

Making Sustainable Seafood Choices Irresistible

Closing the Values-Action Gap

21 November 2024

The background of the slide is a composite image. On the left, a portion of the Earth is visible, showing continents and oceans. On the right, a large school of fish is shown swimming in the water. A semi-transparent circular area is overlaid on the center, containing the word "WELCOME" in white, bold, capital letters.

WELCOME

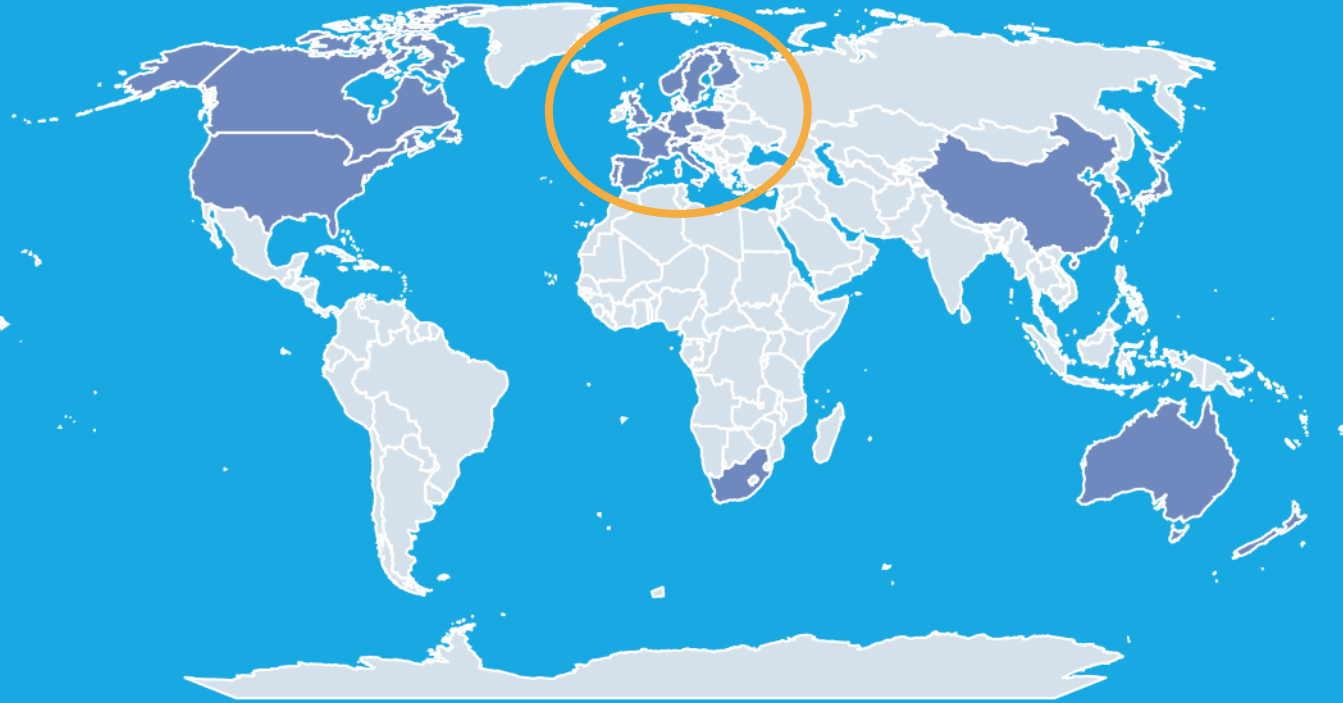


**Know your world.
Lead the future.**

We're a global insights and advisory consultancy working at the intersection of sustainability, behavior change, and trust.

We partner with leading companies, NGOs, and governmental organizations to deliver insights that guide decision-making and build strategies that contribute to a sustainable and equitable future.

Consumer insights from GlobeScan and the MSC



The Marine Stewardship Council partnered with GlobeScan to conduct the fifth wave of a **global research study** into **consumer perceptions**.



n=20,308 seafood consumers in 23 countries

n=11,171 European seafood consumers

January – March 2024

**Healthy &
Sustainable
Living**

n=30,216 consumers in 31 countries
n=8,618 European general population

July – August 2024

Agenda

1.

Context-setting: How are consumers feeling in 2024?

2.

Consumer Priorities: What are they doing about their concerns?

3.

Engaging Consumers: What can the seafood industry do to make sustainability irresistible?

4.

Who Creates Change: Consumers are one part of the collective action needed to have positive impact





How are consumers feeling in 2024?

Global context – worries about conflict, cost of living, climate change



Global



Top-of-mind **global concerns** are...

War/conflict



67%

Water pollution



63%

Climate change



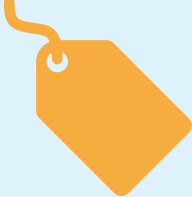
62%

Perceived seriousness of global problems, "very serious"



Global

People feel more **personally affected** by...



