The Rise of the Conscious Food Consumer:

COVID, Climate, and Conservation; How Will These Affect Consumer Habits?

MARINE STEWARDSHIP COUNCIL™

GLOBESCAN
evidence and ideas. applied

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
Director at GlobeScan

Kristen Stevens
Senior Marketing Manager at MSC (US Team)

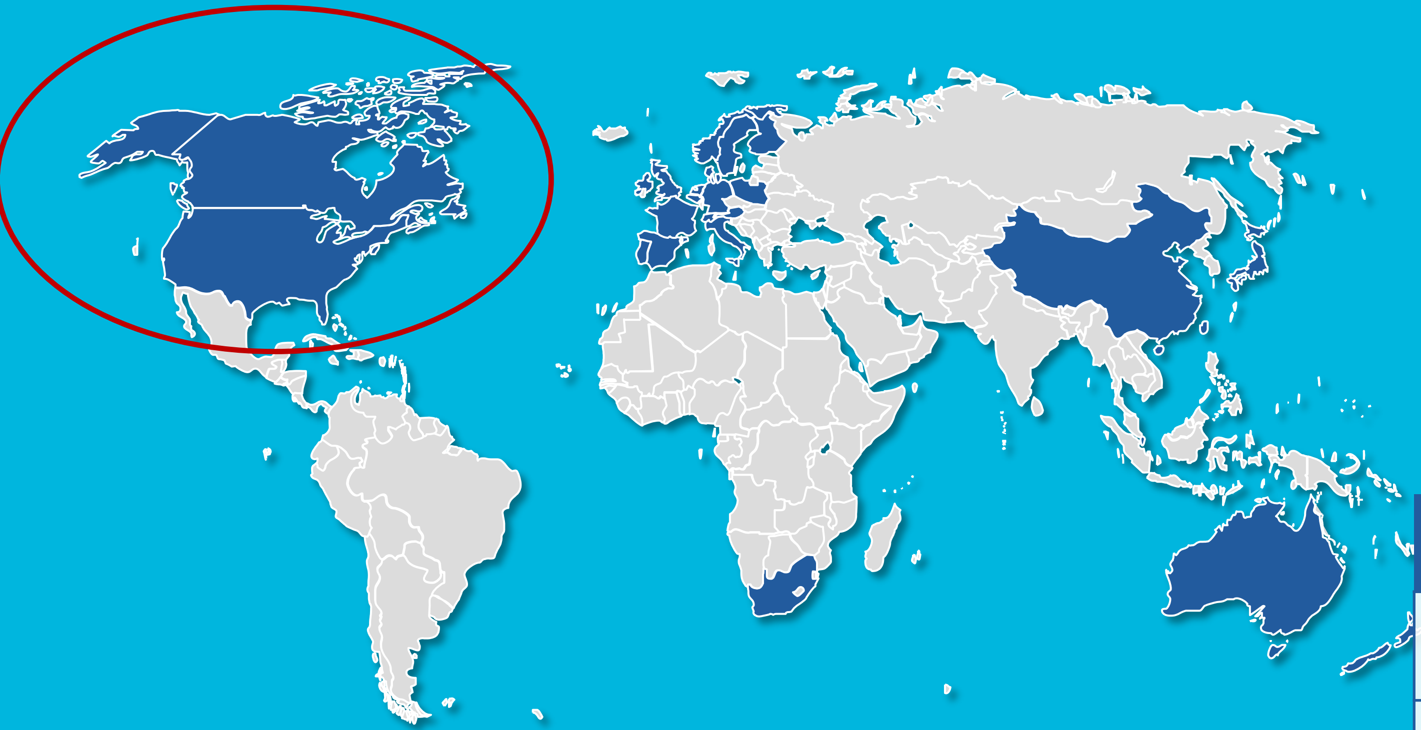
Wesley Rose
VP of Seafood Merchandising at Whole Foods Market

Tonette Lim
Responsible Sourcing Manager at Costco Wholesale

1. Consumer Trends Before COVID-19

MSC GlobeScan Consumer Insights

Introduction to MSC Consumer Insights for North America 2020

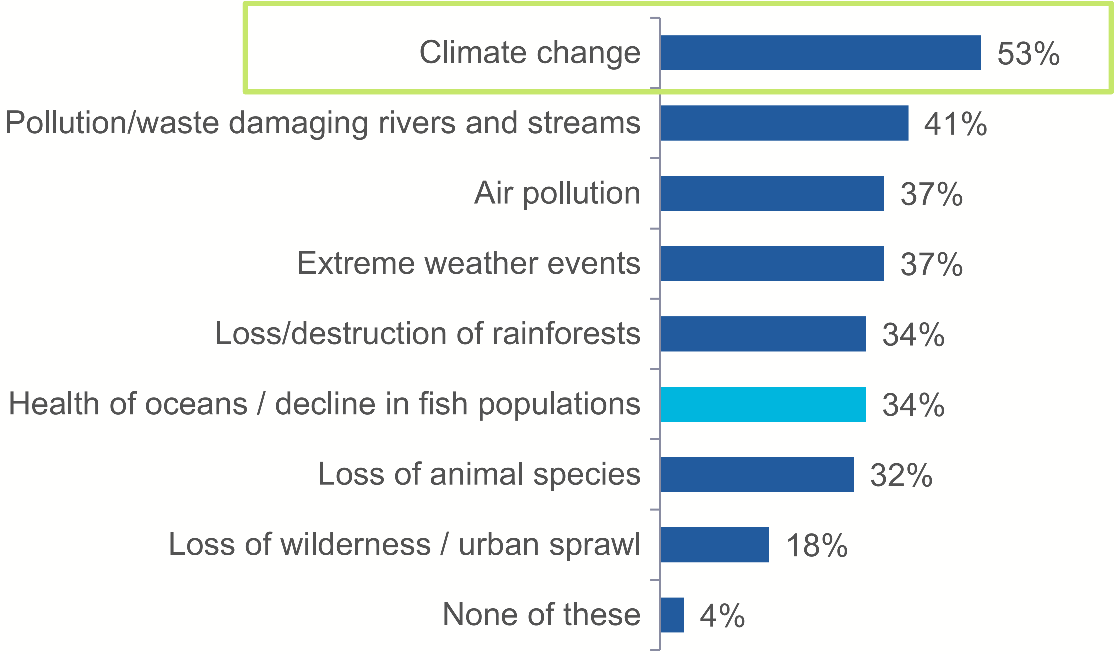


The Marine Stewardship Council partnered with GlobeScan to conduct the third wave of a **global research study** into **consumer perceptions**.

Type of consumer	Sample
General public	*n*=5,728
Seafood consumers	*n*=4,170

Climate change is the most concerning environmental issue globally.

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



Base: General population, global, *n*=26,535
Q1.2: Which, if any, of the potential environmental issues are you most worried about?

