

# Seafood

## CONSUMER INSIGHTS

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OCTOBER 2015 // VANCOUVER, BC



global aquaculture  
**the alliance**





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**REPORT**

## HOW TILAPIA IS A MORE UNHEALTHY FOOD THAN BACON

**Best of Supermarkets**

- 1 11 Best and Worst Greek Yogurts for Weight Loss
- 2 12 "Vegetarian" Foods That Shockingly Aren't
- 3 Worst Healthy Snacks for Weight Loss

## TILAPIA is

Worse than BACON!

**Dr. Axe**  
FOOD IS MEDICINE

### Why Tilapia & Farmed-Raised Fish Is Bad for You

Fish can either be one of the best foods for you or detrimental to your health depending on where it's sourced. There is a world of difference between a fish that is caught in the wild vs. farm-bred or farm-raised fish.

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# The Telegraph

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## Farmed salmon has 'more fat than pizza'

Farmed smoked salmon has three times as much fat as wild fish and is fatter than pizza, research shows

# HEALING *Gourmet*

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## 6 Reasons Why You Should Avoid Farm Raised Fish

### The most common farm-raised fish

SALMON

TILAPIA

SEA BASS

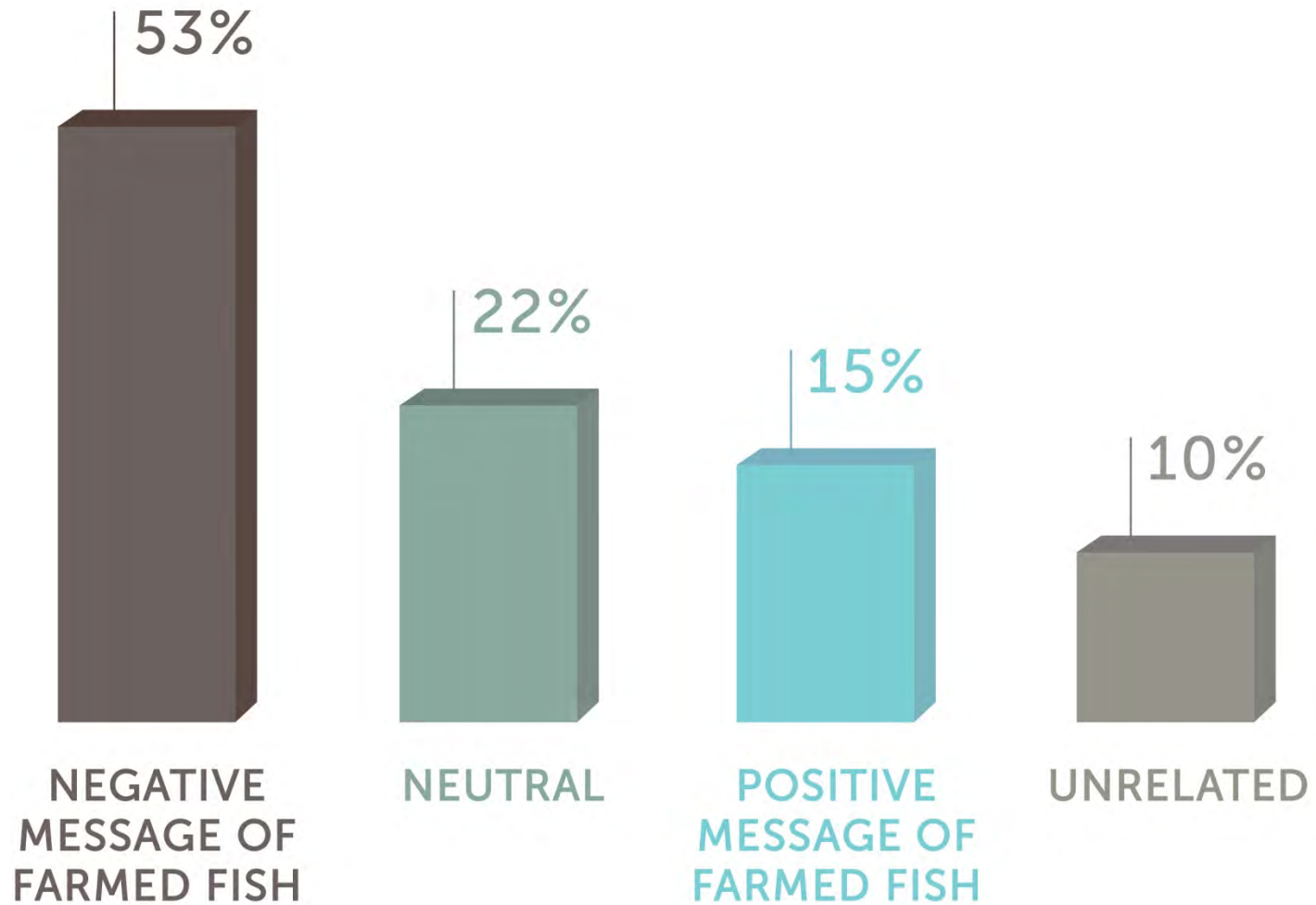
CATFISH

COD

### 6 reasons why farm-raised fish can damage your health

1. Recent studies have concluded that **eating tilapia may worsen inflammation**, which can lead to heart disease, arthritis, asthma and a world of other serious health problems. In fact, a scientist from Wake Forest University has found that the inflammatory potential of tilapia is far greater than that of a hamburger or pork bacon!
2. Farmed salmon may have at least **10 times the amount of cancer-causing organic pollutants** compared to the wild variety. Why? Because of the feed (often full of animal waste)
3. Farm-bred fish have been found to have **high concentrations of antibiotics and pesticides**. To keep the fish alive despite crowded conditions, farm owners give antibiotics to the fish to stave off disease. Farm-bred fish are also treated with pesticides to combat sea lice.
4. Farm-bred fish also have **lower levels of healthy nutrients**. The omega-3s that are found in farm-raised fish are less usable to our bodies compared to wild-bred fish. Farm-raised fish also have a lower protein content and a higher concentration of omega-6 acids, which causes inflammation.
5. Dibutyltin levels, a **chemical used in PVC plastics and a known immunotoxin**, is said to be six times higher in farm-raised mussels compared to wild ones.
6. **Dioxin levels are 11 times higher in farm-bred salmon** compared to wild salmon. Dioxin is a toxic chemical that can contribute to cancer and other complications, and it can take over a decade to leave your system.

Search results for "Is farmed fish bad for you?"



