

INSIGHTS INTO THE SEAFOOD SHOPPER

MSC CANADA 2024

MSC & GlobeScan study of seafood consumers

Prepared September 2024

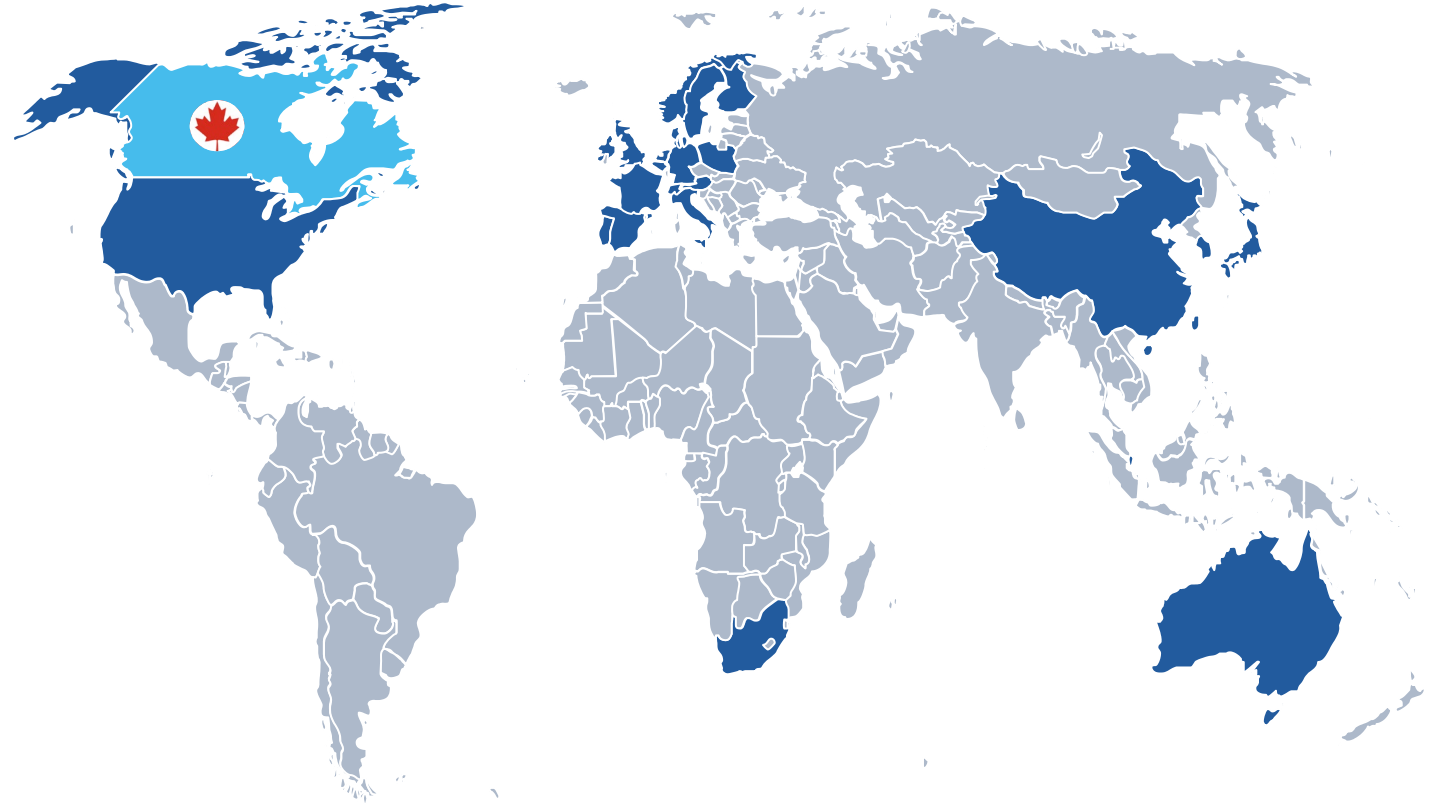


**Globe
Scan** 

2024 Globescan Consumer Research: Introduction to the Study

- MSC commissions the largest global survey of seafood consumers every 2 years.
- 25,000 consumers surveyed in 23 markets. In Canada, 2,175 people were surveyed, of which 1,516 were seafood consumers.
- The survey covers:
 - Attitudes about sustainability and ocean health
 - Changes in dietary habits and healthy eating
 - Perceptions of ecolabels and certification
 - Motivators of seafood purchase
 - MSC awareness, trust, and impact on purchase

The 2024 study was in field in Canada between January 22nd and March 6th.



23 markets: Australia, Austria, Belgium, Canada, China, Denmark, Finland, France, Germany, Italy, Japan, Netherlands, New Zealand, Norway, Poland, Portugal, South Africa, South Korea, Spain, Sweden, Switzerland, UK, and USA.

Statistical significance of tracking and comparisons

Differences of +/- 3 percentage point are statistically significant (approx.) at a country level. Caution should still be taken when interpreting and communicating results as small differences may be significant but not always meaningful. Please note that figures are rounded to whole numbers throughout. This may mean some charts do not add up to 100%.

SUMMARY & TAKEAWAYS

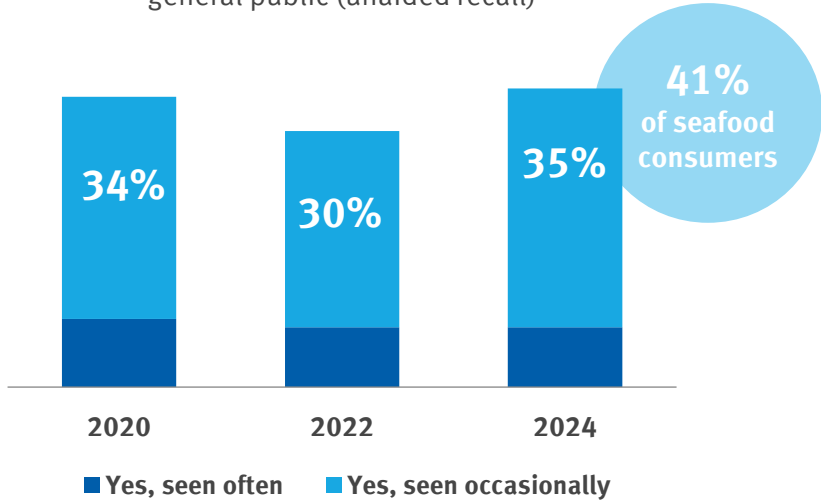
Key takeaways

- 1. Support for sustainable seafood holds strong since 2022.**
- 2. Concern about the ocean and fishing practices are at an all time high; pessimism about the future of the ocean and seafood is on the rise.**
- 3. Price, personal health, and sustainability have grown in importance as diets continue to shift.**
- 4. Intent to shop sustainably remains high, and benefits of the MSC ecolabel are clearly recognized. Still, there is a gap in consumer action.**
- 5. Consumers could be motivated to purchase more seafood with better information about the health and environmental benefits.**
- 6. Significant increase in MSC label recognition, understanding, and impact on likelihood to purchase. Trust remains high.**

2024 GLOBESCAN CONSUMER RESEARCH: SUMMARY OF FINDINGS, CANADA

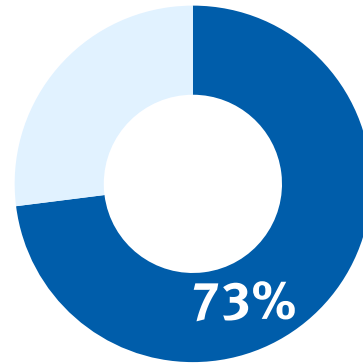
*seafood consumers
(Canada), n=1,516

Recognition of the MSC label general public (unaided recall)



