

Reputation at Risk: How Animal Welfare, Antimicrobial Resistance and Social Responsibility Are Shaping Consumer Perception

- **MARIE MOLDE**, DATASSENTIAL
- **ARLIN WASSERMAN**, CHANGING TASTES
- **ELIZABETH WELLINGTON**, UNIVERSITY OF WARWICK
- **CONSTANZA ALVIAL**, PRO BONO NETWORK



Marie Molde

With a strong background in both nutrition and business — Marie holds a combined MBA/RD from Dominican University — Marie brings a unique culinary perspective to Datassential, a leading Chicago-based food market research firm.

Restaurant chains and suppliers have relied on Marie's expertise in menu and product development, and for years she has helped foodservice and retail companies excel in better-for-you innovation.

REGISTERED
DIETITIAN
DATASSENTIAL



Arlin Wasserman

Arlin is founder of Changing Tastes, a consultancy providing business strategy and culinary consulting to Fortune 500 companies, restaurant and hospitality businesses, investors and the philanthropic sector. He served as Sodexo's first vice president of sustainability and corporate responsibility. Arlin's commentary on food sustainability and public health has been featured in *The New York Times*, *Wall Street Journal*, *Washington Post*, *USA Today*, *Fortune*, CNN.com and NPR.

FOUNDER &
PARTNER
CHANGING
TASTES

US MARKETPLACE LANDSCAPE

OPPORTUNITIES

IN HUMANE AQUACULTURE PRODUCTION



changing  tastes



operators
major buyers

The diagram consists of two light blue rounded rectangular boxes with thin black outlines, positioned side-by-side on a solid black background. The left box contains the text 'operators' and 'major buyers' in white. The right box contains the text 'consumers' and 'general population' in white.

