



What Will the Future Hold for the Conscious Seafood Consumer?

Seafood Expo North America
March 17, 2021

GLOBESCAN



Today's Agenda

- 1 Introductions
- 2 Consumer Trends & Vibrant Panel Discussion
- 3 Q&A

Join the discussion: [@GlobeScan](#) | [@MSCBlueFish](#) | [#GlobeScan](#)

Meet the Team



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Kristen Stevens

Senior Marketing Manager
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Logan Soraci

Brand Manager - Brand
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Seafood - Conagra Brands



Marife Casem

Senior Manager, Sustainability
- Walmart Inc.

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Results from 2020 Healthy & Sustainable Living Study

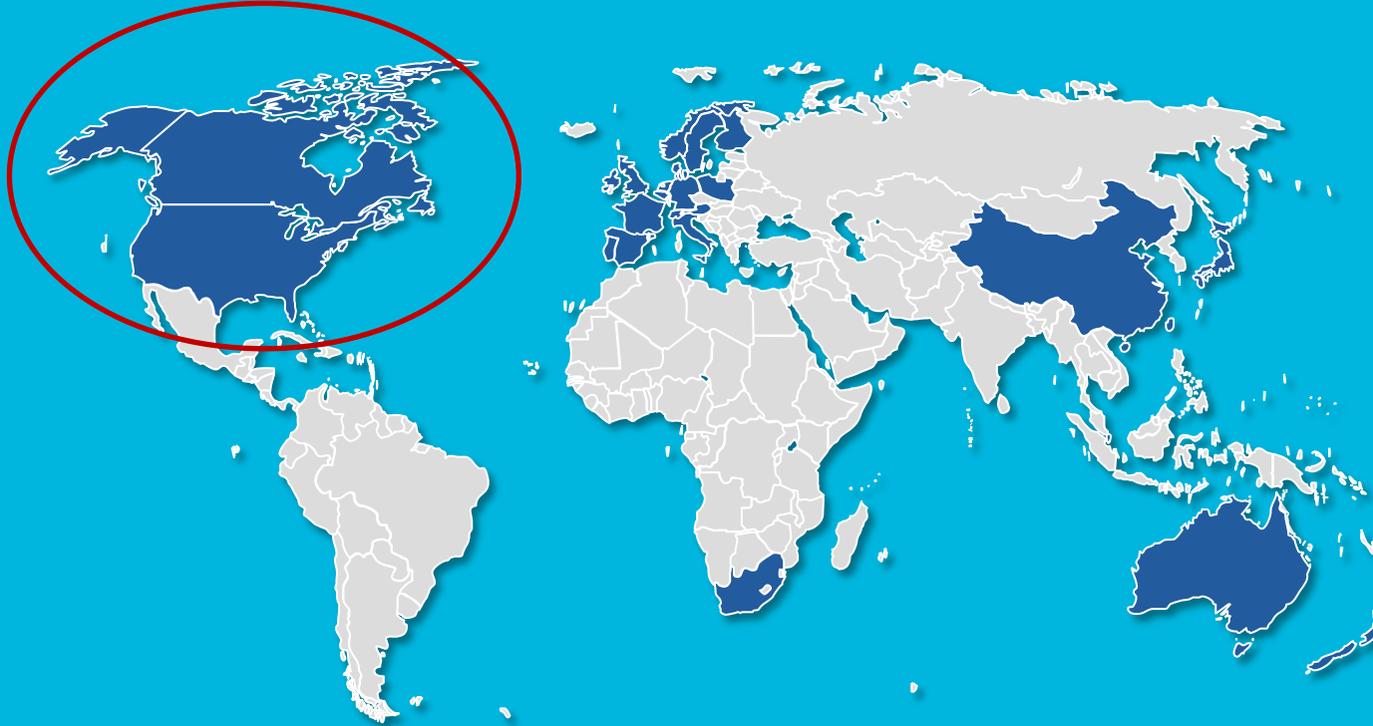
Healthy &
Sustainable
Living

A Global Consumer
Insights Project

Participating Countries
2020



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.**

Type of consumer	Sample
General public	<i>n</i> =5,728
Seafood consumers	<i>n</i> =4,170