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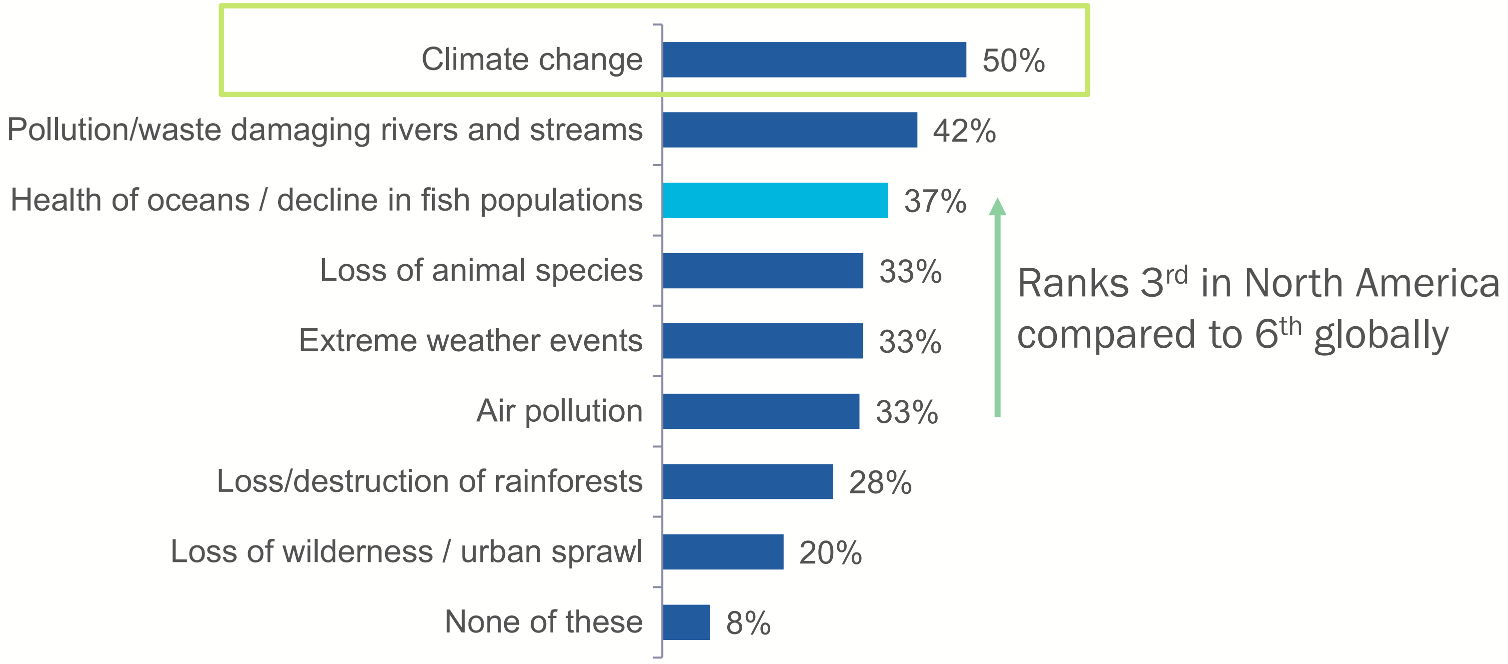
North American consumers are more concerned about the health of oceans and decline in fish populations than the average global consumer.

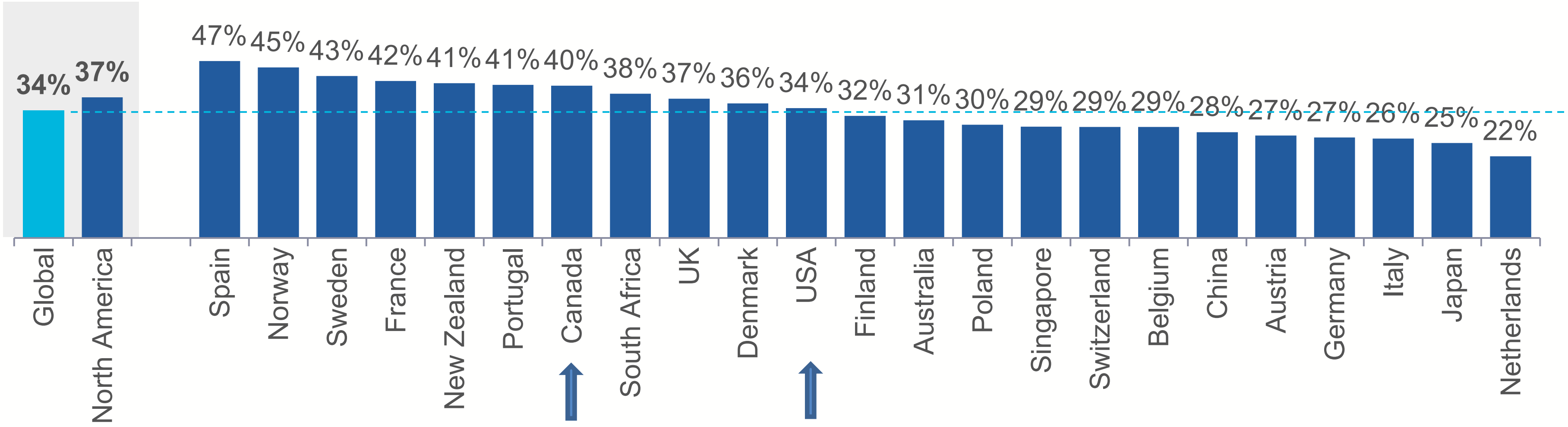
Most concerning environmental issues; percentage choosing issue in top 3, North America



Base: General population, North America, *n*=5,728
Q1.2: Which, if any, of the potential environmental issues are you most worried about?

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



	Global	North America	Spain	Norway	Sweden	France	New Zealand	Portugal	Canada	South Africa	UK	Denmark	USA	Finland	Australia	Poland	Singapore	Switzerland	Belgium	China	Austria	Germany	Italy	Japan	Netherlands
Rank (of 8)	6th	3rd	2nd	3rd	2nd	2nd	3rd	4th	3rd	4th	4th	4th	3rd	7th	5th	5th	6th	6th	7th	6th	6th	6th	6th	5th	7th

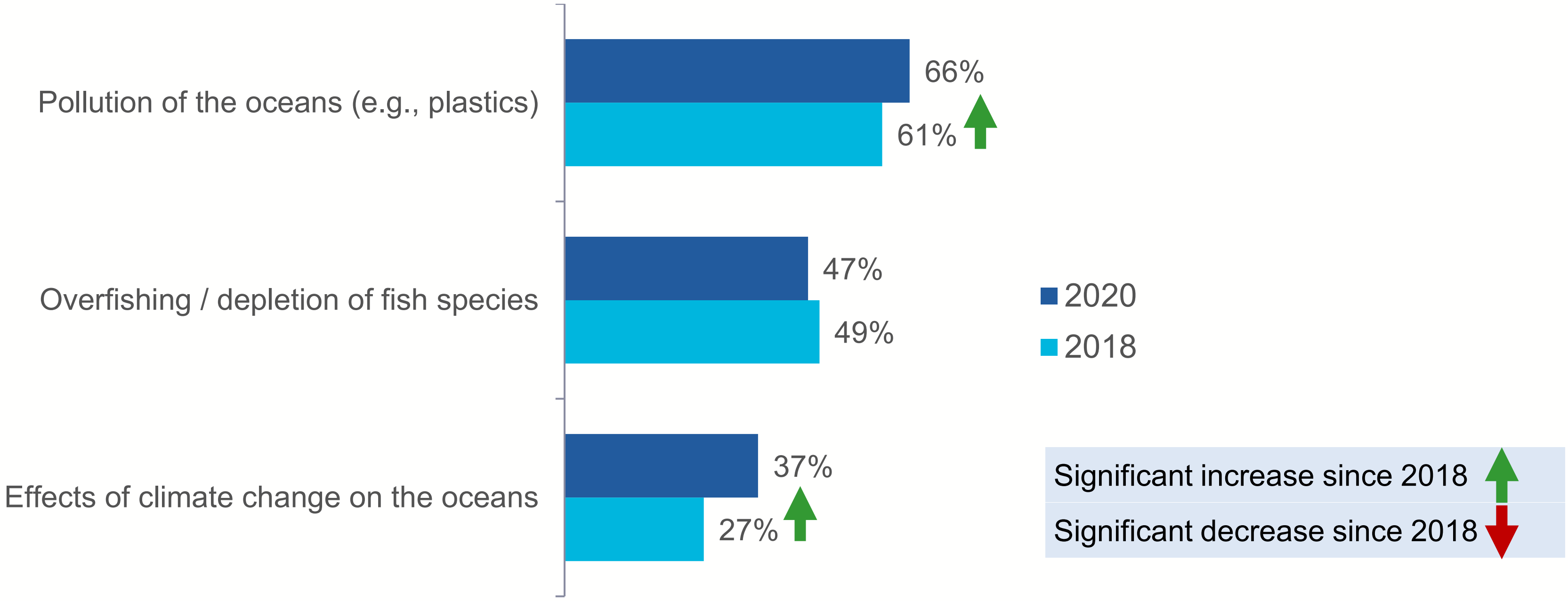
Ranking from 1 (green) to 8 (red)

Base: General population, global, *n*=26,535
Q1.2: Which, if any, of the potential environmental issues are you most worried about?