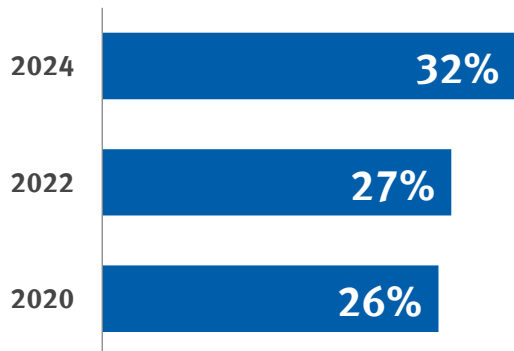
MSC trust

Seafood consumers
(MSC-aware)



Understanding of the MSC label

Among seafood consumers (free text answers)



MSC label increases likelihood of purchase

Seafood consumers that agree



OVERWHELMING SUPPORT FOR SUSTAINABILITY & OCEAN HEALTH AMONG SEAFOOD CONSUMERS

93% are concerned about
the state of the world's ocean

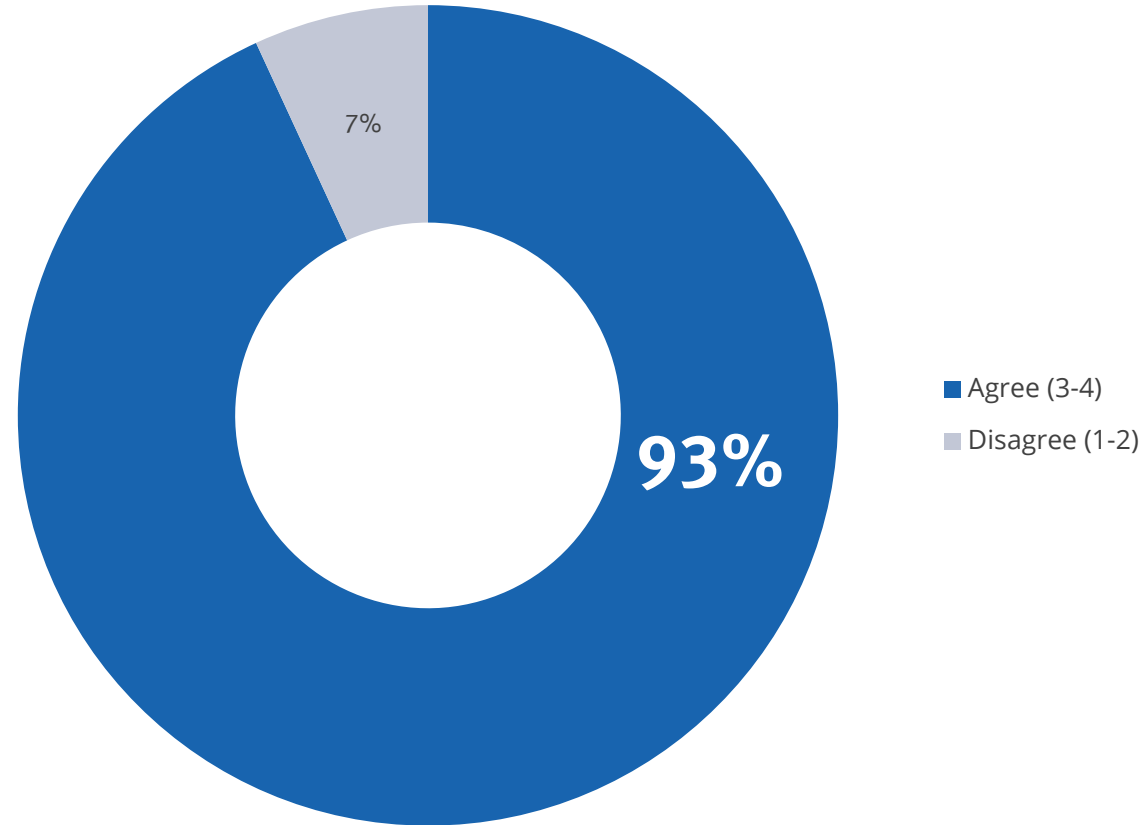
74% demand retailers' and
brands' claims about sustainability
and the environment be clearly
labeled and third-party verified*

72% would like to hear
more from companies about the
sustainability of their seafood

HIGHEST RECORDED LEVELS OF ENVIRONMENTAL AWARENESS AND CONCERN

Concern about the state of the oceans continues to rise in Canada, now surpasses the global average

I feel worried about the state of the world's oceans
(“Agree” - top 2 answers on 4-point scale)

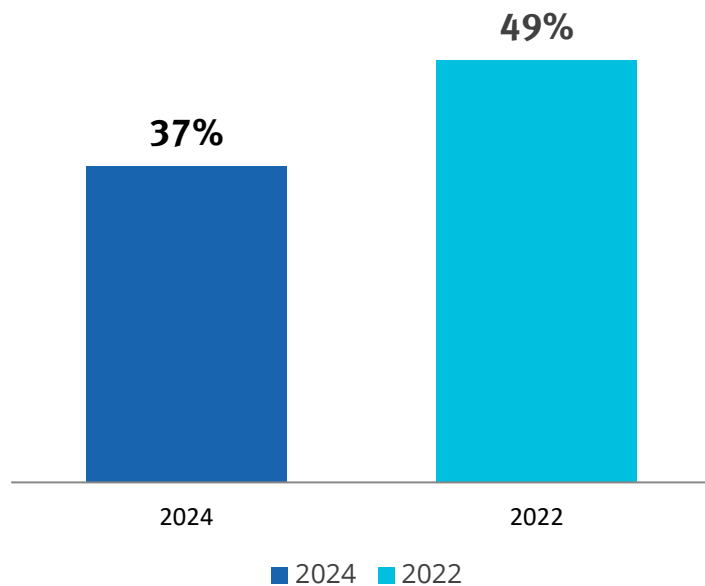


2022 "Agree": 89%

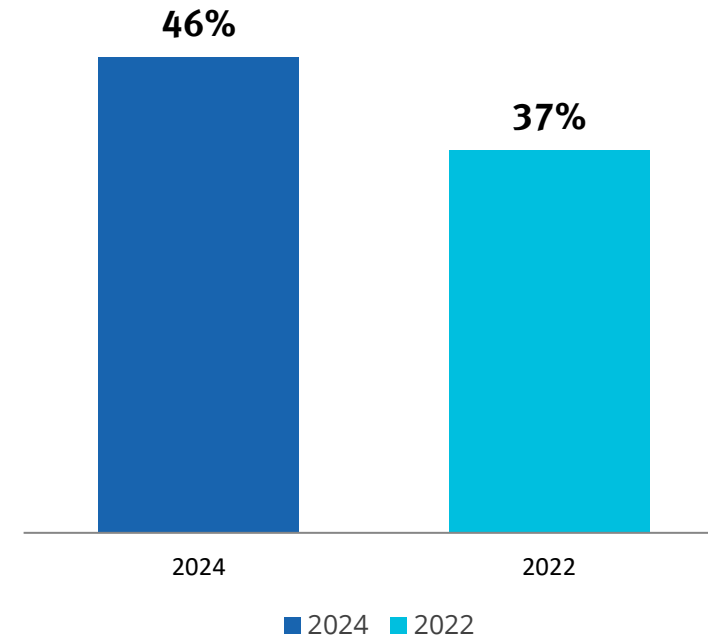
Describes opinion well, “agree” (3+4 on 4-pt scale). Base: Seafood consumers: (Canada) n=1516

Pessimism about the future is on the rise

“In 20 years' time we will have saved the ocean from irreparable damage“
(“Agree” - top 3 answers on 7-point scale)



“My favourite fish or seafood will not be available to eat 20 years from now“
(“Agree” - top 3 answers on 7-point scale)