Timeline of 2020 surveys



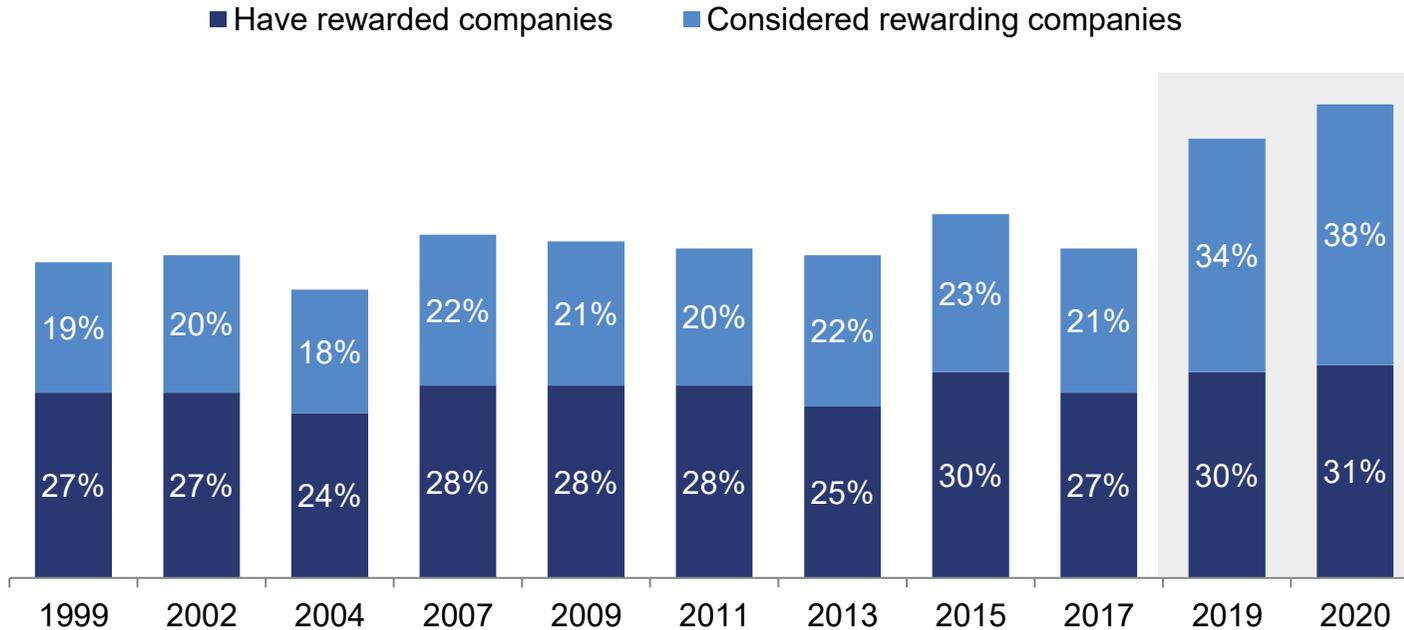


Insight #1

We are on the cusp of a potential consumer revolution

Consumers are increasingly likely to consider rewarding socially responsible companies, but the proportion doing so remains stable

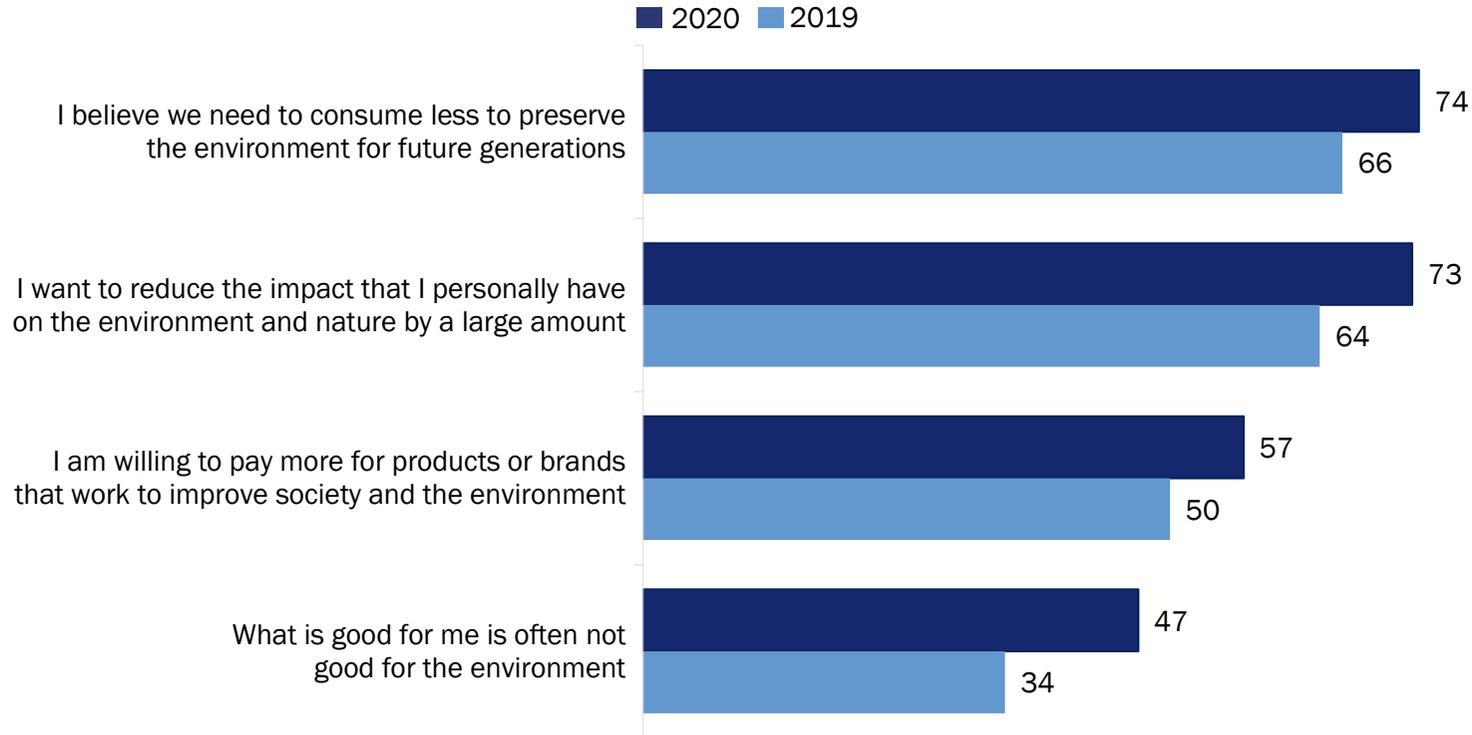
“Have rewarded companies seen as socially responsible” vs “considered this, but did not actually do,” Average of 16 countries,* 1999–2020