GLOBESCAN

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



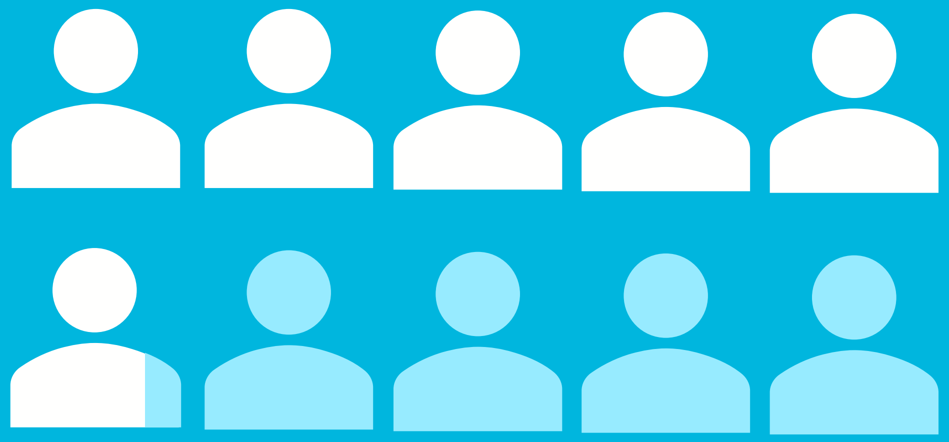
Base: Seafood consumers, North America, *n*=4,170
Q11.2: There are many different potential threats to the world's oceans, the wildlife living there, and the people who work there. Which of these potential issues worries you the most?

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

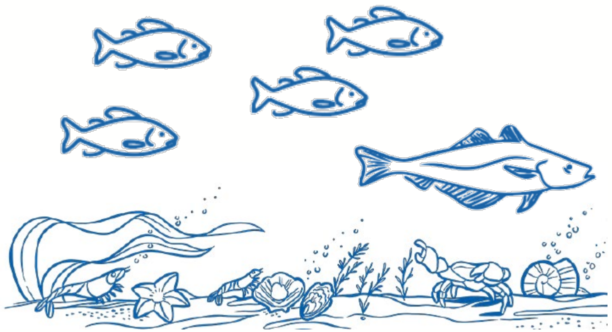


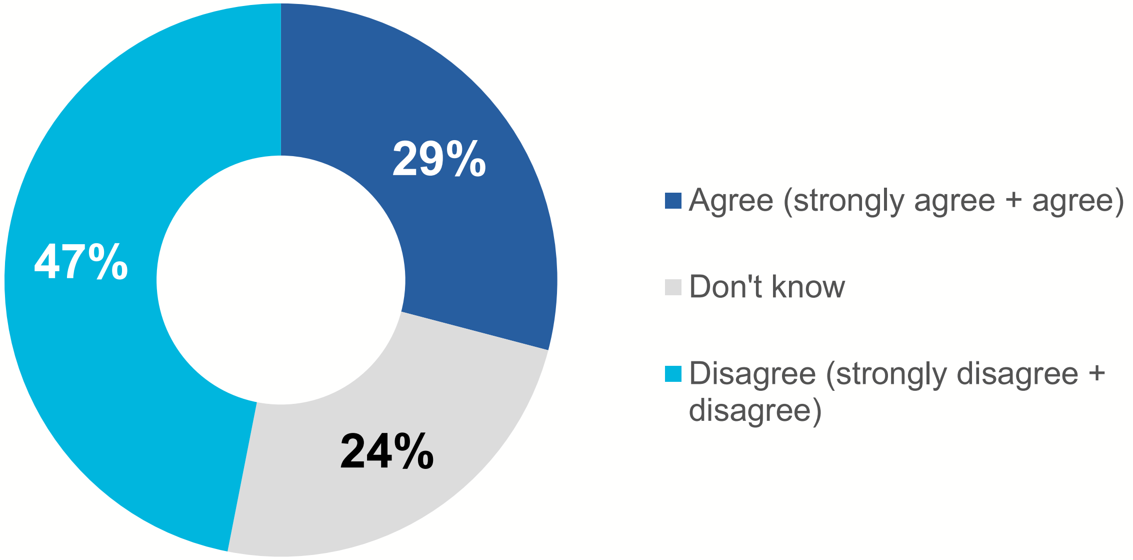
Base: Seafood consumers, North America, *n*=4,170
Q5.1: How well does each of the following statements describe your opinions?

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

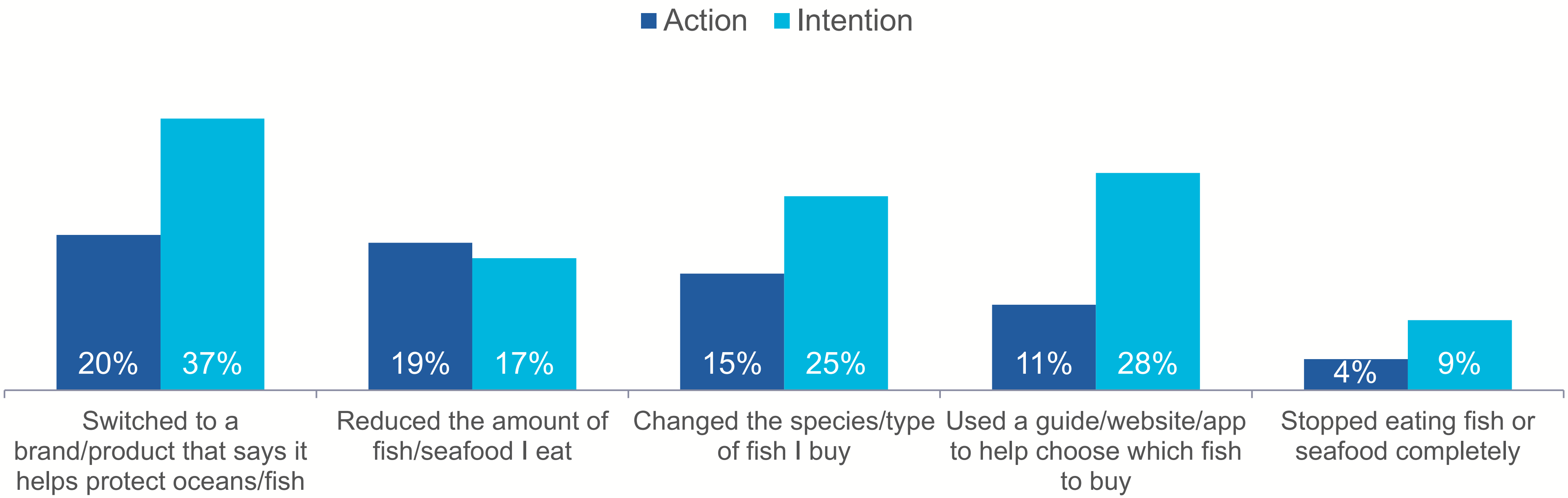




Base: Seafood consumers, North America, *n*=4,170
*Fish species shown was the preferred species of each respondent
Q4.5: Please indicate how much you agree or disagree with the following statement: I don’t think [fish species] will be available to eat 20 years from now.

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



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**

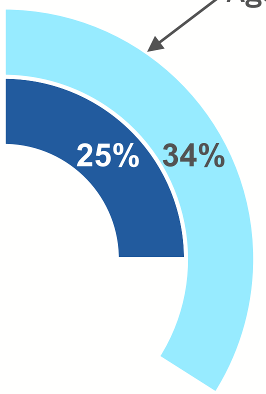
Base: Seafood consumers, North America, *n*=4,170
*Q11.3: Please indicate how much you agree or disagree with the following statements; “agree” (3+4 on a 4-pt scale)
Q5.1: How well does each of the following statements describe your opinions?

