The Rise of the Conscious Food Consumer: COVID, Climate, and Conservation; How Will These Affect Consumer Habits?

North America 10 November 2020
Today’s Agenda

1. Welcome
2. Consumer trends – MSC GlobeScan Global Seafood Consumer Insights 2020
3. Results from GlobeScan Healthy & Sustainable Living survey
4. Q&A

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Meet the Team

Eric Wan
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Kristen Stevens
Senior Marketing Manager at MSC (US Team)

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VP of Seafood Merchandising at Whole Foods Market

Tonette Lim
Responsible Sourcing Manager at Costco Wholesale
1. Consumer Trends Before COVID-19
Introduction to MSC Consumer Insights for North America 2020

The Marine Stewardship Council partnered with GlobeScan to conduct the third wave of a **global research study** into consumer perceptions.

<table>
<thead>
<tr>
<th>Type of consumer</th>
<th>Sample</th>
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</thead>
<tbody>
<tr>
<td>General public</td>
<td>n=5,728</td>
</tr>
<tr>
<td>Seafood consumers</td>
<td>n=4,170</td>
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</tbody>
</table>
Climate change is the most concerning environmental issue globally.

Most concerning environmental issues; percentage choosing issue in top 3, 23 country average

- **Climate change**: 53%
- Pollution/waste damaging rivers and streams: 41%
- Air pollution: 37%
- Extreme weather events: 37%
- Loss/destruction of rainforests: 34%
- Health of oceans / decline in fish populations: 34%
- Loss of animal species: 32%
- Loss of wilderness / urban sprawl: 18%
- None of these: 4%

Base: General population, global, n=26,535
Q1.2: Which, if any, of the potential environmental issues are you most worried about?
North American consumers are more concerned about the health of oceans and decline in fish populations than the average global consumer.

Most concerning environmental issues; percentage choosing issue in top 3, North America

Climate change: 50%
Pollution/waste damaging rivers and streams: 42%
Health of oceans / decline in fish populations: 37%
Loss of animal species: 33%
Extreme weather events: 33%
Air pollution: 33%
Loss/destruction of rainforests: 28%
Loss of wilderness / urban sprawl: 20%
None of these: 8%

Ranks 3rd in North America compared to 6th globally
Perceived importance of ocean health around the world – in North America (Canada and the USA), this ranks third.

Prioritization of health of oceans among other environmental issues, percentage choosing issue in top three

Ranking from 1 (green) to 8 (red)

Base: General population, global, n=26,535
Q1.2: Which, if any, of the potential environmental issues are you most worried about?
There has been a large increase in concern regarding pollution of the oceans and the impact of climate change on the oceans.

Top three most concerning ocean issues; percentage choosing each issue in top three, North America

- Pollution of the oceans (e.g., plastics)
  - 2020: 66%
  - 2018: 61%
  - Significant increase since 2018

- Overfishing / depletion of fish species
  - 2020: 47%
  - 2018: 49%
  - Significant decrease since 2018

- Effects of climate change on the oceans
  - 2020: 37%
  - 2018: 27%

Base: Seafood consumers, North America, n=4,170
Q11.2: There are many different potential threats to the world’s oceans, the wildlife living there, and the people who work there. Which of these potential issues worries you the most?
Roughly six in ten agree that in order to save the ocean, we have to consume fish only from sustainable sources.

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

58% believe that in order to save the ocean, we have to consume fish / seafood only from sustainable sources

Base: Seafood consumers, North America, $n=4,170$
Q5.1: How well does each of the following statements describe your opinions?
Three in ten North American seafood consumers think that their favorite fish species will not be available to eat 20 years from now.

Perceptions of fish availability over time, North America

I don’t think [favorite fish species]* will be available to eat 20 years from now

- Agree (strongly agree + agree): 47%
- Don't know: 29%
- Disagree (strongly disagree + disagree): 24%

Base: Seafood consumers, North America, n=4,170

*Fish species shown was the preferred species of each respondent

Q4.5: Please indicate how much you agree or disagree with the following statement: I don’t think [fish species] will be available to eat 20 years from now.
There is a large gap between the actions taken to protect fish and seafood (action) and those that people are willing to take in the future (intention).