Next major challenge for aquaculture:

## CONSUMER EDUCATION

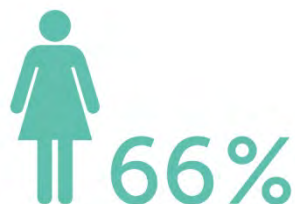
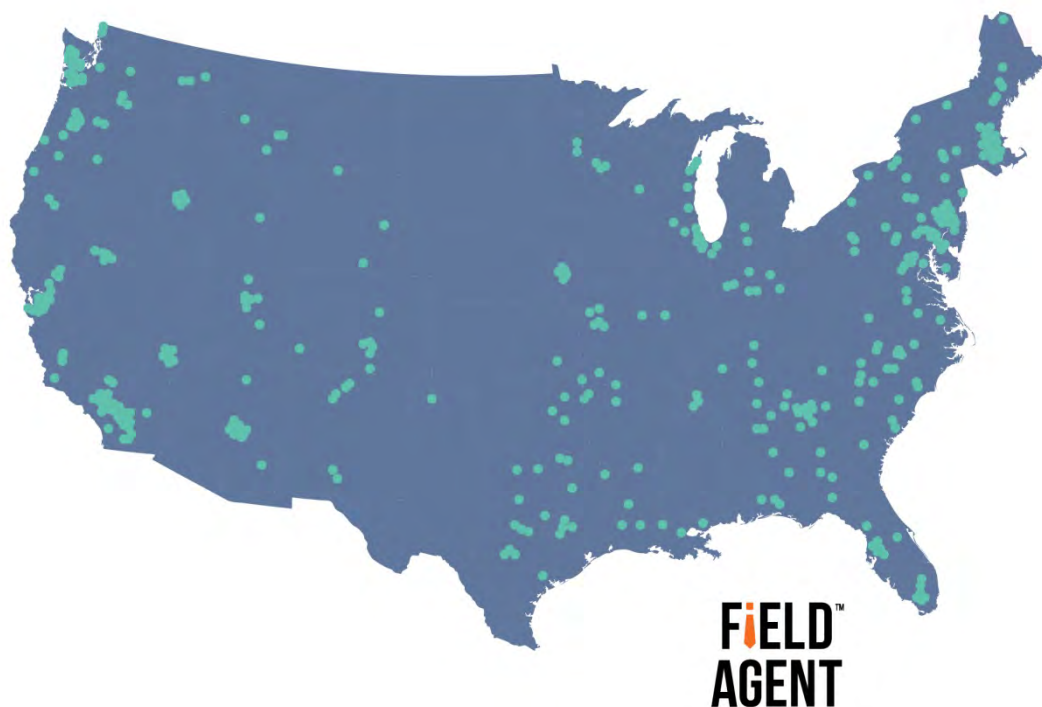
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**“ AT THE END OF THE DAY, THE PRIZE FOR  
ALL OF US IS CONSUMER EDUCATION ”**

*-Wally Stevens, 2014 GOAL Conference*

# METHODOLOGY

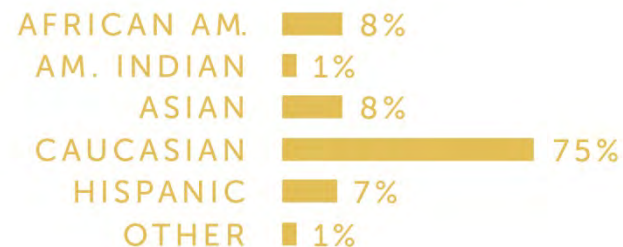
454 Americans across the country were asked 30 questions regarding seafood.



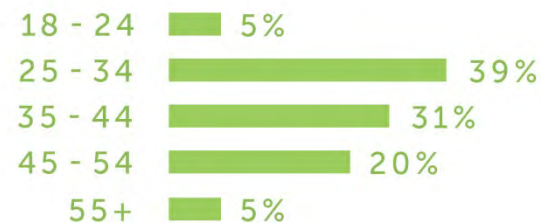
## HOUSEHOLD INCOME



## ETHNIC BACKGROUND



## AGE





- Purchasing Priorities
- Sustainability
- Country of Origin
- Farmed vs. Wild



An aerial photograph of the ocean with small, choppy waves. The water is a deep blue color. The top right corner of the image is cut off by a white diagonal line.

# Purchasing

PRIORITIES



# PURCHASING PRIORITIES OF CONSUMER

PRICE PER LB // 81%

VISUAL APPEAL OF PRODUCT // 72%

HEALTH BENEFITS // 67%

SUSTAINABILITY // 55%

FARMED VS. WILD // 40%

PACKAGING // 39%

COUNTRY OF ORIGIN // 39%

FRESH OR FROZEN // 35%

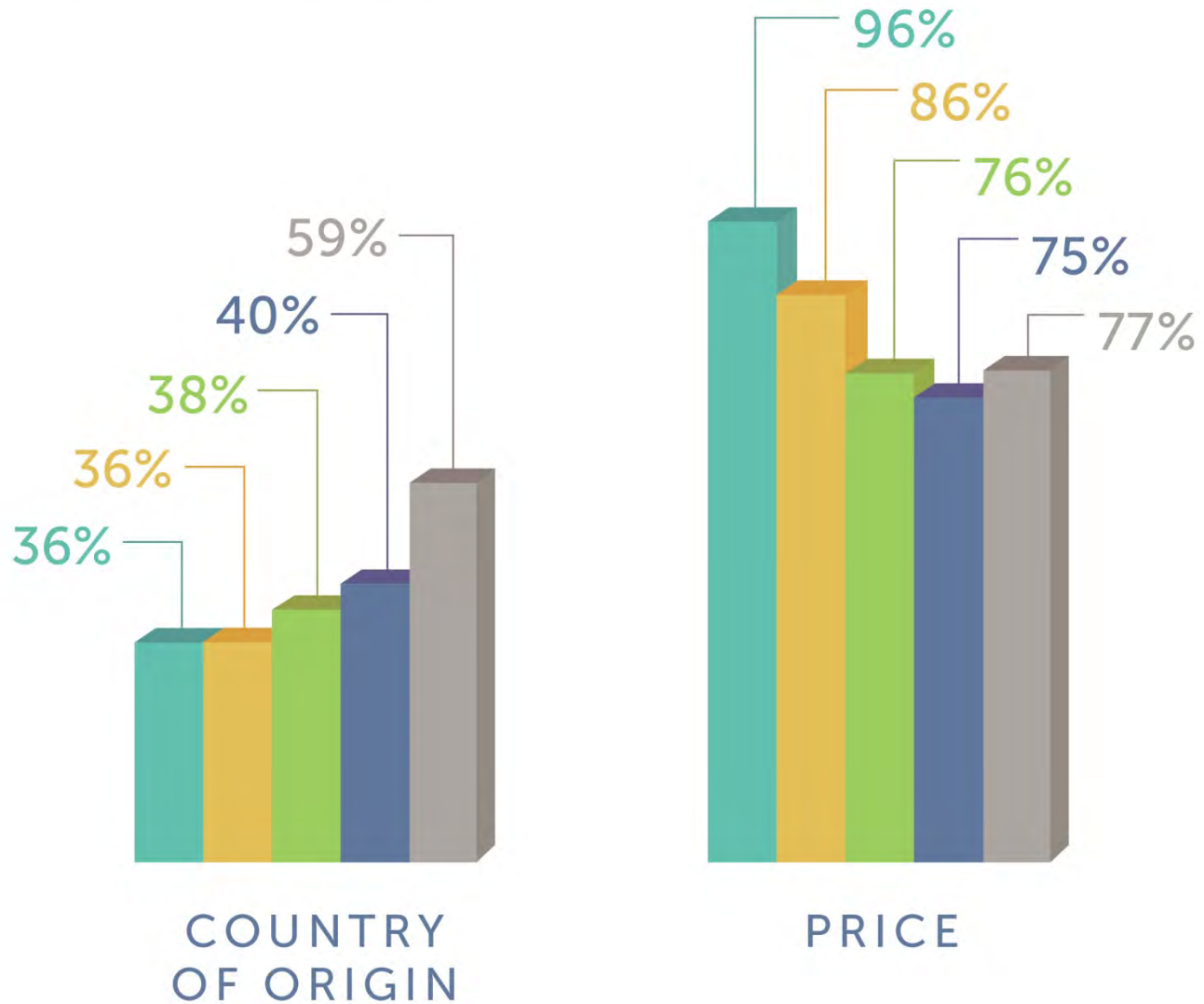
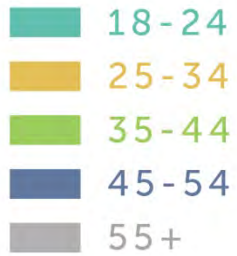
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Percentage of respondents that answered with *Extremely Important* or *Very Important* for each factor when purchasing seafood {sample size= 454}