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



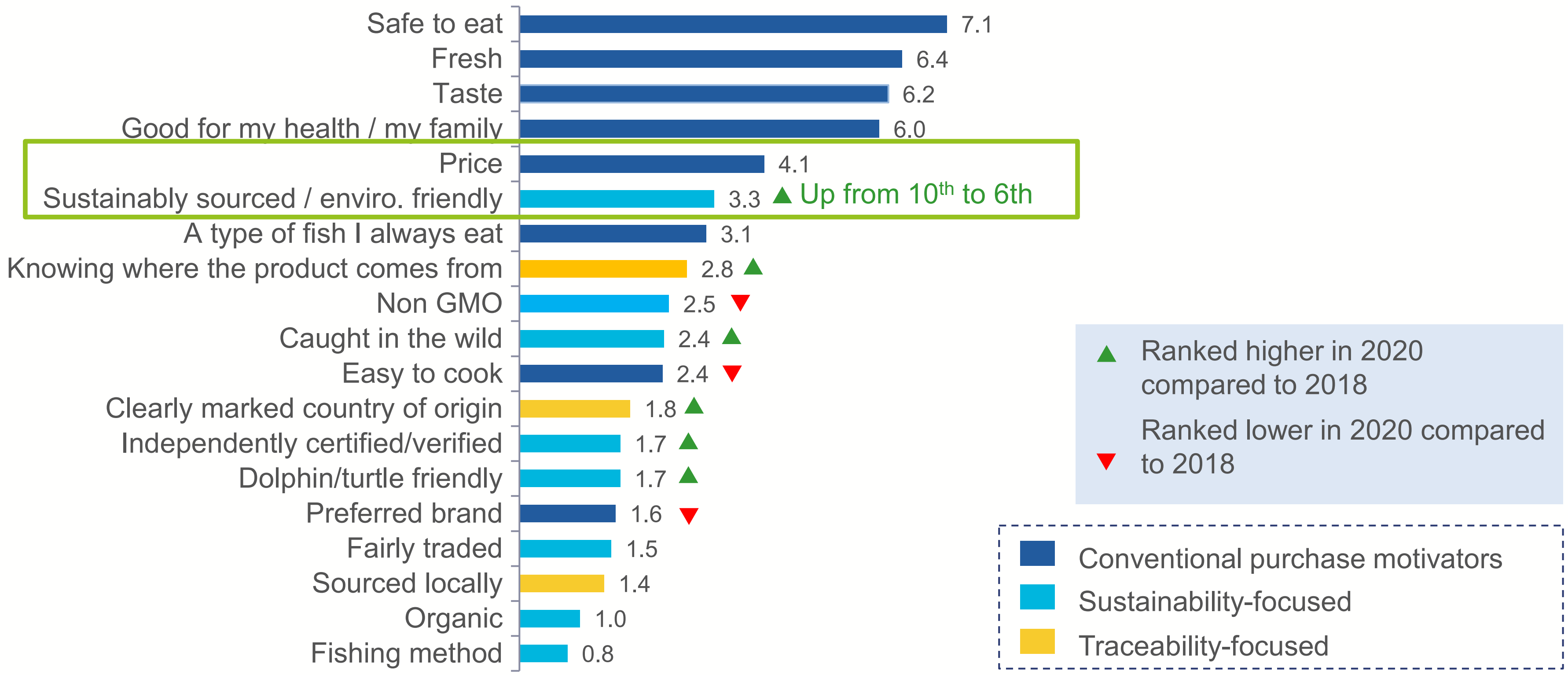
Base: Seafood consumers, North American, *n*=4,170
Q5.1: How well does each of the following statements describe your opinions?
Q8.1: How well does each of the following statements describe your opinions about ecolabels?

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



 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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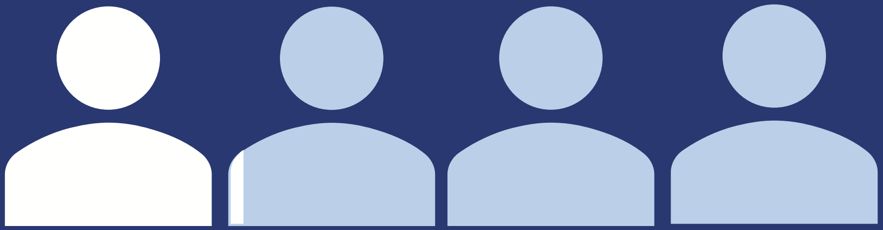
Recognition of the MSC label has risen significantly in 2020, with awareness levels particularly high among those aged between 18 and 34.

Awareness of the MSC label, North America



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

This rises to 32% among seafood consumers

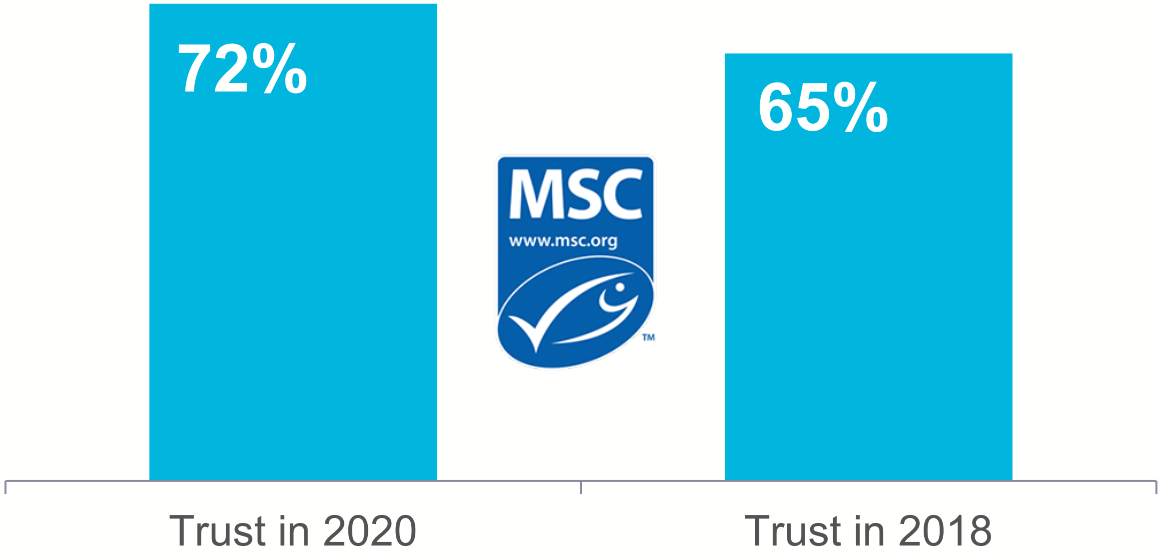
and

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

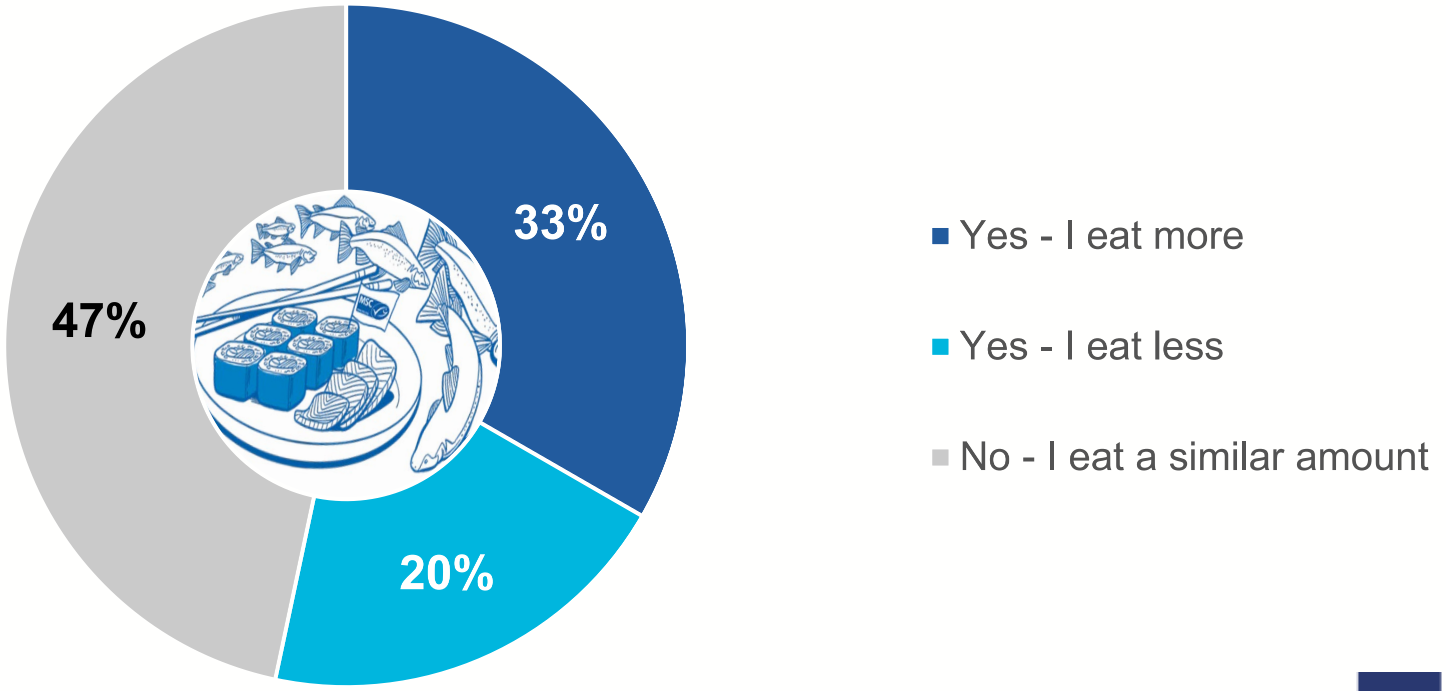


Base: MSC Aware seafood consumers, North America, *n*=1,236; MSC Aware seafood consumers, North America 2018, *n*=1,065
Q9.2: How much trust do you have in the claims of each of the following initiatives/organizations? *7-pt scale: 1 = "No trust," 7 = "A lot of trust"*

