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Top Seafood Consumer Trends 2021

What trends will affect seafood and the Norwegian seafood industry in the years to come?

This report is the first in a series of reports where we in the Norwegian Seafood Council take a deep dive into what is happening in the trend picture in the world, and how and why this is important to us in the seafood industry. This is particularly relevant now that we have had a global pandemic and it can be difficult to get an overview of what is going on, especially at market and consumer level.

Since this report is the first of its kind, it will go a little deeper into megatrends as they lay much of the groundwork for what also affects the seafood industry. In the report we will also refer to our own consumer surveys and analyses carried out by the Norwegian Seafood Council in recent years.

We hope you enjoy this first edition, and should you have any questions or comments, please let us know!

Best regards,
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Photo header slide: Knut Åserud / Norwegian Seafood Council

Megatrends

In order to talk about the trend picture in seafood in the best possible way – we need to take a closer look at the big megatrends. Megatrends move slowly, but surely, laying the groundwork for how new trends emerge and how we live our lives. Following are some of the most important.

0.1 **Increased focus on sustainability**

0.2 **A larger and older population**

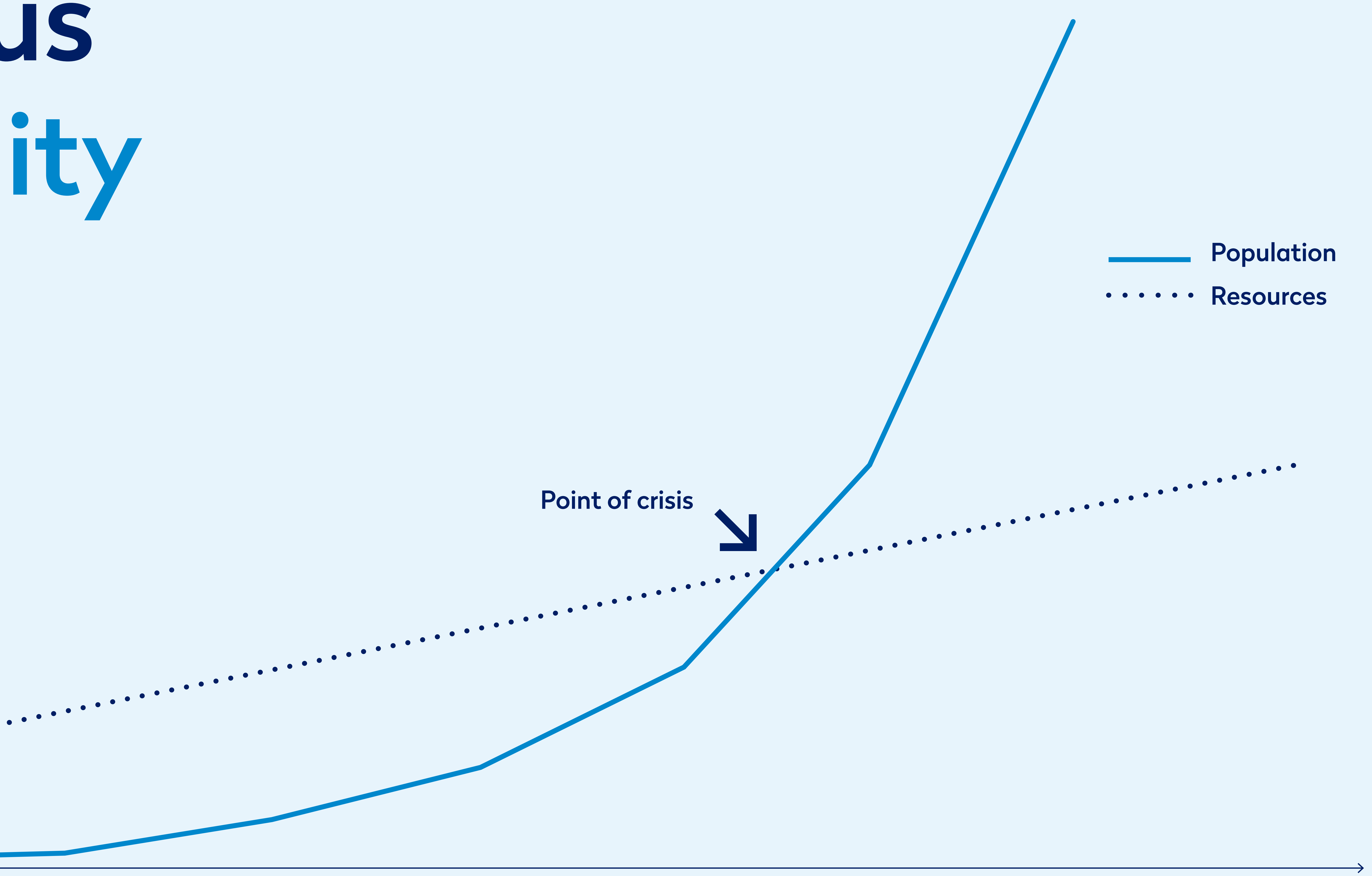
0.3 **Urbanization and a busier everyday life**

0.4 **Technologies that change**

MEGATREND 0.1

Increased focus on sustainability

Concern about the effects of human activity on the environment is not new. Sources point out that several civilizations may have met their doom by exploiting their resources for collapse (Jansen et al., 2004; Field Museum, 2019). →



Already over 200 years ago Malthus (1798) predicted that food production did not correspond to the rapidly increasing population growth (e.g., Bretschger, 2020).

The term "sustainable development" was not defined until 1987 (UN, Commission on Environment and Development/Gro Harlem Brundtland "Our Common Future"), but it was only in September 2015 that all UN member states adopted 17 Sustainable Development Goals by 2030. These objectives have a total of 169 intermediate objectives broken down into the three dimensions of sustainability: environment, economy and social conditions. Goal 14 deals with "underwater life" and is particularly important for the seafood industry. The United Nations Group of Experts is composed of 200 people from approximately 50 countries, reviewing available and up-to-date literature and research.

The purpose is to inspire innovation and new perspectives on how technology, politics and finance can be used to create a more sustainable and prosperous relationship with the sea. Today, there are hardly any companies that have not included anything about the UN's sustainability goals in their thinking or in their strategies. In addition, over the last few years, consumers have seen that they are demanding change and are gaining ever greater power and influence. Already in 2014, Deloitte pointed out that the gap between consumer expectations for products and services and the ability of businesses to meet them was widening (Deloitte consumer review, 2014). ▪

MEGATREND 0.2

A larger and older population

Photo: Norwegian Seafood Council

The population of several countries is ageing, and this is happening at the same time as the birth rate is falling. Yet the world population is increasing. This puts pressure on food production, while at the same time placing greater demands on the proper functioning of health care. While approx. 820 million people live in famine (who.int) some 2 billion people are overweight (e.g. statista.com). Among other things, this has resulted in an increased focus on health and healthy food.

In response to this, the United Nations Climate Panel has highlighted the importance of marine aquaculture in producing enough healthy and sustainable food for an increasing population (Blue Paper; HLP, 2019). The world needs systematic and industrial food production, as well as efficient logistics and distribution. To achieve this, technology and innovation must be strengthened at all stages – from the production and distribution of feed to the processing, packaging and distribution of finished products.

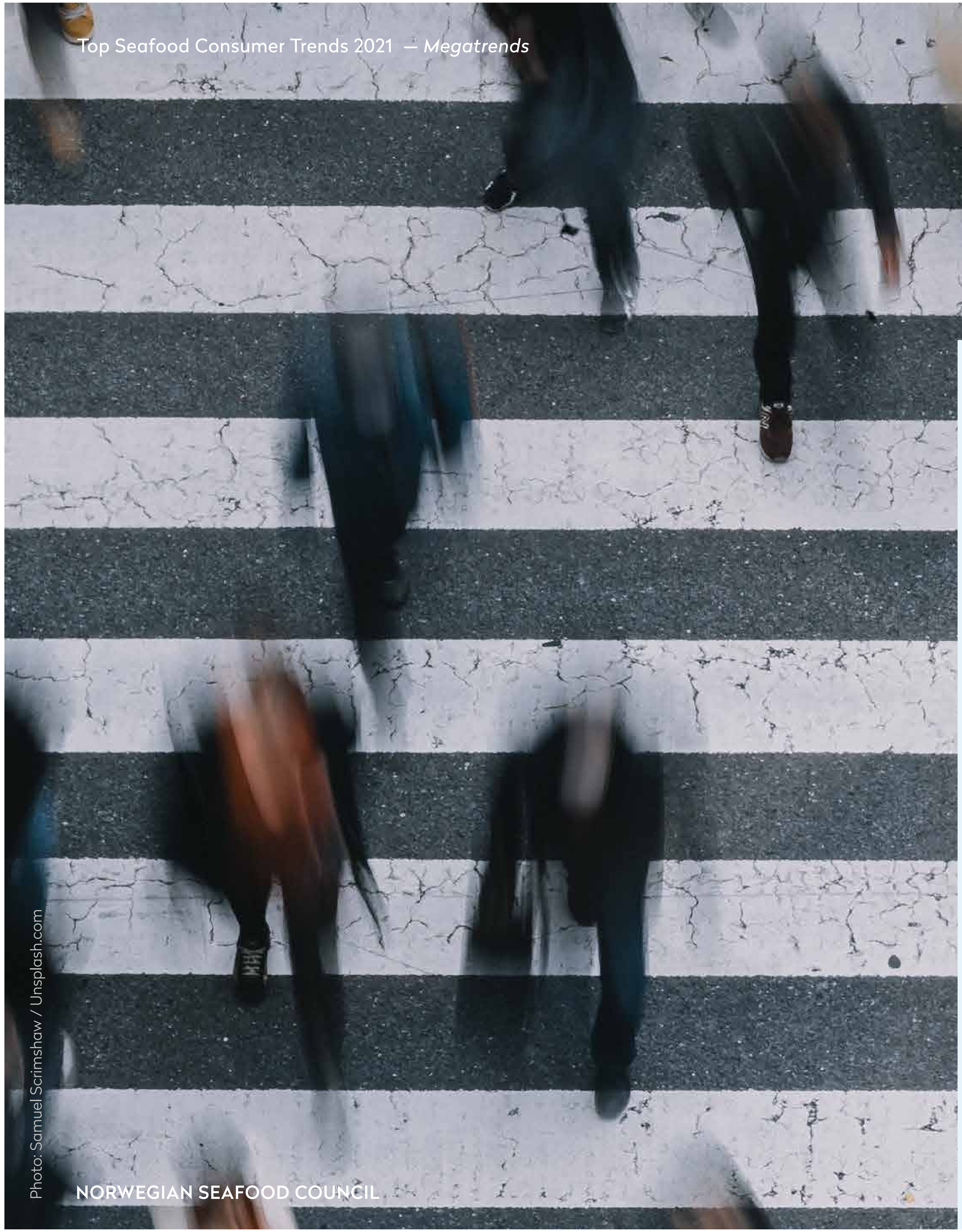


Photo: Samuel Scrimshaw / Unsplash.com

MEGATREND 0.3

Urbanization and a busier everyday life

More and more of us have had busier weekdays, live in large population centers, commute to and from work, and have less time at home. This time squeeze has increased the need for foods and products that make cooking easier and less time consuming, while maintaining quality. At least on the weekdays.

MEGATREND 0.4

Technologies that change

Photo: Nathan Dumlao / Unsplash.com

Technological development is another megatrend. Development has enabled everything from global trade and distribution – including seafood – to sustainable solutions. Much is so seamlessly integrated into our everyday lives that we don't think about the technological developments that have occurred in recent decades. This connected world may seem daunting from time to time, but we are on the threshold of a tremendous future that will really take off with the rollout of 5G.

It's just to see what happened to the expansion of 4G that was up to 500 times faster than 3G. As 4G expanded, the popularity of smartphones increased. Similarly, technologies and services that rely on fast data transmission and low latency will increase as 5G is deployed. The use of automated systems, such as driverless robots, blockchain and smart homes, are examples of this. The pandemic has helped accelerate innovation in these areas, as well as lowering barriers to use and implementation.

AUTOMATION

Automated department stores (e.g. Amazon) help reduce the time from ordering to delivery (e.g., Ocado in the UK and "hive grid machine").

Photo: Pixabay

Photo: Pixabay

DRIVERLESS ROBOTS

Automatic delivery is still in the test phase, but may prove particularly important for the delivery of goods to, for example, people at risk. Driverless robots were used early in the pandemic to deliver equipment to frontline workers in infected areas of China (see Baidu Intelligent Driving Group). The use of robots is already widespread in the automotive industry – the pandemic has highlighted the need for increased automation in the food value chain.

DRONES

Used to deliver goods to hard-to-reach locations (such as hospitals in Rwanda and Ghana, made by Zipline International). Various companies are prominent in the use of drones, such as Amazon, Alibaba, UPS, Walmart, and others operating in Europe. In urban areas, regulation of airspace will be required for drone traffic.

Photo: pexels.com

Top Seafood Consumer Trend 1.0

New sales channels

In this chapter we will look at the development of new sales channels, and in particular the development of e-commerce. →

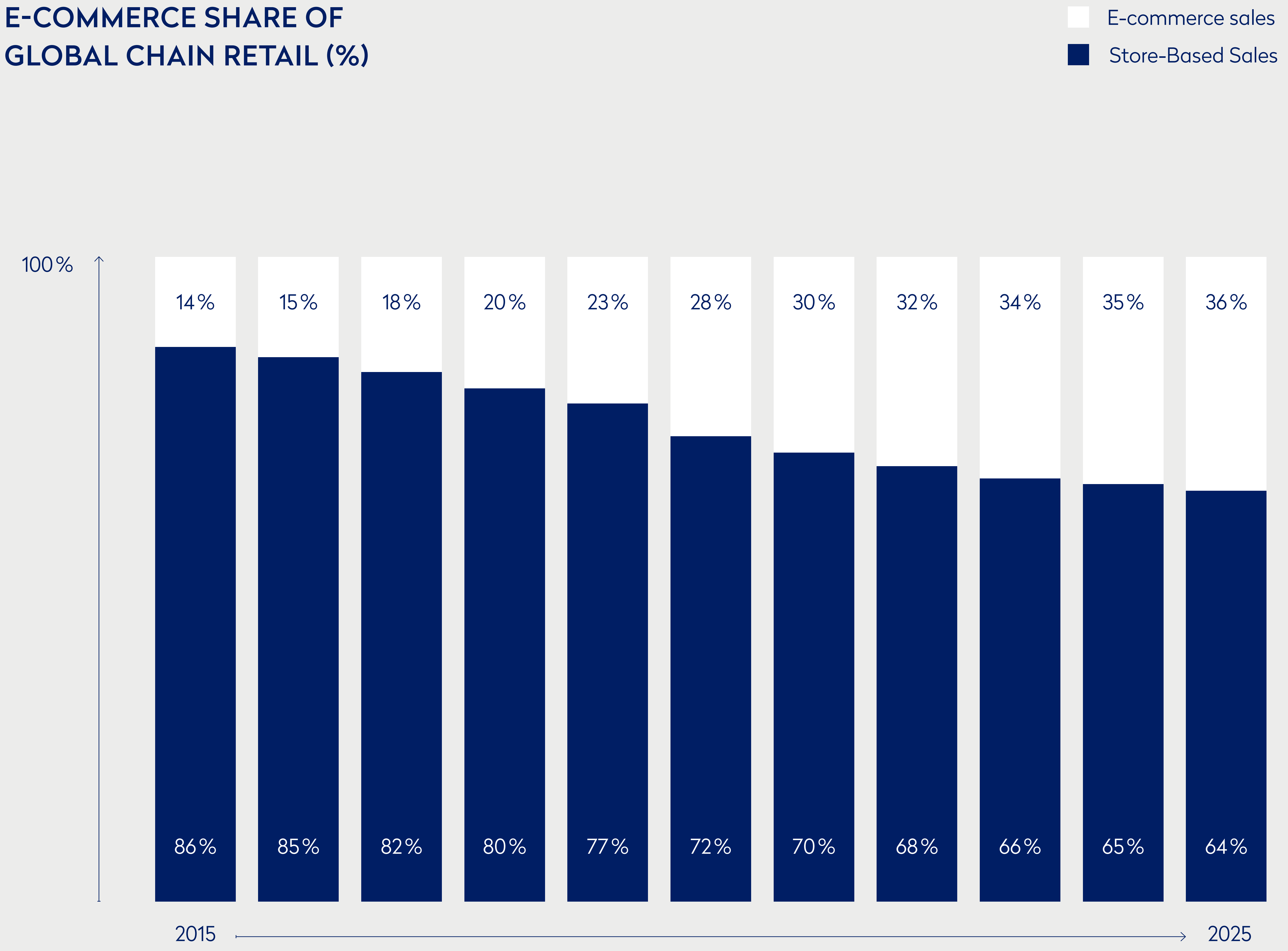
> *“The essence of a consumer’s convenience mindset is to save time and money, as well as to get what you want.*

There has been little change in where the consumer buys seafood in recent years, with the exception of e-commerce, according to the Norwegian Seafood Council own surveys. During the pandemic, these developments have accelerated further.