consumers
general population

how americans eat

HOW I CURRENTLY EAT
TODAY

HOW I WANT TO EAT
TOMORROW

meat eater

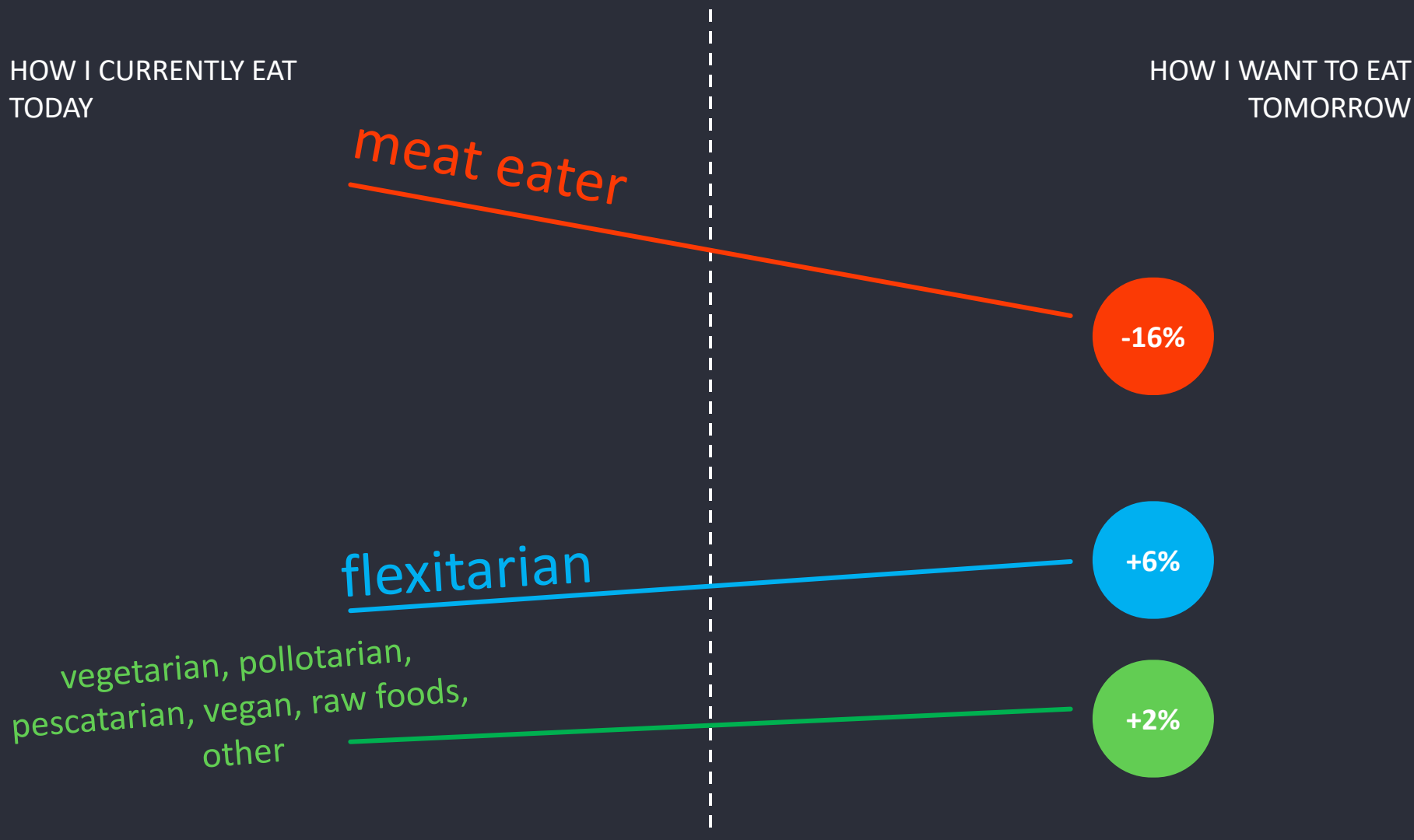
-16%

flexitarian

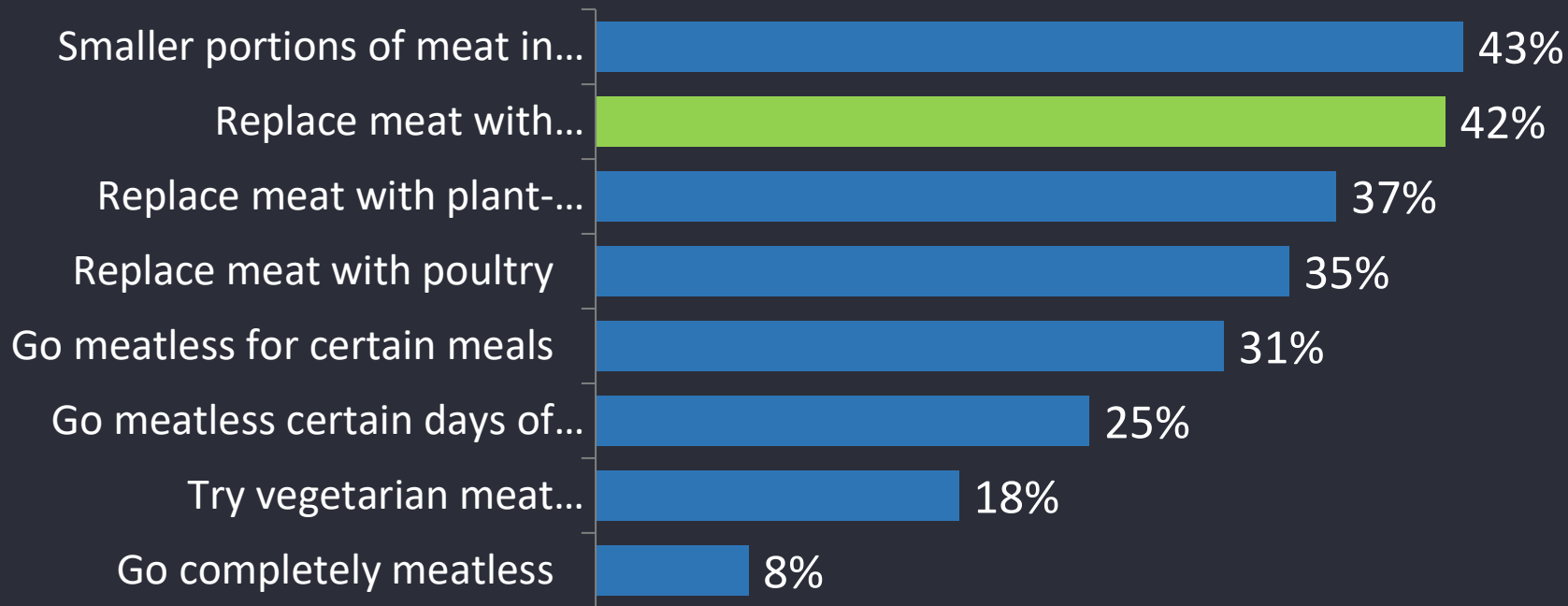
+6%

vegetarian, pollotarian,
pescatarian, vegan, raw foods,
other

+2%



today's consumers who want to eat less meat also want to eat more fish and seafood instead