Increased cost of living 60%



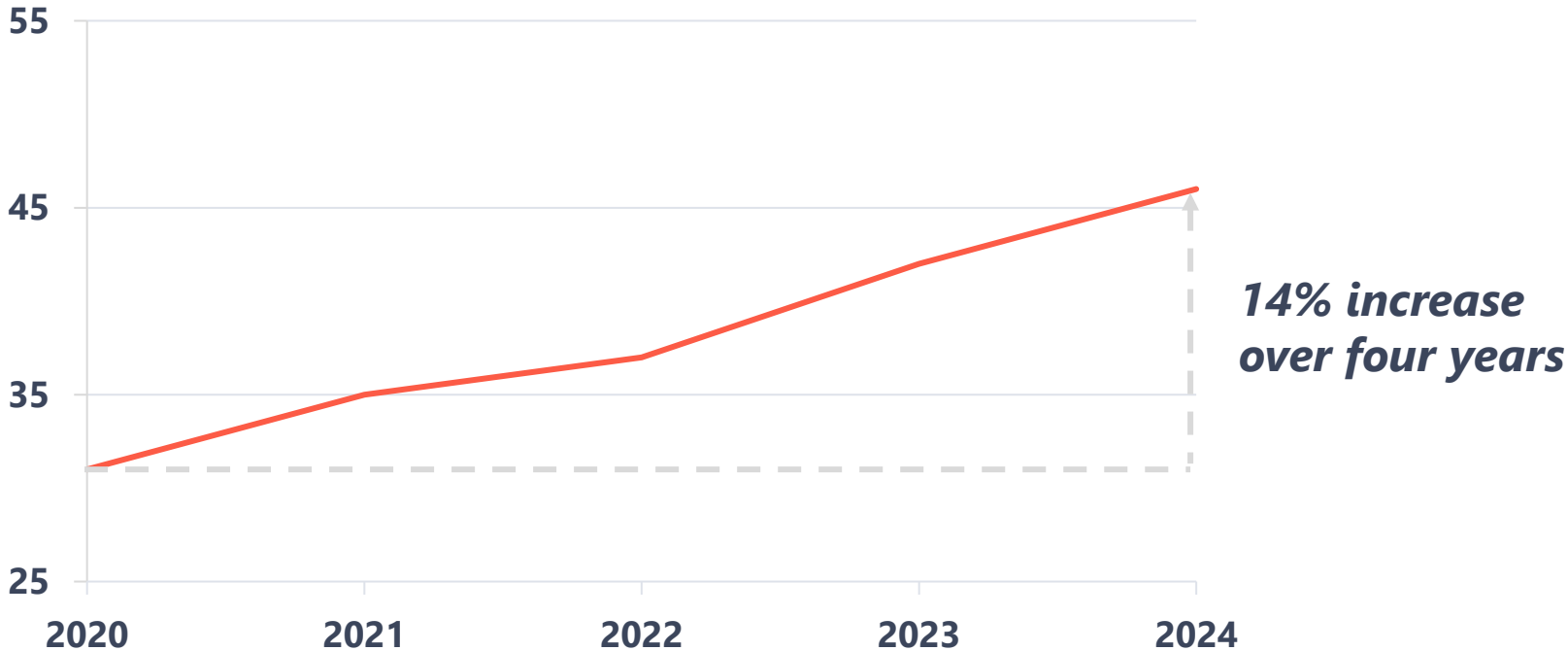
Climate change 46%

Extent personally affected by issues, "greatly" affected

People are increasingly feeling personally affected by climate change



Global

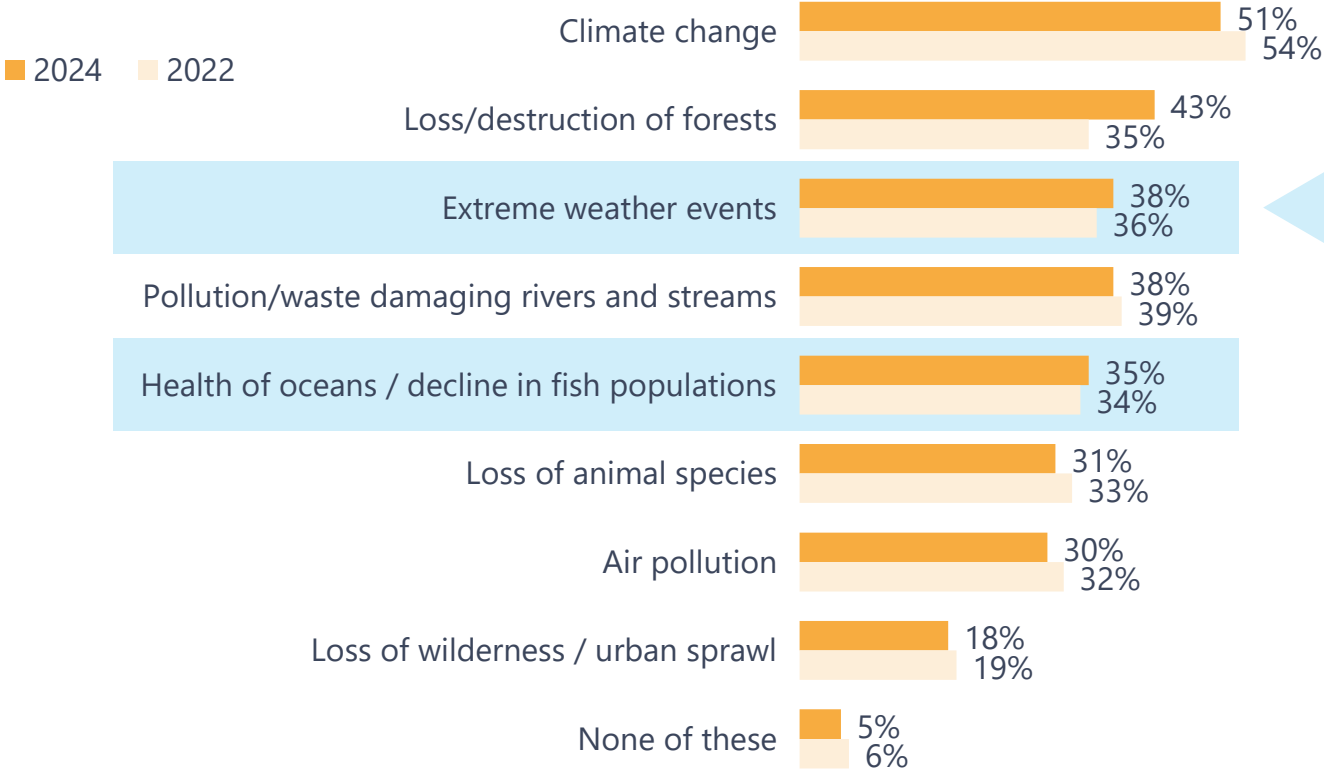


7 Base: 31-country total n=30,216
T2. How much are you personally affected by each of the following? – Climate change or global warming.



They express growing concerns on many environmental issues and connect them together

Europe



62%
Recent extreme weather has made me consider the importance of protecting our ocean

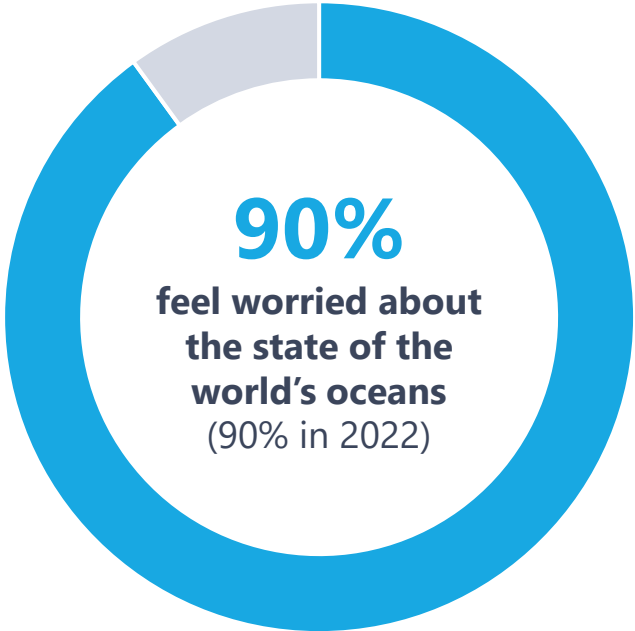
Base: Seafood consumers, Europe, n=11, 171