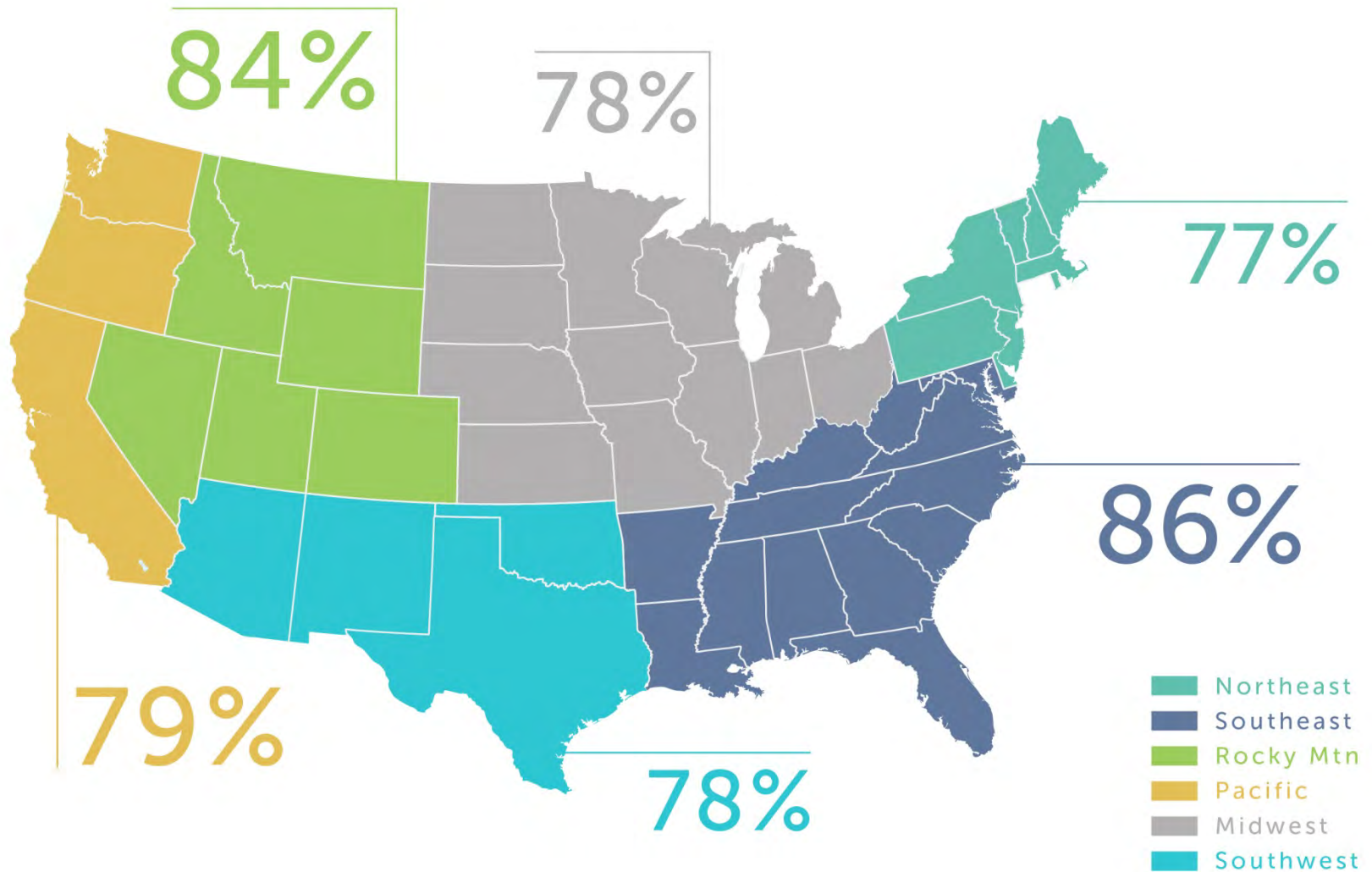
# PURCHASING PRIORITIES BY AGE GROUP

Percentage of respondents who rated either *extremely important* or *very important*:



# PURCHASING PRIORITIES BY REGION

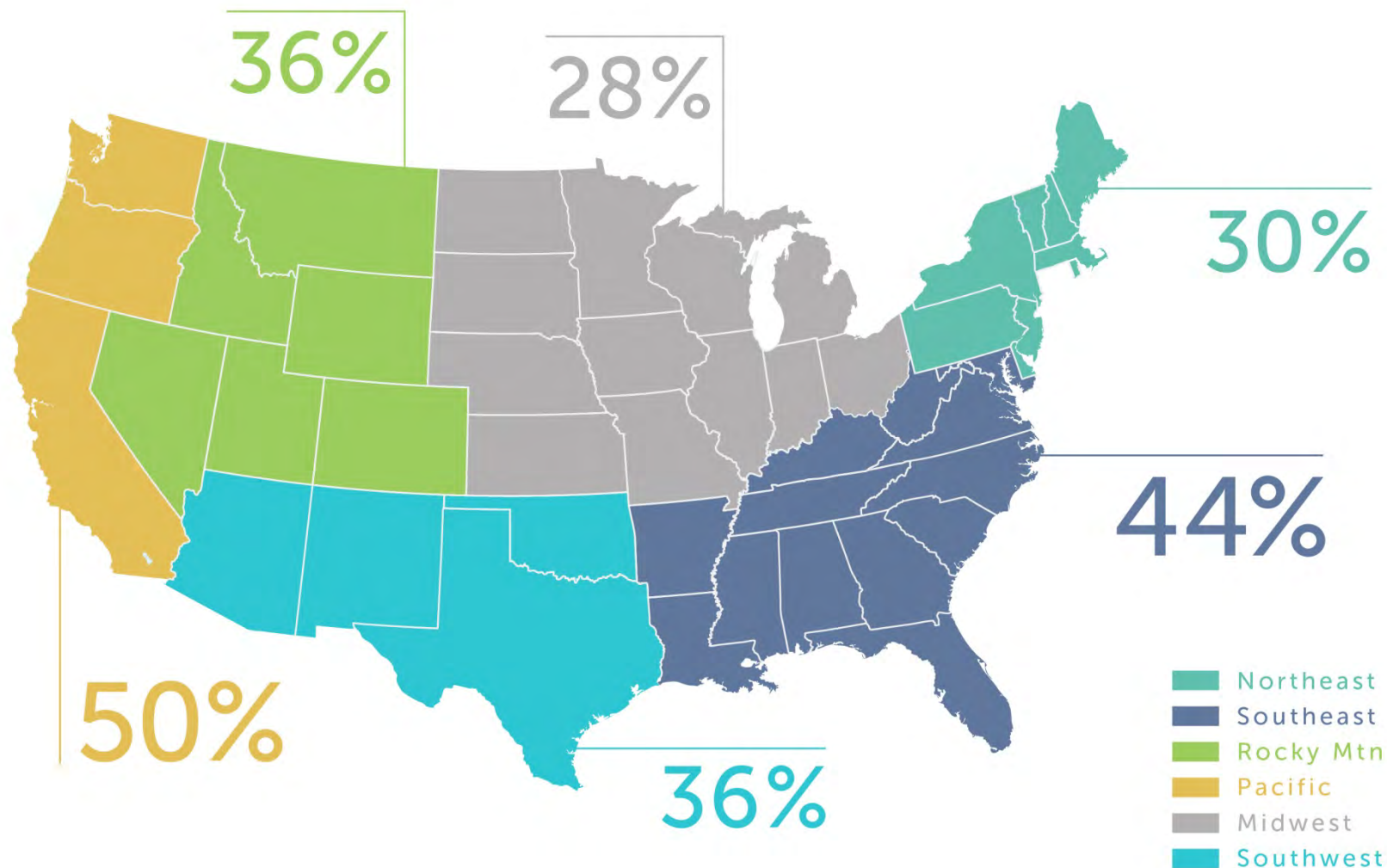
Percentage of consumers who rated *price* as extremely important or very important:





# PURCHASING PRIORITIES BY REGION

Percentage of consumers who rated *country of origin* as extremely important or very important:





An aerial photograph of the ocean, showing a dense pattern of small, white-capped waves across the entire frame. The water is a deep, vibrant blue. In the top right corner, there is a white, triangular shape that appears to be a cutout or a design element.

**Sustainability**



# UNDERSTANDING OF SUSTAINABILITY

Top terms associated with *sustainability*:

ENVIRONMENTAL  
RESPONSIBILITY  
70%

PRODUCT  
AVAILABILITY  
43%

SOCIAL  
RESPONSIBILITY  
41%

ANIMAL WELFARE / ANIMAL CARE  
40%

FOOD SAFETY  
35%

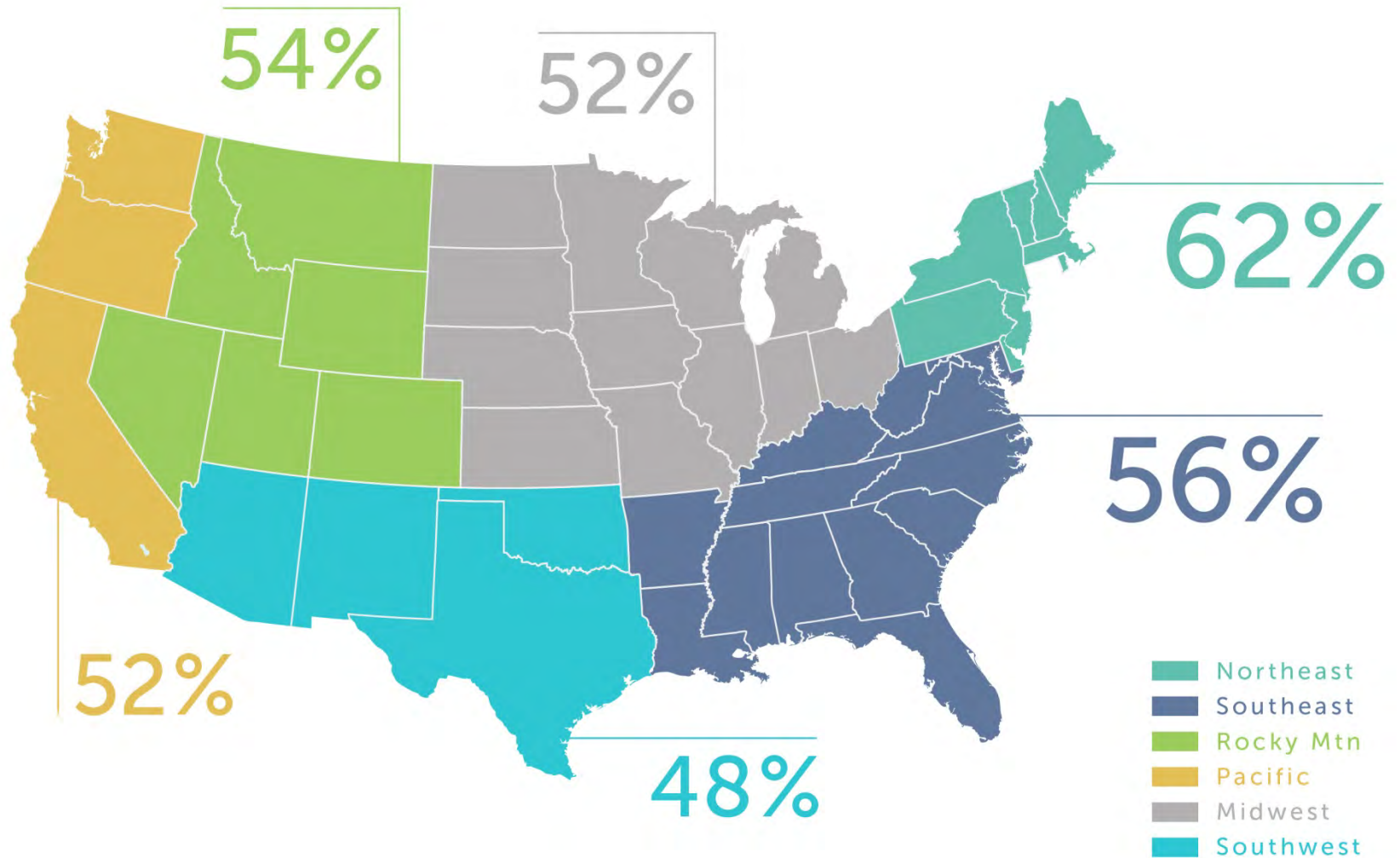
TRACEABILITY *{ability to determine  
country of origin}*  
31%