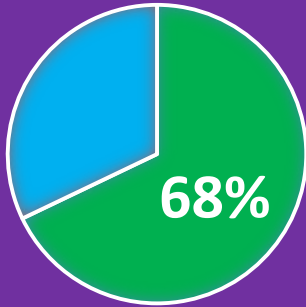
concerns with animal-based protein

animal welfare is a driving force in changing what consumers eat

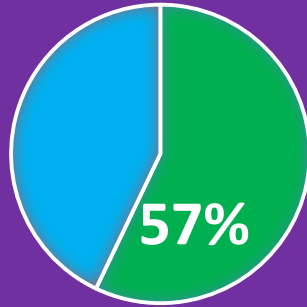
animals given antibiotics	34%
unnatural farming techniques	29%
animals not treated well	26%
too expensive	21%
lack of food safety	18%
artificial flavoring / coloring added	18%
not healthy	16%
environmental impact	15%
don't know how to cook it	6%
friends / family don't eat animal protein	5%

most large US restaurant companies have commitments to humane production

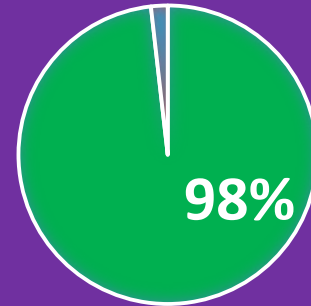
ANIMAL WELFARE



ANTIBIOTICS



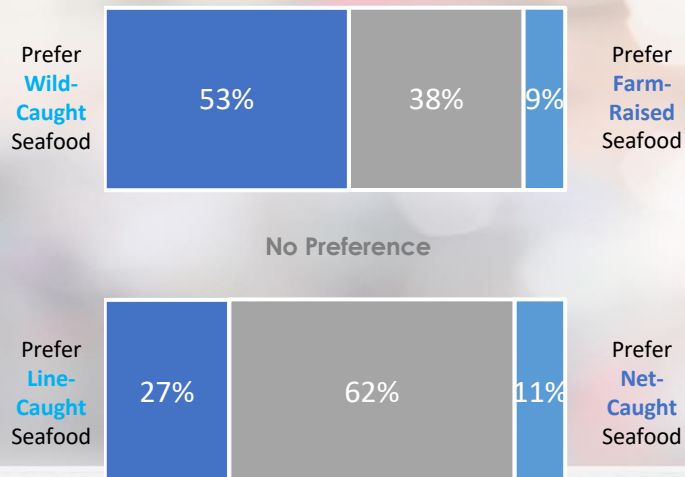
CAGE & CRATE FREE



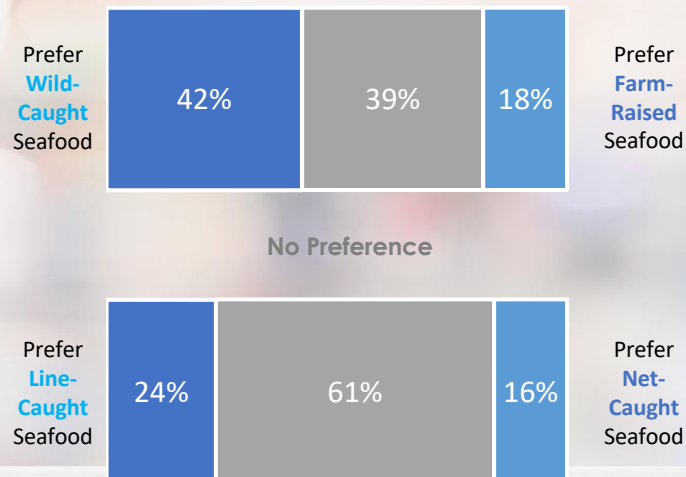
share of US publicly traded Restaurant Companies