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

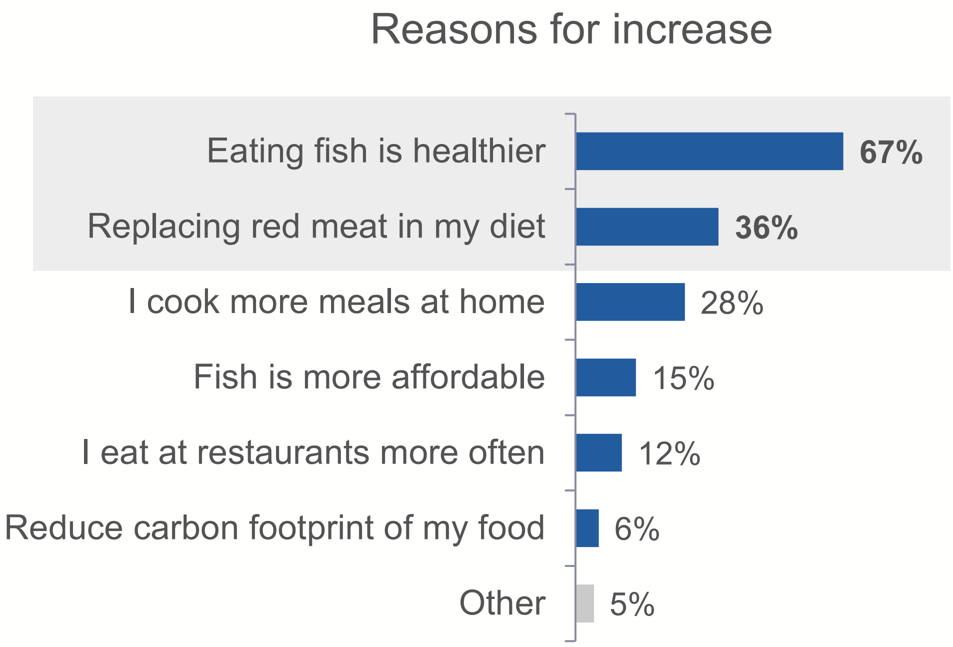
Compared to five years ago, has the amount of fish and seafood you eat changed?

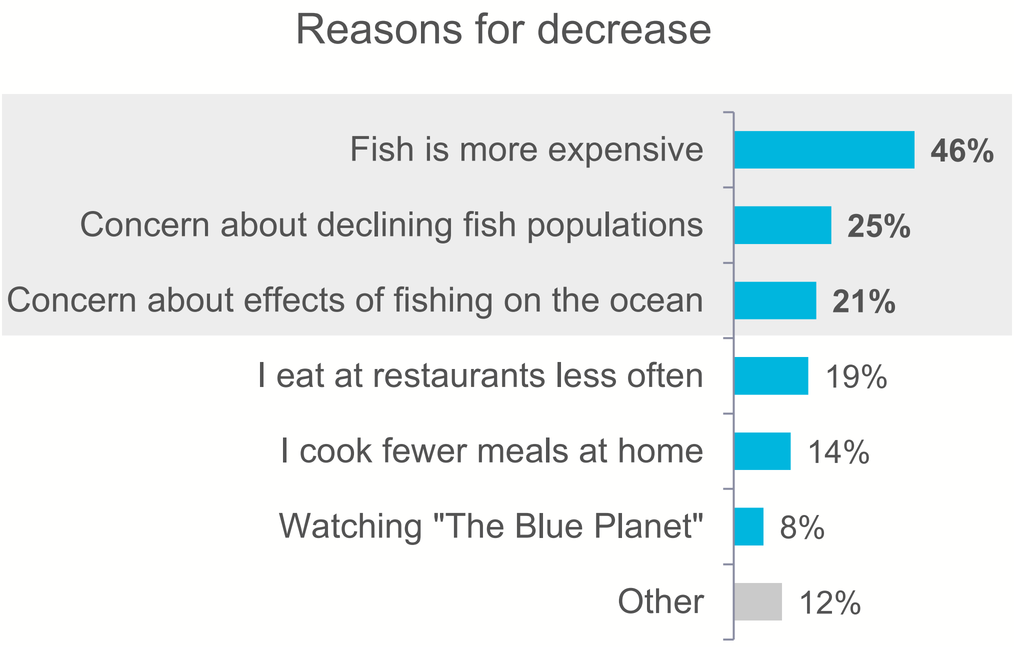


Base: Seafood consumers, North America, *n*=4,170
Q4.6: Compared to five years ago, has the amount of fish and seafood you eat changed?

Health is the most cited reason for increase in seafood consumption, followed by replacing red meat.

Reasons for change, North America

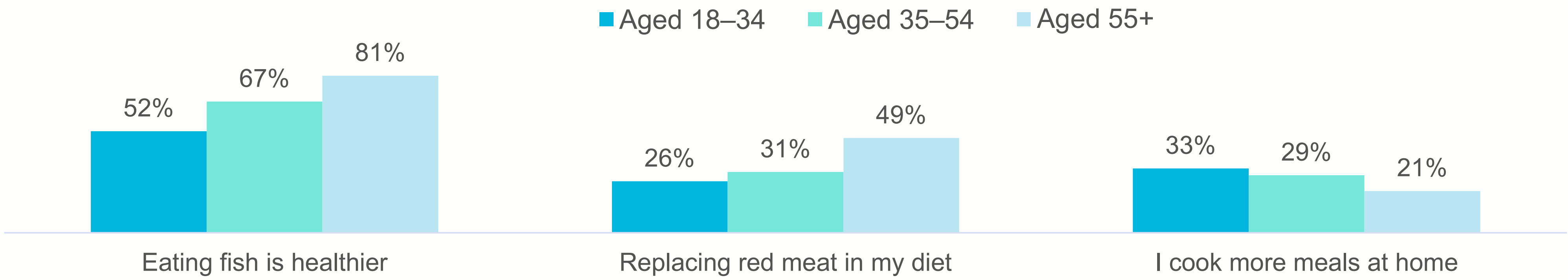




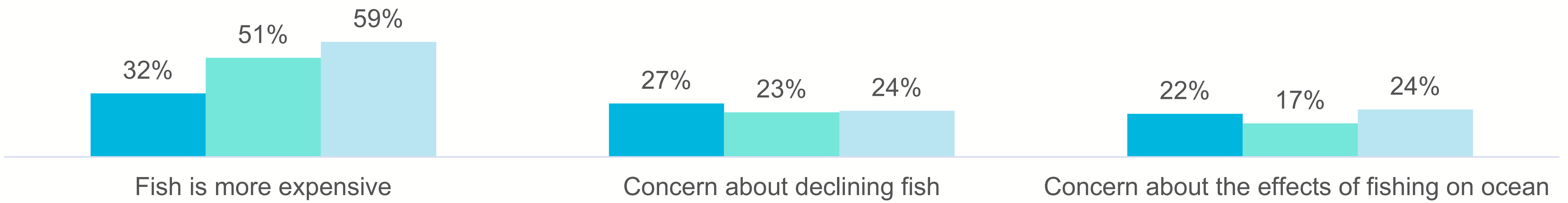
Base: Seafood consumers who say they have increased their consumption, North America, *n*=1,410; Seafood consumers who say they have decreased their consumption, North America, *n*=811
Q4.6: Compared to five years ago, has the amount of fish and seafood you eat changed?
Q4.7a: What are the reasons for 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