Actions taken in the last year to protect fish and seafood and actions willing to take in the future, total mentions, North America

<table>
<thead>
<tr>
<th>Action</th>
<th>Intention</th>
</tr>
</thead>
<tbody>
<tr>
<td>Switched to a brand/product that says it helps protect oceans/fish</td>
<td>20%</td>
</tr>
<tr>
<td>Reduced the amount of fish/seafood I eat</td>
<td>19%</td>
</tr>
<tr>
<td>Changed the species/type of fish I buy</td>
<td>15%</td>
</tr>
<tr>
<td>Used a guide/website/app to help choose which fish to buy</td>
<td>11%</td>
</tr>
<tr>
<td>Stopped eating fish or seafood completely</td>
<td>4%</td>
</tr>
</tbody>
</table>

Base: Seafood consumers, North America, n=4,170
Q11.4a: Which, if any, of the following actions have you taken in the last year to help protect the fish and seafood in our oceans?
Q11.4b: And which other actions would you also be willing to take in the future to protect the fish and seafood in our oceans?
There is a thirst for more information on sustainability and traceability of fish and seafood products.

Attitudes toward ocean sustainability issues, “describes opinion well,” top three (5+6+7 on 7-pt scale), North America

88% want better information so they can be confident that they are not buying unsustainable fish or seafood products.*

70% would like to hear more from companies about the sustainability of their fish and seafood products.

63% want to know that the fish they buy can be traced back to a known and trusted source.

Base: Seafood consumers, North America, n=4,170

*Q11.3: Please indicate how much you agree or disagree with the following statements; “agree” (3+4 on a 4-pt scale)
Q5.1: How well does each of the following statements describe your opinions?
Nearly seven in ten agree that claims about sustainability should be labeled by an independent organization, but less than four in ten say they notice ecolabels.

Attitudes toward ecolabels, “describes opinion well,” top three (5+6+7 on 7-pt scale), North America

Supermarkets’ and brands’ claims about sustainability should be clearly labeled by an independent organization

I notice ecolabelled products when I’m shopping

Aged 18–34

66%

25% 34%

Base: Seafood consumers, North American, $n=4,170$

Q5.1: How well does each of the following statements describe your opinions?

Q8.1: How well does each of the following statements describe your opinions about ecolabels?
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
Top drivers of purchase remain the same but sustainability and traceability focused motivators have risen since 2018.

Motivators: max diff analysis, Importance score, North America

- Safe to eat: 7.1
- Fresh: 6.4
- Taste: 6.2
- Good for my health / my family: 6.0
- Price: 4.1
- Sustainably sourced / enviro. friendly: 3.3 (Up from 10th to 6th)
- A type of fish I always eat: 3.1
- Knowing where the product comes from: 2.8
- Non GMO: 2.5
- Caught in the wild: 2.4 (Up)
- Easy to cook: 2.4
- Clearly marked country of origin: 1.8 (Up)
- Independently certified/verified: 1.7 (Up)
- Dolphin/turtle friendly: 1.7 (Up)
- Preferred brand: 1.6 (Down)
- Fairly traded: 1.5
- Sourced locally: 1.4
- Organic: 1.0
- Fishing method: 0.8

▲ Ranked higher in 2020 compared to 2018
▼ Ranked lower in 2020 compared to 2018

Base: Seafood consumers, North America \(n=4,170\)

Q4.2: Thinking about your recent purchase of [fish type], which of the following five considerations was the most important and which was the least important?
Recognition of the MSC label has risen significantly in 2020, with awareness levels particularly high among those aged between 18 and 34.

27% of the general population recall seeing the MSC label up from 23% in 2018.

This rises to 32% among seafood consumers.

46% among those aged 18–34.

Base: General population, North America, n=5,728; Seafood consumers, North America, n=4,170; Seafood consumers aged 18–34, North America, n=984
Q1.1: Have you ever seen the following logos?
Trust in the MSC label has also risen significantly since 2018.

Trust in the MSC label (5+6+7 on a 7-pt scale), North America

- Trust in 2020: 72%
- Trust in 2018: 65%

Base: MSC Aware seafood consumers, North America, n=1,236; MSC Aware seafood consumers, North America 2018, n=1,065
Q9.2: How much trust do you have in the claims of each of the following initiatives/organizations? 7-pt scale: 1 = "No trust," 7 = "A lot of trust"
Among seafood consumers, a third say they are eating more fish now than five years ago.