Q5.35: How well does each of the following statements describe your opinions? Recent extreme weather events have made me think more about the importance of protecting our oceans. Q1.2: Which, if any, of the potential environmental issues are you most worried about?

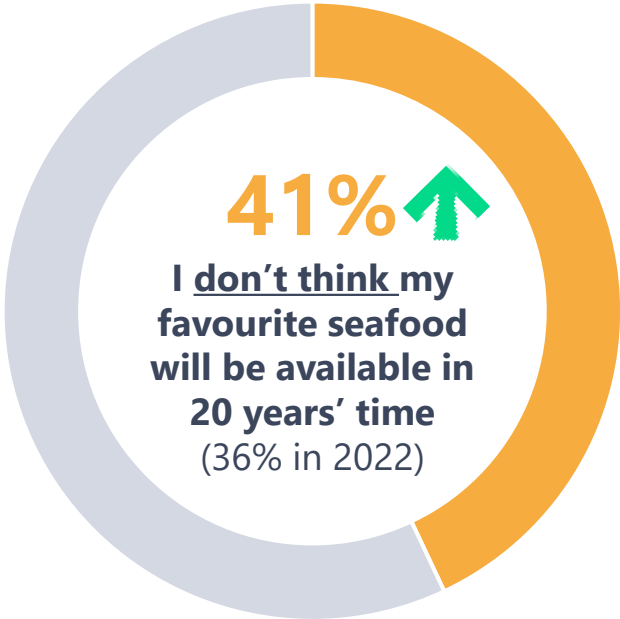


Europeans are also worried about the state of the oceans and are feeling pessimistic about the future

 Europe



Perceptions of ocean health, "agree"
General Population



Perceptions of fish availability, "describes opinion well"
Seafood Consumers





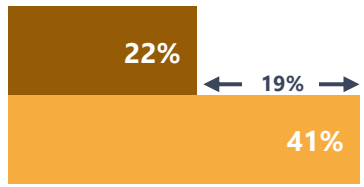
What Are They Doing About Their Concerns: The Value-Action Gap

Seafood consumers want to do their bit to protect fish and seafood - but there's a widening value-action gap