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



Base: Seafood consumers who have increased consumption, North America, *n*=1,140; Seafood consumers who have decreased 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]

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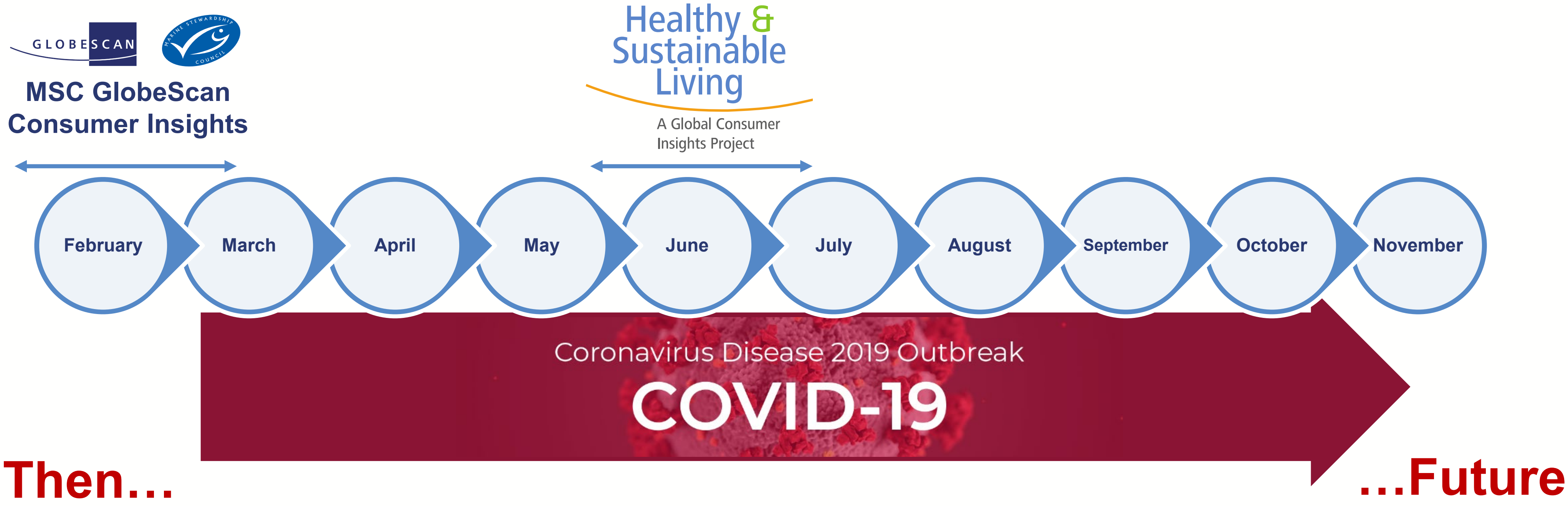
Timeline of 2020



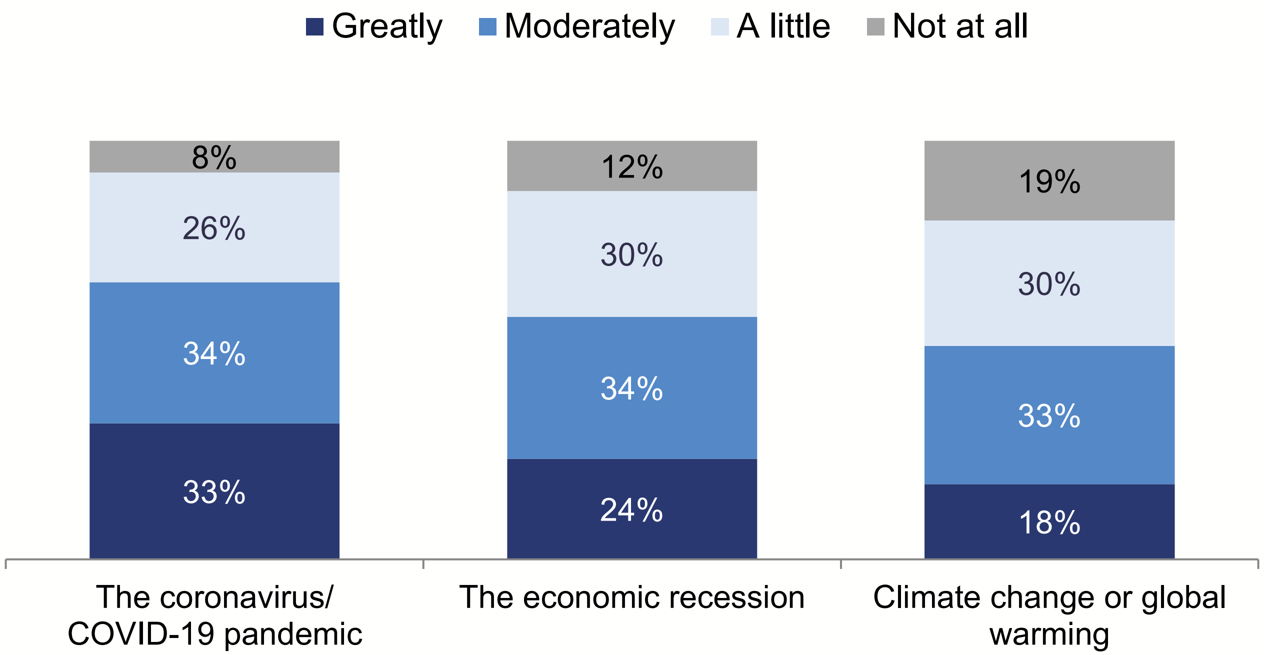
2. Results from Healthy and Sustainable Living 2020

Healthy & Sustainable Living

A Global Consumer Insights Project

A third of consumers say they have been greatly affected by the COVID-19 pandemic.

Extent personally affected by issues, North America



Base: North America, *n*=2,055
T2: How much are you personally affected by each of the following problems?

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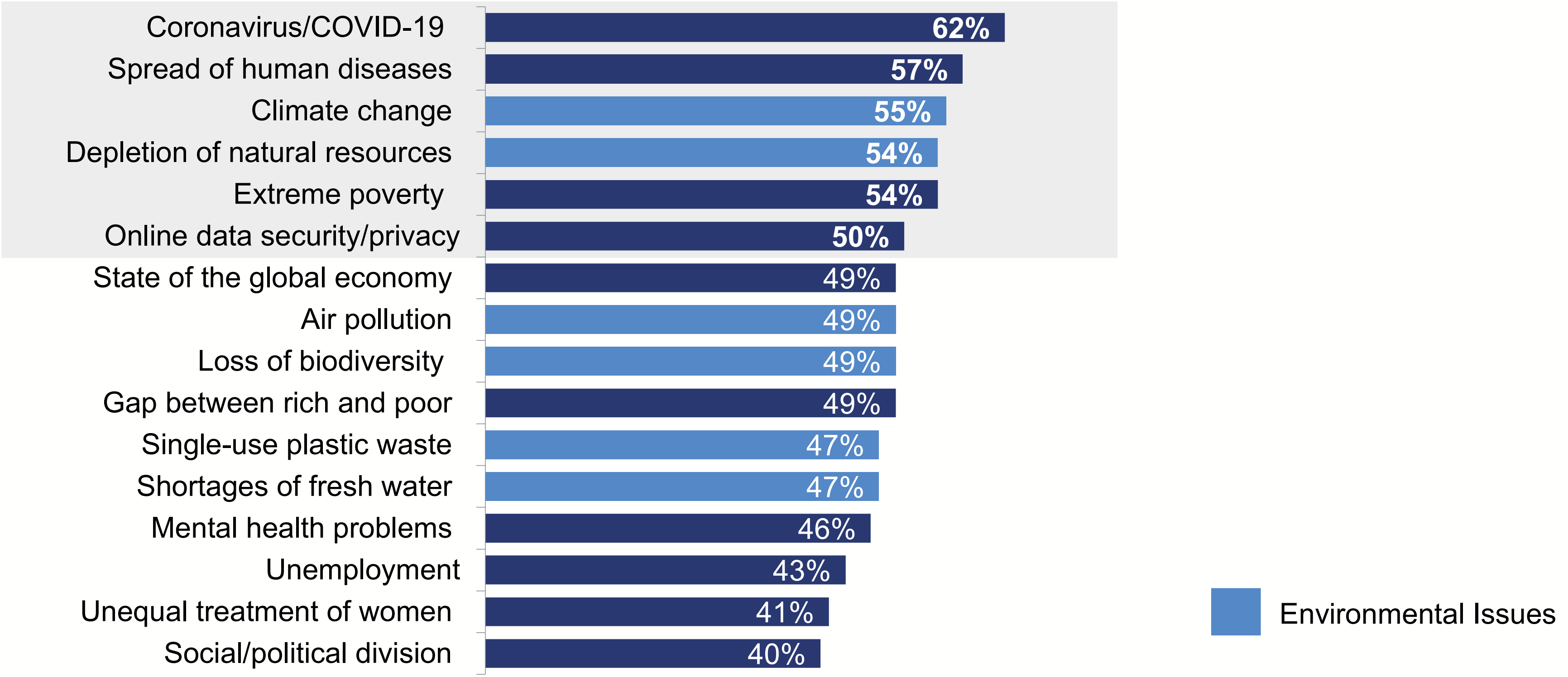
COVID-19 is the most serious issue for consumers in North America; climate change and natural resource depletion are the top environmental concerns.