Changes in seafood consumption and reasons for change, North America

Compared to five years ago, has the amount of fish and seafood you eat changed?

- Yes - I eat more (33%)
- Yes - I eat less
- No - I eat a similar amount (47%)

Base: Seafood consumers, North America, n=4,170
Q4.6: Compared to five years ago, has the amount of fish and seafood you eat changed?
Health is the most cited reason for increase in seafood consumption, followed by replacing red meat.

Reasons for change, North America

### Reasons for increase

- Eating fish is healthier: 67%
- Replacing red meat in my diet: 36%
- I cook more meals at home: 28%
- Fish is more affordable: 15%
- I eat at restaurants more often: 12%
- Reduce carbon footprint of my food: 6%
- Other: 5%

### Reasons for decrease

- Fish is more expensive: 46%
- Concern about declining fish populations: 25%
- Concern about effects of fishing on the ocean: 21%
- I eat at restaurants less often: 19%
- I cook fewer meals at home: 14%
- Watching "The Blue Planet": 8%
- Other: 12%

Base: Seafood consumers who say they have increased their consumption, North America, n=1,410; Seafood consumers who say they have decreased their consumption, North America, n=811

Q4.6: Compared to five years ago, has the amount of fish and seafood you eat changed?
Q4.7a: What are the reasons for this change? [Increase] / Q4.7b: What are the reasons for this change? [Decrease]
Younger consumers are more likely to be eating less fish due to price and concerns about declining stocks.

### Top 3 reasons for increase in consumption compared to five years ago, North America

- **Eating fish is healthier**
  - Aged 18–34: 52%
  - Aged 35–54: 67%
  - Aged 55+: 81%
- **Replacing red meat in my diet**
  - Aged 18–34: 26%
  - Aged 35–54: 31%
  - Aged 55+: 49%
- **I cook more meals at home**
  - Aged 18–34: 33%
  - Aged 35–54: 29%
  - Aged 55+: 21%

### Top 3 reasons for decrease in consumption compared to five years ago, North America

- **Fish is more expensive**
  - Aged 18–34: 32%
  - Aged 35–54: 51%
  - Aged 55+: 59%
- **Concern about declining fish**
  - Aged 18–34: 27%
  - Aged 35–54: 23%
  - Aged 55+: 24%
- **Concern about the effects of fishing on ocean**
  - Aged 18–34: 22%
  - Aged 35–54: 17%
  - Aged 55+: 24%
Timeline of 2020

MSC GlobeScan Consumer Insights

February March April May June July August September October November

Healthy & Sustainable Living

A Global Consumer Insights Project

Coronavirus Disease 2019 Outbreak

COVID-19

Then... ...Future
2. Results from Healthy and Sustainable Living 2020
A third of consumers say they have been greatly affected by the COVID-19 pandemic.

Extent personally affected by issues, North America

- The coronavirus/COVID-19 pandemic: 8% greatly, 26% moderately, 34% a little, 33% not at all
- The economic recession: 12% greatly, 30% moderately, 34% a little, 24% not at all
- Climate change or global warming: 19% greatly, 30% moderately, 33% a little, 18% not at all

Base: North America, n=2,055
T2: How much are you personally affected by each of the following problems?
COVID-19 is the most serious issue for consumers in North America; climate change and natural resource depletion are the top environmental concerns.

Seriousness of global problems, “very serious,” North America

- Coronavirus/COVID-19: 62%
- Spread of human diseases: 57%
- Climate change: 55%
- Depletion of natural resources: 54%
- Extreme poverty: 54%
- Online data security/privacy: 50%
- State of the global economy: 49%
- Air pollution: 49%
- Loss of biodiversity: 49%
- Gap between rich and poor: 49%
- Single-use plastic waste: 47%
- Shortages of fresh water: 47%
- Mental health problems: 46%
- Unemployment: 43%
- Unequal treatment of women: 41%
- Social/political division: 40%

Base: North America, n=1,366:
T1: For each of the following global problems, please indicate if you see it as a very serious, somewhat serious, not very serious, or not at all serious problem?
Following the COVID-19 pandemic, concern about the spread of disease has risen sharply, globally; perceived seriousness of climate change remains high.