seafood landscape

Consumer: preference for different seafood origins



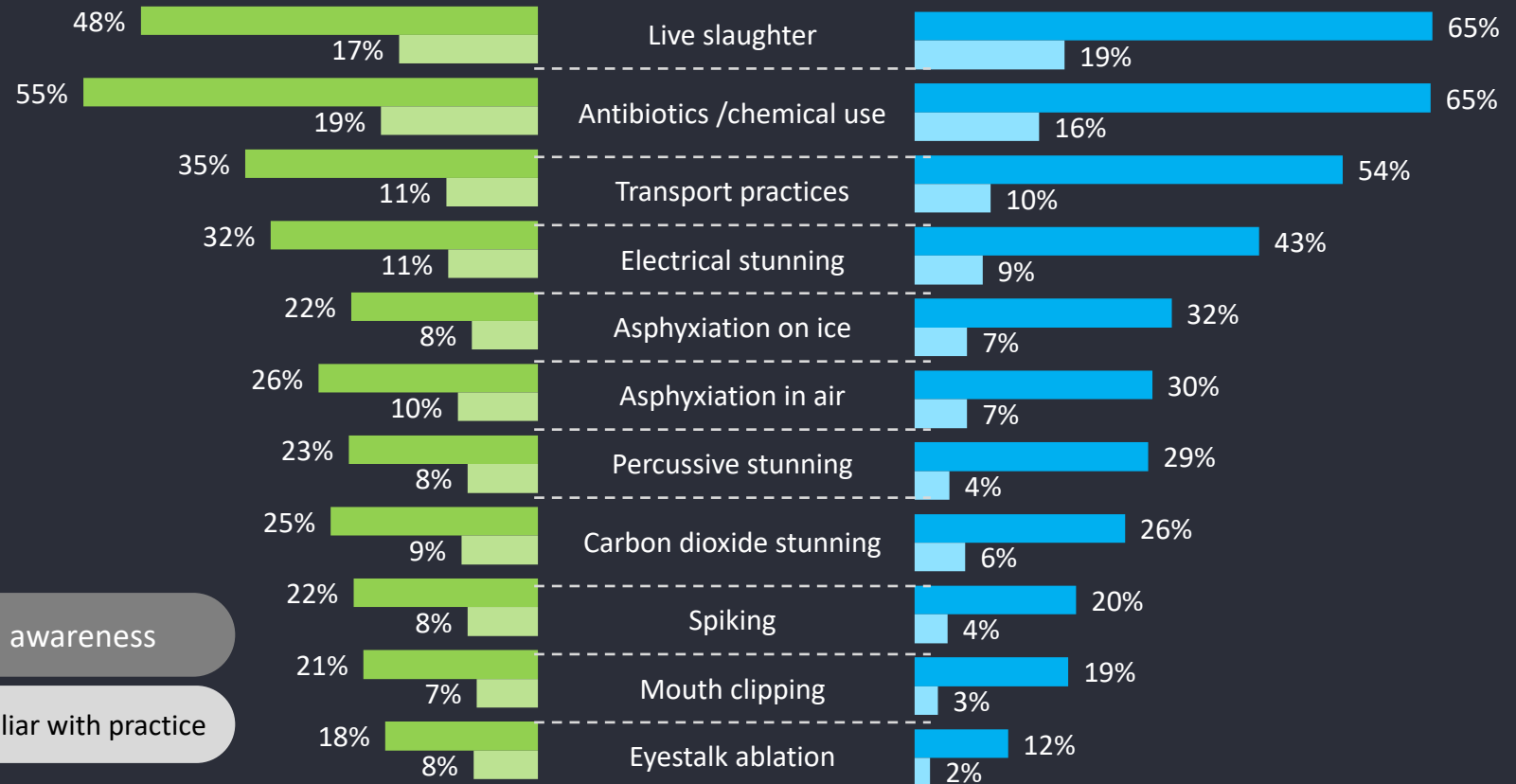
Operator: preference for different seafood origins



most menued &
fastest growing
seafood species in
U.S. restaurants

	2018 PENETRATION	4-YEAR GROWTH
Shrimp	65%	-1%
Salmon	43%	+7%
Tuna	38%	-2%
Crab	34%	-5%
Scallop	26%	-12%
Calamari	24%	-6%
Clam	22%	-13%
Lobster	20%	-3%
Anchovy	18%	-6%
Mussel	16%	-10%
Cod	14%	+8%
Oyster	13%	+5%
Tilapia	11%	-15%
Squid	10%	-4%
Ahi Tuna	10%	+27%
Octopus	9%	+17%
White Fish	8%	+2%
Catfish	7%	-1%
Albacore Tuna	7%	-10%
Snapper	6%	-10%