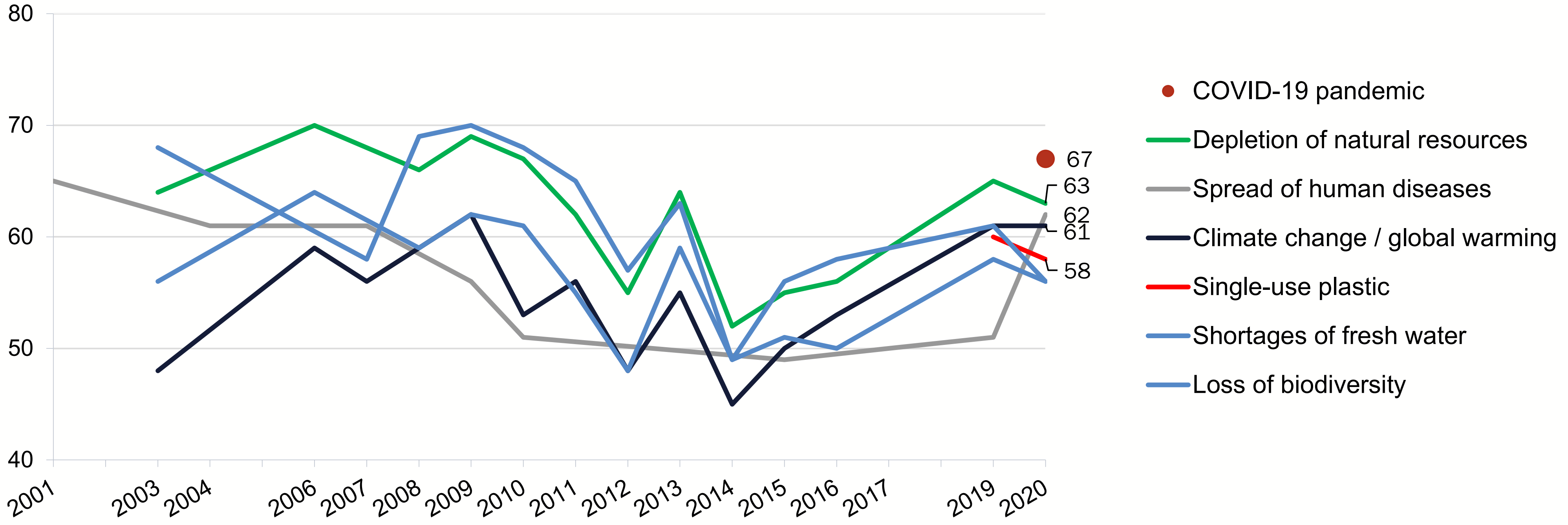
Seriousness of global problems, “very serious,” North America



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.

Seriousness of global problems, "very serious," average of 17 countries,* 2001–2020

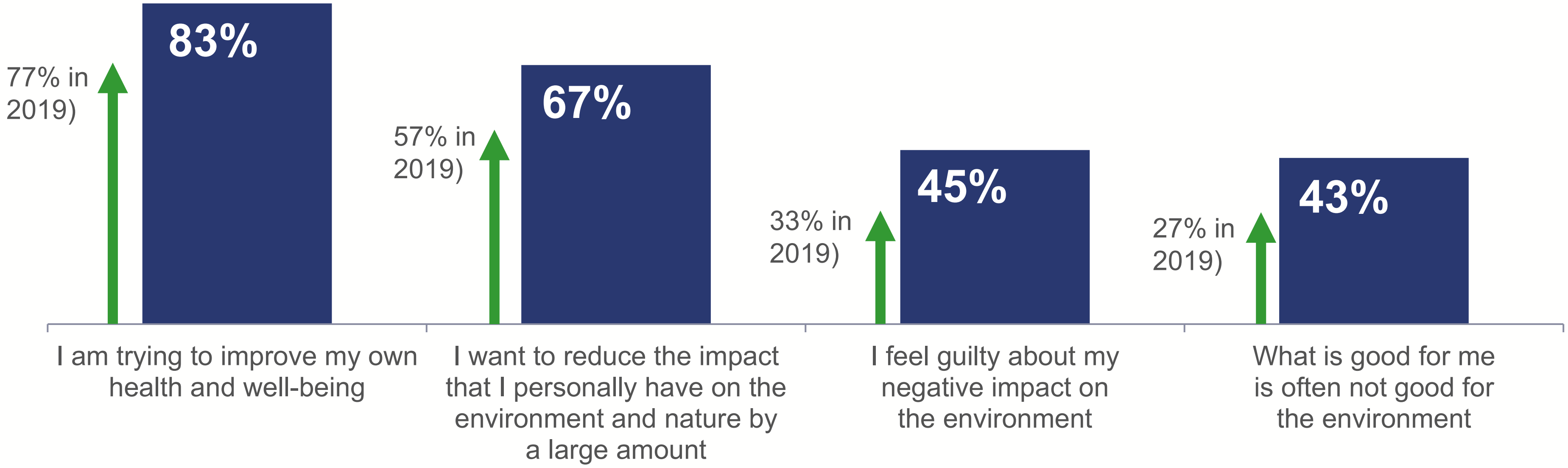


*Includes Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Italy, Kenya, Mexico, Nigeria, Russia, Spain, Turkey, UK, and USA
Not asked in all countries in all years. Before 2019 this question was asked using an in-person and telephone methodology.

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?

Consumer opinion has intensified in the past year; nearly seven in ten want to reduce their environmental impact.

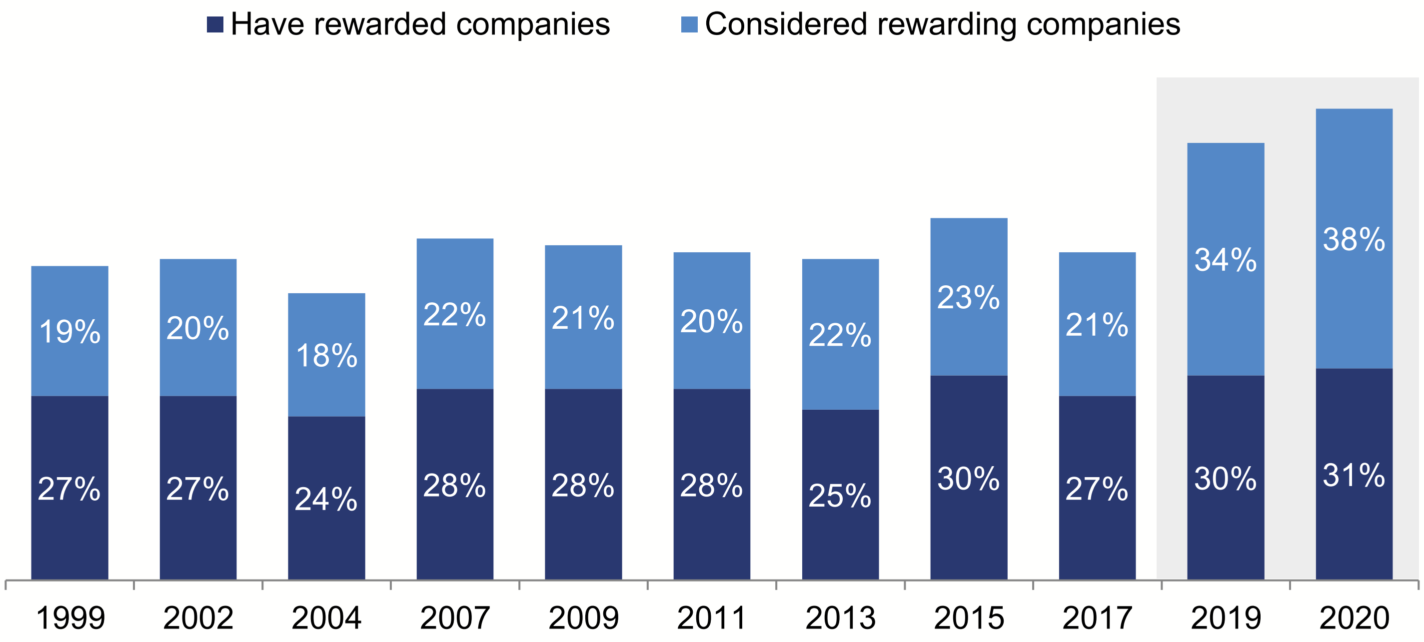
Environmental attitudes, "strongly agree" and "somewhat agree," North America