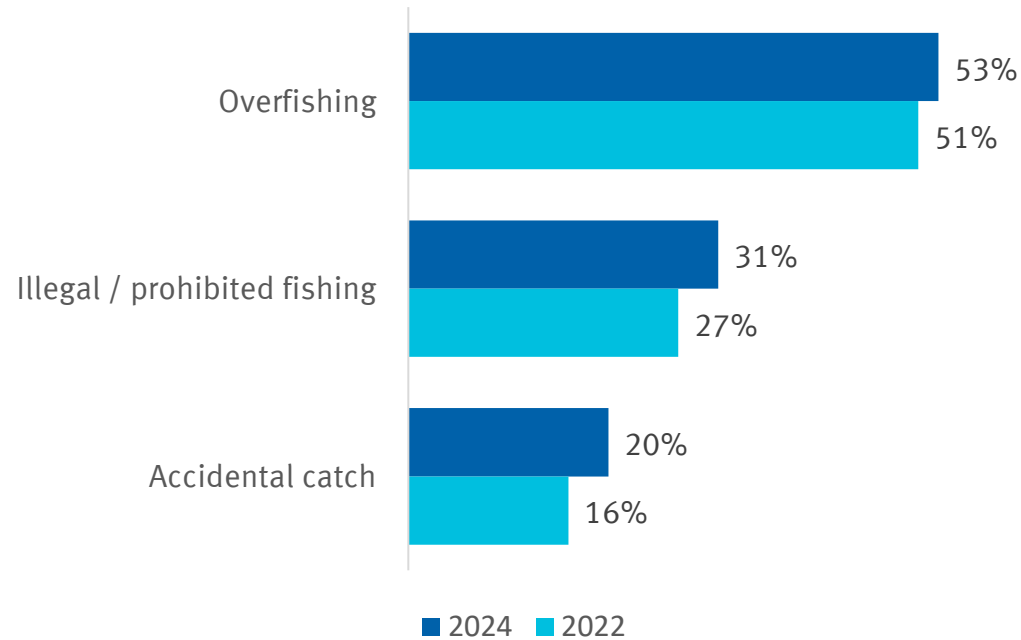
Describes opinion well, “agree” (3+4 on 4-pt scale) (5+6+7 on 7-pt scale).
Base: Seafood consumers: (Canada) n=1516

Concern about fishing practices has intensified since 2022

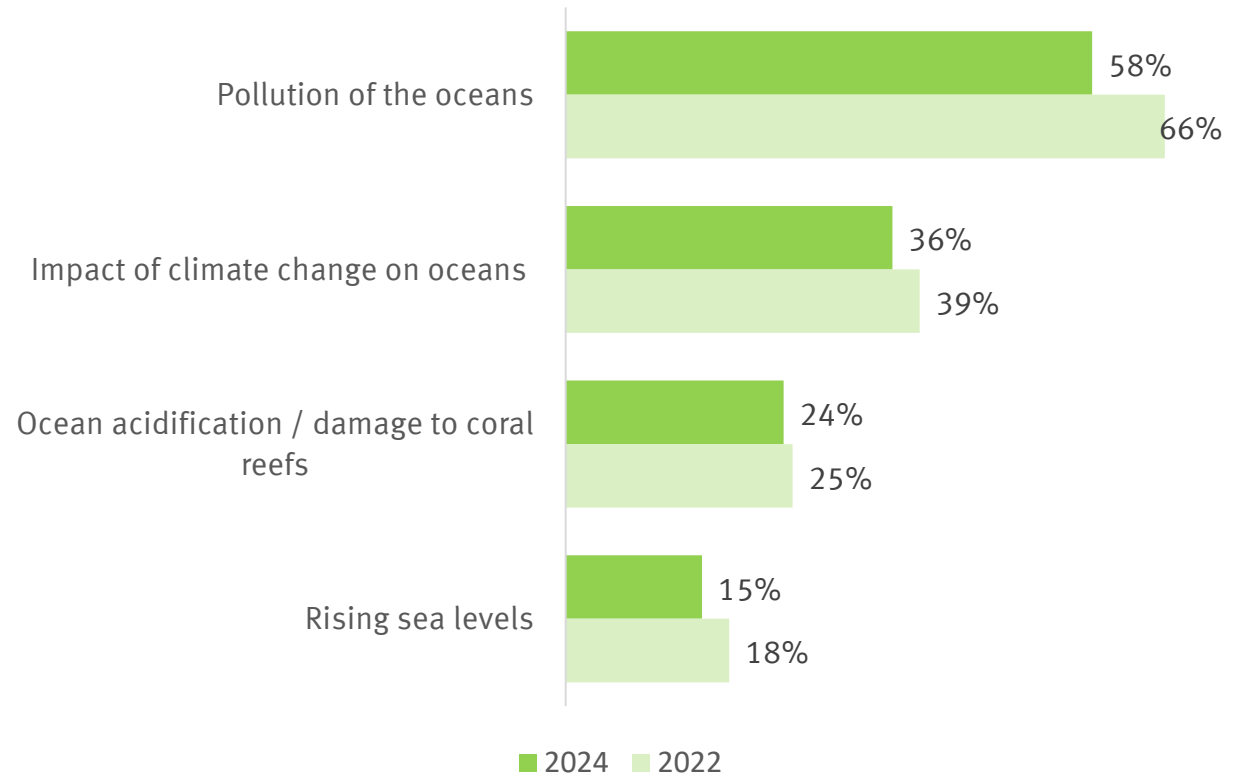
Which of these potential threats to the world's oceans worries you the most?

(Each respondent selected three issues)