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

*Includes Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Italy, Kenya, Mexico, Nigeria, Russia, Spain, Turkey, UK, and USA
Not asked in all countries in all years. Before 2019 this question was asked using an in-person and telephone methodology.
Consumer opinion has intensified in the past year; nearly seven in ten want to reduce their environmental impact.

Environmental attitudes, “strongly agree” and “somewhat agree,” North America

- I am trying to improve my own health and well-being: 77% in 2019
- I want to reduce the impact that I personally have on the environment and nature by a large amount: 57% in 2019
- I feel guilty about my negative impact on the environment: 33% in 2019
- What is good for me is often not good for the environment: 45% in 2019
- "I am trying to improve my own health and well-being": 83%
- "I want to reduce the impact that I personally have on the environment and nature by a large amount": 67%
- "I feel guilty about my negative impact on the environment": 45%
- "What is good for me is often not good for the environment": 43%

Base: North America, n=2,055:
Q11: Please indicate whether you strongly agree, somewhat agree, neither agree nor disagree, somewhat disagree, or strongly disagree with each of the following statements.
Consumers are increasingly likely to consider rewarding socially responsible companies, but the proportion doing so remains stable.

“Have rewarded companies seen as socially responsible” vs “considered this, but did not actually do,”
Average of 16 countries,* 1999–2020

*Includes Argentina, Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Nigeria, Russia, Spain, Turkey, UK, and USA.
Not all countries were asked in all years. Before 2019 this question was asked using an in-person and telephone methodology.

T24: Over the past year, have you considered rewarding a socially responsible company by either buying their products or speaking positively about the company to others? Would you say you have…?
Three in ten meat eaters favor plant-based alternatives; health and animal treatment are the key reasons for reduction in meat consumption.

Preference for meat and reasons to reduce meat consumption, all who eat meat, North America

Assuming equal **taste, nutritional value, and cost**, meat eaters prefer…

- Real meat from animals: 70%
- Meat-like alternatives made from plants: 30%

Most important reasons for meat eaters to **reduce** their consumption…

- Health: 40%
- Animal treatment: 19%
- Nothing would make me eat less meat: 16%
- Financial: 13%
- Environmental: 10%
- Other: 2%

Q13. Assuming each tasted equally good, had equal nutritional value, and cost the same, which one of the following do you prefer?
Q14. What would be the most important reason, if any, for you to reduce the amount of meat you eat?
Taste, price, and health continue to be determinants for food/drinks purchase choices; environmental impacts are less likely to be top priorities.

Food and drink purchase considerations, “always” and “often,” North America

<table>
<thead>
<tr>
<th>Consideration</th>
<th>Frequency</th>
</tr>
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<tbody>
<tr>
<td>Taste</td>
<td>87%</td>
</tr>
<tr>
<td>Price</td>
<td>82%</td>
</tr>
<tr>
<td>Health / nutritional value</td>
<td>71%</td>
</tr>
<tr>
<td>Information about ingredients/recyclability</td>
<td>56%</td>
</tr>
<tr>
<td>Hormones/antibiotics/chemicals</td>
<td>53%</td>
</tr>
<tr>
<td>Recyclability of packaging</td>
<td>51%</td>
</tr>
<tr>
<td>Amount of packaging</td>
<td>47%</td>
</tr>
<tr>
<td>GM ingredients</td>
<td>47%</td>
</tr>
<tr>
<td>Treatment of animals</td>
<td>43%</td>
</tr>
<tr>
<td>Responsible brand</td>
<td>42%</td>
</tr>
<tr>
<td>Treatment of producers/farmers</td>
<td>39%</td>
</tr>
<tr>
<td>Organic</td>
<td>37%</td>
</tr>
<tr>
<td>Environmental impacts</td>
<td>36%</td>
</tr>
<tr>
<td>Environmental impacts of transport</td>
<td>34%</td>
</tr>
</tbody>
</table>

Base: North America, n=1,485:
Q17. Thinking of the foods and drinks that you choose and how they are produced, distributed, and sold, please indicate how often you consider each of the following in your choices.
The impact of Covid-19 on the conscious food consumer

Q & A

Kristen Stevens
Senior Marketing Manager at MSC (US Team)

Wesley Rose
VP of Seafood Merchandising at Whole Foods Market

Tonette Lim
Responsible Sourcing Manager at Costco Wholesale
Thank you

For future MSC events, please register at: msc.org/en-us/about-the-msc/contact-us