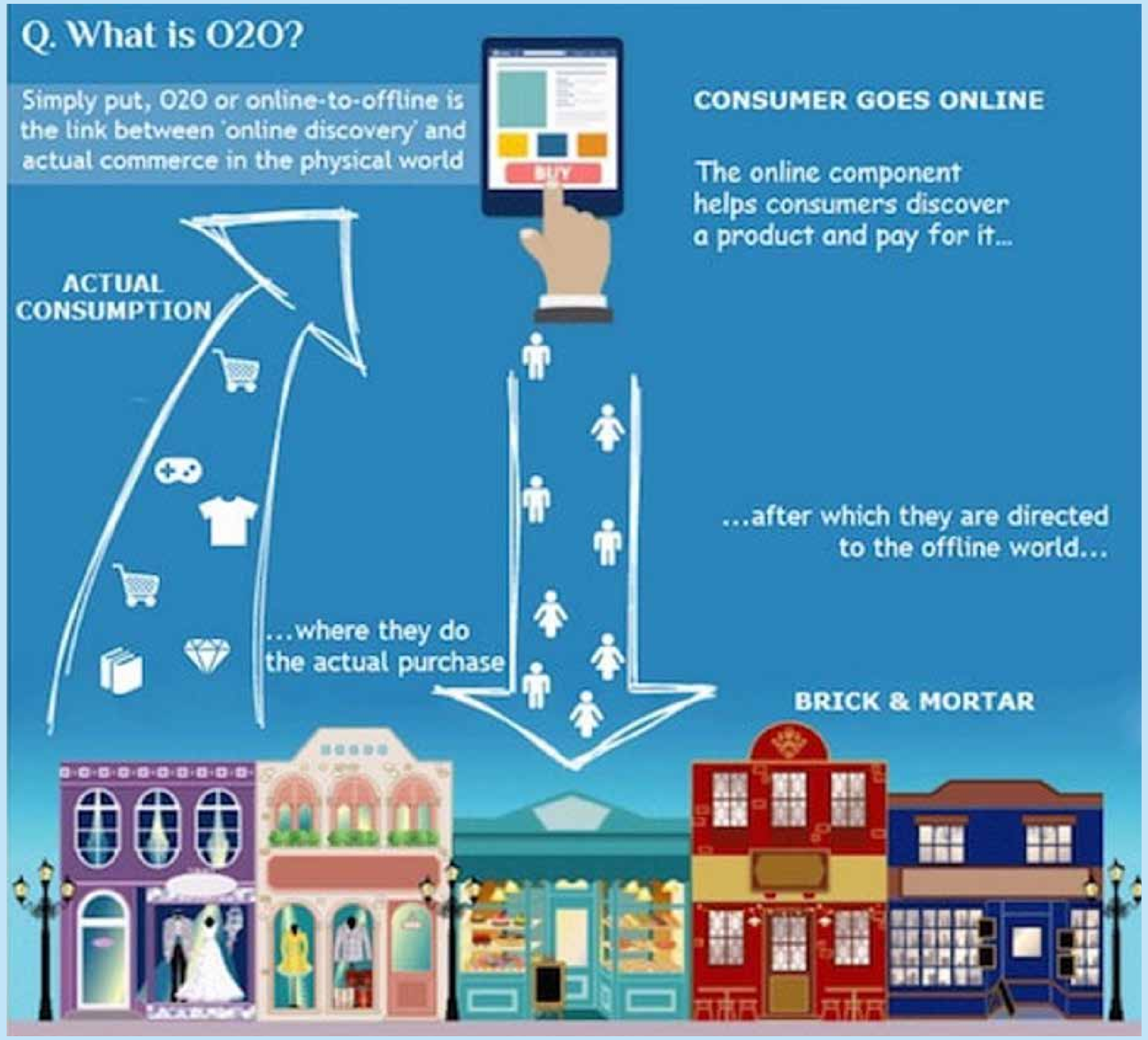
The essence of a consumer’s convenience mindset is to save time and money, as well as to get what you want. Most of us would probably agree that e-commerce meets these criteria to a large extent, and this is also supported by several research studies. For example, in a study dated 2011, G. Paj found that the time saving and finding what you’re looking for, were by far the most important criteria for shopping online. The reason we’re pulling out an “old” study is that around 2010 we got 4G and 4G compatible smartphones. Where e-commerce used to be “tied” to home or work PC, the future now really began to become mobile and thus more accessible. ■

Today, e-commerce accounts for nearly 28 percent of grocery sales globally, according to the analysis company Edge By Ascential. This is twice as much as the 2015 estimates. The corona pandemic has put e-commerce two years ahead of previous growth forecasts. Significant growth is also expected in the years to come in this channel, with the highest growth expected in Asia, Africa and the Middle East (Edge by Ascential, 2020b).

E-COMMERCE SHARE OF GLOBAL CHAIN RETAIL (%)



Online 2 Offline



innovationiseverywhere.com

According to Investopedia (investopedia.com), O2O is a business strategy aimed at moving customers from online channels to physical ones.

Online to offline

It is nevertheless important to note that the grocery trade will not be completely moved to online solutions in the near future. Multi-channel, or Omnichannel, is a term that is being used more and more. This means that chains have a presence both in the traditional sense with physical stores, but they also have an online version. The goal is to create as seamless an experience as possible between these two. China in particular is at the forefront of linking online with "offline" commerce – in what they simply call **O2O** (online to offline). However, we also have examples from the West, including **Groupon**, **OpenTable**, and **Uber**, to name a few. →

If we look at the domestic market, a player such as **kolonial.no**, which sells groceries online, has seen significant growth during the corona pandemic. The seafood industry also has the **YORSO** service, which is an online app for wholesalers. At the time of writing, it connects 105 companies and embraces most of the seafood market (Yorso, 2021).

E-commerce depends on technological development, such as secure payment solutions, home delivery and securing 'the last mile' – meaning that you can get refrigerated goods delivered to your door. This is especially important for seafood products. There is a rapid development in this area. At the time of writing, for example, Spanish last-mile delivery platform Paack raises USD 53 million in funding (Edge by Ascential, 2020c). ■

PAACK

Started in 2015, Paack is a delivery platform for companies like Amazon, Decathlon, Mediamarkt and others. They are active in Spain, UK, France and Portugal (Edge by Ascential, 2020c).

Shop streaming

Shop streaming is a compilation of e-commerce and live streaming. The scheme offers customers the opportunity to digitally walk around a store, interact with the service and the like. The scheme was first launched in China, but is an emerging trend in western parts of the world.

In connection with Christmas 2020, Carrefour launched its own events on its website (carrefour.com). The focus was mainly on toys, where they had promotions, demonstrations and interactions between customers and real-time service. According to Forbes, live streaming from stores' websites (online portals) will be able to provide customers with more information about products and help them discover new items they haven't previously considered. Additionally, it creates trust among customers, who see the host/service as experts.

Live streaming has developed positively in China in recent years, and especially since the Covid-19 outbreak. According to the Ministry of Commerce in China, more than 4 million live e-commerce streams were held in the first quarter of 2020 (Kantar, 2020).

GWI Coronavirus Research July 2020 | Post-Outbreak Behavior Increases

Post-Outbreak Behavior Increases

% who say they expect to do the following after the outbreak is over*

*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Exercise at home more frequently	54	45	38	27	44	43	46	39
Shop online more frequently	51	50	49	36	47	50	54	43
Use food delivery services more frequently (e.g. Uber Eats, Just Eat, Deliveroo, etc)	31	25	15	9	20	24	25	18
Use mobile payment services more frequently	48	42	38	19	36	44	43	36
Use video calling more frequently (e.g. FaceTime, WhatsApp video, etc)	41	37	32	18	32	38	38	31
Use video conferencing platforms more frequently (e.g. Zoom, Hangouts, etc)	29	30	23	11	24	29	35	19
Work from home more frequently	31	28	25	18	25	28	33	25
None of these	7	14	21	39	16	16	11	20

Question: After the outbreak is over, do you think you'll do any of the following?

GWI Coronavirus Research July 2020

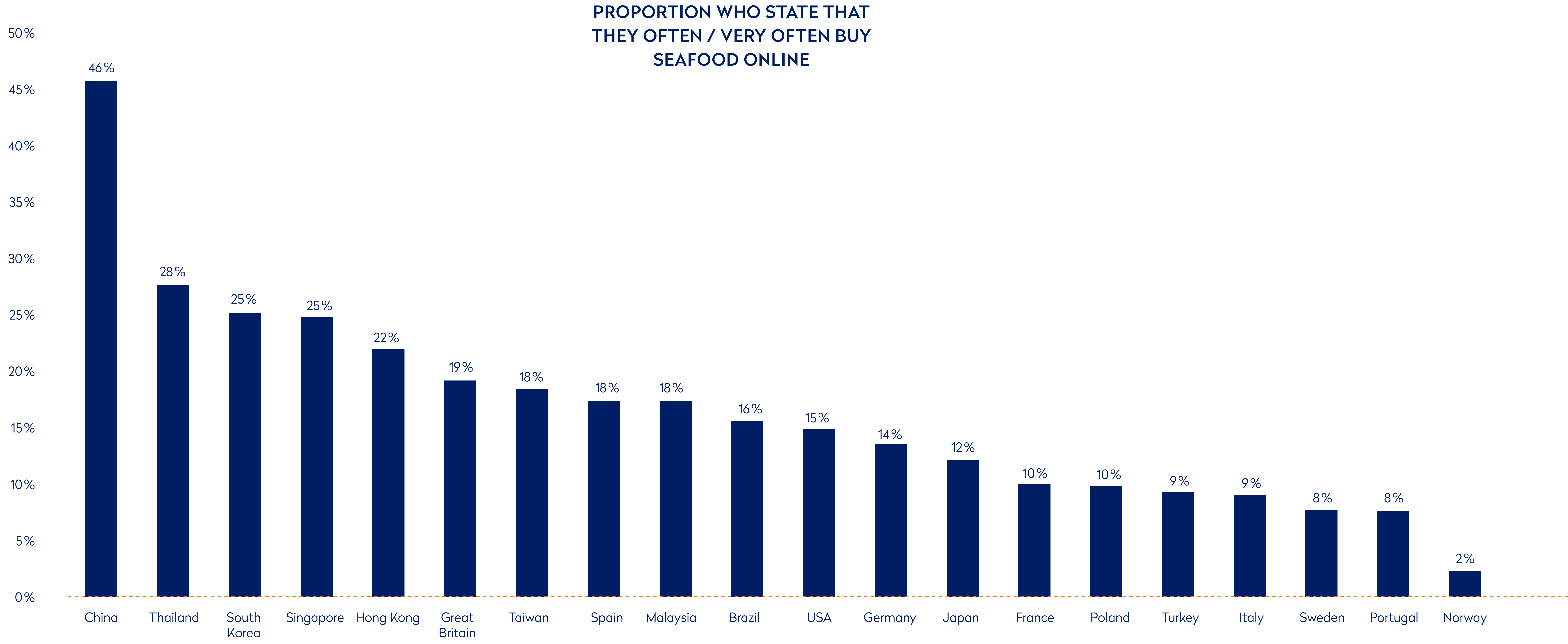
E-commerce by Corona

Figures from GWI, the Global Web Index, show that there was an increase from April to June 2020 in the proportion who expect to shop more often online after the corona outbreak is over.

Looking at all countries combined for July 2020, 49 percent stated this. The proportions were highest among Gen Z (those born after 1996) and Millennials (those born between 1981 and 1996), marginally ahead of Gen Xs (those born between 1965 and 1980).

Photo: Norwegian Seafood Council / Per Anders Jorgensen

What about the seafood?



Caption: Figures from the Norwegian Seafood Council's annual consumer survey. Seafood Consumer Insight (2020)

According to the "Top 10 Global Consumer Trends 2021" report by Euromonitor, there are differences between generations in what is perceived as most practical. Because while younger consumers prefer digital interactions when trading, older consumers like to talk to the service.

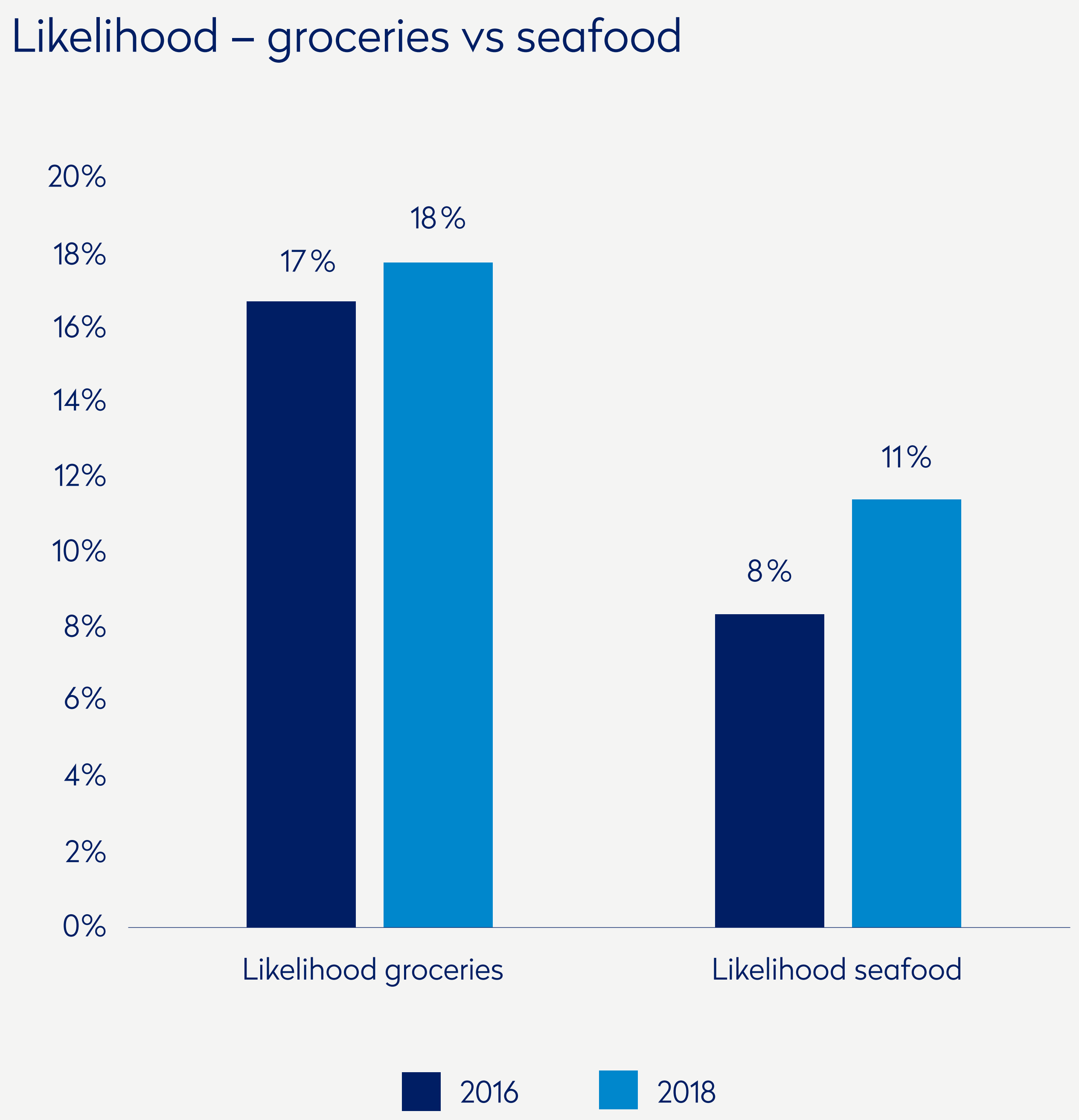
Photo: Andreas Lindahr

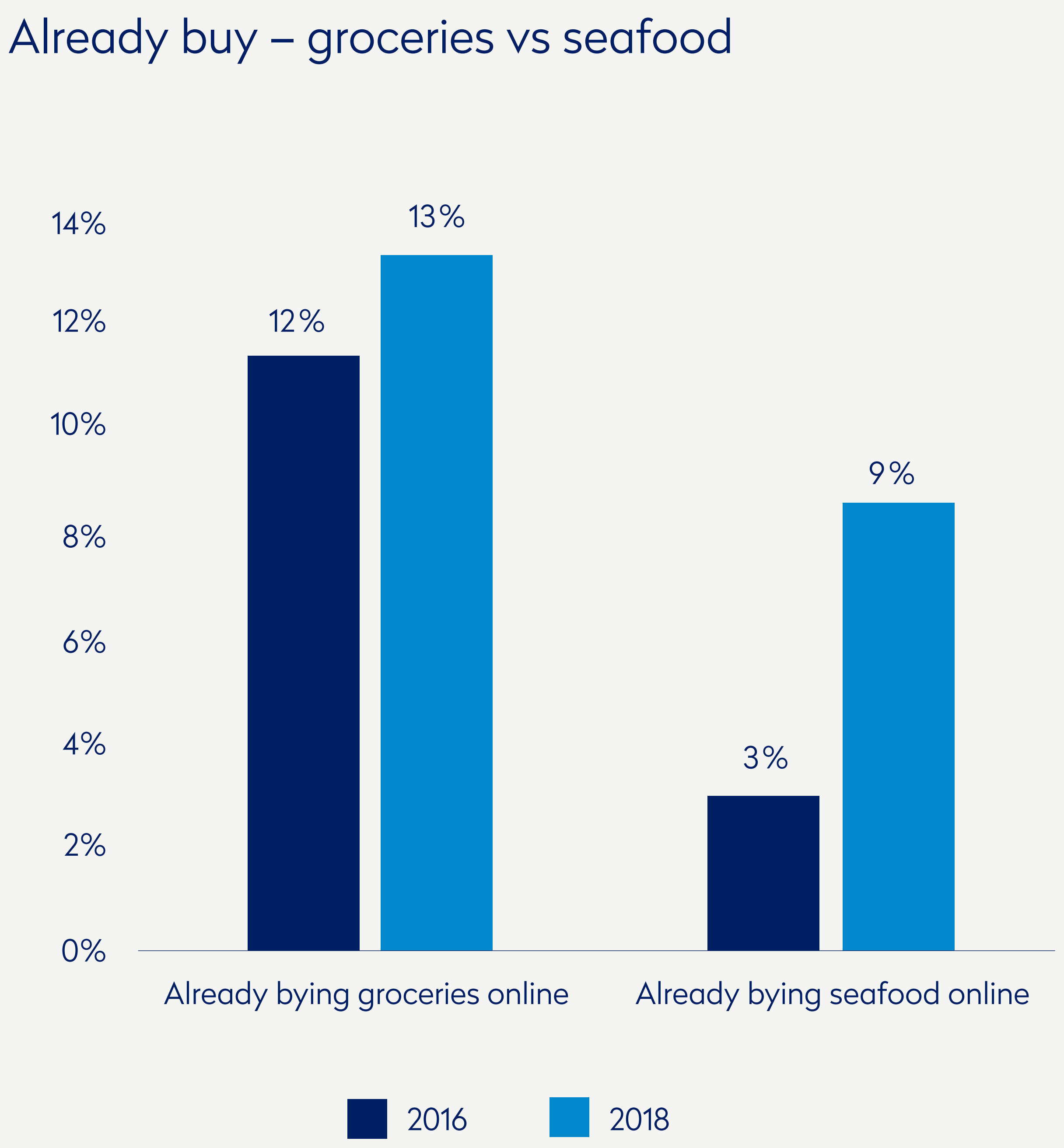
In the Norwegian Seafood Council's annual consumer survey for 2020, more than 23,000 seafood eaters in a number of countries were asked how often they shop seafood online, and not surprisingly, in Asia we find the five countries where the most say they "often/very often" shop seafood online. At the very bottom is Norway, with a share of only 2 percent.

