



THE RISE OF THE CONSCIOUS CONSUMER



Concerns for our ocean are driving a new wave of consumer activism, new research for the Marine Stewardship Council (MSC) reveals. North American shoppers are increasingly 'voting with their forks' for sustainable seafood.

The study was conducted in early 2020 by **GlobeScan**, an independent research and strategy consultancy. It is one of the largest global surveys of seafood consumers, involving more than 20,000 people across 23 countries.

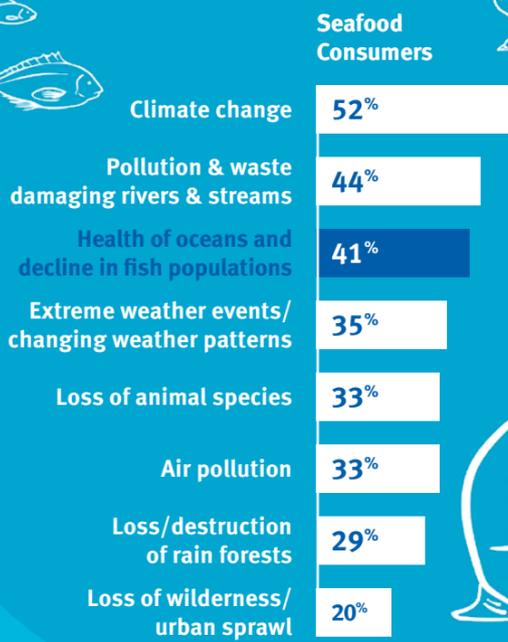
More than 5,700 consumers in the US and Canada were surveyed.

North Americans are increasingly concerned about our ocean and the impact of pollution, overfishing, and climate change.

Ocean health and the decline of fish populations is ranked as North American consumers' third highest environmental concern.



MOST CONCERNING ENVIRONMENTAL THREATS FOR SEAFOOD CONSUMERS



The top action seafood consumers are willing to take to help the ocean is switching to a different brand or product.

66%

of North Americans believe retailers' and brands' claims about sustainability and the environment need to be clearly labeled by an independent organization.



48%

of North American shoppers are willing to pay more for seafood from a certified sustainable fishery.



58%

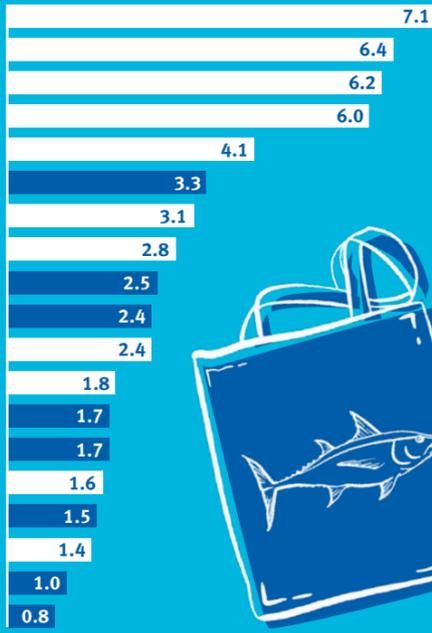
of North American seafood consumers agreed that in order to protect the ocean, we have to consume fish and shellfish only from sustainable sources.



MOTIVATORS WHEN PURCHASING FISH & SEAFOOD

- Safe to eat
- Fresh
- Taste
- Good for my health/my family
- Price
- Sustainably sourced/environmentally friendly
- A type of fish I've always eaten
- Knowing where a product originally comes from
- Is not genetically modified
- Caught in the wild
- Easy to cook
- Clearly marked country of origin
- Independently certified/verified
- Dolphin/turtle friendly
- Preferred brand
- Fairly traded
- Sourced locally
- Organic
- Fishing method

Relative importance scores



Choosing sustainably sourced seafood has risen in importance as a purchase motivator to seafood shoppers since 2018.



MSC awareness continues to grow among North American seafood consumers.

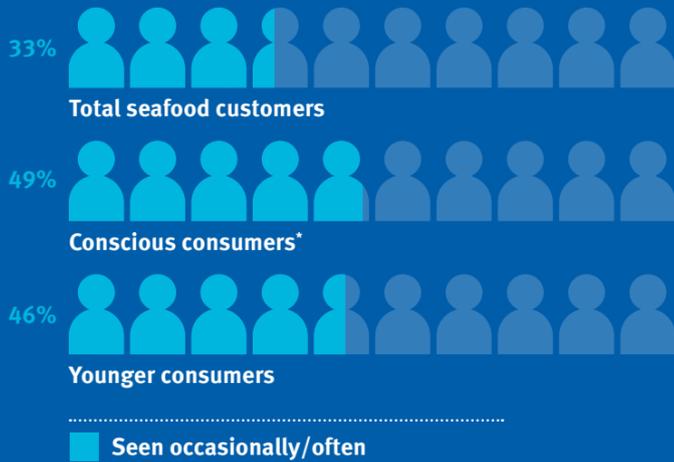
Recognition is particularly high among the **conscious consumer*** (49%) and **younger consumers aged 18-34** (46%).

*Seafood consumers who care about the planet alongside a love of shopping. When purchasing seafood, they value sustainability highly and prefer buying certified products.

The survey revealed that younger generations are most likely to have taken action in the past year to protect seafood for the future.



FREQUENCY OF SEEING THE MSC BLUE FISH LABEL



Trust in the MSC label is high and has increased since 2018, with 72% of North American consumers reporting that they trust MSC claims.



49% of MSC-aware consumers would recommend MSC-certified products to people they know.