adopting humane practices can
unlock the market for aquaculture



Total awareness

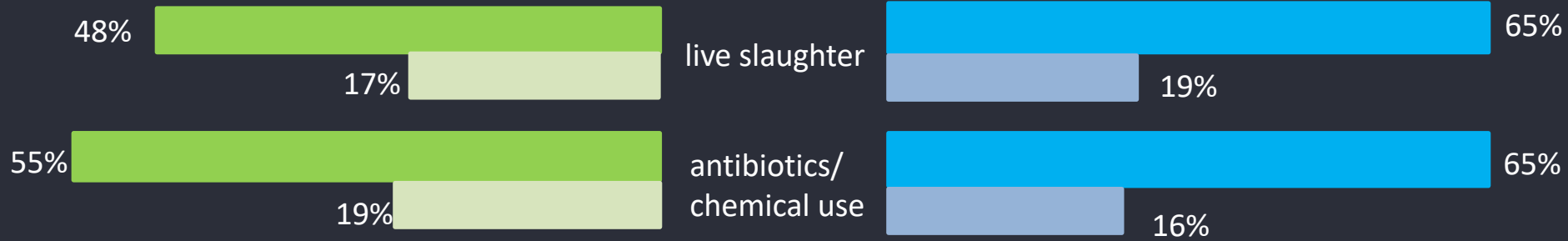
Very familiar with practice

CONSUMER

OPERATOR

CONSUMER

OPERATOR

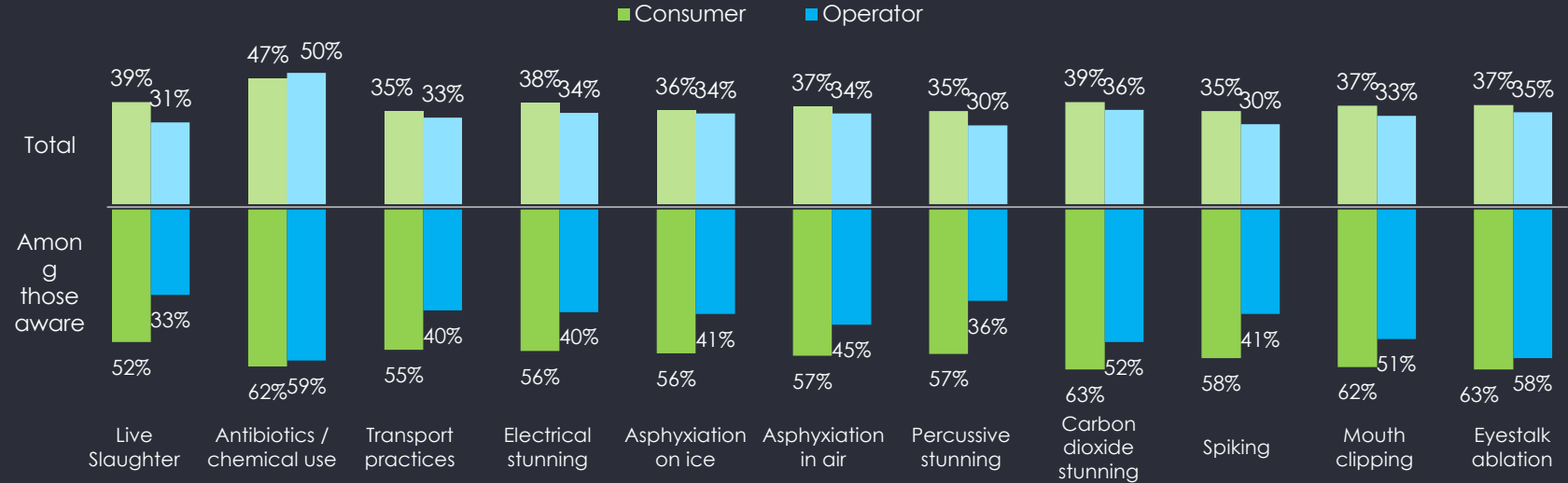


both groups are most aware of live slaughter and antibiotic use

likely some halo awareness from land based livestock

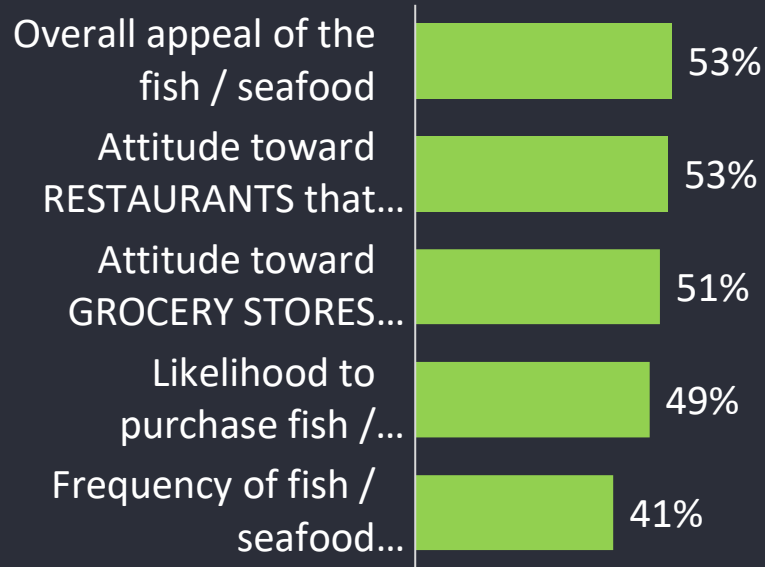
current levels of concern are low, but...

concern over aquaculture practices grows with awareness

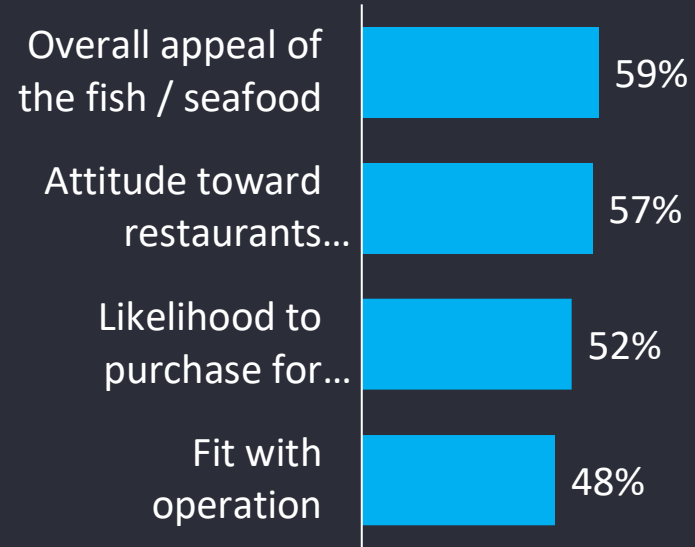


...market recognition increases with humane practices

humane practices enhance appeal among both groups



CONSUMER



OPERATOR

humane practices elevate perceived quality

quality



55% operator