Fishing practices



Environmental issues

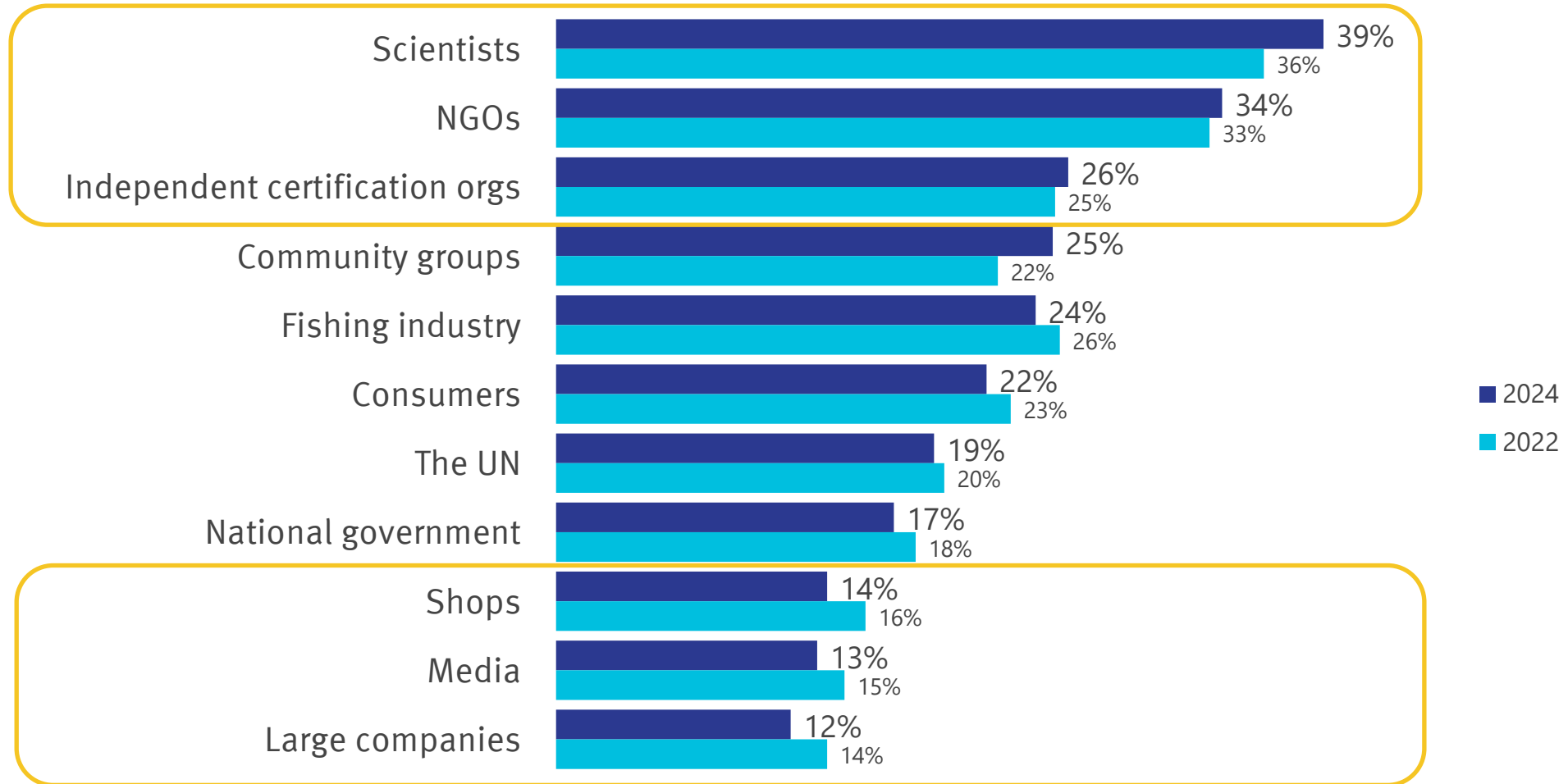


There are many different potential threats to the world's oceans, the wildlife living there and the people who work there. Which of these potential issues worries you the most? Base: Seafood consumers: (Canada) n=1516

Perceived performance of different groups in protecting the ocean

How well do you think the following groups are contributing to protecting the ocean environment?

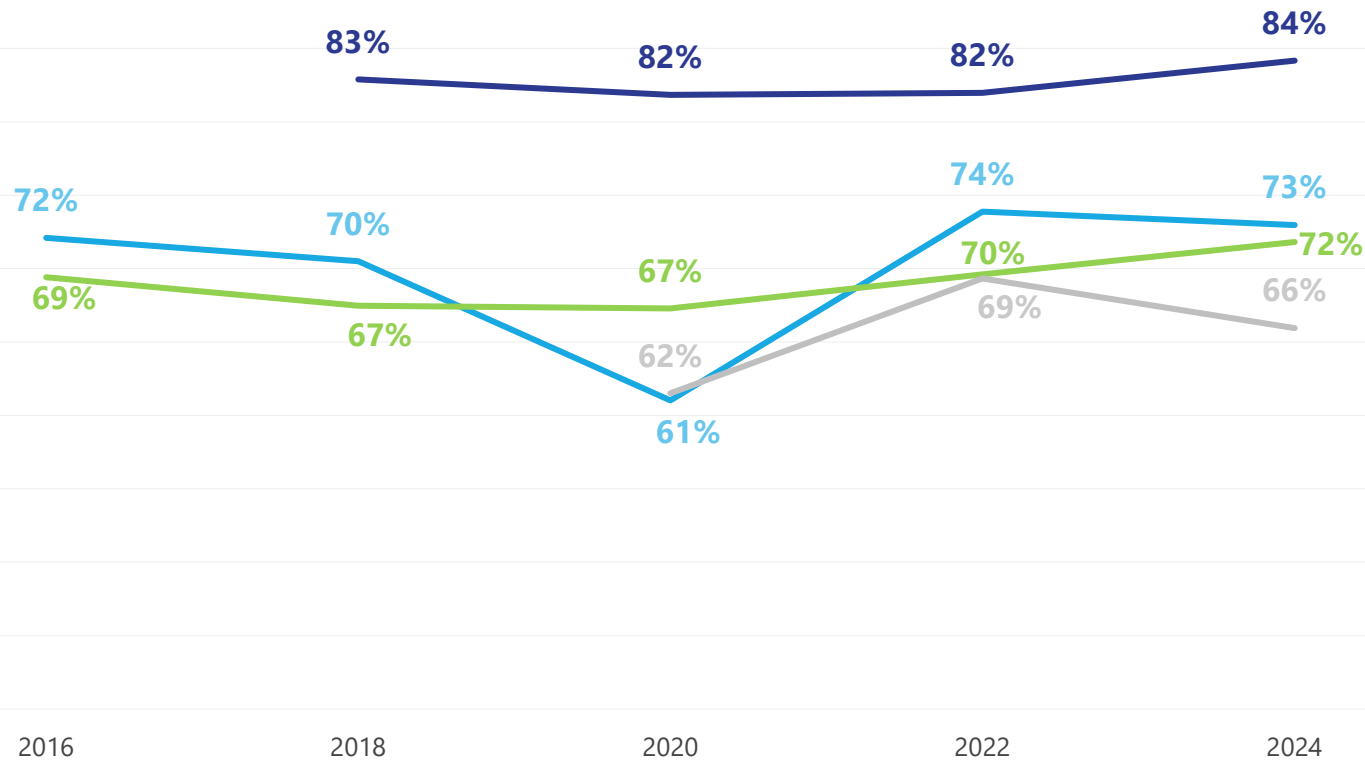
(Top two answers, 6+7 on a 7-point scale)



How well do you think the following institutions are contributing to protecting the ocean environment? Contributing "very well" to protecting oceans, top two (6+7 on a 7-point scale). Base: Seafood consumers: (Canada) n=1516

DEMAND FOR SUSTAINABLE SEAFOOD IN CANADA REMAINS STRONG

Opinions on the need to protect the ocean are strong



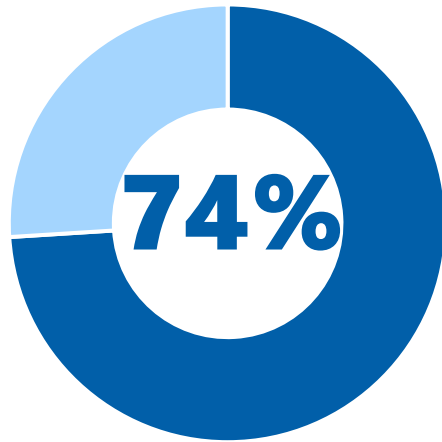
We need to **protect fish and shellfish** so that our children and grandchildren can eat healthy seafood today and in the future.

To save the ocean, we have to **consume fish and seafood only from sustainable sources**

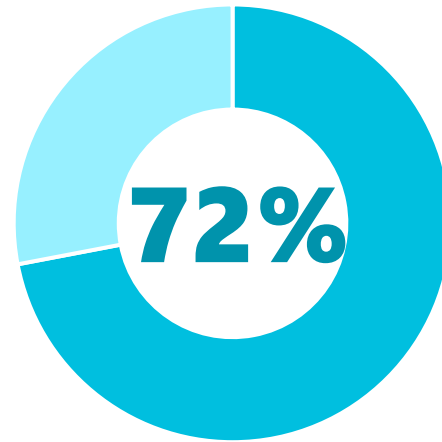
People should be **prepared to change to another type of fish if it is more sustainable.**

My choices about eating fish/seafood **can make a difference to the health of our oceans.**

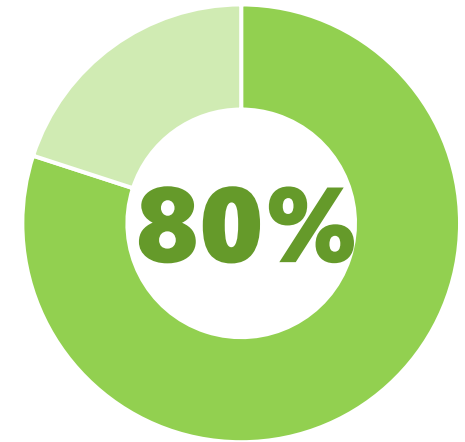
Consumers have high expectations toward sustainability performance and communication from industry



“Supermarket and brand claims about sustainability and the environment need to be clearly labeled by an independent organization”