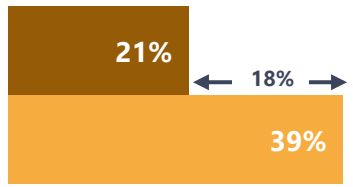
Europe

- Actions taken in the last year
- Actions willing to take in the future
- ↔ Value-action gap

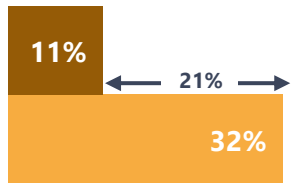
Bought/buy more sustainable seafood



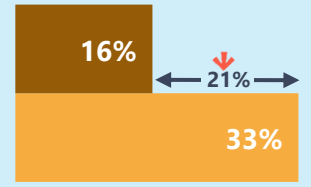
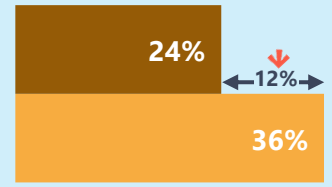
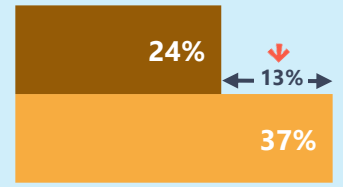
Bought/buy more seafood with an ecolabel on the packaging



Switch(ed) to a brand/product that says it helps protect oceans/fish



18-24 yr olds



Base: Seafood consumers, Europe, n=11, 171

Q11.4a: Which, if any, of the following actions have you taken in the last year to help protect the fish and seafood in our oceans?


Q11.4b: And which other actions would you also be willing to take in the future to protect the fish and seafood in our oceans?

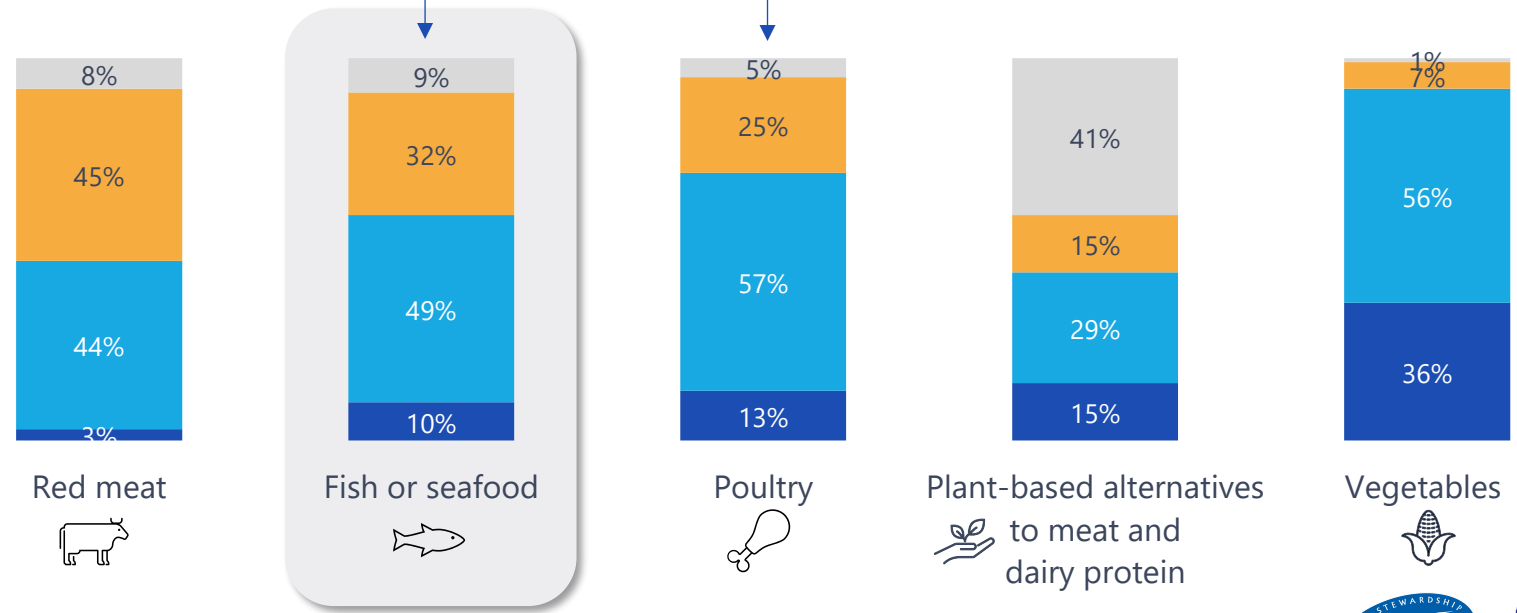


Diets have been shifting over the past two years – people are eating less fish and meat, and more vegetables