55% consumer

taste



50% operator
50% consumer

texture



52% operator
52% consumer

...and increase purchase intent

likelihood to purchase [humanely
caught and harvested] fish / seafood



A horizontal bar chart with two bars. The top bar is purple and is shorter. The bottom bar is green and is longer, extending to the 49% mark. The word 'CONSUMER' is written in white on the green bar.

CONSUMER

49%

likelihood to purchase [humanely
caught and harvested] fish /
seafood for operation



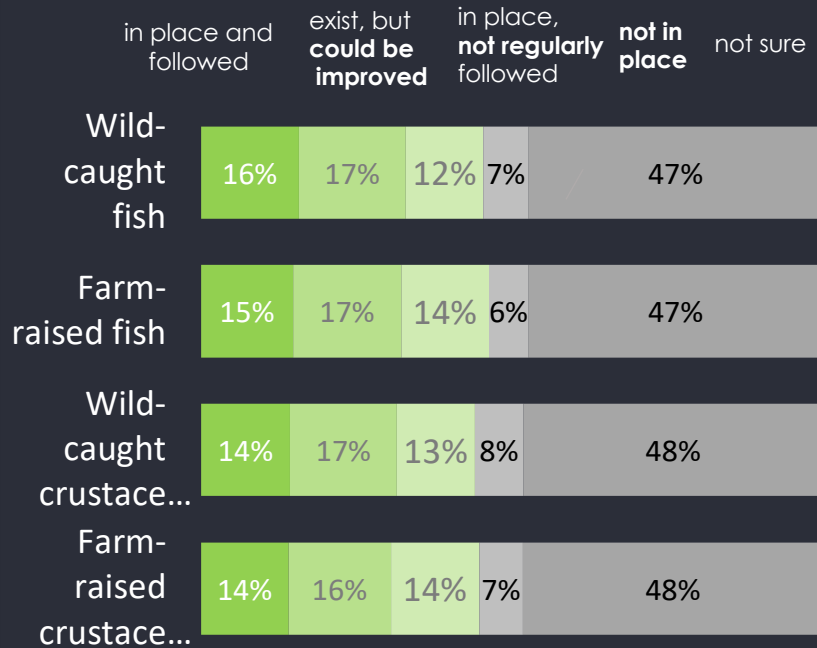
A horizontal bar chart with two bars. The top bar is purple and is shorter. The bottom bar is blue and is longer, extending to the 52% mark. The word 'OPERATOR' is written in white on the blue bar.