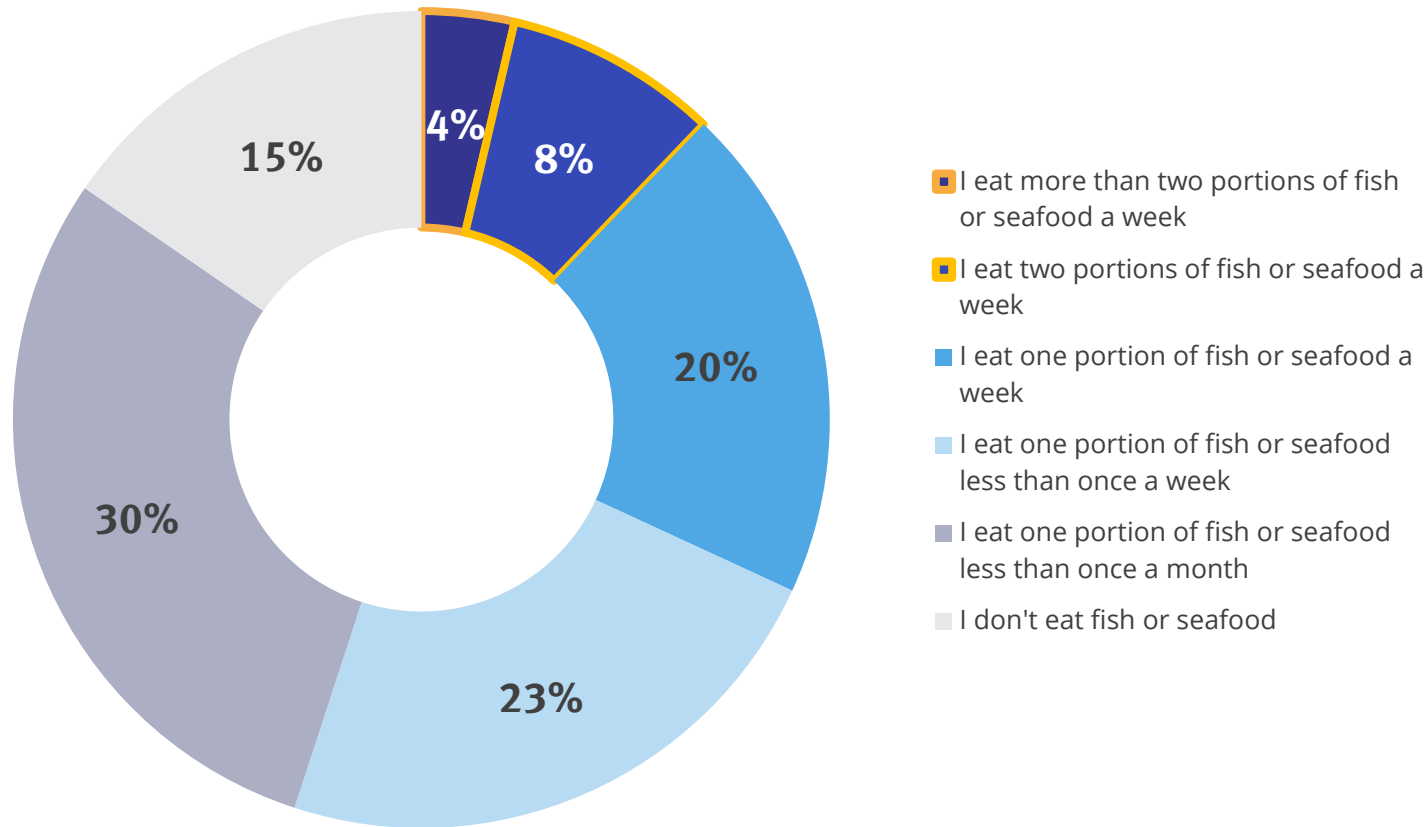
“I want to hear more from companies about the sustainability of their fish/seafood products”



“To protect the ocean, all fishing needs to be sustainable”

SEAFOOD CONSUMPTION

Only 12% of Canadians eat the World Health Organization recommended amount of seafood per week

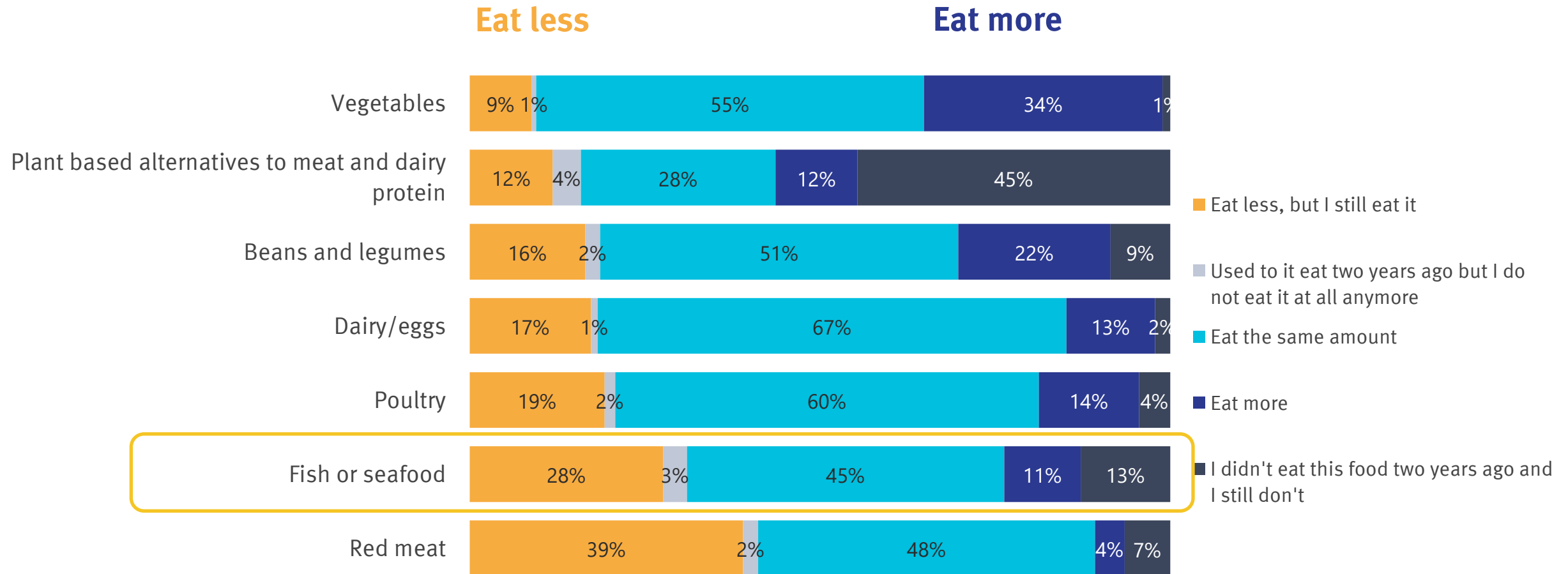


12%
Canadians who eat two or more portions of seafood a week

Q2.5: How often do you eat a portion of fish? A portion of fish or seafood could be a piece of fish in a main meal, a prawn/shrimp sandwich, tinned tuna salad, or some fish sushi. Base: General public (Canada) n=2175

Diet changes vs two years ago

Do you eat more or less of the following foods than you did two years ago?