Globally, it is those in the 20–34 age group who most often state that they "often/very often" shop seafood online, with a share of over 20 percent. By comparison, about 10 per cent in the 50–65 age group report the same. ■

SEAFOOD IS CATCHING UP WITH GROCERIES IN E-COMMERCE

Purchase Seafood Online





A study conducted in France in 2016 found that the barrier to buying seafood online was higher than for other groceries (Norwegian Seafood Council and Kantar, 2016). Only 8 per cent of French consumers indicated that they would consider buying seafood online, compared to 17 per cent for groceries in general. When the same study was done two years later, the proportion who would consider buying seafood online had increased to 11 percent. There was also an increase in the proportion who stated that they already bought seafood online, where the proportion went from 3 percent in 2016 to 9 percent in 2018. By comparison, there was only a slight increase in the proportion who stated that they were already buying groceries online, from 12 percent to 13 percent.

Why is this important to the seafood industry?

New sales channels represent first and foremost an opportunity for the seafood industry. It provides new points of contact with customers, and also makes it possible to reach new customers. According to the Norwegian online grocery store Kolonial.no, more seafood is sold relative to other groceries through their online store than what is sold in traditional grocery stores.

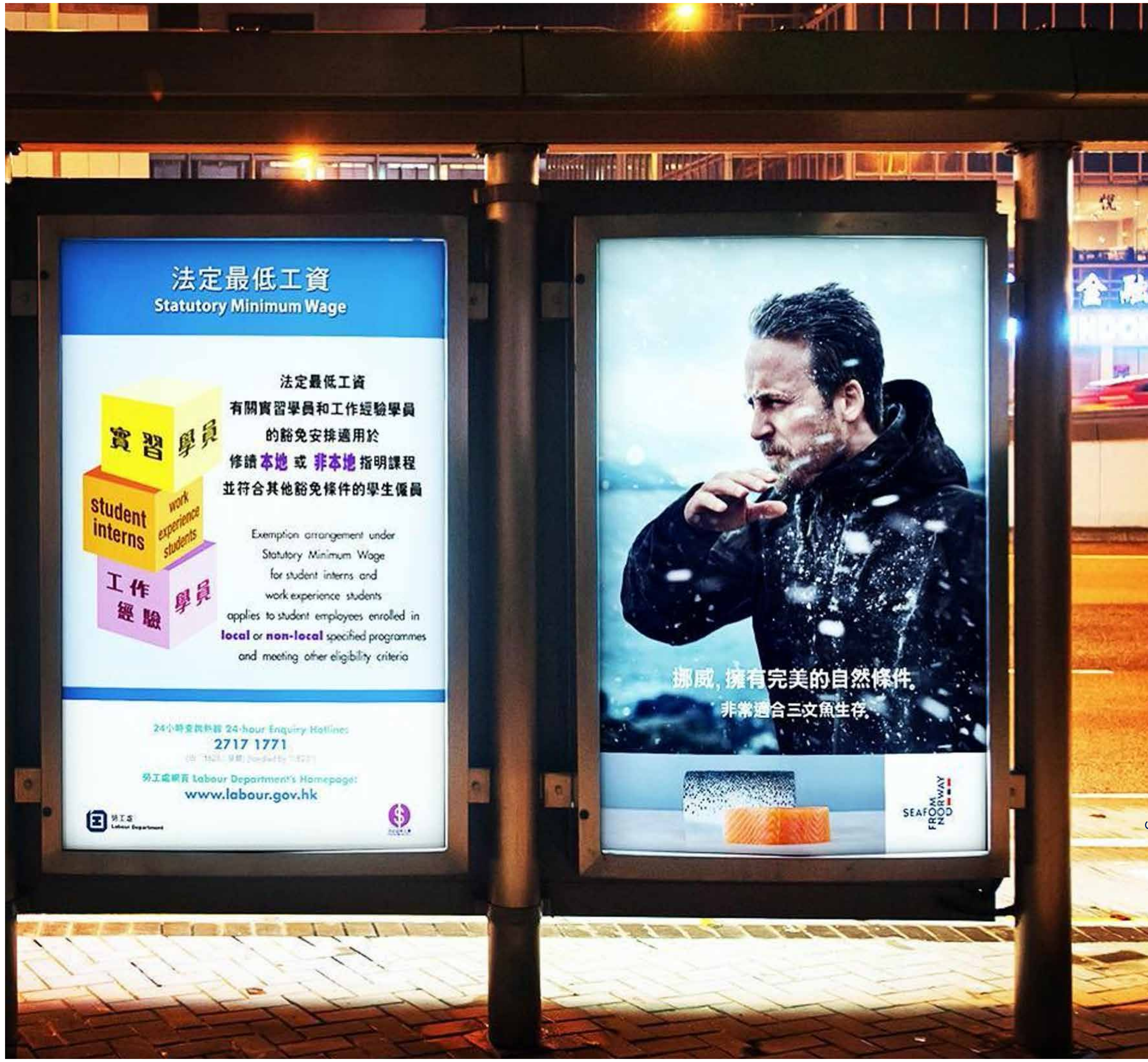


Photo: Norwegian Seafood Council

Photo: Norwegian Seafood Council

What should you be thinking about?

There are a number of things to consider before starting online shopping. →

The analysis company Edge By Ascential points out, among other things:

- Why should the consumer buy the product online instead of the store?
- How to minimize conflict with other sales channels?
- Are you going to sell through your own online store or through others?
- What is the purpose? Branding or sales?
- Does the product require high level of involvement or expertise?
- What does the sale have to be to defend such an investment?
- How are you going to ensure knowledge and traffic to the store?
- Do you have a buy-back plan?
- How is deployment? Is the cooling chain optimal?
- Are you going to deliver yourself or use third-party suppliers?
- Is the price point of the product such that delivery on the door is worth it?

These are just a few of the questions that require some reflection before you spawn on e-commerce. Nor is it unlikely, for example, that the grocery chain, to which you sell your own products today, plans such a solution. If so, consider exploring the possibility of being able to promote your own products with them, as some e-commerce platforms offer that possibility. ■

Top Seafood Trend 2.0

Sustainability

In this section we will take a closer look at the sustainability trend and how it has increased in importance in recent years. Sustainability has long been less important for consumers in general, but an ever-increasing environmental awareness among young people has acted as a catalyst to put sustainability and the environment on the agenda.

> *“ This means that if you do not have products that are certified according to certain environmental standards, you will not get into the hands of certain manufacturers, wholesalers or chains.*

Photo: Knut Åserus / Norwegian Seafood Council

Sustainability has become a market driver for innovation and growth for companies. This has resulted in an increased focus on all elements of the value chain – from raw material purchases to information on packaging (cornell.edu).

Sustainability will become more important, and if companies do not follow up, they risk losing customers. Today we see that eco-labels such as the Swan or MSC are considered “license to play” in individual markets. This means that if you do not have products that are certified according to certain environmental standards, you will not get into the hands of certain manufacturers, wholesalers or chains.

Findings from a series of studies, conducted by the Global Web Index (GWI), show that consumers express stronger support for sustainability. The study was conducted in several phases during 2020. 72 percent of consumers express that it is more important now than before that brands behave more sustainably. Most of them are from Gen. Z (those born after 1996). Almost equally important is that only 5 percent globally say sustainability is now less important, and only one country out of the 18 participated in the study where this figure exceeds 10 percent (Romania). →

Changing Importance: Companies Behaving More Sustainably

% who say that companies behaving more sustainably has taken on the following importance because of coronavirus

	All	AU	BE	BR	CN	FR	DE	IN	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
A lot more important	39	22	19	55	37	22	16	60	38	24	23	63	23	25	25	44	28	23	21
A little more important	33	29	30	24	41	34	32	27	25	24	30	24	31	19	39	28	35	32	25
No change	23	45	43	16	20	40	43	5	29	42	41	9	40	43	29	21	32	41	48
A little less important	3	3	5	3	2	3	5	5	6	3	5	2	4	9	5	4	4	2	3
A lot less important	2	2	4	2	0	2	4	2	3	6	2	2	2	4	3	3	1	3	3

% who say that companies behaving more sustainably has taken on the following importance because of coronavirus*

*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
A lot more important	47	39	37	27	39	40	48	33
A little more important	32	35	31	23	32	33	30	34
No change	15	21	29	46	25	22	18	27
A little less important	4	3	2	2	2	4	3	4
A lot less important	2	2	2	2	2	2	1	3

Question: Has the importance of any of these things changed for you, because of coronavirus? Companies behaving in more sustainable / eco-friendly ways

Source: Global Web Index (2020) - https://www.globalwebindex.com/hubfs/1.%20Coronavirus%20Research%20PDFs/GWI%20coronavirus%20findings%20July%202020%20-%20Multi-Market%20Research%20(Release%2011).pdf?_ga=2.4606128.242209883.1614001121-1137515679.1614001121

Changing Importance: Reducing Carbon Footprint / Environmental Impact

% who say that reducing their carbon footprint / impact on the environment has taken on the following importance because of coronavirus

	All	AU	BE	BR	CN	FR	DE	IN	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
A lot more important	39	23	19	50	38	21	17	62	48	19	23	59	24	33	29	45	29	21	21
A little more important	32	24	31	26	42	31	27	24	20	27	27	26	28	22	34	28	33	28	23
No change	23	46	41	17	17	38	45	6	25	43	42	10	40	33	28	22	31	44	50
A little less important	4	4	5	4	3	6	7	7	4	5	4	4	5	7	6	3	6	4	4
A lot less important	2	3	4	2	1	5	5	2	3	6	4	2	2	5	3	3	2	3	3

% who say that reducing their carbon footprint / impact on the environment has taken on the following importance because of coronavirus*

*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
A lot more important	47	40	35	28	39	40	45	33
A little more important	32	33	31	25	32	32	30	34
No change	14	20	29	43	24	21	18	24
A little less important	6	4	3	2	4	4	5	6
A lot less important	2	2	2	2	2	3	2	3

Question: Has the importance of any of these things changed for you, because of coronavirus? Reducing my carbon footprint / impact on the environment

Source: Global Web Index (2020) - https://www.globalwebindex.com/hubfs/1.%20Coronavirus%20Research%20PDFs/GWI%20coronavirus%20findings%20July%202020%20-%20Multi-Market%20Research%20(Release%2011).pdf?_ga=2.46061218.242209883.1614001121-1137515679.1614001121

Consumers also have high expectations of their own behaviour. About 71 percent think it's more important now to reduce your carbon footprint or environmental footprint. Again, Gen. Z is in front and is about 80 percent (see picture p. 31). Consumers are therefore willing to accept a personal responsibility, but they also make demands on companies, according to the findings from GWI.

Consumers are increasingly beginning to buy brands and goods that fit their personal values, and values they believe are good for the world. Nevertheless, there is a small gap between words and action, and 'sustainability' is not necessarily a very strong driver when individuals are out shopping (price/value and simplicity are very important to people) – but sustainability is growing in importance, especially among young people. Here it is also important to understand that we are happy to talk about a set of drivers that work together by action or purchase. And here sustainability is well established.

It is also important to remember that sustainability is only a concept, so what individuals associate with sustainability will vary. For example, if you ask someone if they think it's important that they can breathe clean air in the cities and they say 'yes', you can rightly argue that they are concerned with sustainability, even if they don't explicitly use that term. Just the latter has become very clear to many during the pandemic. Shutdowns led to reduced traffic, both on land and on water. Photos from different cities →

have shown how quickly air and water quality can recover. The pandemic has therefore driven the 'sustainability agenda' forward. The EU is investing heavily in the green shift, and as much as 37 percent of the coronavirus recovery fund is earmarked for this. ■

Photo: Marius Fiskum / Norwegian Seafood Council

Different understanding of sustainability

Another point of conceptual understanding is that there will be cultural differences in what we put into sustainability. Not every country in the world has sustainability on the agenda, as we are used to here, and that means that there is also a different perception among consumers of how important sustainability really is, as well as being understood differently. To illustrate this, we can look at some examples from France and South Korea. Often one can see differences in the perception of one and the same concept across borders and cultures. →

The data is taken from the Norwegian Seafood Council's annual survey for 2020 and is based on a set of questions that we have identified over time as strong drivers for purchasing fish and shellfish. In France, the view on sustainable products is most strongly linked to origin, followed by organic, locally produced and healthy.

This means that when French consumers are out buying seafood, these drivers represent something in common. The situation is not exactly the same in South Korea. Sustainability here is weak in relation to origin marking, and even weaker in relation to the fact that seafood products should be locally produced. Sustainability as a purchasing base is most strongly linked to ecological sustainability for Koreans. ■

Photo: Jim Henslay / Norwegian Seafood Council

What does this even mean?

It may be that the conceptual understanding is different, simply that when Koreans see 'sustainability', they think differently from the French. One hint that this is not necessarily the case is that consumers from both countries link sustainability to organic products. For many, organic farming is 'more natural', and therefore more sustainable. It may therefore be worthwhile to associate sustainability with health and ecological sustainability in the Korean market. In France, on the other hand, it would be natural to focus on origins when communicating sustainability.

We have also asked respondents about their intention to eat more seafood in the future. In addition, we have asked if they would like to make changes to the family diet to become more sustainable. →

How do the grounds for purchase affect these?

Let’s start with what we can call purchasing grounds. The analysis shows that the order of the list is different in both countries.

In **France**, these are the main purchasing grounds for eating more seafood in the future:

- origin
- certified as sustainable
- taste
- health

In **South Korea**, the reasons for purchase are:

- wholesomeness
- organic
- safe to eat
- accessibility (‘must get seafood where you’ usually shop)

At first glance, French and Koreans may seem to have widely different reasons for buying seafood, but this may not be the case. The reasons are only ranked differently, so they do not affect equally. Koreans and French experience the term sustainability differently, so it is important to do a thorough preparatory work on the conceptual understanding and association in exactly the country you want to launch new seafood products in (or have a specific target group). ■

Why do we shop where we do?

Photo: Norwegian Seafood Council

It is our preferences which tends to determine where we shop, so now we're going to look at important criteria for the French and Koreans to buy seafood in exactly the store they do.

In summary, this analysis showed that French people can list a number of criteria that are important when buying seafood products, but in the long term, it is the quality aspects of the outlet that are most important to French people. Koreans, on the other hand, highlight the properties of seafood products themselves. And that the store is close, of course.

Why is this important to the seafood industry?

- You will not be selected if you cannot show that you are operating properly, there are in many ways “license to play” – that is, criteria that must be met in order to compete at all.
- Better financing solutions.
- It’s about creating a circular economy that allows you to live off your resources over time.

Photo: Norwegian Seafood Council

What should you be thinking about?

- **Is sustainability a central part of your strategy?**
- **Show what you're doing**
  don't just talk about what you're doing to be sustainable.
- **Build the story**
  where are you and where are you going?
- **Consider standards and other labelling schemes**
  it may be wise to use standards and labelling schemes which is already recognized and accepted by professionals and consumers.

Top Seafood Consumer Trend 3.0

Convenience

In this chapter we will look at the third trend, often referred to as “convenience”.

Photo: pixabay.com

What is convenience?