*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.

Dramatic increases in sustainability attitudes in past 12 months

“Strongly Agree” and “Somewhat Agree,” Average of 24 Countries, 2019–2020



Q11. Please indicate whether you strongly agree, somewhat agree, neither agree nor disagree, somewhat disagree, or strongly disagree with each of the following statements.



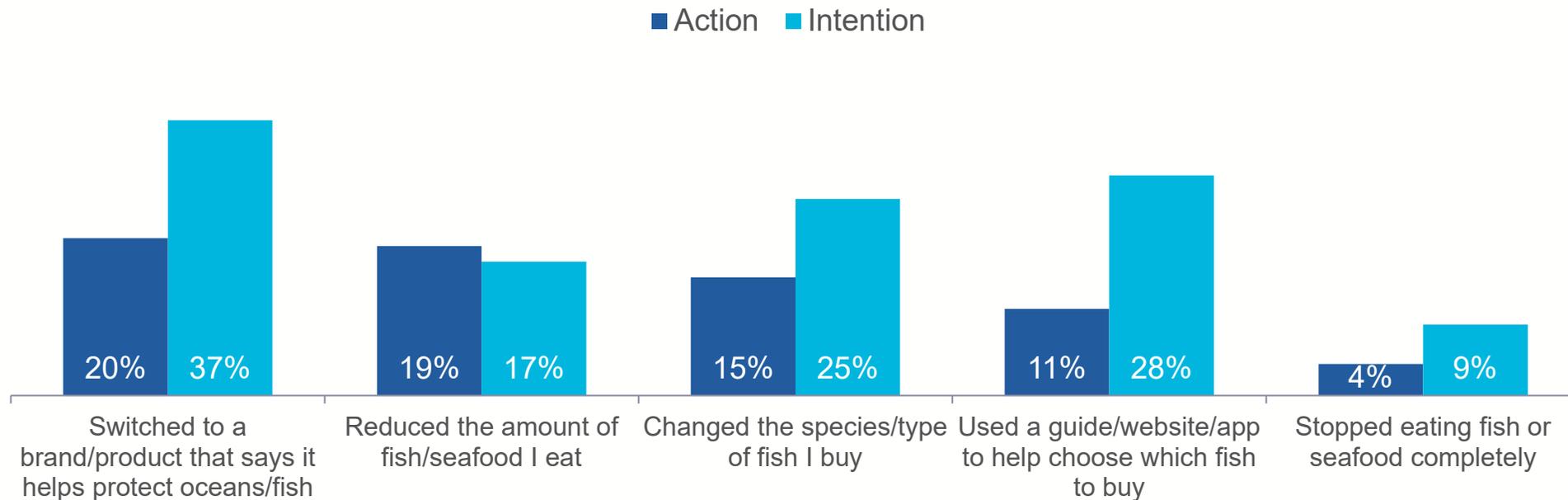
Insight #2

Ongoing gap in what people say they're willing to do versus what they actually do

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





Insight #3

People want independent labeling of environmental claims, yet they largely don't notice ecolabels

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)

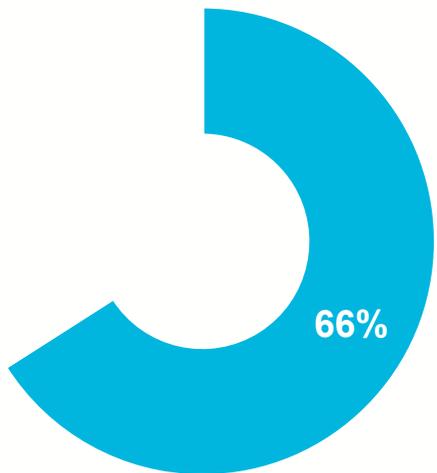
13 Q5.1: How well does each of the following statements describe your opinions?