SAFER TO EAT  
22%

MORE HEALTHY / MORE NUTRITIOUS  
15%

# IMPORTANCE OF SUSTAINABILITY BY REGION

Percentage of consumers who rated sustainability as *extremely important* or *very important*:





# SUSTAINABLE CONFIDENCE

What factors give you confidence that you are buying sustainable seafood?

57%

THE RETAILER WHERE  
I'M PURCHASING

55%

CERTIFICATION  
LOGOS

36%

SUPPLIER  
BRAND

32%

COUNTRY OF  
ORIGIN

22%

IN-STORE MATERIAL  
(EX. PAMPHLETS OR FLIERS)



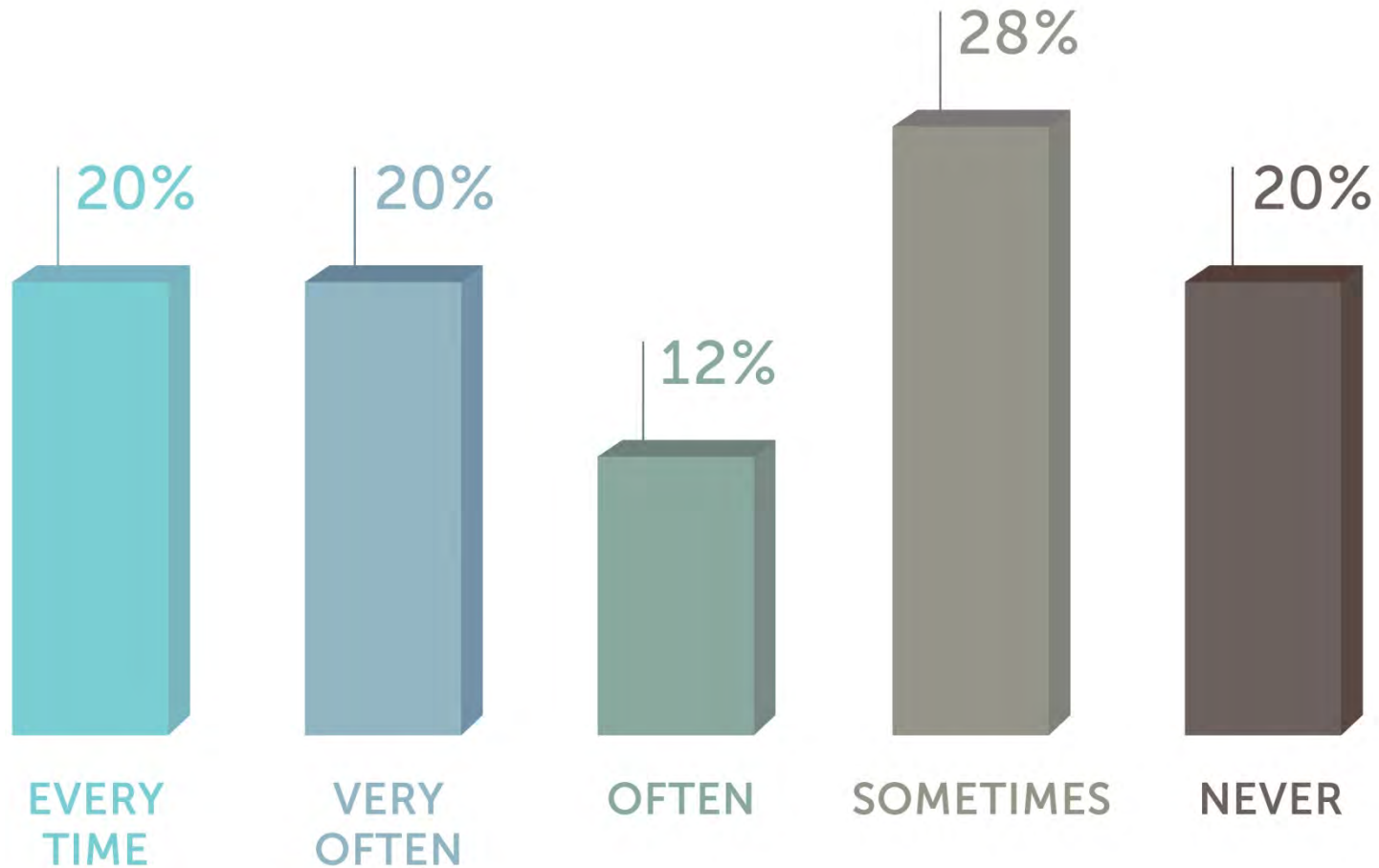
An aerial photograph of the ocean with small, choppy waves. The water is a deep blue color. In the top right corner, there is a white triangular shape that looks like a page corner cut-off.

**Country of Origin**



## COUNTRY OF ORIGIN LABEL

How often do you check for Country of Origin Label on your seafood packaging?