The fact that consumers are concerned about convenience is not new. Back in 1958, Eugene J. Kelley wrote a research article that looked at the 'increasing convenience trend' in the United States in connection with the expansion of malls (Kelley, 1958). For him, people's 'shopping behaviour' was about the balance between the cost of goods and the cost of convenience:

'Commodity costs are defined as the monetary price paid the seller to obtain possession of goods and services. Convenience costs are incurred through the cost of time, physical and nervous energy, and money required to overcome the frictions of space and time, and to obtain possession of goods and services.' →

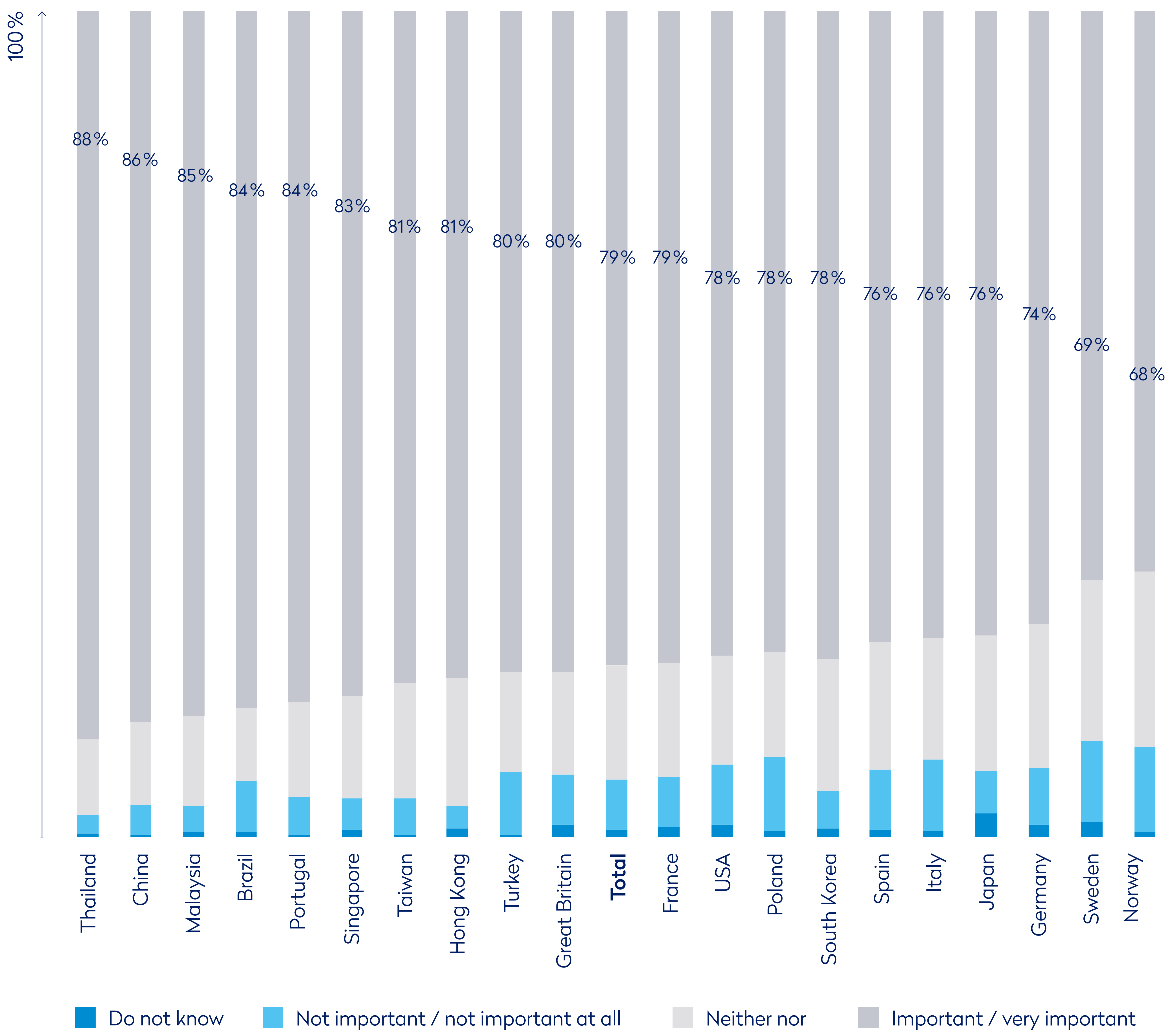
THEN VS. NOW

Purchase choices are made at the point where the cost in terms of the price and convenience are minimal. This can save time for customers and retail space, which means that we can do what we need to do in the same place.

Not much has changed in the grocery sector in the decades since Kelley's study. Shopping malls have appeared, chains have grown, but in principle the sales channels now are similar to what they were then (we were eventually able to shop by mail order).

Photo: Norwegian Seafood Council

IT IS IMPORTANT THAT THE FISH AND SEAFOOD PRODUCTS I BUY ARE: EASY TO PREPARE



Convenience is also important when it comes to product format. For example, we can compare buying frozen packaged salmon fillets at any store, to shopping fresh at the fish shop, or at the fish counter. The former is time-saving, space-saving and 'product-saving'. The latter does not meet any of these criteria, as long as the product you buy in the fish counter is not filleted and the fish counter is nearby your workplace.

Studies by the Norwegian Seafood Council show that one of the most important drivers of shop selection is precisely that the shop should be close to home or work. Furthermore, 79 percent of respondents in the Norwegian Seafood Council's annual consumer study state that it is important that the seafood products they buy are easy to prepare. This result can be seen across life situations, but there is a somewhat higher proportion of families with children responding that this is important. →

Photo: Benjamin Wang

Increased focus on simple solutions that fit into a busy everyday life was one of the themes of the Norwegian Seafood Council's seafood study for Japan in 2020. 2 out of 5 respondents indicated that they used to buy ready-to-eat seafood products at supermarkets or convenience stores. This was applicable in all age groups.

The study also looked at different consumer types. Seven different consumer segments were created using statistical methods. One of the groups were named the urban food pioneer. Urban food pioneers are typically young adults, many of whom are women, that enjoy experimenting when it comes to food. For this group, 7 out of 10 responded that they bought ready-to-eat seafood products. Common to the urban food pioneer is that they love to eat fish, but at the same time think fish can be demanding to cook, especially at home. In fact, one could see that their biggest barrier to eating more seafood was that it was considered impractical. An entire 97 percent of this group responded that it would have been nice if seafood were easier to eat. →

In the 2019 Korea Seafood Study, hypermarkets and traditional fish markets emerged as the places where Koreans most often buy seafood, while 56 percent stated that they never buy seafood in convenience stores. Despite this, figures from GS25, a major convenience channel chain in South Korea, showed that their sales of seafood products increased by 26.7 percent in the first half of 2019.

According to Euromonitor, convenience stores have experienced strong growth in South Korea in recent years, with an increase in value of 5 percent in 2019. One of the main reasons is that there is an increase in single-person households and a rapid change in lifestyles. In recent years, online services have also made inroads into convenience stores, providing the opportunity to order goods through app providers, such as Bursim and Yogijo. ▪

Photo: pexels.com

Effect of the corona pandemic on trade in goods

The corona pandemic has had a negative impact on the world economy. According to the WTO, world trade in goods fell by 12.7 percent in the second quarter of 2020 (revised from the previous estimate of 14.3 percent). Parts of this can be explained by changing consumer habits, changing global buying patterns, and abandonment of tourism and food services.

Nevertheless, there are some sectors that have experienced good growth, and here are low-cost shops and convenience good examples. In China, for example, convenience channel growth is weaker, as the Chinese market moves faster towards online channels.

Following the slowdown in world trade in goods in the second quarter of 2020, the volume increased in the third quarter by 11.6 percent compared to the previous quarter. Despite an upturn in trade in goods in the third quarter, the volume between July and September was 5.6 percent lower than in the same period last year. The strongest increase was seen in more industrialised regions (WTO, 2020).

What should you be thinking about?

- Is your product currently perceived as convenient by the purchaser or consumer?
- How does your product stand up to the developments in the category in which you operate?
- What is the development of the convenience channel in the markets in which you operate? Is seafood sold on these channels?
- Can your product be included in meal solutions with other products? How are your products consumed in the market and may it be possible to run campaigns with others?

These are just some of the questions you should ask yourself to know if you are facing this trend. Most of these tips are based on recommendations from the analysis company Edge by Ascential (2020a).

Top Seafood Consumer Trend 4.0

Health & Wellness

"Health and wellbeing" is well established within the theme of consumer trends, but what is put in the term can vary widely.

The World Health Organization defines health and well-being as follows: A state of complete physical, mental, and social well-being, and not simply the absence of disease or infirmity (WHO.int).

The National Wellness Institute in the United States describes well-being as: conscious, self-directed and evolving process of achieving full potential (nationalwellness.org). The definitions thus show that health and well-being are about much more than the absence of illness or suffering (nationalwellness.org).

Photo: Norwegian Seafood Council

Health-related trends are diverse and varied. They cover everything from mindfulness to functional foods, and not least hundreds of different ways of exercising. In this chapter we will look a little closer at recent developments in health trends, how the 2020 pandemic has affected these trends, but also look a little into what developments might look like in the future.

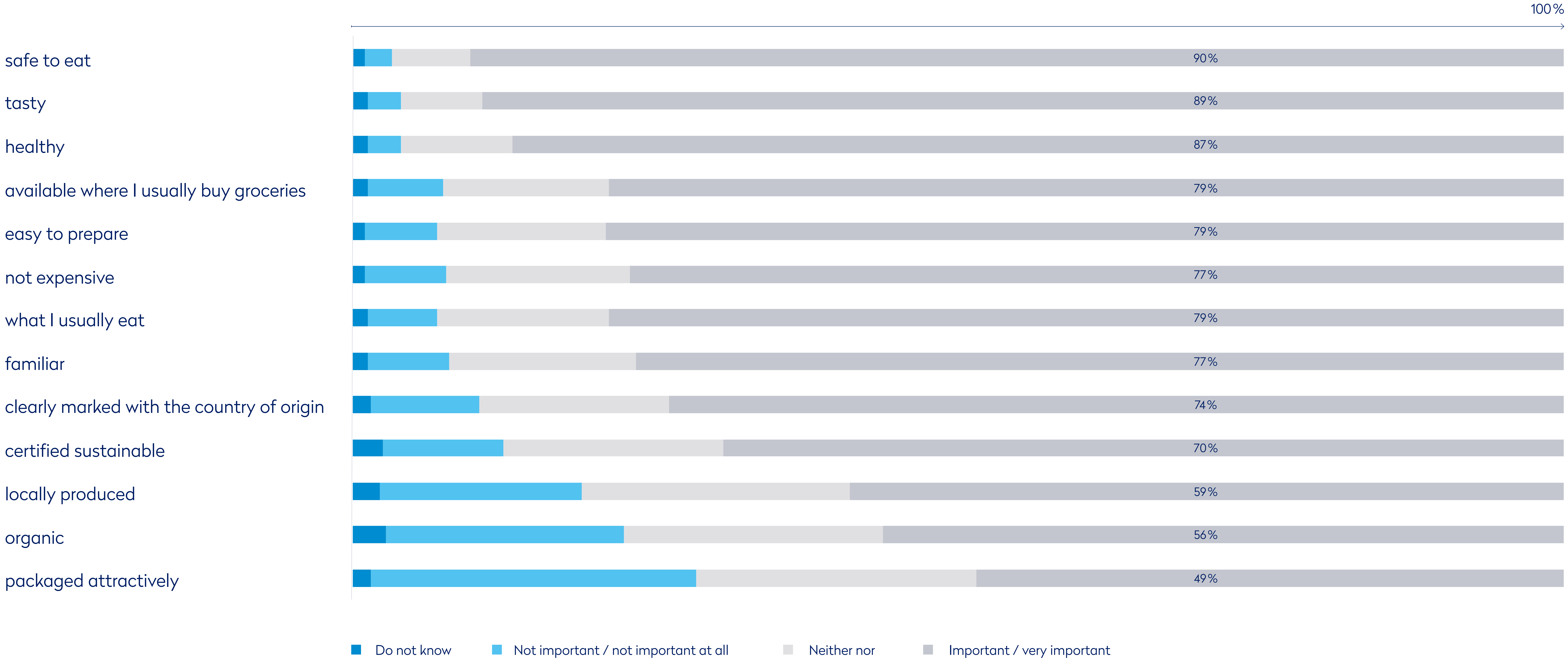
The grocery industry is experiencing strong competition and is constantly looking for areas for growth. To do that, they have to differentiate to create value on the bottom line. One solution is to tap into the health and wellness wave that has seen strong growth and increasing attention, especially during the pandemic. As mentioned in the introduction, there are several macro trends that increase the focus on, and need for, health and well-being. The trend is not only in the Western world. As the population ages and chronic diseases continue to rise, a healthier lifestyle is becoming increasingly important.

Seafood consumption has long been associated with health and is an important source of protein for many people in the world. Overall, seafood accounts for only 6 percent of protein intake, but for 3 billion people seafood accounts for 20 percent of the average animal protein intake (FAO, 2014). Seafood also contains many other important nutrients.

In the Norwegian Seafood Council's annual survey, we have long asked what is most important for our consumers when choosing seafood. We have already talked a little about drivers in this context, but now we can focus more closely on just how important the health aspect is in our markets.

Among more than 23,000 respondents globally, the third most important reason for buying seafood (measured against 12 other reasons) is that it is healthy. Most people in Turkey say this is 'very important', followed by Brazil and China. →

IT IS IMPORTANT THAT THE FISH AND SEAFOOD PRODUCTS I BUY ARE...



If we ask respondents if they have an expectation and a desire to eat more seafood in the future, and see all countries under one (20 countries in the survey conducted in 2020), we find that health is the strongest driver (out of 12). In a survey conducted by Ipsos on behalf of the Norwegian Seafood Council, among Norwegian consumers in December 2020, it turned out that health is perceived as an important reason for eating seafood.

This has probably become entrenched during the pandemic – especially in countries that have been severely affected. Rumors and myths about how the virus is spreading made it a little more risky with fresh fish for a period of time. Frozen goods therefore experienced positive growth. That is, the health aspect, which has perhaps been more strongly linked to the positive attributes of eating seafood, was extended to foods that have had fewer human contact points in the value chain. ■

SOME THINGS TO THINK ABOUT

The importance of health and well-being varies from country to country. Therefore, it is important to find out before opting to focus on this in the communication.
Are there certification or labelling schemes in the market that help guide consumers in choosing healthier foods? In that case, check if this is something for your products.

Top Seafood Consumer Trend 5.0

Transparency

The global pandemic has caused more people to want to know more about the food they eat. Where did it come from? How is it produced? What's in the food? These are just some of the questions that consumers are asking today.

Increased concerns about hygiene and food safety may lead to more consumers looking into the brands they buy. Digital traceability solutions and labelling that provide contactless and secure product information can quickly help reassure consumers that the product is safe to eat. The emergence of such solutions is expected in particular in countries where e-commerce is widespread, such as China and South Korea. Asian markets can provide important lessons for global businesses on how to seamlessly integrate such solutions on digital platforms.

Euromonitor, the analytical company, summarises 3 emerging technologies in digital traceability, which can also be important in demonstrating transparency and building trust in the products:

BLOCK CHAIN

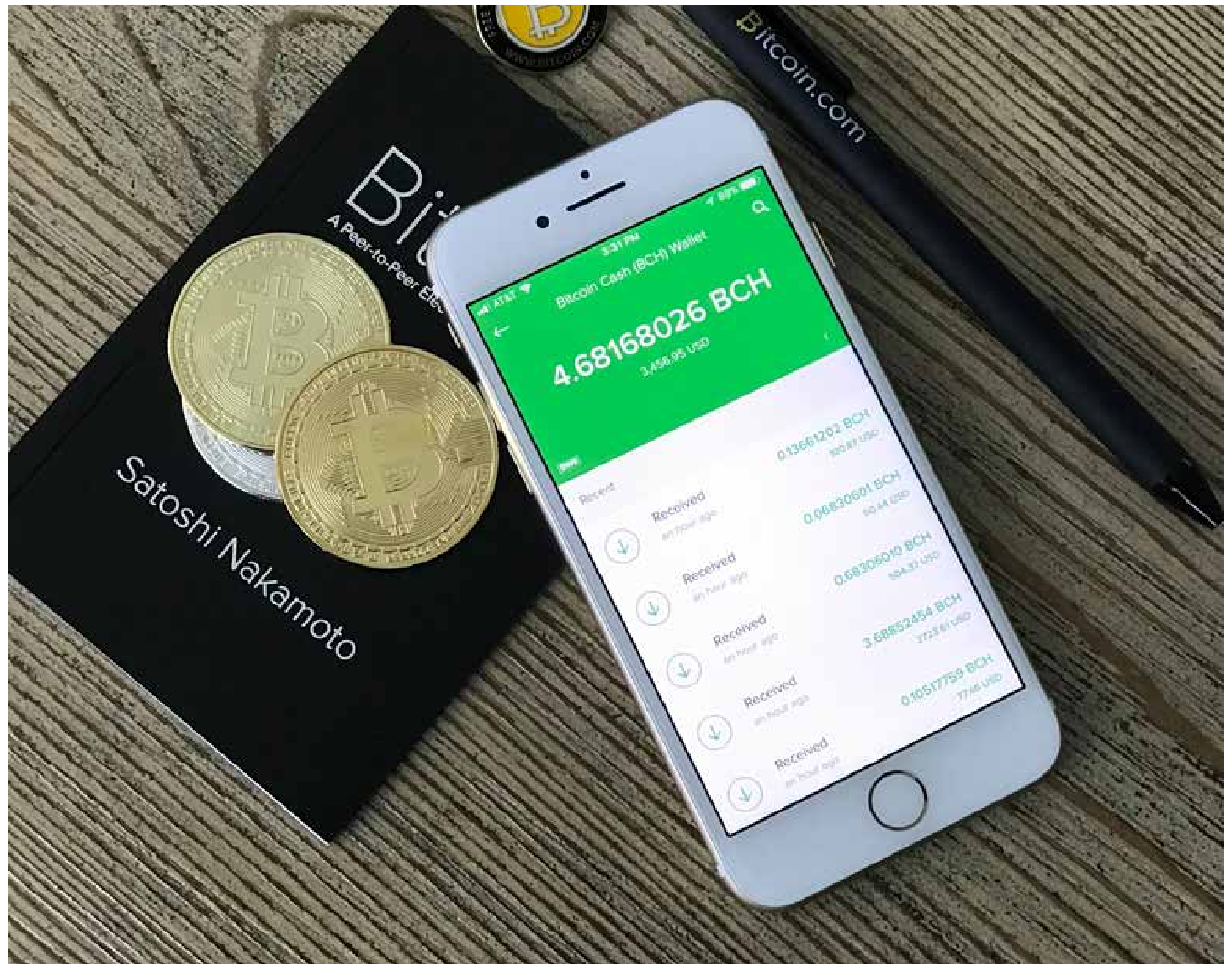


Photo: David Shares / Unsplash.com

INTERNET OF THINGS

Photo: Sebastian Scholz Nuki / Unsplash.com

ARTIFICIAL INTELLIGENCE

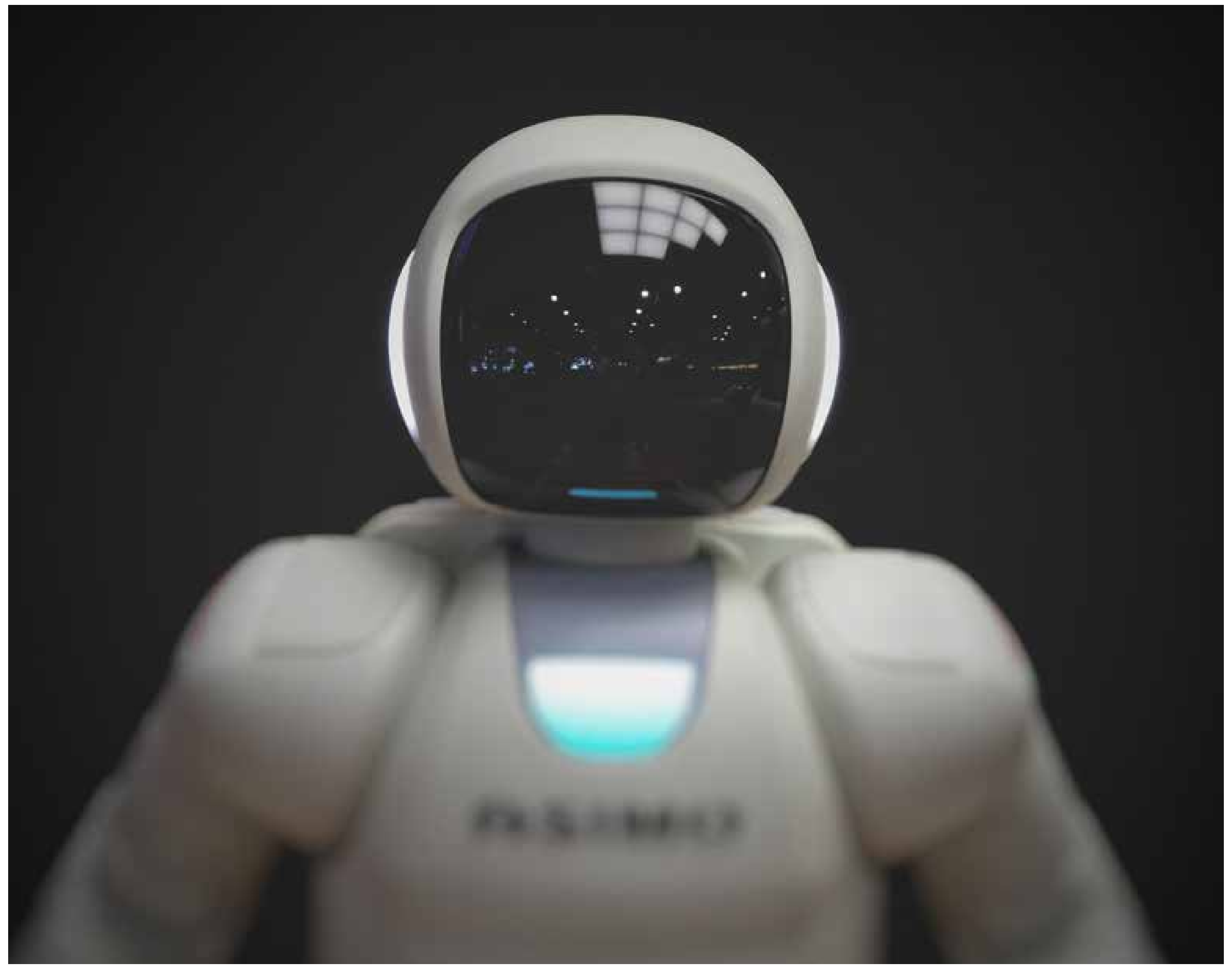


Photo: Possessed Photography / Unsplash.com

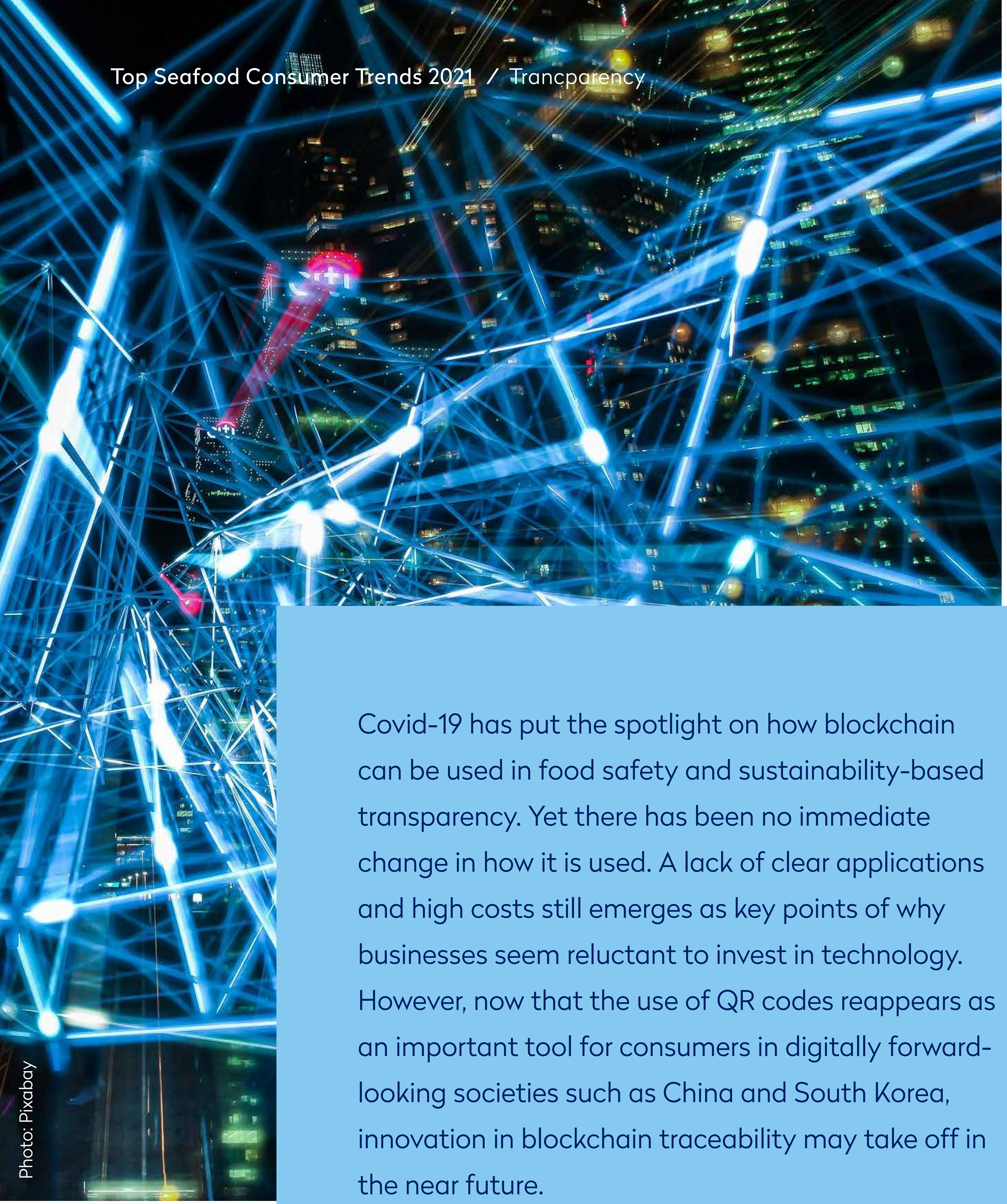


Photo: Pixabay

Covid-19 has put the spotlight on how blockchain can be used in food safety and sustainability-based transparency. Yet there has been no immediate change in how it is used. A lack of clear applications and high costs still emerges as key points of why businesses seem reluctant to invest in technology. However, now that the use of QR codes reappears as an important tool for consumers in digitally forward-looking societies such as China and South Korea, innovation in blockchain traceability may take off in the near future.

Blockchain

Blockchain, also called distributed ledged technology, is a technology where all transactions are visible and traceable in a digital ledger. Transactions cannot be changed retrospectively – they are irrevocable (Euromonitor, 2020). Examples of companies using blockchain are: Starbucks and Alibaba. In May 2019, Starbucks announced a partnership with Microsoft's Azure Blockchain to track the coffee's journey from farmer to outlet. In 2019, Alibaba invested in blockchain to track the origins of goods in their online platform, Tmall. The investment aims to move information about the goods imported and exported to the blockchain, so that you can track the country of origin, get shipping information, port of arrival and the like. The purpose is to optimize the customer experience by offering a transparent value chain.

Internet of Things

The Great Norwegian Encyclopedia define the Internet of Things (IoT) as "*an ICT system where a large number of physical devices communicate with each other and the Internet.*" They illustrate this with a refrigerator that keeps track of the contents and automatically orders items when it detects something is missing. Internet-connected devices are expected to grow in popularity and become a prerequisite among consumers. Approximately 32 percent of American homes have smart speakers. Initially, such devices were primarily used to adjust volume or brightness, but over the years they have been developed to be able to perform more advanced operations (Euromonitor, 2019b).

IoT opens up the ability to remotely control devices and collect data in a way that was previously not possible. This means, for example, tracking technical problems and malfunctions along supply chains, monitoring product quality, and following a food's journey from one place to another (IoT for all, 2019).

Artificial Intelligence

Euromonitor (2020) describes Artifical Intelligence (AI) as technology capable of performing tasks that normally require human intelligence. This could be, for example, what is called machine learning, where “intelligent” search engines suggest matches based on past search data and other user behaviors (Store norske leksikon, 2020). In the food industry, AI can help create more visibility in value chains, thus offering recommendations to improve processes. Many companies face challenges during the Covid-19 pandemic. Against this background, significant investment in robotics is expected, which could lower labour costs, reduce food wastage and increase productivity (Euromonitor, 2020).

Photo: pexels.com

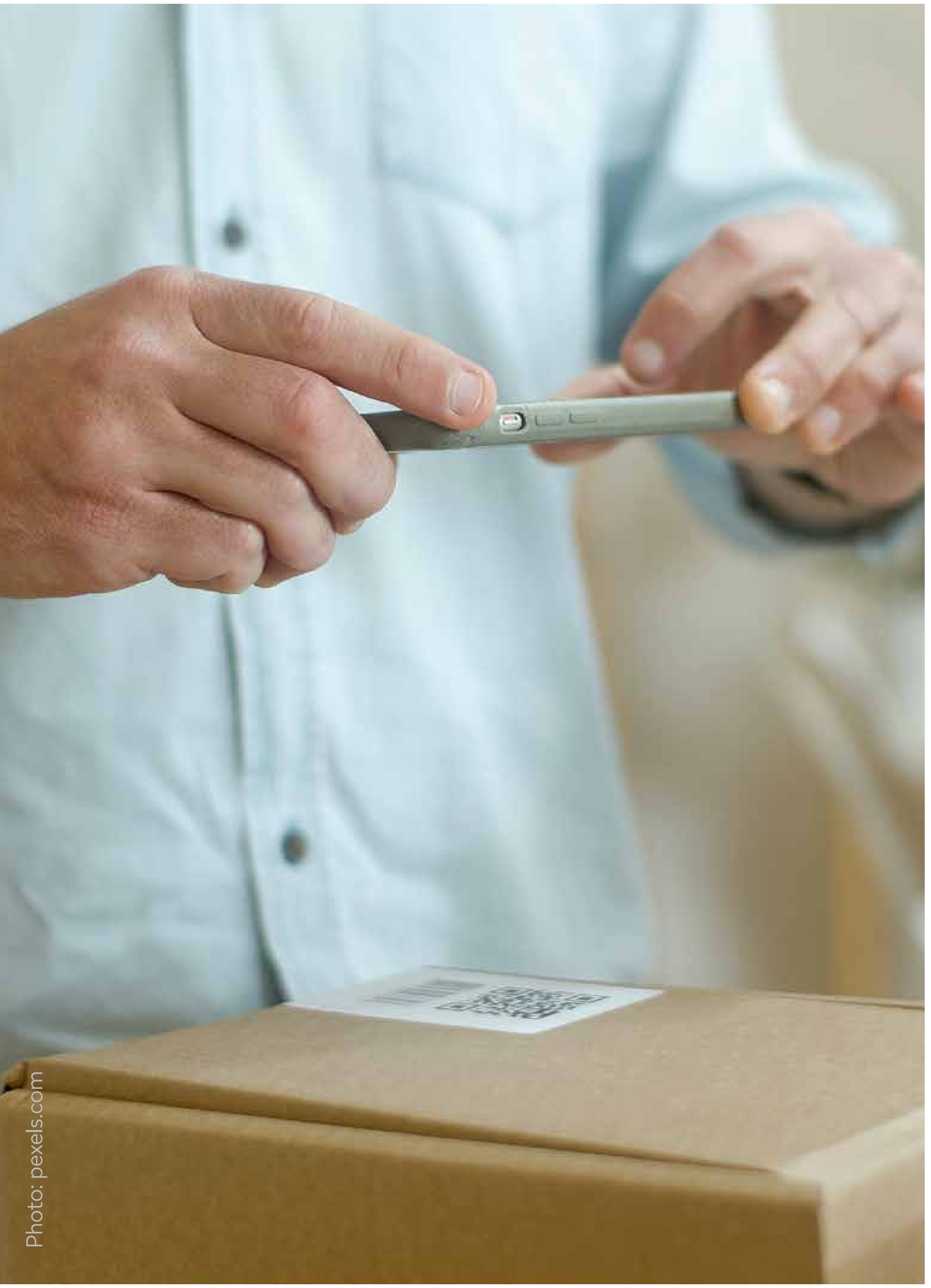


Photo: pexels.com

Traceability solutions ahead

When it comes to traceability solutions, Euromonitor (2020) predicts greater investment in the Internet of Things and Artificial Intelligence, rather than Blockchain, over the next five years. Huge price falls for these technologies over the past decade have led to increased use.

A study conducted by the Norwegian Seafood Council 2019 showed that food has become more than health (NSC, 2019). When the Germans choose protein sources, it is often associated with lifestyle and values. Therefore, both transparency and environmental certification requirements are becoming more important for manufacturers. Consumers are increasingly concerned about origins, food safety and sustainability, and they are pursuing information about that.

The seafood study tells us that it is important to continue working with the visibility of the country of origin on packaging, and that sustainability and food safety is something consumers want to know even more about. →

In the “New Era of Smarter Food Safety” report, the U.S. Food and Drug Administration (FDA) states that it expects to see more changes in the food system over the next 10 years than has been experienced over the past decades. In the same report, they summarise the following aspiring technologies that may be seen more in the future:

- Scanning of food products for immediate information on where it comes from, so that it can be determined whether the product is bound to an outbreak.
- Reporting system where text messages are sent to customers who have purchased a recalled item.
- Increased confidence that foods are safe due to increased predictive ability to detect unsafe foods using artificial intelligence.
- Big Data analyses to determine the impact of weather events (such as hurricanes and floods) on food production in nearby areas.
- Ability to know that the water farmers have used for food production is safe thanks to sensor monitoring on smart devices in real time.
- Alerts on your smartphone when your dinner has reached a safe temperature. ■

Top Seafood Consumer Trends Summary

The complex consumer

This report is the Norwegian Seafood Council's first in a series of trend reports that will be updated annually. The purpose is to extract which trends are present in a complex world, who's affected by them and why. At the time of writing, we are still in a pandemic that has turned everyday life upside down. It has changed how we do the easiest things – like shaking hands when we meet – to go on vacation. Uncertainty about the supply and availability of goods led to many of us hoarding basic commodities (such as toilet paper) in the early stages of the pandemic. Who would have thought the world could be so changed?

Being able to foresee behavior is difficult at times, but perhaps even more difficult in an extraordinary situation like this. The pandemic is not entirely comparable to the financial crisis, although it has similarities. This is a health-related crisis with economic consequences in addition. We observe that consumer habits are changing, but do not know if this is permanent. What is absolutely certain is that there is no simple solution or an arrow that clearly points in a particular direction. But there's order in the madness. Taking a step back to see the big picture to draw out the relevance at a more detailed level. The sum of the parts makes up the whole.

Photo: Norwegian Seafood Council

Choices that are good for you and the planet

Covid-19 has had a major and immediate impact on the lives of people around the world. Closure of fresh food departments, fear of contamination via surfaces, increased focus on hygiene, but also packaging, are some of the things seen during the pandemic. Origin and value are more important than both hygiene and environmentally friendly packaging.

Ipsos, "Clean, green, and affordable" (2020).

We can safely say that consumers are becoming increasingly complex, but so is the world to which we are exposed. What binds and enables this is, among other things, the macro trends we have looked at, but also the time we live in. The current generation is growing up in a world that is different from those that grew up in the 90s, 80s, or earlier. For example, if in the '80s you wanted to check where the fish you bought in the store came from (or what the nutrient content was), you might make a note, call the company when you got home, or visit the library and search the shelves there. In the 90s, it wasn't very different, but then you might be able to check on your computer at home (if someone wasn't on the phone so you couldn't use the modem), as long as the company had a website. →

If information is more readily available, it also becomes more important. Not only for the end user, but for operators throughout the value chain. Therefore, it will be important to satisfy the increasingly stringent requirements of transparency. Consumers have a lot of power, and if they turn their backs on you, they won't come back. Take the importance of sustainability, for example. Sustainability is often communicated through a form of third-party certification, as well as transparency around production, processing and transportation through websites or other online portals. This has come about because of a need for change, but also because there is an increasing demand from consumers that the food they eat should be good for them, in addition to being good for the planet. This means that it is not enough that the food is healthy, which we know the seafood is. It must also have as low a negative environmental footprint as possible – and here, among other things, the UN's high-level papers have highlighted the importance of the role of the sea in feeding an ever-growing population. There is no doubt that sustainability is important. The importance of purchasing seafood varies – even across borders. We have touched on this with conceptual understanding and purchase drivers in examples earlier in the report. To complicate matters further, we can highlight that we also find variations between age groups (generations), and also regional differences in one and the same country (stockfish in Italy; Norwegian Seafood Council/ Kantar). However, we see an unequivocal strengthening of how important sustainability has become for consumers. And the youngest are leading the way. ■

Bugs, beakers and beyond!