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.

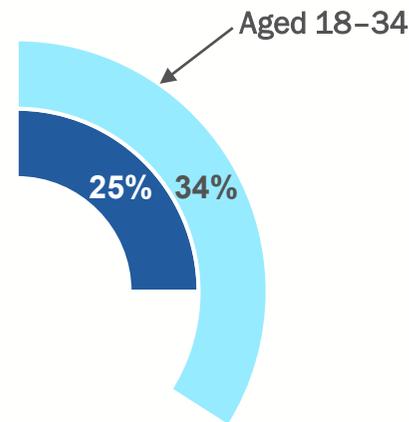


Attitudes toward ecolabels, “describes opinion well,” top three (5+6+7 on 7-pt scale), North America

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



I notice ecolabelled products when I’m shopping





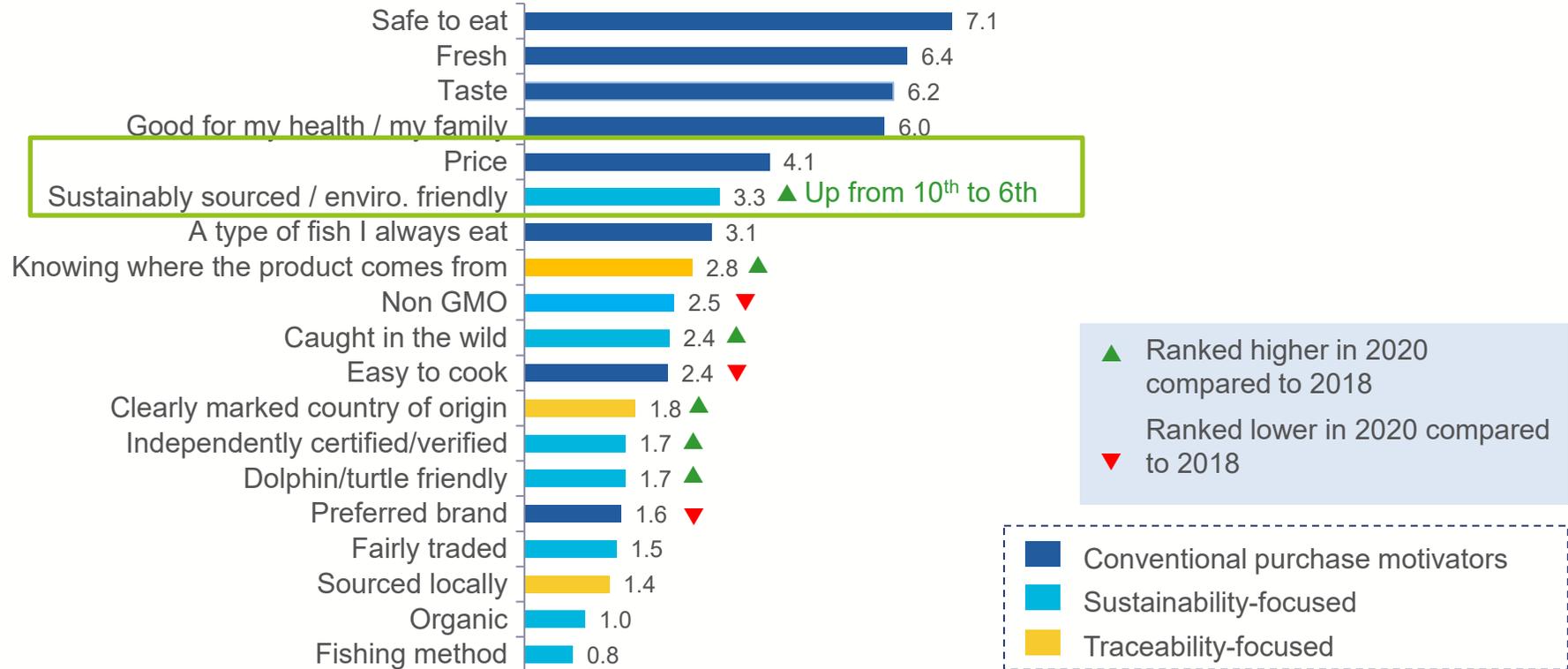
Insight #4

Evolution in drivers of seafood purchases, with sustainability on the rise

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





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Q & A

If we missed your question today, you can reach us at UScommunications@msc.org

Thank you!



evidence and ideas. applied



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