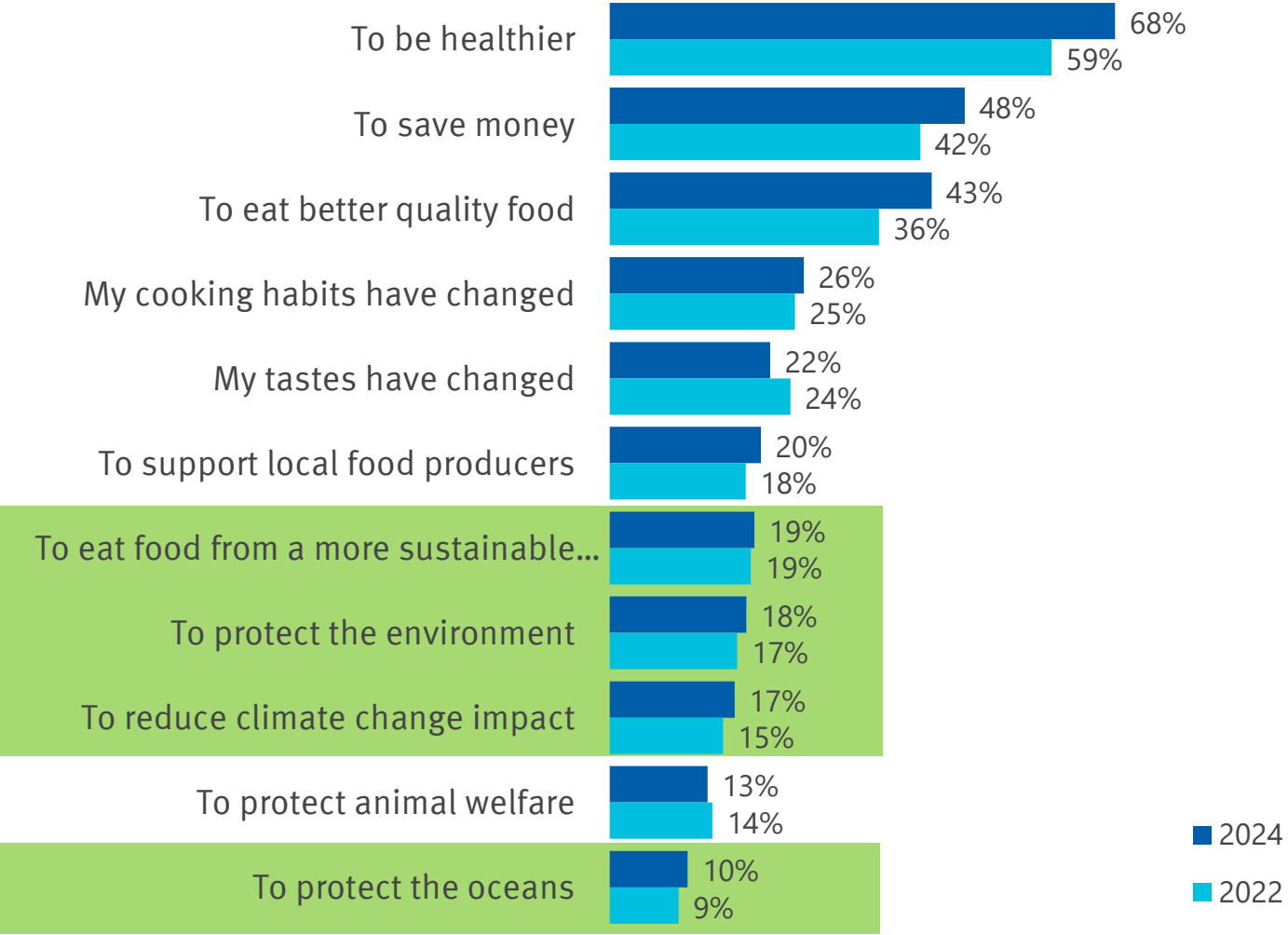


Do you eat more or less of the following foods than you did two years ago?

Base: General public: (Canada) n=2,175

Consumers who have changed their diet for environmental reasons

What are the reasons for changing your diet?



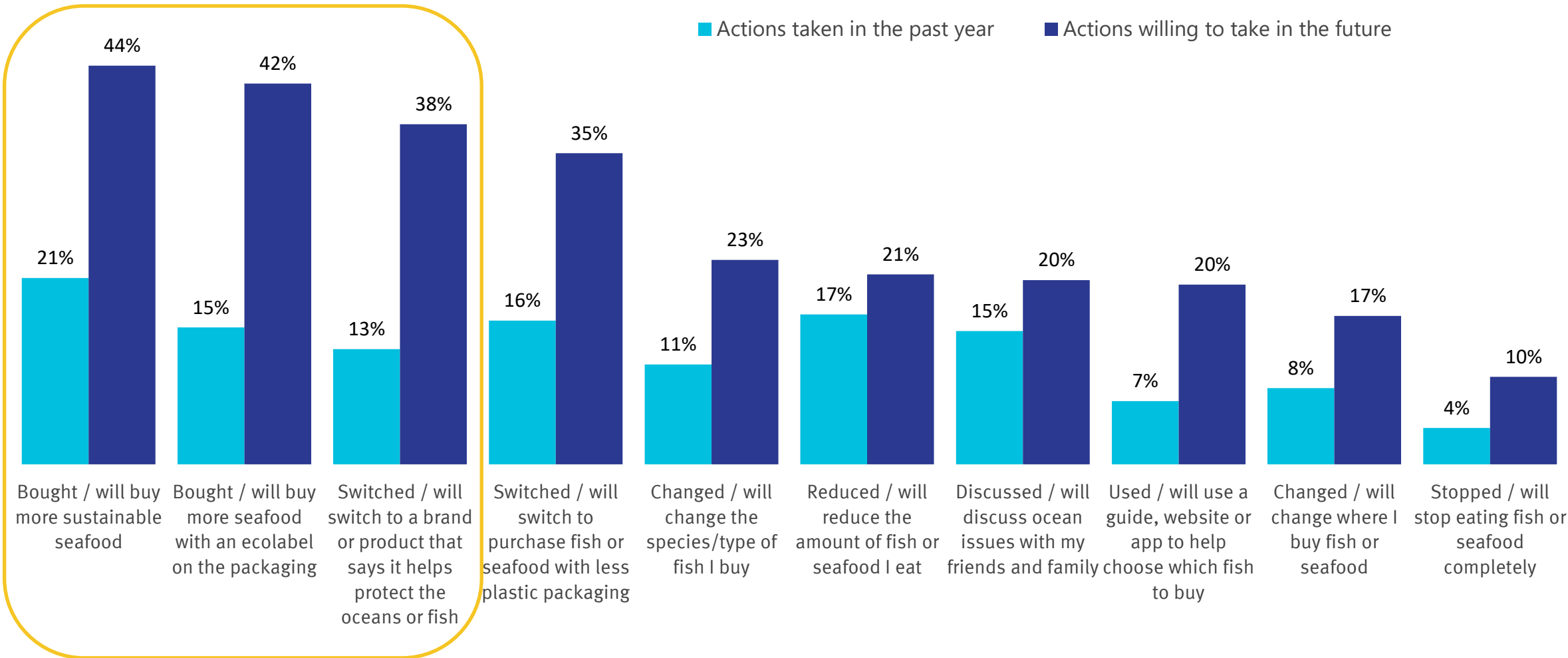
36% of people in total have changed their diet to have less impact on the environment (marked in green on the chart)

This was **34%** in 2022

What are the reasons for changing your diet?
 Base: All general public who say they have changed their diet in the last two years: (Canada) n=1,757