An exciting, and for some slightly scary, development is the idea of "labgrown" – proteins that are cultivated and not a slaughter product. Maybe even scarier is the idea of crunching insects. The least controversial are vegetarian products such as "beyond meat" and "the impossible burger", where the structure of the vegetarian mass is composed in a way that mimics the texture and taste of meat. We have reliable data that meat production is one of the strongest contributors to climate change, both in terms of animal emissions but also in terms of the size of the land used in production, and not least feed production (deforestation, etc.). This is not a political statement. Labgrown will use stem cells taken from living animals, but where the cells are cultivated (and thus grow) in bowls or barrels as this becomes more widespread. As a result, the number of animals used in meat production will be reduced. The challenge is to change consumer attitudes. If we consider people's negative attitudes towards GMO products, it is not difficult to see that labgrown will offer challenges.

But, with labgrown, at least we're talking about meat – so what about insects? More insect types transform food into energy (feed conversion) more efficiently than mammals, they use significantly less space and have lower emissions. So why haven't we incorporated insects into our food to a greater extent? Here, too, there will be more barriers to overcome (for human food), and perhaps these are larger than for labgrown. →

An uncontroversial and undeniably positive dietary change would be to eat more plant-based food. You might think you'll have a vegetable dish instead of some lamb chops. The point here will be to replace the chops once or twice a week with a plant-based protein, not necessarily to become fully vegetarian. In sum, we have an increasingly urgent need to adjust our climate footprint – so any adjustment in that direction helps.

These examples are accentuated because they highlight that understanding the complex consumer goes far beyond the attitudes, perceptions, and preferences that we may immediately envision in everyday life: buying fresh, or buying frozen, buying finished products, or buying chicken breasts, shopping for sale, or going all in for luxury. The consumer is complex, but we are also exposed to a complex world and increasingly complex choices. One important thing is that businesses are able to meet the consumer where he or she is. There are more nodes to consider now than there were just ten years ago. Businesses should have a strategy for interacting with consumers on these surfaces, emphasising transparency of communication. This includes the use of social media for sales and marketing, but also to nurture customer relationships, as well as monitoring news stories. ■

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Thanks to Mr. Vonheim, Charles Faraday, for his contributions to the making of this report.

Appendix

Results from the Seafood Consumer Insight (SCI). The survey surveys seafood consumer attitudes and behaviour in up to 25 markets per year. The tables below show results from 2020.

Q20: Think of the shop or market where you most often buy fish and seafood and indicate how important the following reasons are. The shop/market…

has quality fish and seafood brands	Don't know	1	2	3	4	5	6	7	Mean score
		Not important at all						Very important	
Brazil	2 %	2 %	2 %	4 %	10 %	17 %	21 %	43 %	5.8
China	1 %	0 %	1 %	2 %	7 %	22 %	32 %	36 %	5.9
France	4 %	2 %	1 %	3 %	13 %	24 %	25 %	30 %	5.6
Germany	5 %	2 %	1 %	4 %	12 %	26 %	26 %	23 %	5.4
Hong Kong	1 %	1 %	0 %	2 %	16 %	32 %	29 %	19 %	5.4
Italy	3 %	1 %	2 %	3 %	12 %	25 %	23 %	33 %	5.7
Japan	5 %	2 %	2 %	4 %	18 %	28 %	21 %	20 %	5.2
Malaysia	1 %	1 %	1 %	2 %	9 %	20 %	25 %	40 %	5.8
Norway	2 %	2 %	1 %	4 %	14 %	27 %	22 %	29 %	5.5
Poland	2 %	1 %	1 %	4 %	12 %	22 %	25 %	34 %	5.7
Portugal	3 %	2 %	1 %	4 %	15 %	25 %	23 %	29 %	5.5
Singapore	1 %	1 %	1 %	3 %	15 %	30 %	25 %	25 %	5.5
South Korea	1 %	1 %	1 %	3 %	14 %	29 %	24 %	27 %	5.6
Spain	3 %	1 %	1 %	3 %	13 %	27 %	24 %	28 %	5.6
Sweden	3 %	1 %	1 %	4 %	11 %	24 %	24 %	33 %	5.7
Taiwan	1 %	1 %	1 %	4 %	12 %	25 %	26 %	31 %	5.6
Thailand	1 %	2 %	1 %	2 %	11 %	21 %	30 %	33 %	5.7
Turkey	2 %	2 %	3 %	4 %	12 %	19 %	21 %	37 %	5.6
Great Britain	3 %	2 %	1 %	4 %	13 %	27 %	25 %	25 %	5.4
US	2 %	2 %	2 %	3 %	10 %	18 %	22 %	42 %	5.8

has special offers on fish and seafood products	Don't know	1	2	3	4	5	6	7	Mean score
		Not important at all						Very important	
Brazil	1 %	2 %	2 %	4 %	10 %	20 %	20 %	43 %	5.8
China	0 %	1 %	1 %	5 %	17 %	32 %	28 %	16 %	5.2
France	4 %	3 %	1 %	5 %	17 %	27 %	25 %	19 %	5.2
Germany	5 %	4 %	3 %	9 %	20 %	26 %	17 %	16 %	4.8
Hong Kong	2 %	1 %	1 %	2 %	16 %	36 %	27 %	16 %	5.3
Italy	3 %	2 %	1 %	5 %	14 %	26 %	23 %	26 %	5.4
Japan	5 %	2 %	2 %	7 %	20 %	28 %	20 %	17 %	5.1
Malaysia	1 %	2 %	2 %	3 %	13 %	25 %	25 %	30 %	5.5
Norway	2 %	7 %	5 %	14 %	22 %	28 %	14 %	8 %	4.4
Poland	3 %	2 %	2 %	5 %	16 %	28 %	24 %	21 %	5.3
Portugal	1 %	1 %	1 %	3 %	11 %	26 %	23 %	33 %	5.6
Singapore	1 %	1 %	1 %	4 %	18 %	33 %	23 %	19 %	5.3
South Korea	2 %	2 %	3 %	9 %	21 %	29 %	21 %	14 %	4.9
Spain	2 %	2 %	2 %	5 %	15 %	27 %	24 %	23 %	5.4
Sweden	3 %	3 %	3 %	8 %	21 %	25 %	19 %	18 %	5.0
Taiwan	1 %	1 %	2 %	5 %	18 %	29 %	21 %	24 %	5.3
Thailand	1 %	1 %	2 %	3 %	13 %	25 %	30 %	26 %	5.6
Turkey	2 %	5 %	5 %	8 %	13 %	21 %	21 %	26 %	5.1
Great Britain	3 %	3 %	3 %	6 %	17 %	31 %	21 %	17 %	5.1
US	2 %	4 %	2 %	6 %	15 %	23 %	22 %	25 %	5.2

always have reasonable prices for fish and seafood products	Don't know	1	2	3	4	5	6	7	Mean score
		Not important at all						Very important	
Brazil	1 %	1 %	2 %	4 %	10 %	19 %	19 %	45 %	5.8
China	0 %	0 %	1 %	2 %	8 %	26 %	34 %	29 %	5.8
France	3 %	1 %	1 %	2 %	14 %	29 %	25 %	25 %	5.5
Germany	5 %	1 %	1 %	4 %	16 %	27 %	24 %	22 %	5.4
Hong Kong	1 %	0 %	1 %	1 %	13 %	29 %	32 %	23 %	5.6
Italy	2 %	1 %	0 %	2 %	13 %	24 %	28 %	30 %	5.7
Japan	4 %	1 %	2 %	3 %	14 %	24 %	25 %	28 %	5.6
Malaysia	1 %	1 %	1 %	2 %	7 %	21 %	26 %	42 %	5.9
Norway	2 %	5 %	5 %	13 %	28 %	25 %	13 %	10 %	4.4
Poland	2 %	1 %	1 %	3 %	12 %	26 %	25 %	30 %	5.6
Portugal	1 %	0 %	1 %	2 %	10 %	26 %	27 %	33 %	5.8
Singapore	1 %	0 %	0 %	2 %	15 %	28 %	27 %	27 %	5.6
South Korea	1 %	0 %	1 %	4 %	12 %	27 %	27 %	29 %	5.6
Spain	1 %	1 %	1 %	3 %	13 %	28 %	25 %	29 %	5.6
Sweden	3 %	1 %	1 %	5 %	15 %	26 %	25 %	25 %	5.5
Taiwan	1 %	1 %	1 %	3 %	10 %	26 %	24 %	36 %	5.8
Thailand	0 %	0 %	1 %	1 %	8 %	21 %	29 %	39 %	5.9
Turkey	1 %	2 %	3 %	6 %	15 %	20 %	19 %	35 %	5.4
Great Britain	3 %	1 %	0 %	5 %	12 %	28 %	27 %	24 %	5.5
US	2 %	1 %	2 %	3 %	11 %	23 %	24 %	35 %	5.7

has fish and seafood products which are sustainable	Don't know	1	2	3	4	5	6	7	Mean score
		Not important at all						Very important	
Brazil	5 %	3 %	4 %	5 %	14 %	20 %	17 %	32 %	5.3
China	1 %	1 %	1 %	4 %	13 %	31 %	30 %	20 %	5.5
France	5 %	2 %	1 %	3 %	16 %	25 %	23 %	26 %	5.4
Germany	7 %	4 %	1 %	5 %	17 %	26 %	20 %	20 %	5.2
Hong Kong	1 %	1 %	2 %	6 %	23 %	34 %	22 %	11 %	5.0
Italy	5 %	1 %	1 %	5 %	14 %	26 %	23 %	25 %	5.5
Japan	10 %	5 %	4 %	10 %	26 %	25 %	14 %	7 %	4.5
Malaysia	2 %	1 %	2 %	4 %	14 %	26 %	27 %	25 %	5.4
Norway	6 %	7 %	5 %	10 %	22 %	24 %	14 %	13 %	4.5
Poland	5 %	2 %	2 %	6 %	17 %	25 %	22 %	22 %	5.3
Portugal	4 %	2 %	2 %	5 %	18 %	25 %	21 %	24 %	5.3
Singapore	3 %	2 %	1 %	4 %	20 %	32 %	23 %	15 %	5.1
South Korea	2 %	1 %	2 %	6 %	21 %	33 %	22 %	12 %	5.0
Spain	5 %	1 %	2 %	6 %	18 %	28 %	20 %	19 %	5.1
Sweden	5 %	2 %	3 %	6 %	16 %	24 %	21 %	24 %	5.2
Taiwan	1 %	1 %	3 %	5 %	20 %	27 %	21 %	23 %	5.2
Thailand	1 %	1 %	1 %	2 %	13 %	26 %	27 %	28 %	5.6
Turkey	3 %	3 %	4 %	6 %	14 %	20 %	20 %	30 %	5.3
Great Britain	4 %	3 %	3 %	5 %	15 %	29 %	20 %	23 %	5.2
US	3 %	4 %	2 %	6 %	16 %	23 %	20 %	27 %	5.3

Q20: Think of the shop or market where you most often buy fish and seafood and indicate how important the following reasons are. The shop/market...

has a fresh fish counter	Don't know	1	2	3	4	5	6	7	Mean score
		Not important at all						Very important	
Brazil	1 %	2 %	2 %	4 %	8 %	14 %	20 %	49 %	5.9
China	1 %	0 %	1 %	3 %	10 %	27 %	33 %	25 %	5.6
France	3 %	3 %	1 %	4 %	12 %	22 %	24 %	32 %	5.6
Germany	5 %	8 %	4 %	7 %	15 %	21 %	21 %	20 %	4.9
Hong Kong	1 %	1 %	1 %	5 %	18 %	30 %	26 %	19 %	5.3
Italy	2 %	1 %	1 %	3 %	10 %	20 %	23 %	41 %	5.9
Japan	5 %	2 %	2 %	5 %	18 %	26 %	23 %	19 %	5.2
Malaysia	1 %	1 %	1 %	3 %	8 %	20 %	26 %	42 %	5.9
Norway	2 %	12 %	8 %	14 %	19 %	21 %	13 %	12 %	4.2
Poland	3 %	1 %	1 %	4 %	12 %	21 %	24 %	34 %	5.7
Portugal	1 %	1 %	1 %	2 %	9 %	21 %	24 %	41 %	5.9
Singapore	2 %	2 %	1 %	3 %	15 %	29 %	26 %	22 %	5.4
South Korea	1 %	2 %	1 %	5 %	15 %	29 %	26 %	21 %	5.3
Spain	1 %	1 %	1 %	3 %	12 %	23 %	24 %	36 %	5.8
Sweden	4 %	7 %	5 %	11 %	18 %	20 %	17 %	18 %	4.7
Taiwan	1 %	1 %	2 %	7 %	19 %	29 %	20 %	22 %	5.2
Thailand	1 %	2 %	1 %	3 %	14 %	28 %	27 %	25 %	5.4
Turkey	1 %	1 %	2 %	3 %	7 %	15 %	21 %	49 %	5.9
Great Britain	3 %	9 %	3 %	9 %	15 %	22 %	20 %	19 %	4.8
US	2 %	5 %	3 %	5 %	12 %	18 %	20 %	37 %	5.5

have knowledgeable staff	Don't know	1	2	3	4	5	6	7	Mean score
		Not important at all						Very important	
Brazil	2 %	2 %	2 %	5 %	12 %	18 %	19 %	42 %	5.7
China	1 %	1 %	2 %	6 %	19 %	31 %	26 %	15 %	5.2
France	4 %	2 %	1 %	3 %	16 %	29 %	23 %	22 %	5.3
Germany	6 %	6 %	3 %	7 %	17 %	24 %	20 %	17 %	4.9
Hong Kong	1 %	1 %	2 %	5 %	26 %	35 %	21 %	9 %	5.0
Italy	3 %	1 %	2 %	3 %	13 %	24 %	25 %	30 %	5.6
Japan	6 %	7 %	5 %	14 %	27 %	20 %	13 %	9 %	4.3
Malaysia	1 %	2 %	3 %	6 %	17 %	27 %	24 %	21 %	5.2
Norway	3 %	9 %	6 %	15 %	20 %	23 %	12 %	13 %	4.3
Poland	3 %	3 %	2 %	8 %	16 %	27 %	21 %	21 %	5.2
Portugal	2 %	1 %	1 %	4 %	16 %	25 %	23 %	28 %	5.5
Singapore	2 %	1 %	2 %	6 %	22 %	32 %	21 %	15 %	5.1
South Korea	2 %	2 %	3 %	10 %	28 %	28 %	17 %	8 %	4.7
Spain	2 %	1 %	1 %	3 %	13 %	27 %	25 %	27 %	5.5
Sweden	5 %	4 %	4 %	7 %	18 %	25 %	20 %	18 %	5.0
Taiwan	1 %	2 %	4 %	11 %	25 %	28 %	16 %	14 %	4.7
Thailand	1 %	2 %	2 %	4 %	13 %	29 %	26 %	24 %	5.4
Turkey	2 %	3 %	5 %	6 %	14 %	19 %	21 %	30 %	5.3
Great Britain	3 %	8 %	4 %	8 %	20 %	26 %	18 %	14 %	4.7
US	2 %	4 %	3 %	5 %	14 %	21 %	22 %	28 %	5.3

has a large selection of fish and seafood products	Don't know	1	2	3	4	5	6	7	Mean score
		Not important at all						Very important	
Brazil	1 %	1 %	2 %	4 %	11 %	18 %	20 %	45 %	5.8
China	1 %	0 %	0 %	2 %	10 %	26 %	35 %	27 %	5.7
France	3 %	2 %	1 %	4 %	18 %	26 %	26 %	20 %	5.3
Germany	5 %	3 %	2 %	7 %	20 %	28 %	20 %	16 %	5.0
Hong Kong	1 %	1 %	1 %	3 %	20 %	33 %	26 %	16 %	5.3
Italy	2 %	0 %	0 %	3 %	11 %	27 %	26 %	31 %	5.7
Japan	5 %	2 %	2 %	4 %	19 %	30 %	23 %	16 %	5.2
Malaysia	1 %	1 %	1 %	2 %	10 %	21 %	28 %	37 %	5.8
Norway	2 %	5 %	2 %	11 %	24 %	31 %	15 %	11 %	4.7
Poland	2 %	1 %	1 %	3 %	13 %	25 %	26 %	29 %	5.6
Portugal	1 %	1 %	1 %	3 %	11 %	27 %	26 %	31 %	5.7
Singapore	1 %	0 %	1 %	3 %	14 %	33 %	29 %	19 %	5.4
South Korea	2 %	1 %	1 %	3 %	17 %	33 %	27 %	17 %	5.3
Spain	1 %	1 %	1 %	3 %	13 %	30 %	24 %	28 %	5.6
Sweden	3 %	3 %	3 %	8 %	23 %	29 %	17 %	15 %	4.9
Taiwan	0 %	1 %	1 %	5 %	16 %	29 %	27 %	22 %	5.4
Thailand	1 %	1 %	1 %	2 %	8 %	25 %	30 %	34 %	5.8
Turkey	1 %	3 %	4 %	6 %	11 %	20 %	22 %	32 %	5.4
Great Britain	3 %	2 %	2 %	6 %	19 %	29 %	23 %	17 %	5.1
US	2 %	3 %	2 %	5 %	15 %	24 %	23 %	29 %	5.4

has fish and seafood products which are organic	Don't know	1	2	3	4	5	6	7	Mean score
		Not important at all						Very important	
Brazil	7 %	6 %	5 %	9 %	16 %	19 %	15 %	23 %	4.9
China	1 %	1 %	1 %	4 %	14 %	29 %	28 %	22 %	5.4
France	7 %	3 %	3 %	7 %	20 %	27 %	19 %	14 %	4.9
Germany	7 %	8 %	4 %	9 %	21 %	22 %	16 %	13 %	4.6
Hong Kong	2 %	2 %	3 %	9 %	26 %	33 %	16 %	9 %	4.7
Italy	5 %	2 %	2 %	7 %	17 %	24 %	20 %	23 %	5.3
Japan	11 %	5 %	4 %	11 %	28 %	23 %	12 %	8 %	4.4
Malaysia	2 %	4 %	5 %	8 %	18 %	25 %	19 %	20 %	4.9
Norway	6 %	22 %	12 %	18 %	18 %	14 %	6 %	5 %	3.3
Poland	4 %	3 %	2 %	6 %	16 %	23 %	25 %	21 %	5.2
Portugal	7 %	4 %	4 %	9 %	21 %	24 %	15 %	16 %	4.8
Singapore	3 %	6 %	4 %	10 %	25 %	25 %	17 %	11 %	4.6
South Korea	4 %	3 %	3 %	11 %	28 %	27 %	15 %	9 %	4.6
Spain	7 %	4 %	4 %	9 %	21 %	25 %	16 %	13 %	4.7
Sweden	6 %	7 %	5 %	10 %	22 %	21 %	17 %	13 %	4.6
Taiwan	1 %	2 %	3 %	11 %	24 %	29 %	16 %	14 %	4.8
Thailand	1 %	2 %	1 %	2 %	10 %	27 %	28 %	29 %	5.6
Turkey	2 %	3 %	3 %	6 %	12 %	18 %	20 %	35 %	5.5
Great Britain	5 %	11 %	5 %	10 %	20 %	24 %	15 %	10 %	4.3
US	3 %	9 %	5 %	9 %	18 %	20 %	16 %	19 %	4.6