Europe

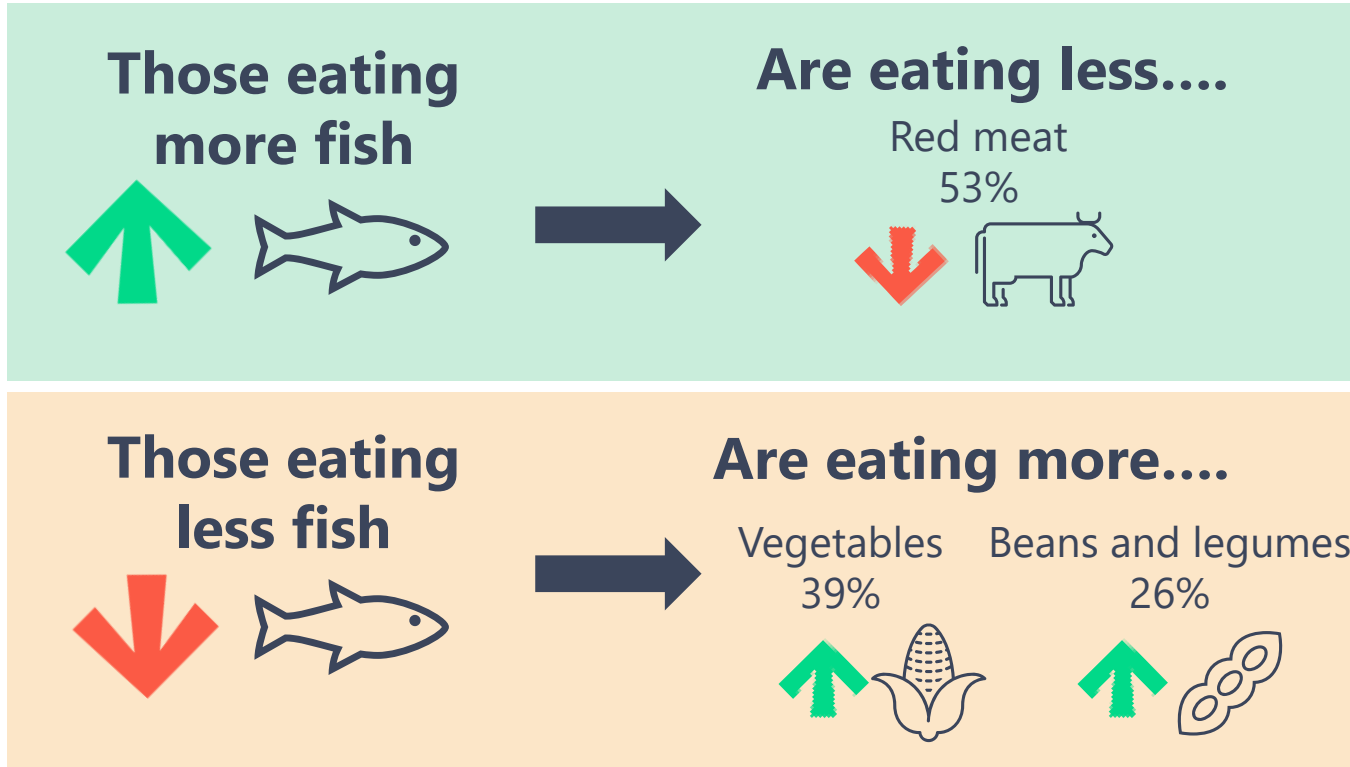
■ Eat more
 ■ Eat the same
 ■ Eat less
 ■ Didn't eat two years ago and still don't


18-24 yr olds
 38% are eating less seafood
 17% are eating more poultry



Diet swaps from red meat to fish and fish to vegetarian / vegan

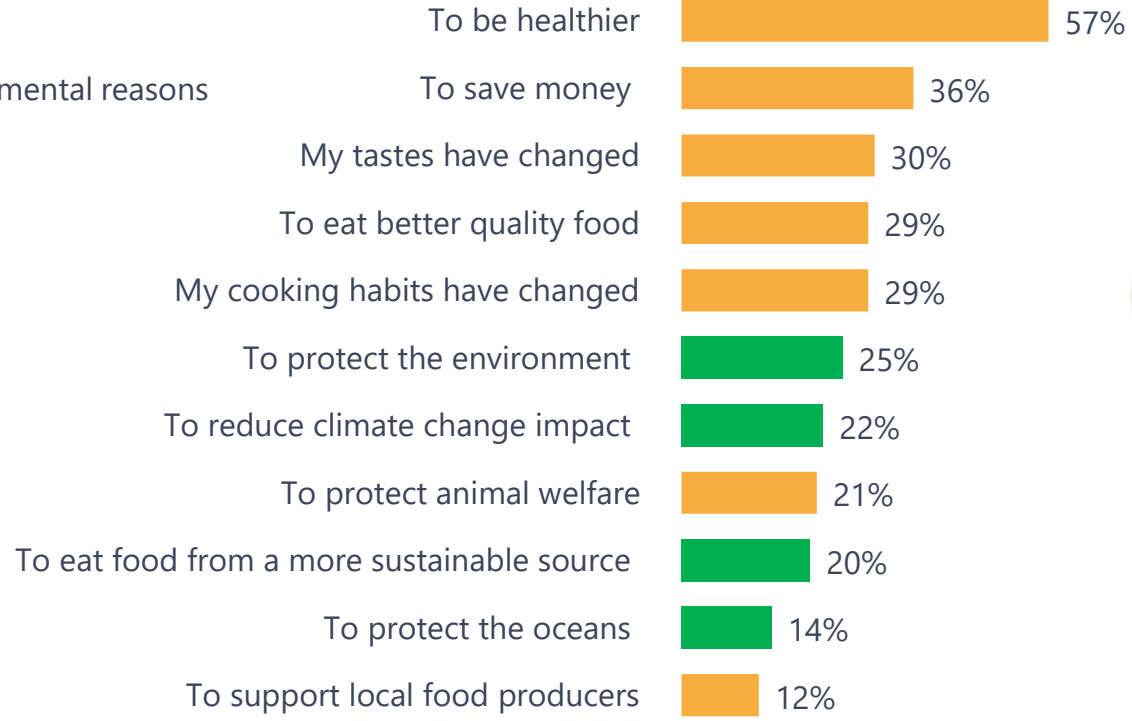
 Europe




Diet changes are motivated by a combination of health, money and being better for the environment