# PERCEPTIONS OF SEAFOOD BY COUNTRY

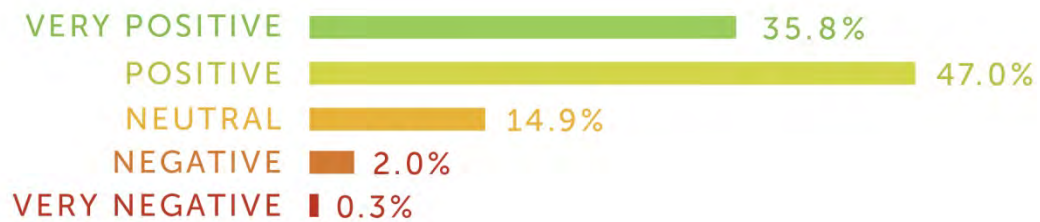


- 
- USA
  - CANADA
  - NORWAY
  - CHILE
  - THAILAND
  - VIETNAM
  - CHINA

# PERCEPTIONS OF SEAFOOD BY COUNTRY

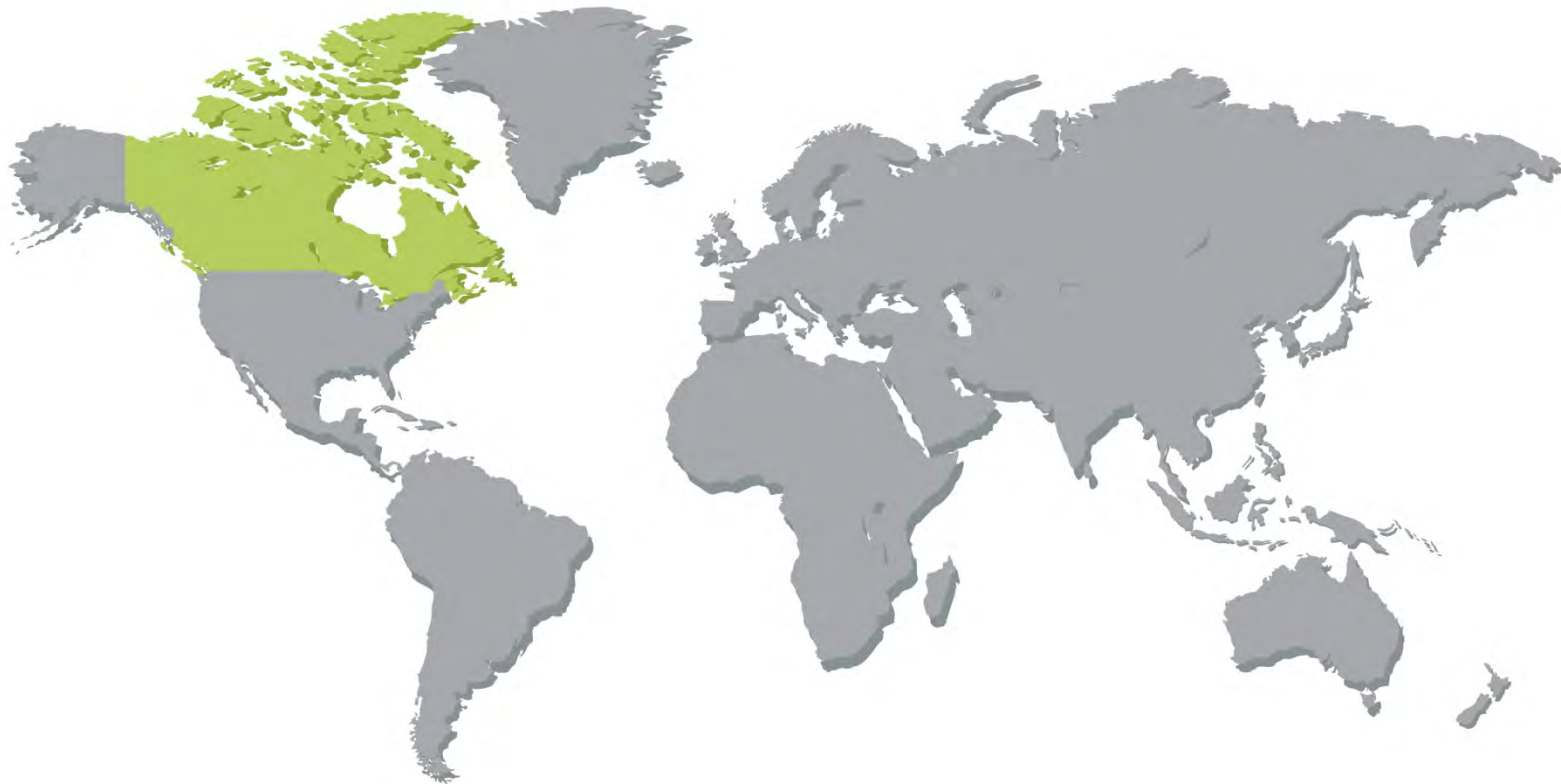


USA

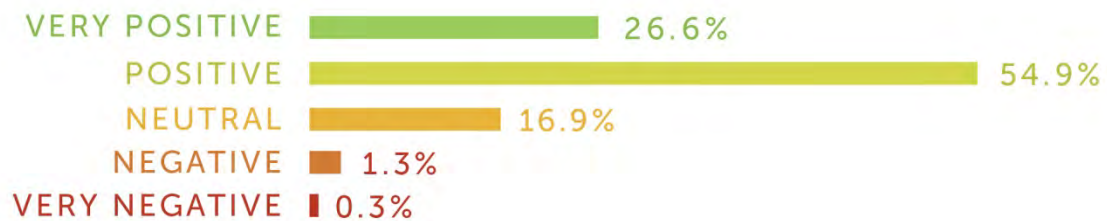




# PERCEPTIONS OF SEAFOOD BY COUNTRY



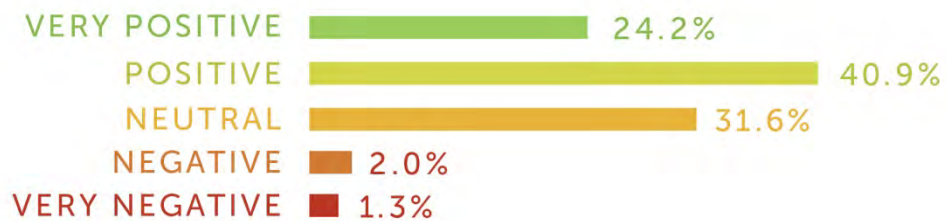
## CANADA



# PERCEPTIONS OF SEAFOOD BY COUNTRY



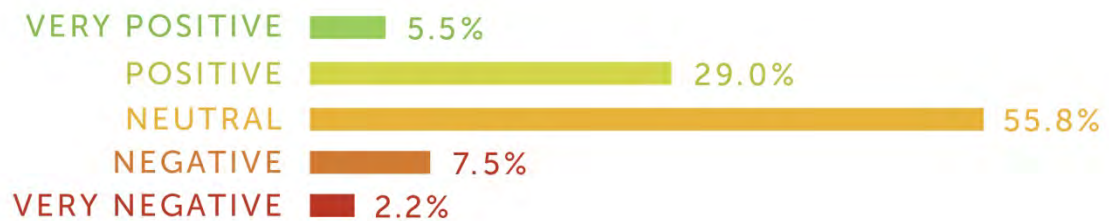
## NORWAY



# PERCEPTIONS OF SEAFOOD BY COUNTRY



## CHILE

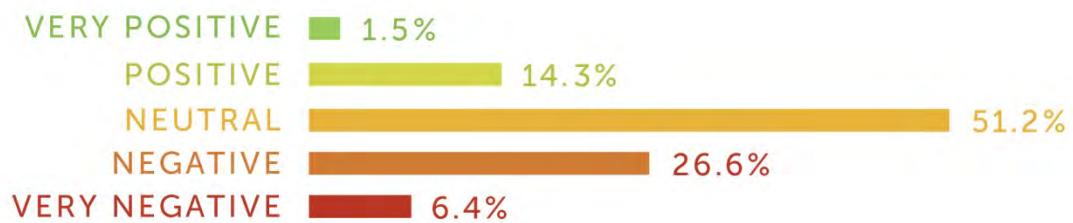




# PERCEPTIONS OF SEAFOOD BY COUNTRY



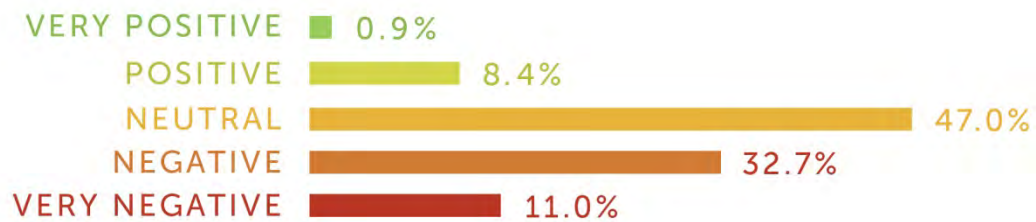
## THAILAND



# PERCEPTIONS OF SEAFOOD BY COUNTRY



## VIETNAM

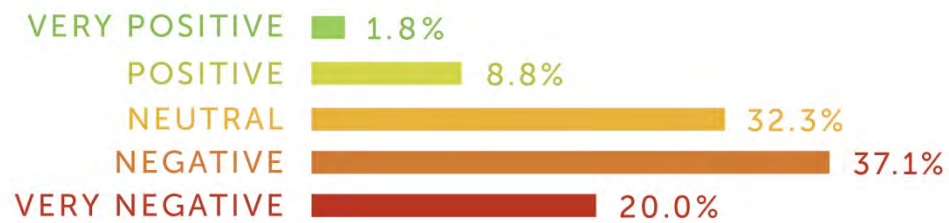




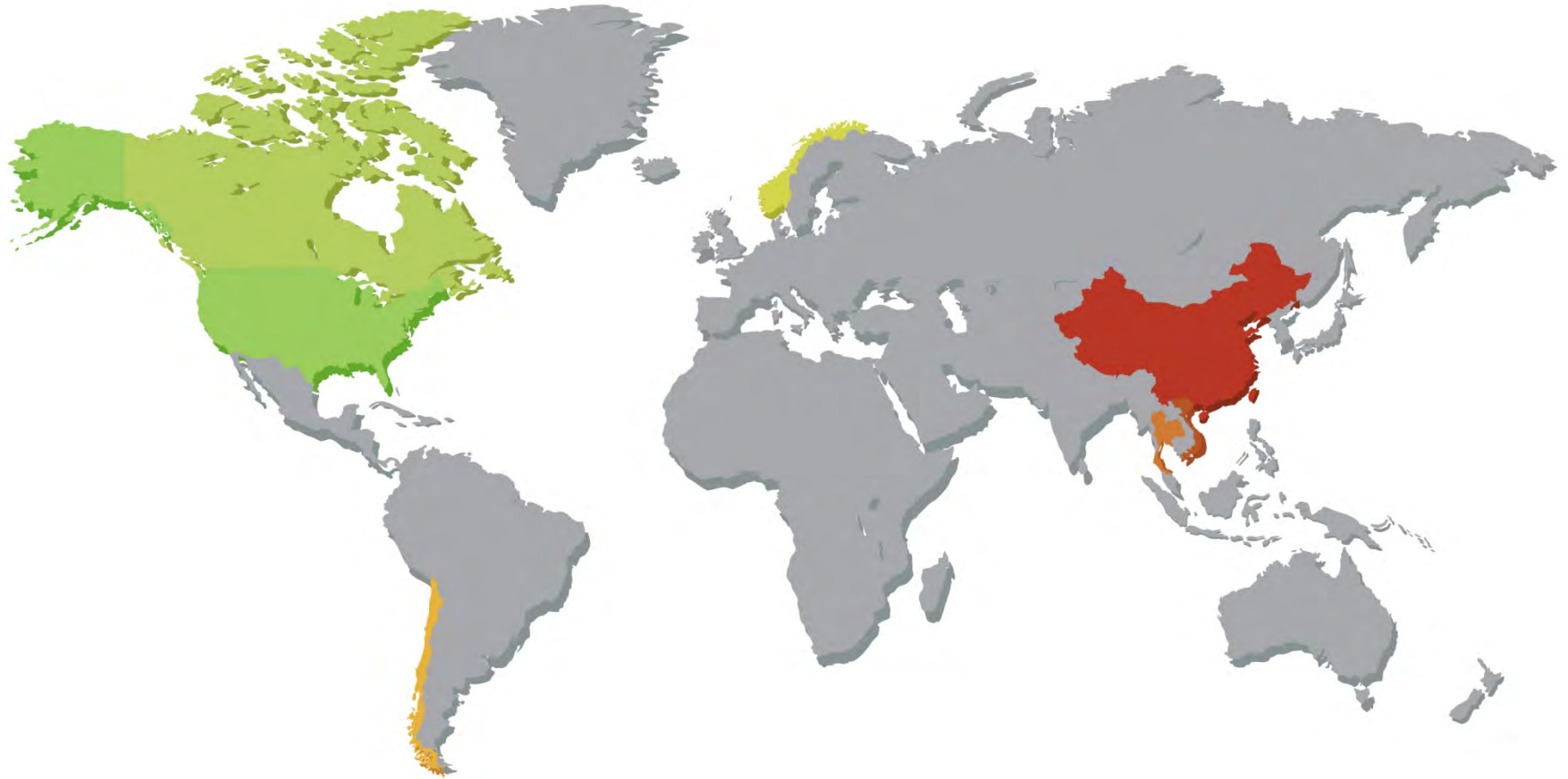
# PERCEPTIONS OF SEAFOOD BY COUNTRY



## CHINA



# PERCEPTIONS OF SEAFOOD BY COUNTRY





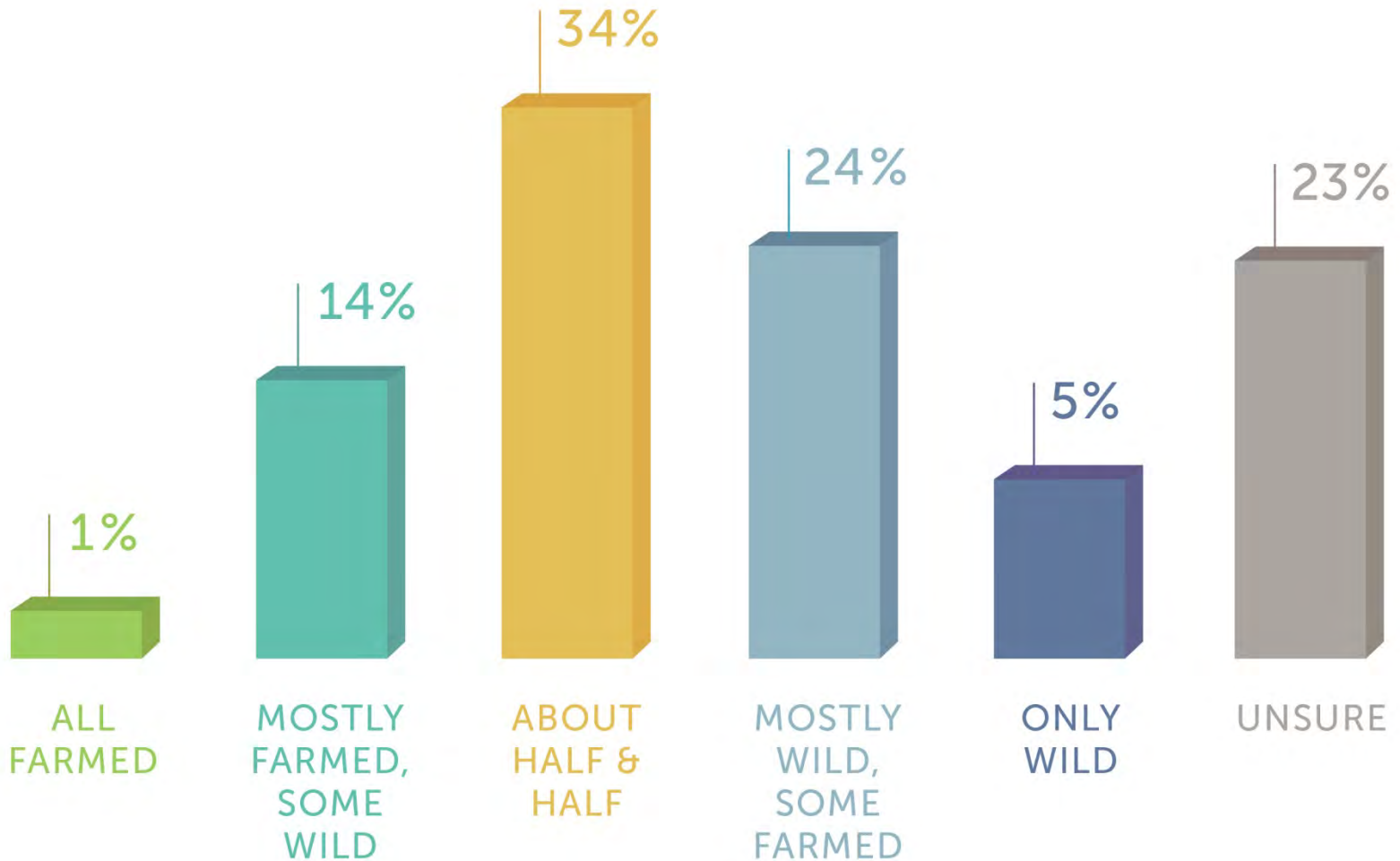
An aerial photograph of the ocean, showing a dense pattern of small, white-capped waves across the entire frame. The water is a deep, vibrant blue. In the top right corner, there is a white, triangular shape that appears to be a cutout or a design element.

