



**WALTON FAMILY
FOUNDATION**



TO: Walton Family Foundation
FR: Morning Consult
DT: June 2022
RE: Results for 2022 Traceability Poll

Morning Consult ran a survey, on behalf of the Walton Family Foundation, focusing on the importance of traceability in the seafood consumers purchase. The survey was conducted from May 26th – 29th among a sample of 2,210 adults nationally. The interviews were conducted online. The survey finds that consumers say it is important when purchasing meat and seafood to know about key aspects of the supply chain – including country of origin and the country of processing. When it comes to traceability, there is bipartisan support for increasing the traceability of seafood through the supply chain.

CONSUMERS WANT INCREASED TRACEABILITY IN THEIR SEAFOOD PURCHASES

- 72% of consumers support increasing the traceability of seafood, defined as the ability to track seafood through the supply chain – this includes 34% who strongly support increasing the traceability of seafood. There is also bipartisan support for increasing the traceability of seafood:
 - 81% of Democrats support increasing the traceability of seafood.
 - 64% of Independents support increasing the traceability of seafood.
 - 70% of Independents support increasing the traceability of seafood.
- Both seafood consumers* and non-seafood consumers support increasing the traceability of seafood – 76% of seafood consumers and 68% of non-seafood consumers support increasing the traceability of seafood.

SUPPLY CHAIN INFORMATION IS IMPORTANT FOR CONSUMERS

- Two-in-three (65%) seafood or meat consumers say the country of processing is important when purchasing meat or seafood.
- Three-in-five (61%) seafood or meat consumers say the country of origin is important when purchasing meat or seafood.

Purchasing Considerations for Meat or Seafood***	Total Important
Price	91%
Sustainability of the food	70%
Country of processing	65%
Wild or farmed	65%
Country of origin	61%
The legality of the food production**	61%

- When asked specifically about seafood:
 - 60% of seafood consumers say they would be less likely to purchase seafood if *slave labor was used to catch the fish*.
 - 58% of seafood consumers say they would be less likely to purchase seafood if it was *collected in an illegal manner*.

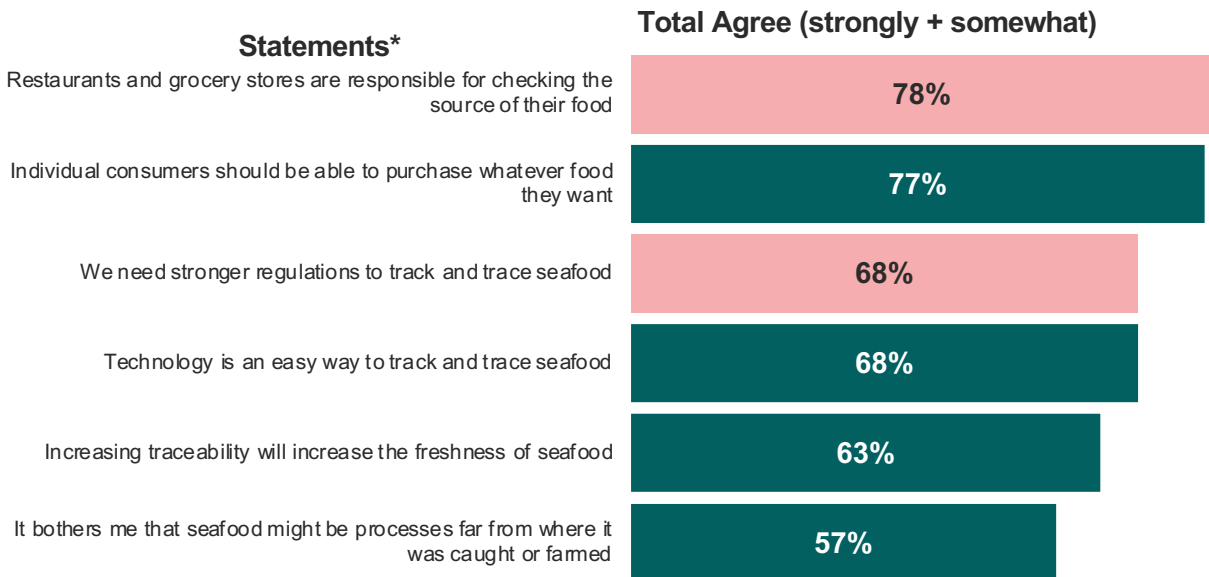
*Seafood consumer is defined as an adult who has purchased seafood in the past two weeks
 ** Full text: The legality of the food production - e.g., there was no rainforest destruction in beef production or there were no human rights violations for the fisherman in seafood production
 ***Not every consideration tested is shown

CONSUMERS ARE MORE CONFIDENT IN BUYING FROM COMPANIES WHO ARE COMMITTED TO SUSTAINABILITY AND TRACEABILITY

- Two-in-three (65%) consumers are more confident buying from a company if they know it *has a traceability program to avoid human rights abuses*, only 5% are less confident in buying from a company if they know it has a traceability program. This is true across age generations as well:
 - GenZ Consumers: 57% more confident, 11% less confident.
 - Millennial Consumers: 67% more confident, 4% less confident.
 - GenX Consumers: 61% more confident, 5% less confident.
 - Baby Boomer Consumers: 69% more confident, 2% less confident.
- Three-in-five (61%) consumers are more confident buying from a company if they know it *has a sustainability commitment*.

CONSUMERS AGREE THAT WE NEED STRONGER REGULATIONS TO TRACK AND TRACE SEAFOOD

- Two-in-three (68%) consumers agree that *we need stronger regulations to track and trace seafood*.
 - Three-in-four (75%) seafood consumers agree that we need stronger regulations to track and trace seafood.
- Three-in-four (78%) consumers agree *restaurants and grocery stores are responsible for checking the source of their food*.



This poll was conducted between May 26-May 29, 2022 among a sample of 2210 Adults. The interviews were conducted online and the data was weighted to approximate a target sample of Adults based on gender, age, race, educational attainment, and region. Results from the full survey have a margin of error of plus or minus 2 percentage points.

*Not all statements tested are shown