OPERATOR

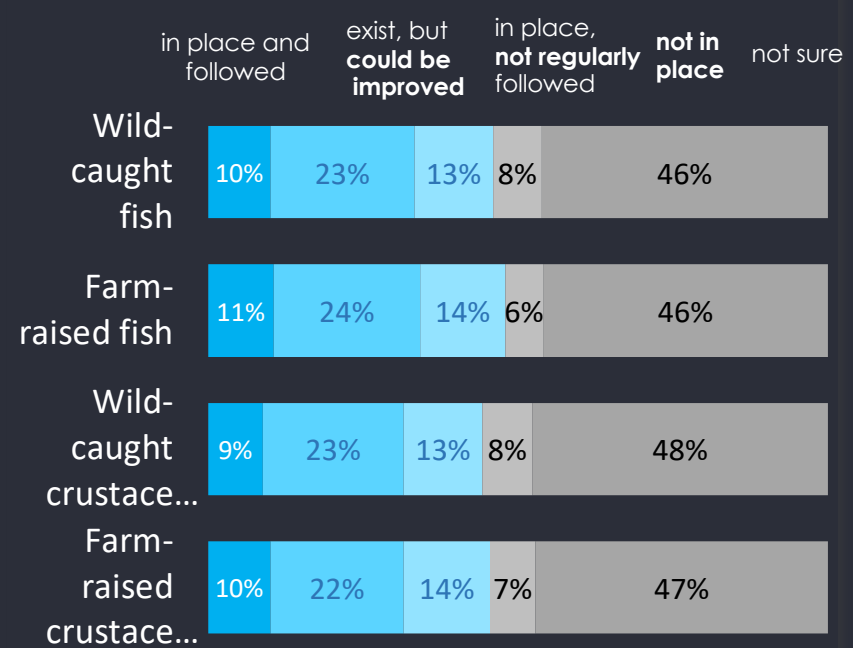
52%

current market understanding implies embedded risk...

both consumers and operators are largely unaware of what kind of humane practice regulations are in place