There's an opportunity to help close the values/action gap

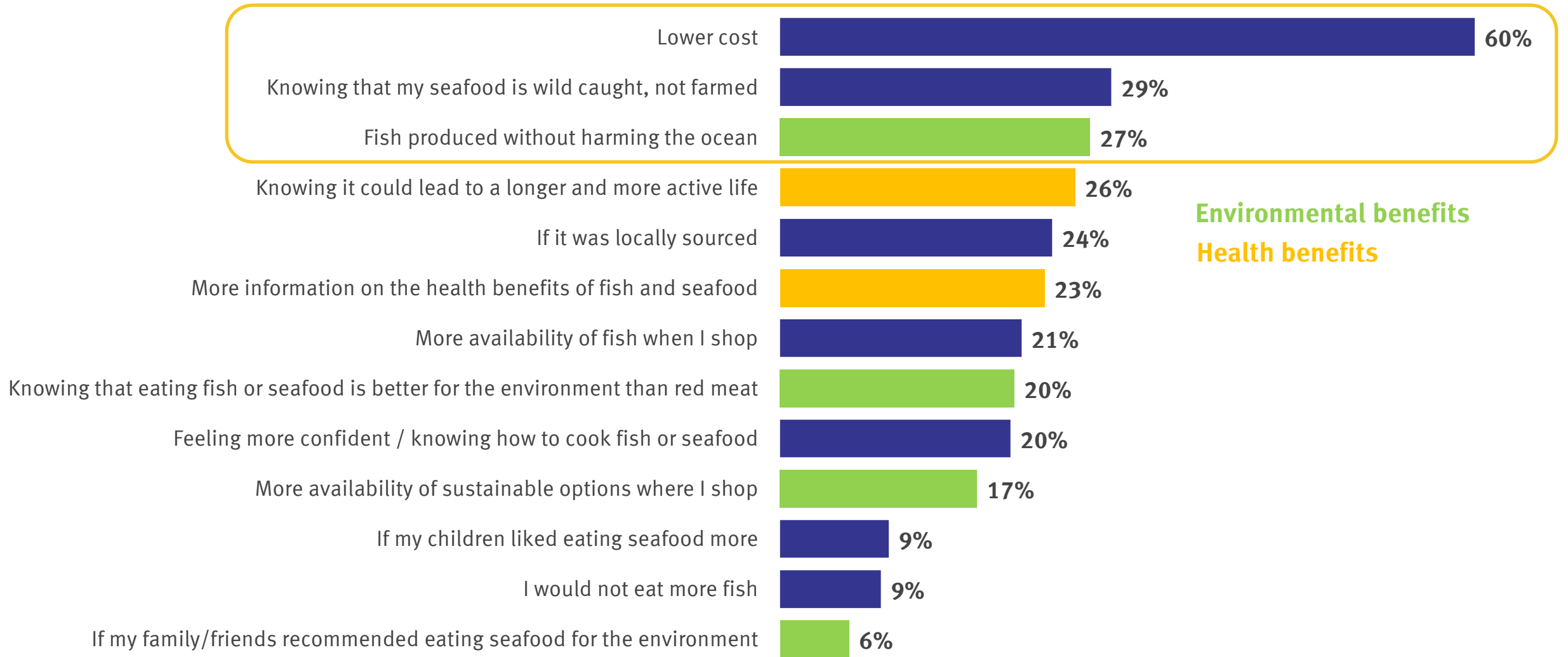
Which, if any, of the following actions have you taken in the last year / are you willing to take to help protect fish and seafood in our oceans?



Which, if any, if the following actions have you taken in the last year to help protect the fish and seafood in our oceans? And which other actions would you also be willing to take in the future to protect the fish and seafood in our oceans? Base: Seafood consumers: (Canada) n=1516



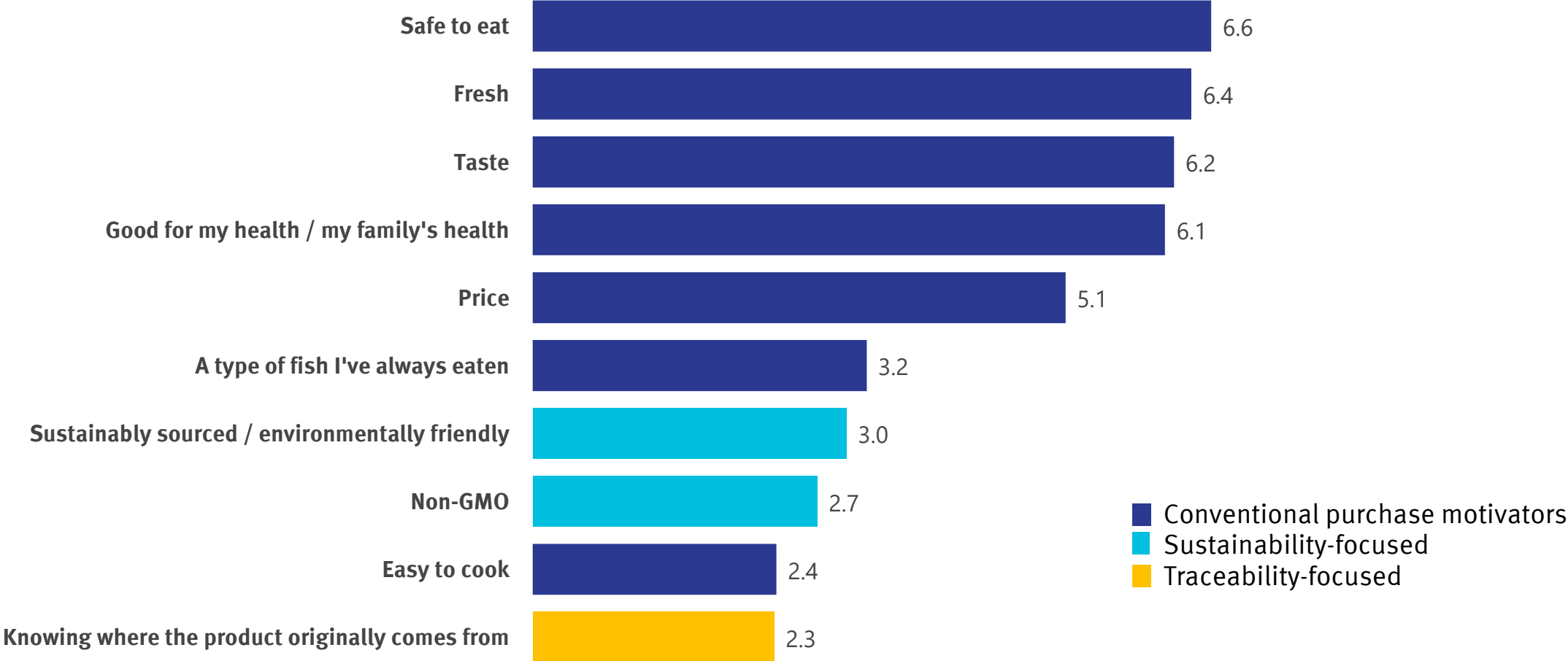
Key motivators that could encourage more seafood consumption



Q111: Which of the following reasons would encourage you to eat more fish/seafood per week? Base: Seafood consumers (Canada): n= 1516

Sustainability holds steady as the top secondary purchase motivator

When purchasing seafood, which were the most and least important considerations?



Q4.2: Thinking about your recent purchase of [type of seafood], which of the following five considerations was the most important and which was the least important? Relative importance scores. Base: Seafood consumers (Canada) n= 1516

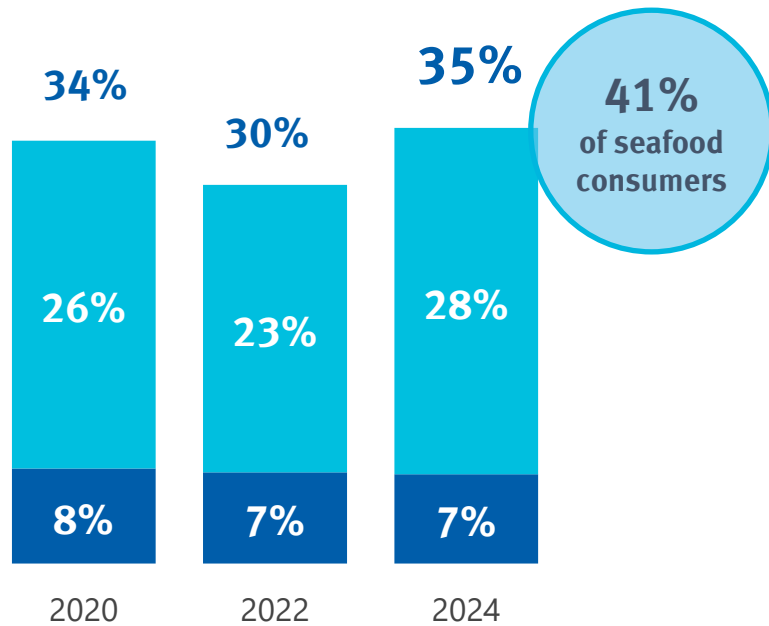
SIGNIFICANT INCREASE IN MSC LABEL RECOGNITION, UNDERSTANDING, AND IMPACT

Significant increase in MSC label recognition, understanding, and impact on purchase