**Farmed vs. Wild**



# FARMED VS. WILD CONSUMPTION

How much of the seafood you eat is wild caught?  
(as opposed to farm raised)





# PERCEPTION OF FARMED SEAFOOD

Do you have a positive or negative view of Farmed Seafood?

**47% OF CONSUMERS HAD A NEGATIVE VIEW OF FARM-RAISED SEAFOOD.**

## TOP DRIVERS OF CONCERNS

**27%**  
Conditions of Farm not Good

**23%**  
Not as Healthy

**18%**  
Unsure of feed/antibiotics



## OPEN ENDED RESPONSES

NEGATIVE view of farmed:

“ I HAVE READ REPORTS OF THE UNHEALTHY AND UNSANITARY CONDITIONS THE FISH ARE RAISED IN AND I DON'T WANT MY FAMILY TO EAT THAT. ”

– 41 YR OLD FEMALE IN WA

“ HIGH IN MERCURY AND LIVE IN CONTAMINATED WATERS, FISH FARMED IN CHINA FED HUMAN FECES...GROSS! ”

– 40 YR OLD FEMALE IN WA

“ I DO NOT KNOW MUCH ABOUT FARM RAISED SEAFOOD BUT MANY PEOPLE SAY IT IS BETTER TO BUY WILD SEAFOOD. ”

– 19 YR OLD FEMALE IN ME

# PERCEPTION OF WILD SEAFOOD

Do you have a positive or negative view of Wild Seafood?