 Europe

 Environmental reasons



 Global
43%

Those who have changed diet say they have done so for environmental reasons

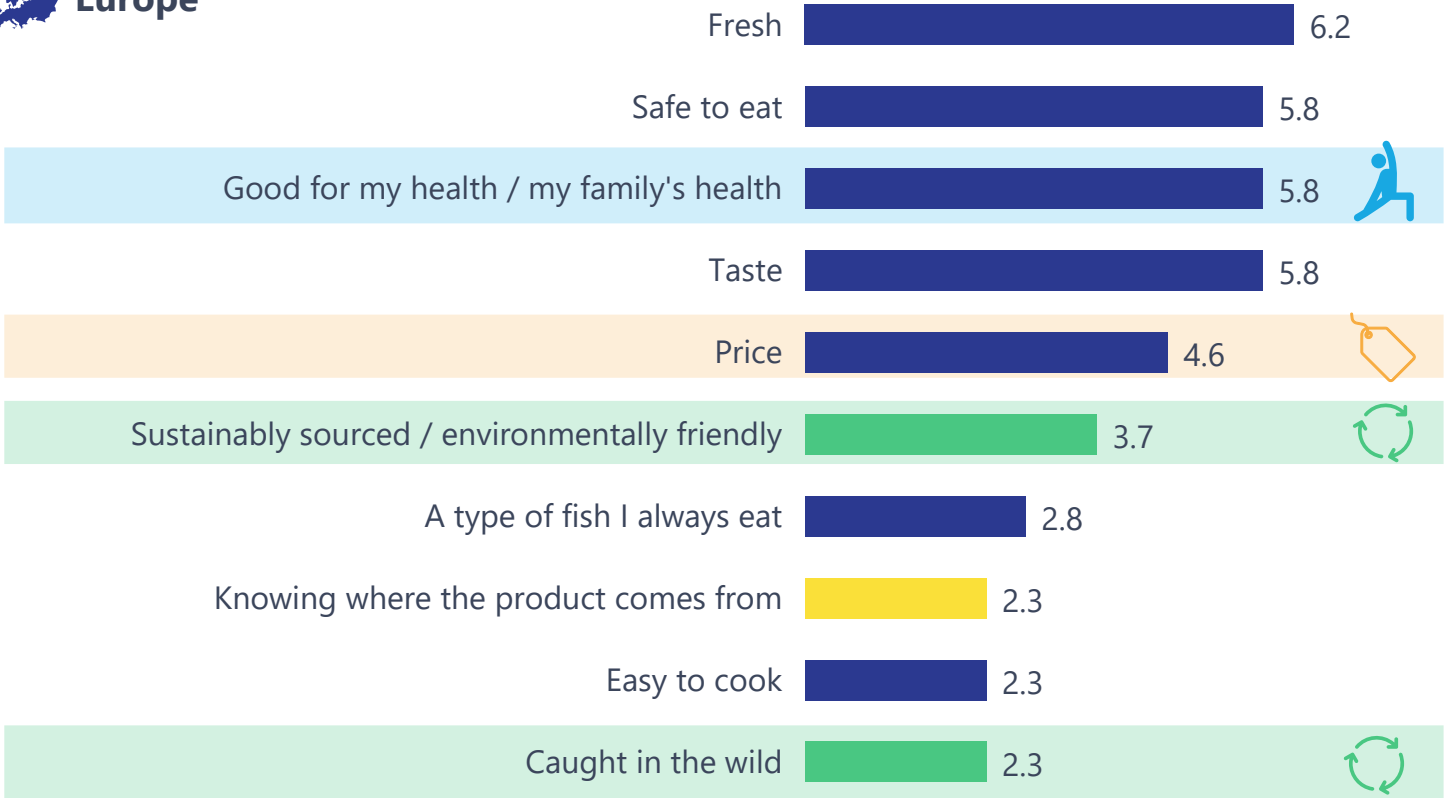
46%



Making Sustainable Choices Irresistible

Consumers are choosing seafood based on quality, health and price, though sustainability is holding steady

Europe



Key:
■ Conventional purchase motivators
■ Sustainability-focused
■ Traceability-focused

Base: Seafood consumers, global, n=11, 171

Q4.2: Thinking about your recent purchase of [fish type], which of the following five considerations was the most important and which was the least important? max diff analysis, importance score, top 10, seafood consumers, 2024



People would be encouraged to eat more seafood by price, sustainability, availability and health

