate whether you strongly agree, somewhat agree, neither agree or disagree, somewhat disagree, or strongly disagree with the following statements. – I would be willing to reduce consumption by half to avoid environmental damage / climate change

Q40. How likely do you do you think it is that each of the following will happen in the next ten years? – “Most people will be living environmentally friendly lifestyles”

Q&A



Sylvain Charlebois

Professor, Food Distribution and Policy,
Senior Director, Agri-Food Analytics Lab
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How to support consumers in making sustainable and healthy food choices affordable