Q20: Think of the shop or market where you most often buy fish and seafood and indicate how important the following reasons are. The shop/market…

has fish and seafood products which are clearly marked with the country of origin;	Don't know	1	2	3	4	5	6	7	Mean score
		Not important at all						Very important	
Brazil	2 %	3 %	4 %	5 %	13 %	18 %	17 %	39 %	5.5
China	1 %	0 %	1 %	3 %	11 %	27 %	31 %	27 %	5.6
France	4 %	2 %	1 %	3 %	13 %	26 %	21 %	31 %	5.5
Germany	5 %	3 %	2 %	5 %	15 %	23 %	24 %	24 %	5.3
Hong Kong	1 %	1 %	1 %	4 %	18 %	32 %	27 %	16 %	5.3
Italy	3 %	0 %	1 %	2 %	12 %	22 %	24 %	36 %	5.8
Japan	5 %	2 %	1 %	7 %	20 %	28 %	21 %	16 %	5.1
Malaysia	1 %	4 %	3 %	6 %	16 %	25 %	22 %	24 %	5.2
Norway	3 %	5 %	4 %	9 %	18 %	25 %	17 %	19 %	4.9
Poland	3 %	2 %	2 %	5 %	16 %	24 %	23 %	26 %	5.4
Portugal	2 %	1 %	2 %	5 %	12 %	26 %	21 %	30 %	5.5
Singapore	2 %	2 %	2 %	5 %	21 %	31 %	22 %	15 %	5.1
South Korea	1 %	0 %	1 %	4 %	15 %	26 %	25 %	28 %	5.6
Spain	3 %	1 %	2 %	5 %	15 %	26 %	21 %	27 %	5.4
Sweden	4 %	2 %	2 %	5 %	16 %	23 %	21 %	27 %	5.4
Taiwan	1 %	1 %	2 %	6 %	17 %	28 %	20 %	25 %	5.3
Thailand	1 %	1 %	1 %	3 %	12 %	28 %	26 %	28 %	5.6
Turkey	2 %	5 %	5 %	7 %	17 %	19 %	18 %	28 %	5.1
Great Britain	4 %	6 %	3 %	8 %	19 %	27 %	19 %	15 %	4.8
US	3 %	5 %	4 %	7 %	16 %	20 %	19 %	27 %	5.1

I can't find elsewhere	Don't know	1	2	3	4	5	6	7	Mean score
		Not important at all						Very important	
Brazil	3 %	3 %	3 %	7 %	12 %	20 %	18 %	35 %	5.4
China	1 %	1 %	2 %	5 %	18 %	29 %	28 %	16 %	5.2
France	5 %	7 %	3 %	9 %	20 %	26 %	18 %	12 %	4.6
Germany	7 %	9 %	5 %	12 %	21 %	22 %	14 %	11 %	4.4
Hong Kong	2 %	1 %	2 %	9 %	27 %	33 %	17 %	9 %	4.8
Italy	4 %	1 %	2 %	8 %	20 %	26 %	19 %	20 %	5.1
Japan	6 %	4 %	4 %	13 %	26 %	25 %	12 %	9 %	4.4
Malaysia	1 %	3 %	3 %	7 %	15 %	26 %	23 %	22 %	5.2
Norway	3 %	16 %	12 %	19 %	23 %	15 %	6 %	6 %	3.5
Poland	3 %	2 %	2 %	6 %	17 %	25 %	23 %	22 %	5.2
Portugal	3 %	3 %	3 %	8 %	19 %	25 %	19 %	20 %	5.0
Singapore	2 %	4 %	3 %	10 %	25 %	29 %	17 %	11 %	4.7
South Korea	2 %	4 %	6 %	13 %	27 %	27 %	13 %	9 %	4.5
Spain	3 %	3 %	2 %	7 %	20 %	27 %	20 %	18 %	5.0
Sweden	6 %	13 %	8 %	17 %	24 %	18 %	9 %	5 %	3.8
Taiwan	2 %	4 %	5 %	14 %	27 %	25 %	14 %	10 %	4.5
Thailand	1 %	1 %	2 %	3 %	15 %	27 %	26 %	25 %	5.4
Turkey	2 %	5 %	7 %	8 %	15 %	20 %	18 %	27 %	5.0
Great Britain	4 %	11 %	7 %	12 %	22 %	23 %	13 %	9 %	4.2
US	3 %	9 %	5 %	10 %	19 %	22 %	15 %	18 %	4.6

is near my home/my workplace	Don't know	1	2	3	4	5	6	7	Mean score
		Not important at all						Very important	
Brazil	1 %	2 %	3 %	5 %	13 %	20 %	21 %	36 %	5.5
China	1 %	1 %	1 %	5 %	14 %	30 %	31 %	18 %	5.4
France	3 %	2 %	2 %	5 %	17 %	27 %	24 %	21 %	5.3
Germany	4 %	3 %	2 %	6 %	16 %	28 %	21 %	20 %	5.2
Hong Kong	1 %	1 %	1 %	4 %	18 %	33 %	26 %	17 %	5.3
Italy	2 %	3 %	1 %	6 %	15 %	28 %	23 %	23 %	5.3
Japan	5 %	2 %	1 %	5 %	14 %	29 %	23 %	22 %	5.4
Malaysia	1 %	2 %	2 %	3 %	14 %	25 %	24 %	30 %	5.5
Norway	2 %	3 %	2 %	5 %	17 %	27 %	23 %	23 %	5.3
Poland	2 %	3 %	2 %	8 %	15 %	25 %	24 %	22 %	5.2
Portugal	1 %	1 %	1 %	5 %	13 %	25 %	25 %	30 %	5.6
Singapore	1 %	1 %	2 %	5 %	17 %	31 %	23 %	19 %	5.3
South Korea	1 %	2 %	3 %	9 %	18 %	28 %	24 %	15 %	5.0
Spain	2 %	1 %	2 %	4 %	16 %	27 %	22 %	26 %	5.4
Sweden	4 %	4 %	3 %	7 %	20 %	29 %	18 %	16 %	4.9
Taiwan	1 %	2 %	3 %	6 %	21 %	28 %	21 %	20 %	5.1
Thailand	0 %	1 %	1 %	2 %	13 %	25 %	29 %	28 %	5.6
Turkey	1 %	8 %	5 %	8 %	13 %	20 %	20 %	25 %	4.9
Great Britain	3 %	2 %	2 %	7 %	16 %	27 %	23 %	20 %	5.2
US	2 %	3 %	2 %	5 %	14 %	23 %	22 %	29 %	5.4

Q21: It is important that the fish and seafood products I buy are ...

safe to eat:	Don't know	1	2	3	4	5	6	7	Mean score
		Not important at all						Very important	
Brazil	1 %	0 %	1 %	1 %	4 %	9 %	19 %	65 %	6.4
China	0 %	0 %	0 %	1 %	4 %	16 %	29 %	50 %	6.2
France	1 %	0 %	0 %	2 %	8 %	21 %	23 %	45 %	6.0
Germany	2 %	0 %	1 %	2 %	10 %	20 %	26 %	40 %	5.9
Hong Kong	1 %	0 %	0 %	1 %	9 %	22 %	29 %	39 %	6.0
Italy	1 %	0 %	0 %	1 %	5 %	14 %	24 %	55 %	6.3
Japan	3 %	1 %	0 %	3 %	14 %	26 %	25 %	28 %	5.6
Malaysia	1 %	0 %	0 %	1 %	5 %	12 %	25 %	56 %	6.3
Norway	1 %	1 %	0 %	1 %	5 %	23 %	27 %	41 %	6.0
Poland	1 %	0 %	1 %	1 %	6 %	16 %	25 %	50 %	6.1
Portugal	0 %	0 %	0 %	1 %	4 %	14 %	22 %	58 %	6.3
Singapore	1 %	0 %	0 %	1 %	8 %	22 %	27 %	40 %	6.0
South Korea	1 %	0 %	0 %	1 %	8 %	24 %	27 %	38 %	5.9
Spain	1 %	0 %	0 %	1 %	6 %	17 %	22 %	52 %	6.2
Sweden	2 %	1 %	0 %	2 %	7 %	20 %	23 %	45 %	6.0
Taiwan	0 %	0 %	0 %	1 %	7 %	19 %	25 %	48 %	6.1
Thailand	0 %	0 %	0 %	1 %	5 %	15 %	26 %	53 %	6.3
Turkey	1 %	1 %	1 %	2 %	5 %	14 %	24 %	53 %	6.2
US	1 %	1 %	1 %	2 %	5 %	12 %	19 %	60 %	6.3
Great Britain	2 %	0 %	0 %	1 %	7 %	18 %	20 %	52 %	6.1

what I usually eat:	Don't know	1	2	3	4	5	6	7	Mean score
		Not important at all						Very important	
Brazil	1 %	1 %	1 %	2 %	8 %	19 %	24 %	45 %	5.9
China	0 %	0 %	0 %	3 %	12 %	31 %	35 %	18 %	5.5
France	1 %	2 %	1 %	5 %	17 %	30 %	25 %	20 %	5.3
Germany	3 %	1 %	2 %	5 %	20 %	28 %	23 %	18 %	5.2
Hong Kong	1 %	0 %	0 %	3 %	18 %	38 %	27 %	13 %	5.3
Italy	2 %	1 %	1 %	4 %	15 %	28 %	26 %	24 %	5.4
Japan	3 %	1 %	0 %	3 %	17 %	35 %	25 %	16 %	5.3
Malaysia	1 %	0 %	1 %	2 %	11 %	26 %	30 %	29 %	5.7
Norway	2 %	4 %	3 %	9 %	25 %	32 %	16 %	10 %	4.7
Poland	1 %	1 %	1 %	5 %	11 %	30 %	26 %	26 %	5.5
Portugal	1 %	1 %	1 %	2 %	9 %	26 %	30 %	32 %	5.8
Singapore	1 %	1 %	1 %	3 %	16 %	35 %	27 %	17 %	5.4
South Korea	1 %	1 %	1 %	2 %	13 %	33 %	31 %	19 %	5.5
Spain	1 %	1 %	1 %	2 %	12 %	29 %	28 %	26 %	5.6
Sweden	2 %	2 %	2 %	7 %	21 %	31 %	20 %	16 %	5.1
Taiwan	0 %	0 %	0 %	2 %	10 %	28 %	30 %	30 %	5.7
Thailand	0 %	1 %	1 %	2 %	10 %	30 %	30 %	26 %	5.6
Turkey	0 %	1 %	1 %	3 %	8 %	19 %	28 %	40 %	5.8
US	2 %	2 %	2 %	4 %	15 %	24 %	23 %	28 %	5.5
Great Britain	2 %	1 %	2 %	6 %	18 %	31 %	22 %	19 %	5.2

tasty:	Don't know	1	2	3	4	5	6	7	Mean score
		Not important at all						Very important	
Brazil	1 %	1 %	1 %	1 %	3 %	10 %	20 %	64 %	6.4
China	0 %	0 %	0 %	1 %	5 %	20 %	35 %	39 %	6.1
France	1 %	1 %	0 %	1 %	9 %	18 %	32 %	38 %	6.0
Germany	2 %	0 %	0 %	2 %	7 %	18 %	28 %	43 %	6.0
Hong Kong	1 %	0 %	0 %	1 %	10 %	27 %	32 %	29 %	5.8
Italy	1 %	0 %	0 %	2 %	7 %	24 %	28 %	37 %	5.9
Japan	3 %	1 %	0 %	2 %	10 %	21 %	28 %	35 %	5.8
Malaysia	1 %	0 %	1 %	1 %	6 %	21 %	30 %	41 %	6.0
Norway	1 %	0 %	0 %	1 %	5 %	24 %	31 %	38 %	6.0
Poland	1 %	0 %	0 %	1 %	5 %	16 %	25 %	52 %	6.2
Portugal	0 %	0 %	0 %	0 %	3 %	17 %	28 %	51 %	6.3
Singapore	1 %	0 %	0 %	2 %	11 %	30 %	29 %	27 %	5.7
South Korea	1 %	0 %	1 %	1 %	6 %	21 %	33 %	38 %	6.0
Spain	1 %	0 %	0 %	1 %	6 %	17 %	27 %	48 %	6.2
Sweden	1 %	0 %	0 %	1 %	6 %	15 %	26 %	51 %	6.2
Taiwan	0 %	0 %	0 %	2 %	7 %	24 %	33 %	35 %	5.9
Thailand	0 %	0 %	0 %	1 %	4 %	16 %	30 %	49 %	6.2
Turkey	1 %	1 %	1 %	1 %	3 %	10 %	23 %	61 %	6.4
US	3 %	5 %	2 %	5 %	11 %	16 %	19 %	38 %	6.2
Great Britain	2 %	0 %	1 %	1 %	6 %	18 %	28 %	44 %	6.1

familiar:	Don't know	1	2	3	4	5	6	7	Mean score
		Not important at all						Very important	
Brazil	1 %	1 %	1 %	3 %	10 %	17 %	22 %	46 %	5.9
China	0 %	0 %	1 %	2 %	11 %	34 %	34 %	18 %	5.5
France	1 %	1 %	1 %	4 %	15 %	30 %	26 %	21 %	5.4
Germany	3 %	2 %	1 %	5 %	16 %	29 %	26 %	18 %	5.3
Hong Kong	1 %	1 %	1 %	4 %	23 %	37 %	23 %	9 %	5.0
Italy	2 %	1 %	1 %	5 %	16 %	31 %	24 %	20 %	5.3
Japan	4 %	3 %	1 %	5 %	22 %	31 %	22 %	12 %	5.0
Malaysia	1 %	1 %	1 %	2 %	15 %	27 %	28 %	26 %	5.6
Norway	1 %	4 %	3 %	11 %	23 %	35 %	17 %	8 %	4.6
Poland	1 %	1 %	1 %	4 %	13 %	27 %	27 %	28 %	5.6
Portugal	1 %	3 %	2 %	4 %	17 %	29 %	22 %	22 %	5.3
Singapore	1 %	0 %	1 %	3 %	18 %	37 %	23 %	17 %	5.3
South Korea	1 %	0 %	0 %	3 %	13 %	37 %	31 %	14 %	5.4
Spain	1 %	0 %	1 %	3 %	9 %	25 %	28 %	33 %	5.8
Sweden	2 %	2 %	2 %	8 %	23 %	31 %	19 %	14 %	5.0
Taiwan	0 %	1 %	1 %	3 %	15 %	31 %	28 %	23 %	5.5
Thailand	0 %	0 %	1 %	2 %	12 %	30 %	32 %	23 %	5.6
Turkey	0 %	2 %	2 %	4 %	10 %	20 %	25 %	38 %	5.7
US	2 %	1 %	1 %	5 %	14 %	27 %	23 %	27 %	5.5
Great Britain	2 %	2 %	1 %	5 %	19 %	31 %	23 %	17 %	5.2