 Europe



These can be emphasised in communications



Lower price



*Fish produced without
harming the ocean*



*More availability
when I shop*

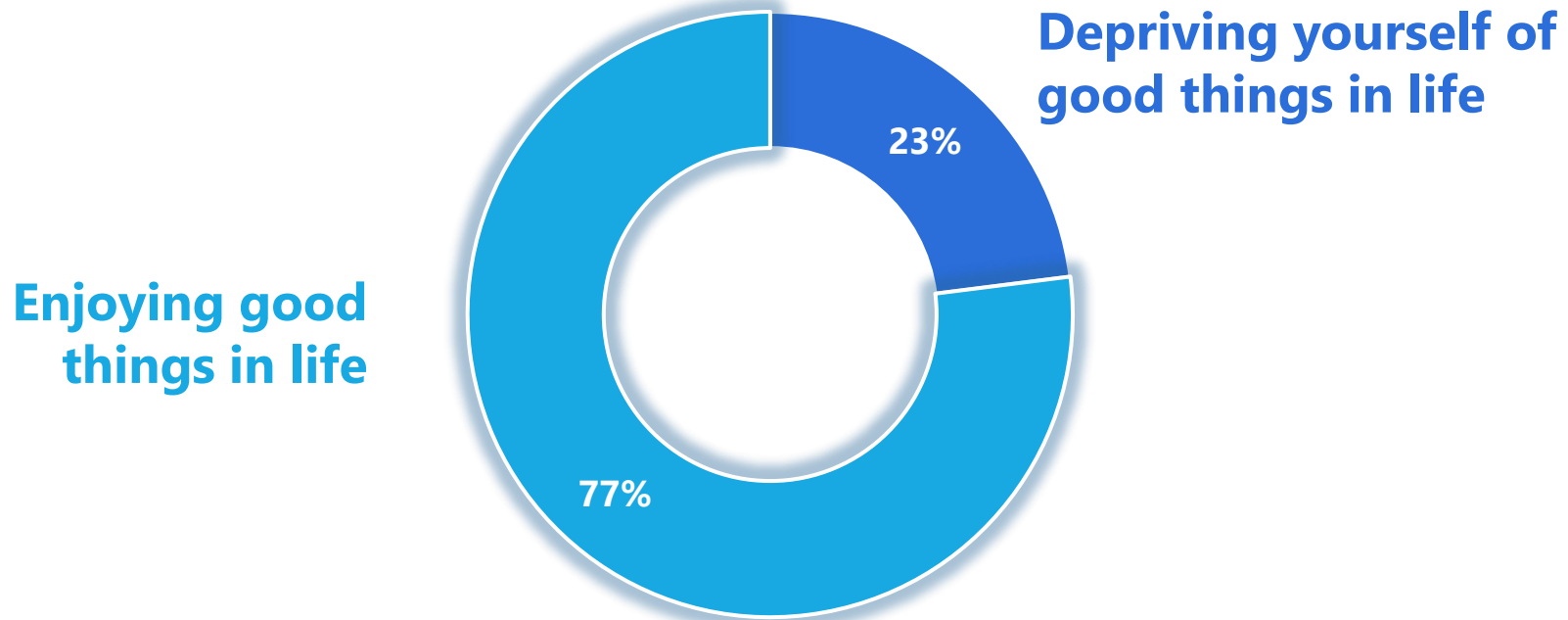


*Knowing it could
lead to a longer
more active life*

People overwhelmingly associate sustainable lifestyles with enjoying the good things in life

 Europe

Living a **sustainable** lifestyle means...

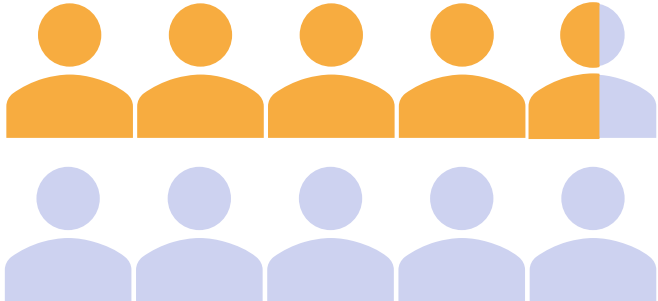


People who have bought environmentally responsible products are cued most by packaging or ecolabels

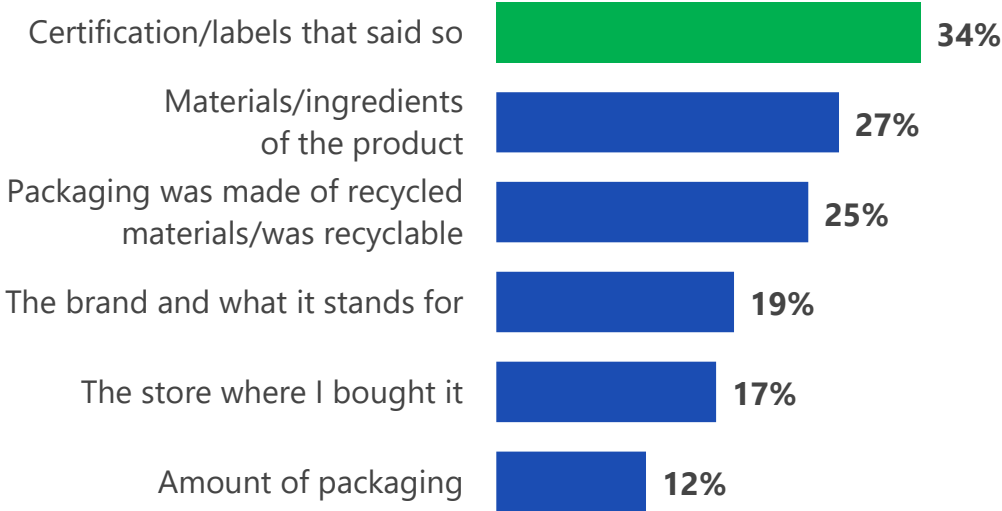
 Europe

46%

Have bought a sustainable product
in the past month



How did you know the product was sustainable?