Recognition of the MSC label

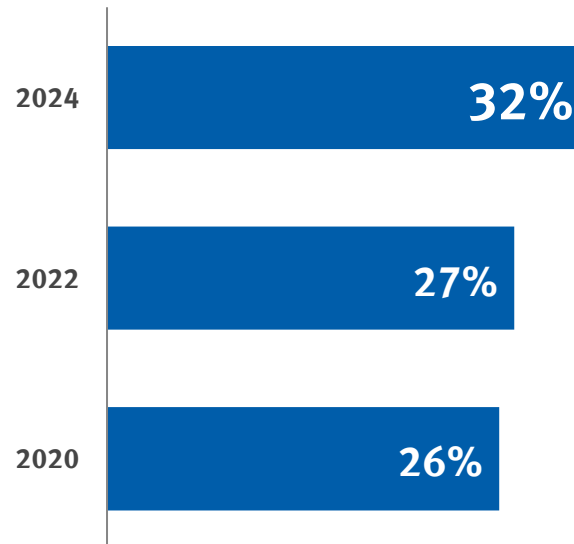
general public (unaided recall)



■ Yes, seen occasionally
■ Yes, seen often

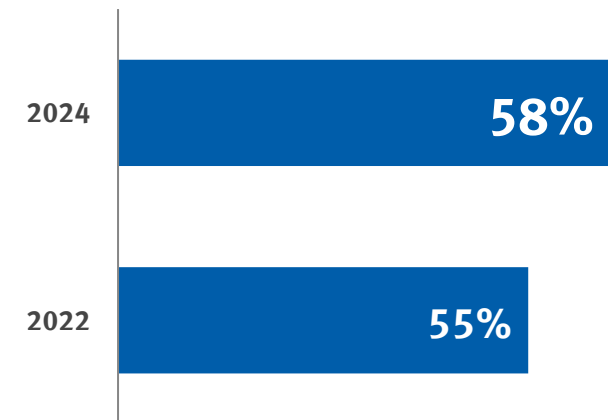
Understanding of the MSC label

Among seafood consumers (free text answers)



MSC label increases likelihood of purchase

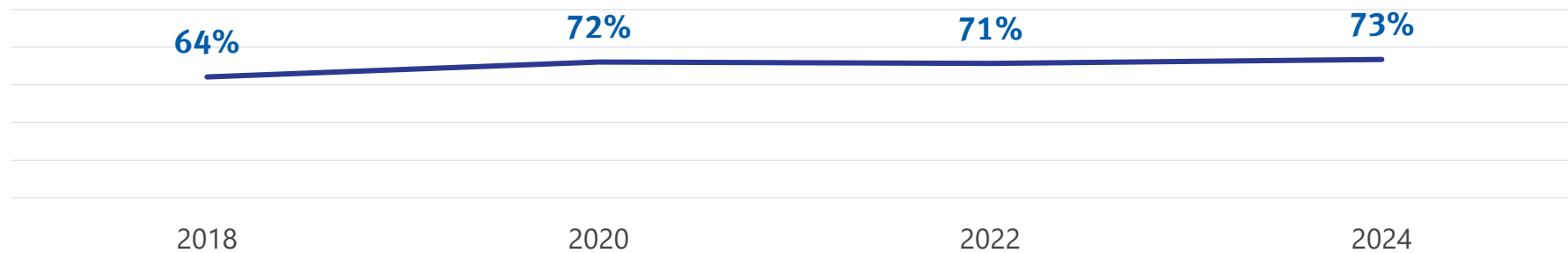
Seafood consumers that agree



Trust in the MSC label remains high

How much trust do you have in the claims of the MSC?

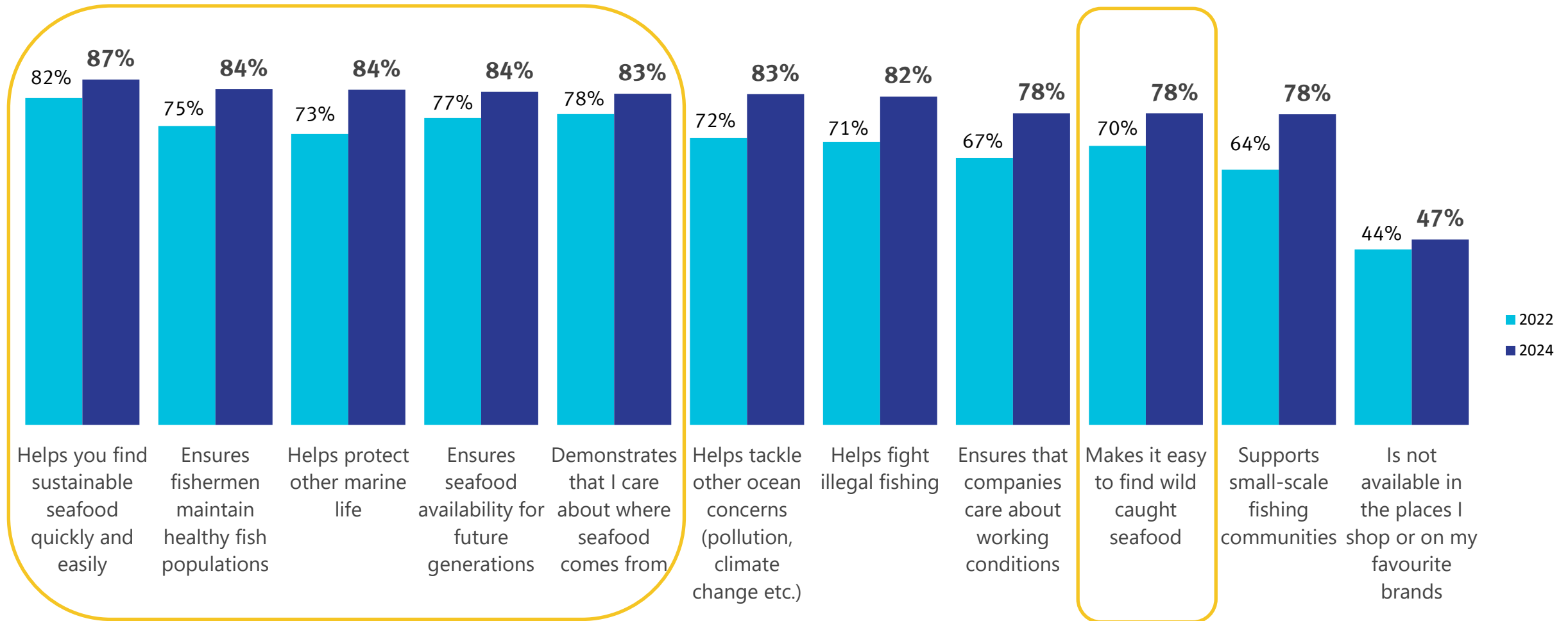
(Top three answers on a 7-point scale)



Perceptions of the MSC: Sustainability impacts and consumer benefits

How well do you think the following statements describe the MSC and its ecolabel?

(Top three answers on a 7-point scale)



Q11.1: How well do you think the following statements describe the Marine Stewardship Council (MSC) and the ecolabel? Describes opinion well, top three (5+6+7 on 7-pt scale). Base: MSC-aware seafood consumers (Canada), n=634

THANK YOU FOR SUPPORTING A HEALTHIER OCEAN FOR THE FUTURE

For more consumer insights:

[Sign up here](#)

For questions, please reach out to:

CAcommunications@msc.org

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