Q21: It is important that the fish and seafood products I buy are …

healthy:	Don't know	1	2	3	4	5	6	7	Mean score
		Not important at all						Very important	
Brazil	0 %	1 %	1 %	2 %	4 %	10 %	19 %	64 %	6.3
China	0 %	0 %	0 %	1 %	4 %	17 %	30 %	48 %	6.2
France	1 %	0 %	0 %	1 %	11 %	20 %	29 %	37 %	5.9
Germany	2 %	1 %	0 %	2 %	12 %	22 %	27 %	32 %	5.7
Hong Kong	1 %	0 %	0 %	1 %	12 %	31 %	29 %	27 %	5.7
Italy	1 %	0 %	0 %	2 %	7 %	17 %	29 %	45 %	6.1
Japan	4 %	2 %	1 %	4 %	19 %	29 %	23 %	19 %	5.3
Malaysia	1 %	0 %	1 %	1 %	5 %	18 %	28 %	47 %	6.1
Norway	1 %	2 %	1 %	3 %	14 %	30 %	27 %	23 %	5.4
Poland	1 %	1 %	0 %	2 %	5 %	15 %	26 %	50 %	6.2
Portugal	0 %	0 %	0 %	1 %	7 %	17 %	26 %	49 %	6.1
Singapore	1 %	0 %	0 %	2 %	10 %	30 %	26 %	30 %	5.7
South Korea	1 %	0 %	1 %	2 %	12 %	31 %	27 %	26 %	5.6
Spain	1 %	0 %	0 %	1 %	8 %	19 %	27 %	45 %	6.0
Sweden	2 %	1 %	1 %	4 %	16 %	26 %	27 %	23 %	5.4
Taiwan	0 %	0 %	0 %	2 %	9 %	23 %	29 %	37 %	5.9
Thailand	1 %	0 %	0 %	1 %	5 %	17 %	27 %	50 %	6.2
Turkey	1 %	1 %	1 %	1 %	4 %	9 %	21 %	64 %	6.4
US	1 %	1 %	1 %	3 %	8 %	18 %	25 %	43 %	5.9
Great Britain	2 %	1 %	1 %	1 %	11 %	25 %	26 %	33 %	5.7

clearly marked with the country of origin:	Don't know	1	2	3	4	5	6	7	Mean score
		Not important at all						Very important	
Brazil	2 %	4 %	3 %	6 %	13 %	18 %	17 %	38 %	5.4
China	1 %	1 %	1 %	4 %	14 %	28 %	29 %	23 %	5.5
France	2 %	1 %	1 %	3 %	12 %	25 %	24 %	33 %	5.7
Germany	3 %	3 %	1 %	5 %	15 %	24 %	23 %	26 %	5.4
Hong Kong	1 %	0 %	1 %	3 %	18 %	30 %	29 %	18 %	5.4
Italy	1 %	0 %	1 %	2 %	9 %	20 %	26 %	42 %	6.0
Japan	3 %	1 %	1 %	4 %	20 %	29 %	21 %	21 %	5.3
Malaysia	1 %	3 %	4 %	7 %	18 %	25 %	20 %	22 %	5.1
Norway	2 %	4 %	4 %	10 %	21 %	25 %	16 %	18 %	4.8
Poland	1 %	2 %	2 %	4 %	14 %	25 %	23 %	30 %	5.5
Portugal	1 %	2 %	2 %	5 %	14 %	24 %	24 %	28 %	5.4
Singapore	1 %	2 %	2 %	6 %	21 %	32 %	19 %	16 %	5.0
South Korea	1 %	0 %	0 %	2 %	11 %	28 %	28 %	30 %	5.7
Spain	1 %	1 %	3 %	4 %	15 %	26 %	21 %	29 %	5.4
Sweden	2 %	2 %	2 %	5 %	16 %	23 %	24 %	27 %	5.4
Taiwan	0 %	0 %	1 %	7 %	17 %	28 %	22 %	25 %	5.4
Thailand	0 %	1 %	1 %	3 %	14 %	24 %	29 %	28 %	5.6
Turkey	1 %	4 %	2 %	5 %	13 %	20 %	22 %	34 %	5.4
US	2 %	5 %	4 %	8 %	17 %	21 %	18 %	26 %	5.1
Great Britain	3 %	6 %	4 %	7 %	20 %	25 %	21 %	16 %	4.8

available where I normally buy my groceries:	Don't know	1	2	3	4	5	6	7	Mean score
		Not important at all						Very important	
Brazil	1 %	1 %	1 %	3 %	8 %	17 %	21 %	48 %	5.9
China	0 %	0 %	0 %	2 %	11 %	32 %	34 %	19 %	5.5
France	1 %	1 %	1 %	3 %	11 %	24 %	32 %	27 %	5.7
Germany	3 %	2 %	1 %	5 %	17 %	27 %	25 %	22 %	5.3
Hong Kong	2 %	2 %	2 %	7 %	28 %	31 %	20 %	8 %	4.8
Italy	1 %	2 %	2 %	4 %	14 %	26 %	27 %	24 %	5.4
Japan	3 %	1 %	0 %	3 %	14 %	30 %	25 %	24 %	5.5
Malaysia	1 %	2 %	2 %	3 %	13 %	25 %	28 %	27 %	5.5
Norway	1 %	2 %	2 %	5 %	15 %	31 %	23 %	22 %	5.3
Poland	1 %	1 %	2 %	5 %	13 %	28 %	25 %	27 %	5.5
Portugal	1 %	1 %	1 %	1 %	7 %	22 %	31 %	37 %	5.9
Singapore	1 %	1 %	1 %	3 %	18 %	30 %	28 %	20 %	5.4
South Korea	1 %	1 %	1 %	3 %	13 %	34 %	31 %	17 %	5.4
Spain	1 %	1 %	1 %	2 %	9 %	25 %	29 %	34 %	5.8
Sweden	2 %	1 %	1 %	3 %	15 %	28 %	26 %	24 %	5.5
Taiwan	0 %	0 %	1 %	3 %	12 %	31 %	29 %	24 %	5.6
Thailand	0 %	4 %	2 %	6 %	17 %	28 %	25 %	18 %	5.1
Turkey	0 %	4 %	3 %	5 %	14 %	20 %	23 %	31 %	5.4
US	1 %	2 %	2 %	4 %	12 %	22 %	24 %	32 %	5.5
Great Britain	2 %	2 %	1 %	4 %	13 %	25 %	28 %	25 %	5.4

certified sustainable:	Don't know	1	2	3	4	5	6	7	Mean score
		Not important at all						Very important	
Brazil	2 %	3 %	2 %	6 %	13 %	18 %	18 %	38 %	5.5
China	1 %	1 %	1 %	5 %	16 %	30 %	26 %	20 %	5.4
France	3 %	2 %	1 %	4 %	17 %	25 %	25 %	25 %	5.4
Germany	3 %	3 %	2 %	5 %	18 %	26 %	23 %	20 %	5.2
Hong Kong	2 %	1 %	1 %	6 %	23 %	32 %	21 %	14 %	5.1
Italy	3 %	1 %	1 %	4 %	14 %	25 %	23 %	30 %	5.6
Japan	9 %	3 %	2 %	8 %	27 %	28 %	16 %	8 %	4.7
Malaysia	1 %	2 %	2 %	6 %	16 %	25 %	22 %	26 %	5.3
Norway	5 %	9 %	7 %	13 %	26 %	19 %	11 %	9 %	4.1
Poland	2 %	2 %	2 %	4 %	15 %	23 %	25 %	28 %	5.5
Portugal	2 %	2 %	2 %	5 %	17 %	25 %	22 %	26 %	5.3
Singapore	2 %	2 %	2 %	6 %	21 %	29 %	21 %	17 %	5.1
South Korea	2 %	1 %	1 %	6 %	21 %	32 %	23 %	15 %	5.1
Spain	3 %	2 %	2 %	5 %	18 %	25 %	21 %	24 %	5.3
Sweden	3 %	4 %	3 %	6 %	20 %	22 %	21 %	21 %	5.1
Taiwan	1 %	1 %	2 %	8 %	19 %	27 %	22 %	20 %	5.2
Thailand	1 %	1 %	1 %	2 %	13 %	25 %	28 %	30 %	5.6
Turkey	2 %	2 %	1 %	3 %	13 %	22 %	23 %	34 %	5.6
US	3 %	3 %	3 %	6 %	18 %	22 %	19 %	25 %	5.2
Great Britain	3 %	2 %	2 %	5 %	18 %	26 %	20 %	25 %	5.3

Q21: It is important that the fish and seafood products I buy are ...

easy to prepare:	Don't know	1	2	3	4	5	6	7	Mean score
		Not important at all						Very important	
Brazil	1 %	1 %	2 %	3 %	9 %	18 %	21 %	45 %	5.9
China	0 %	1 %	0 %	3 %	10 %	30 %	35 %	21 %	5.6
France	1 %	1 %	1 %	4 %	14 %	30 %	26 %	23 %	5.4
Germany	2 %	1 %	1 %	4 %	17 %	27 %	24 %	23 %	5.4
Hong Kong	1 %	0 %	0 %	2 %	15 %	33 %	31 %	16 %	5.4
Italy	1 %	2 %	2 %	5 %	15 %	25 %	26 %	25 %	5.4
Japan	3 %	1 %	1 %	4 %	16 %	30 %	25 %	21 %	5.4
Malaysia	1 %	0 %	1 %	2 %	11 %	26 %	30 %	30 %	5.7
Norway	1 %	2 %	2 %	6 %	21 %	37 %	19 %	12 %	4.9
Poland	1 %	2 %	2 %	6 %	13 %	27 %	25 %	26 %	5.4
Portugal	0 %	1 %	1 %	3 %	12 %	28 %	25 %	30 %	5.6
Singapore	1 %	1 %	1 %	3 %	12 %	34 %	29 %	20 %	5.5
South Korea	1 %	1 %	0 %	4 %	16 %	33 %	26 %	19 %	5.4
Spain	1 %	1 %	1 %	5 %	15 %	26 %	26 %	24 %	5.4
Sweden	2 %	1 %	2 %	7 %	19 %	30 %	22 %	17 %	5.1
Taiwan	0 %	0 %	1 %	3 %	14 %	30 %	26 %	25 %	5.5
Thailand	1 %	0 %	0 %	2 %	9 %	28 %	31 %	29 %	5.7
Turkey	0 %	3 %	1 %	4 %	12 %	19 %	25 %	35 %	5.6
US	2 %	2 %	1 %	4 %	13 %	24 %	24 %	30 %	5.5
Great Britain	2 %	1 %	1 %	4 %	13 %	29 %	28 %	24 %	5.5

locally produced:	Don't know	1	2	3	4	5	6	7	Mean score
		Not important at all						Very important	
Brazil	3 %	7 %	5 %	10 %	19 %	20 %	16 %	21 %	4.8
China	1 %	3 %	3 %	11 %	27 %	28 %	18 %	9 %	4.6
France	3 %	3 %	2 %	6 %	20 %	26 %	22 %	18 %	5.1
Germany	4 %	8 %	6 %	13 %	24 %	22 %	13 %	10 %	4.3
Hong Kong	2 %	4 %	3 %	12 %	32 %	29 %	14 %	4 %	4.4
Italy	2 %	1 %	2 %	5 %	18 %	25 %	25 %	23 %	5.3
Japan	5 %	4 %	2 %	7 %	25 %	29 %	18 %	11 %	4.8
Malaysia	1 %	5 %	3 %	8 %	22 %	24 %	20 %	19 %	4.9
Norway	2 %	8 %	6 %	13 %	27 %	23 %	13 %	9 %	4.3
Poland	2 %	4 %	3 %	9 %	21 %	27 %	18 %	17 %	4.9
Portugal	2 %	3 %	3 %	7 %	22 %	28 %	18 %	17 %	4.9
Singapore	2 %	6 %	4 %	12 %	26 %	28 %	14 %	7 %	4.4
South Korea	1 %	1 %	1 %	5 %	17 %	31 %	23 %	21 %	5.3
Spain	2 %	3 %	3 %	7 %	19 %	28 %	22 %	17 %	5.0
Sweden	3 %	6 %	6 %	13 %	26 %	23 %	15 %	8 %	4.3
Taiwan	1 %	1 %	2 %	8 %	21 %	31 %	19 %	17 %	5.1
Thailand	1 %	3 %	2 %	6 %	18 %	29 %	26 %	17 %	5.1
Turkey	1 %	5 %	3 %	5 %	17 %	22 %	18 %	28 %	5.2
US	3 %	7 %	5 %	11 %	21 %	22 %	15 %	17 %	4.6
Great Britain	3 %	7 %	4 %	9 %	22 %	26 %	17 %	13 %	4.7

not expensive:	Don't know	1	2	3	4	5	6	7	Mean score
		Not important at all						Very important	
Brazil	0 %	1 %	1 %	2 %	6 %	14 %	21 %	56 %	6.2
China	0 %	1 %	1 %	5 %	18 %	34 %	26 %	15 %	5.2
France	1 %	2 %	2 %	7 %	23 %	31 %	17 %	17 %	5.0
Germany	2 %	2 %	1 %	8 %	26 %	26 %	17 %	17 %	5.0
Hong Kong	1 %	0 %	0 %	2 %	13 %	33 %	32 %	19 %	5.5
Italy	1 %	2 %	1 %	6 %	17 %	29 %	23 %	22 %	5.3
Japan	3 %	1 %	0 %	2 %	10 %	26 %	29 %	30 %	5.7
Malaysia	1 %	1 %	1 %	3 %	10 %	22 %	25 %	39 %	5.8
Norway	1 %	3 %	4 %	14 %	30 %	30 %	11 %	8 %	4.5
Poland	0 %	1 %	2 %	5 %	14 %	27 %	26 %	26 %	5.5
Portugal	0 %	0 %	0 %	2 %	8 %	23 %	27 %	40 %	6.0
Singapore	1 %	0 %	1 %	3 %	15 %	30 %	25 %	25 %	5.5
South Korea	1 %	0 %	1 %	2 %	12 %	27 %	30 %	27 %	5.7
Spain	1 %	1 %	2 %	3 %	14 %	30 %	22 %	28 %	5.5
Sweden	2 %	1 %	2 %	6 %	22 %	27 %	20 %	21 %	5.2
Taiwan	0 %	0 %	0 %	3 %	14 %	28 %	27 %	28 %	5.6
Thailand	0 %	0 %	1 %	2 %	9 %	23 %	25 %	41 %	5.9
Turkey	0 %	3 %	1 %	4 %	14 %	20 %	21 %	36 %	5.6
US	1 %	2 %	2 %	6 %	17 %	26 %	21 %	25 %	5.3
Great Britain	2 %	1 %	1 %	5 %	16 %	30 %	24 %	20 %	5.3

organic:	Don't know	1	2	3	4	5	6	7	Mean score
		Not important at all						Very important	
Brazil	5 %	6 %	5 %	9 %	18 %	19 %	16 %	22 %	4.8
China	1 %	1 %	1 %	6 %	17 %	27 %	27 %	20 %	5.3
France	3 %	5 %	5 %	7 %	22 %	26 %	17 %	15 %	4.8
Germany	3 %	10 %	5 %	12 %	22 %	23 %	15 %	10 %	4.3
Hong Kong	2 %	3 %	3 %	14 %	33 %	23 %	17 %	6 %	4.5
Italy	3 %	2 %	2 %	7 %	18 %	26 %	20 %	22 %	5.2
Japan	9 %	4 %	4 %	11 %	30 %	23 %	12 %	7 %	4.4
Malaysia	1 %	4 %	5 %	11 %	19 %	24 %	19 %	16 %	4.8
Norway	3 %	19 %	14 %	19 %	23 %	13 %	5 %	4 %	3.3
Poland	1 %	2 %	3 %	5 %	16 %	23 %	24 %	26 %	5.3
Portugal	4 %	3 %	3 %	11 %	21 %	24 %	20 %	15 %	4.9
Singapore	2 %	7 %	6 %	14 %	23 %	25 %	14 %	10 %	4.4
South Korea	2 %	2 %	3 %	12 %	28 %	30 %	14 %	9 %	4.6
Spain	3 %	4 %	4 %	10 %	23 %	27 %	16 %	13 %	4.7
Sweden	4 %	8 %	6 %	12 %	22 %	23 %	14 %	11 %	4.4
Taiwan	1 %	2 %	4 %	13 %	30 %	26 %	13 %	11 %	4.6
Thailand	1 %	1 %	1 %	2 %	10 %	24 %	28 %	34 %	5.8
Turkey	1 %	2 %	1 %	3 %	9 %	17 %	22 %	45 %	5.9
US	3 %	10 %	7 %	11 %	19 %	20 %	14 %	16 %	4.4
Great Britain	4 %	12 %	6 %	13 %	19 %	21 %	14 %	11 %	4.2

Q21: It is important that the fish and seafood products I buy are ...

packaged attractively:	Don't know	1	2	3	4	5	6	7	Mean score
		Not important at all						Very important	
Brazil	1 %	3 %	3 %	5 %	12 %	18 %	20 %	37 %	5.5
China	0 %	4 %	4 %	14 %	28 %	25 %	17 %	8 %	4.5
France	2 %	11 %	6 %	11 %	22 %	23 %	14 %	11 %	4.3
Germany	3 %	6 %	5 %	13 %	22 %	26 %	14 %	12 %	4.5
Hong Kong	1 %	5 %	5 %	15 %	32 %	26 %	13 %	5 %	4.3
Italy	2 %	10 %	6 %	18 %	22 %	21 %	11 %	9 %	4.1
Japan	4 %	5 %	3 %	8 %	28 %	29 %	15 %	9 %	4.6
Malaysia	1 %	5 %	4 %	12 %	21 %	25 %	16 %	16 %	4.7
Norway	1 %	19 %	12 %	24 %	23 %	13 %	4 %	4 %	3.3
Poland	1 %	7 %	6 %	14 %	22 %	21 %	16 %	13 %	4.5
Portugal	1 %	8 %	5 %	12 %	23 %	22 %	15 %	13 %	4.5
Singapore	1 %	5 %	4 %	12 %	27 %	26 %	15 %	10 %	4.5
South Korea	1 %	0 %	2 %	3 %	16 %	33 %	28 %	17 %	5.3
Spain	1 %	14 %	8 %	16 %	22 %	18 %	12 %	9 %	3.9
Sweden	2 %	14 %	12 %	20 %	24 %	16 %	7 %	5 %	3.6
Taiwan	1 %	9 %	10 %	21 %	29 %	17 %	7 %	6 %	3.8
Thailand	1 %	4 %	2 %	8 %	23 %	29 %	19 %	14 %	4.9
Turkey	1 %	9 %	6 %	11 %	21 %	19 %	15 %	18 %	4.5
US	2 %	7 %	5 %	12 %	21 %	22 %	15 %	17 %	4.6
Great Britain	2 %	14 %	7 %	14 %	23 %	21 %	10 %	9 %	4.0

NORWEGIAN SEAFOOD COUNCIL

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