CONSUMER

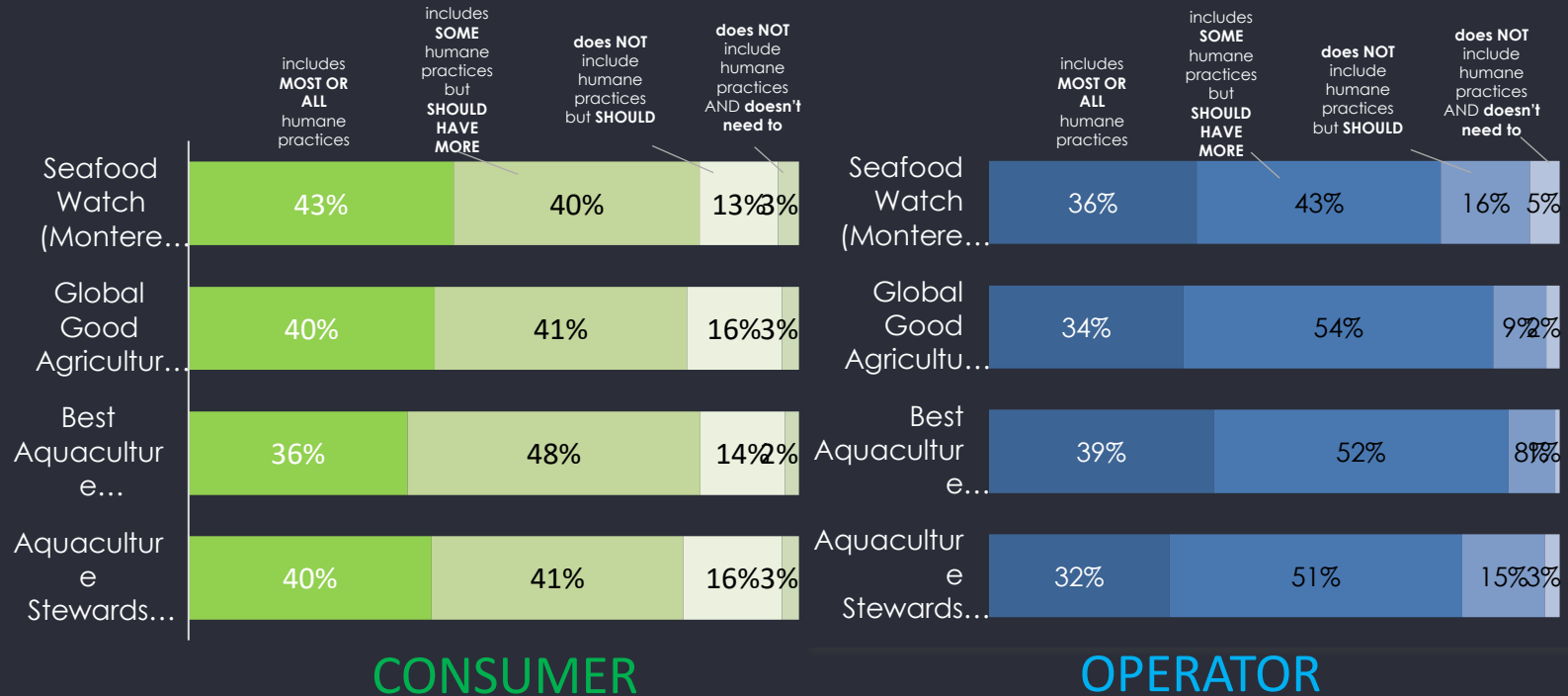


OPERATOR

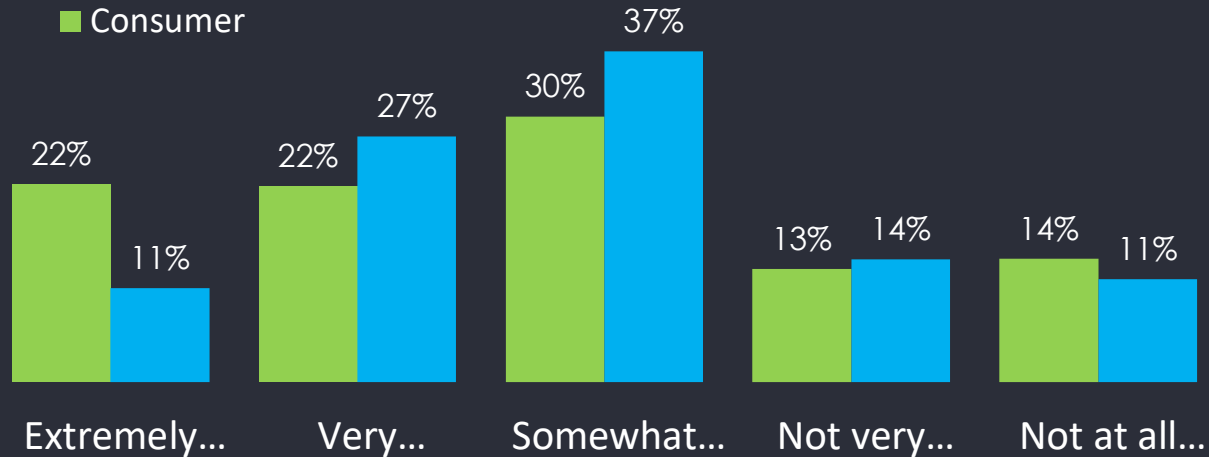
Monterey Bay Aquarium
Seafood Watch



most consumers and operators believe that major ratings and certification include humane practices



a majority of operators and consumers want a guarantee that fish / crustaceans are humanely caught and harvested





changing  tastes

