

What Will the **Future Hold for** the Conscious Seafood **Consumer?**

Seafood Expo North America March 17, 2021





Today's Agenda

1 Introductions

2 Consumer Trends & Vibrant Panel Discussion

3 Q&A

Join the discussion: @GlobeScan | @MSCBlueFish | #GlobeScan

Meet the Team



Chris Coulter CEO, GlobeScan

Kristen Stevens

Senior Marketing Manager Marine Stewardship Council, US

Logan Soraci

Brand Manager - Brand Development Frozen Prepared Seafood - Conagra Brands

Marife Casem

Senior Manager, Sustainability - Walmart Inc.

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Results from 2020 Healthy & Sustainable Living Study

Participating Countries

2020 Germa Russia Turkey USA apan South Korea long Kong Kenya Brazi ustrali South Africa R20 particip mai

A Global Consumer Insights Project

Healthy & Sustainable

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
- Der	General public	n=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



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

Have rewarded companies

8

38% 34% 23% 22% 21% 20% 21% 19% 20% 22% 18% 31% 30% 30% 28% 28% 28% 27% 27% 27% 25% 24% 1999 2002 2004 2007 2009 2011 2013 2015 2017 2019 2020

Considered rewarding companies

*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.

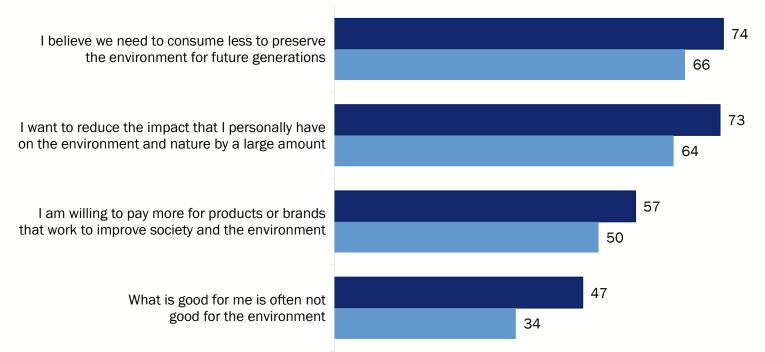
T24: Over the past year, have you considered rewarding a socially responsible company by either buying their products or speaking positively about the company to others? Would you say you have...?





Dramatic increases in sustainability attitudes in past 12 months

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



2020 2019

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





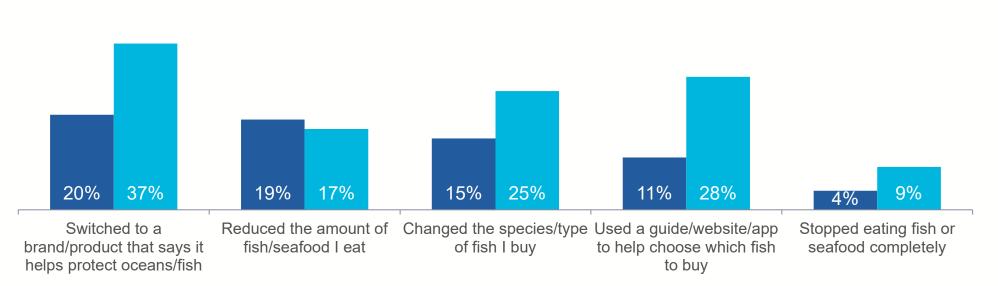
Insight #2 Ongoing gap in what people say they're willing to do versus what they actually do



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



Action Intention



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

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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?

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

889% 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

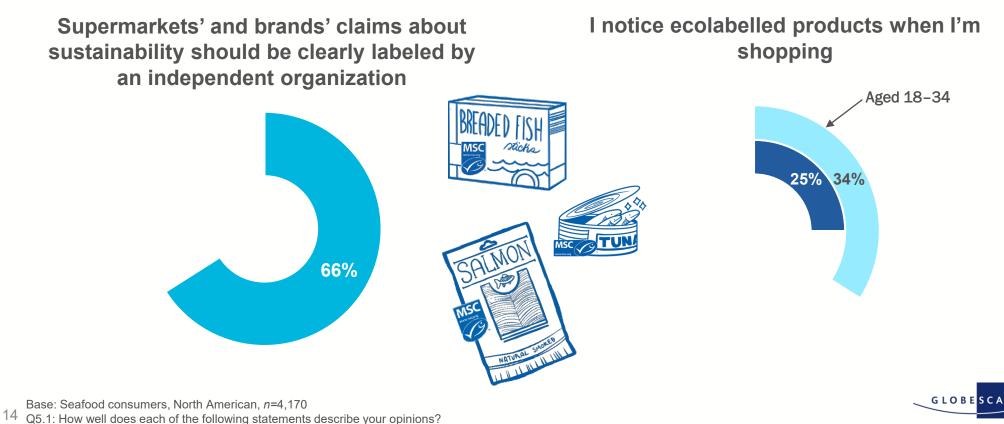
*Q11.3: Please indicate how much you agree or disagree with the following statements; "agree" (3+4 on a 4-pt scale)

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



Q8.1: How well does each of the following statements describe your opinions about ecolabels?

Insight #4 Evolution in drivers of seafood purchases, with sustainability on the rise

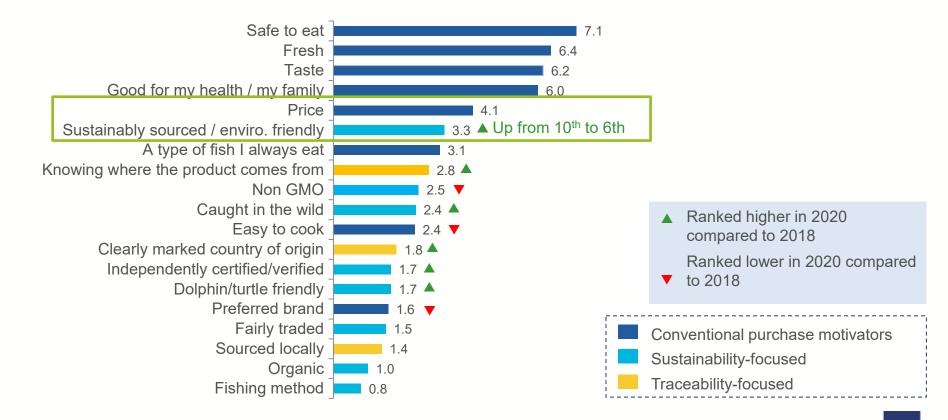


Top drivers of purchase remain the same but sustainability and traceability focused motivators have risen since 2018.



GLOBE

Motivators: max diff analysis, Importance score, North America



16 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?



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

Thank you!





evidence and ideas. applied

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