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



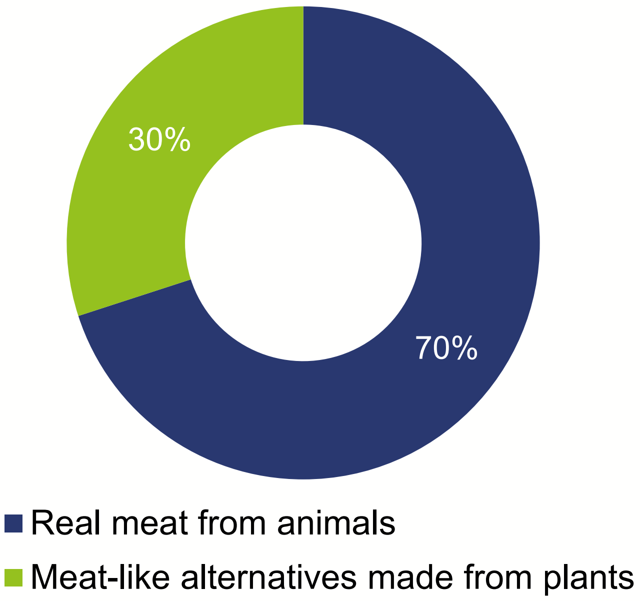
*Includes Argentina, Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Nigeria, Russia, Spain, Turkey, UK, and USA. Not all countries were asked in all years. Before 2019 this question was asked using an in-person and telephone methodology.

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…?

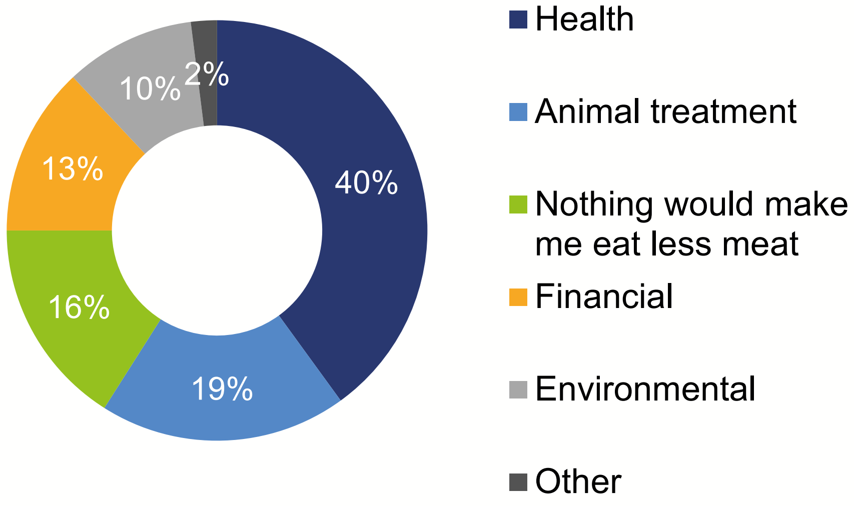
Three in ten meat eaters favor plant-based alternatives; health and animal treatment are the key reasons for reduction in meat consumption.

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…



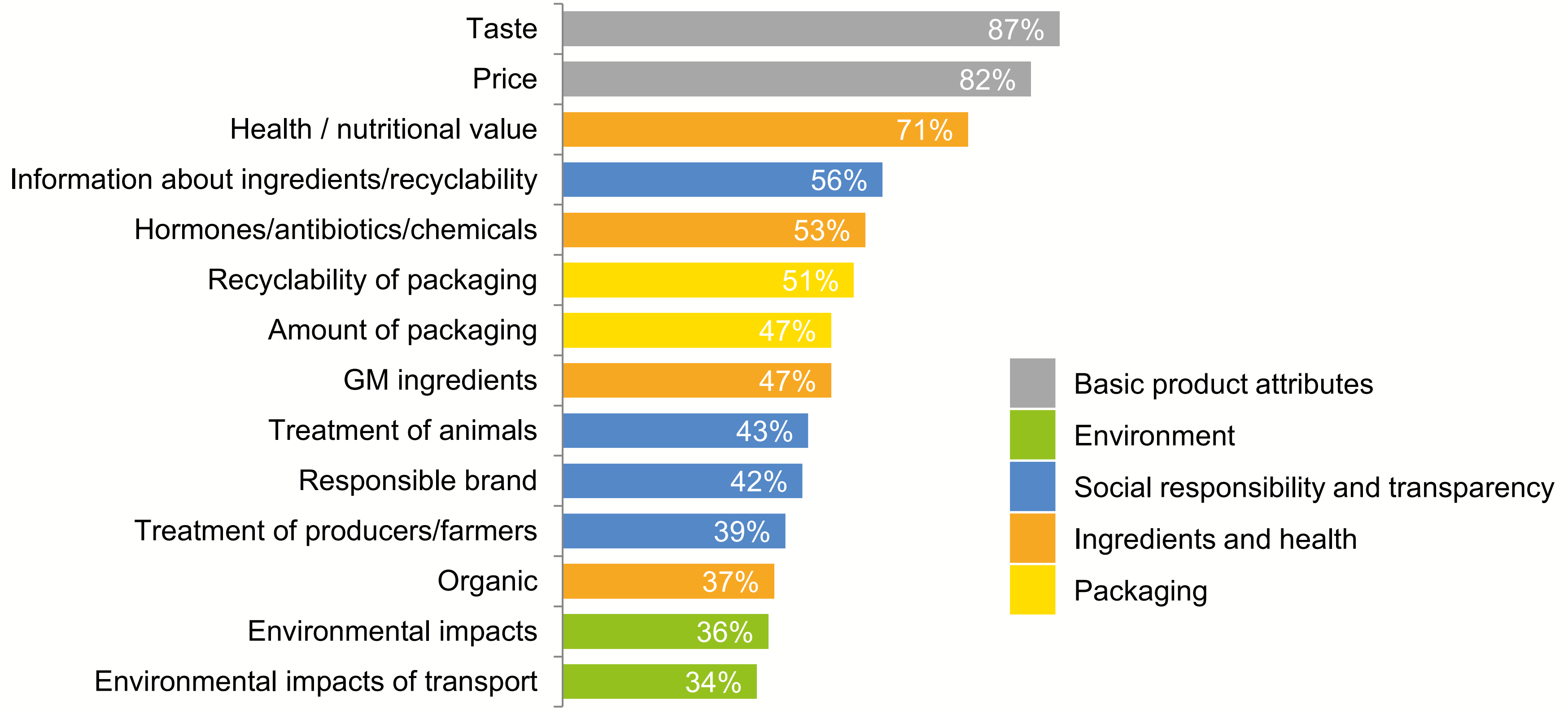
Most important reasons for meat eaters to **reduce** their consumption…



Base: North America, *n*=1,917:
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



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.

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

The impact of Covid-19 on the conscious food consumer

Q & A

Thank you

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evidence and ideas. applied