88% OF CONSUMERS HAD A POSITIVE VIEW OF WILD SEAFOOD.

## TOP DRIVERS OF POSITIVE VIEW

**33%**  
Fish in natural environment

**18%**  
Higher quality & healthier

**15%**  
Better taste





## OPEN ENDED RESPONSES

POSITIVE view of wild:

“ SUSTAINABLE WILD SEAFOOD IS HEALTHY AND DELICIOUS! ”

– 29 YR OLD FEMALE IN OR

“ WILD SEAFOOD IS HEALTHIER THAN FARMED. ”

– 43 YR OLD MALE IN PA

“ I BELIEVE NATURAL RAISED WILD SEAFOOD PRODUCT IS THE WAY FISH WERE INTENDED TO BE PART OF OUR FOOD SUPPLY CHAIN. ”

– 41 YR OLD FEMALE IN NY

“ I SUPPORT FISHERMAN. ”

– 28 YR OLD MALE IN AL



VIGO, SPAIN





An aerial photograph of the ocean, showing a dense pattern of small, white-capped waves. The water is a deep, vibrant blue. The perspective is from directly above, looking down at the sea. The waves are moving in a roughly parallel direction, creating a rhythmic, textured surface. The lighting is bright, highlighting the white foam of the wave crests against the darker blue of the troughs.

**Final thoughts**



# Thank you

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