2024: Europe n=8, 618
Q44. Have you bought an environmentally friendly product in the past month? Q46. How did you know that the product was environmentally responsible? Please choose up to three options.

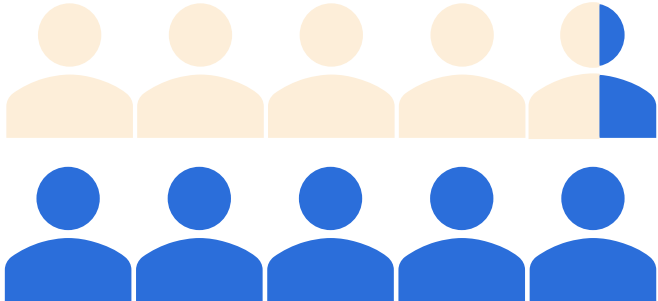


People who haven't bought sustainable products recently aren't disinclined to them

 Europe

54%

Have not bought a sustainable product
in the past month

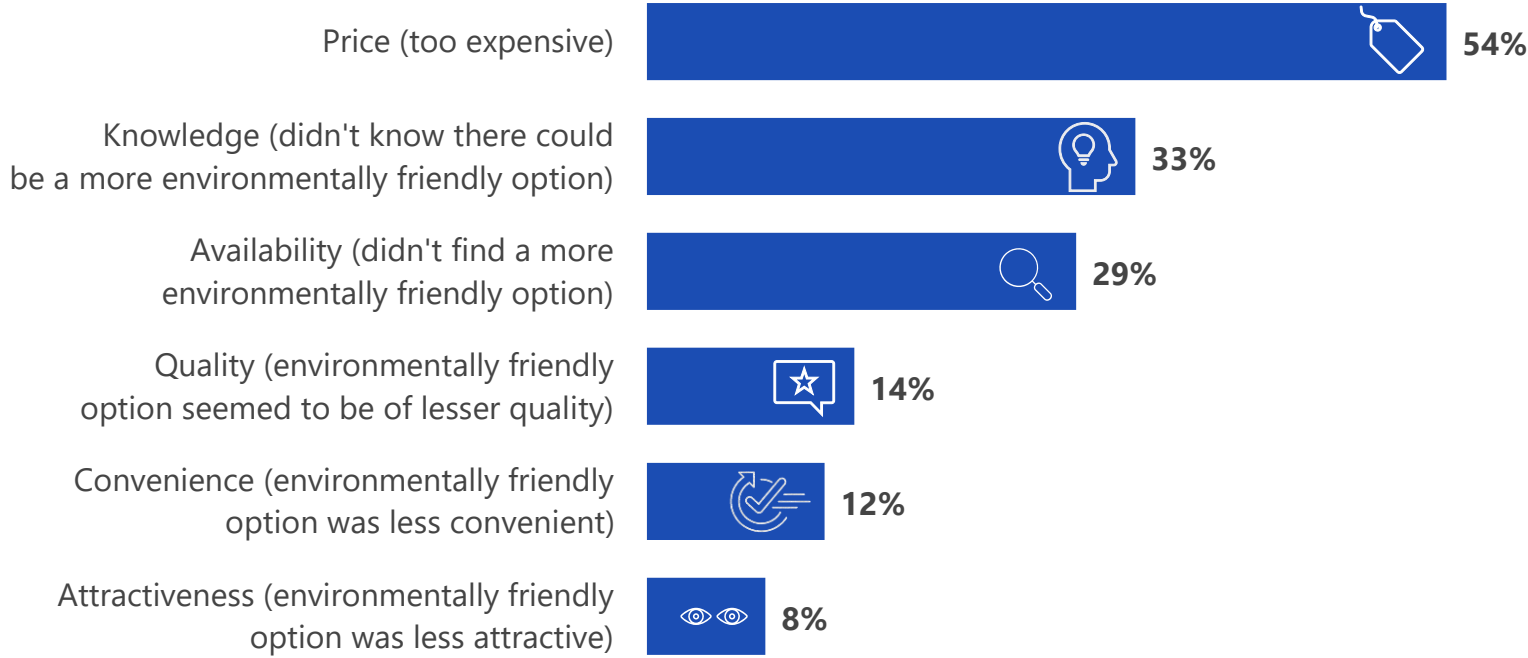


... but 74% of them
would have liked to buy a sustainable
product if they could have

20 2024: Europe n=8, 618
Q44. Have you bought an environmentally friendly product in the past month? Q73. Would you have liked to buy a product that was environmentally responsible, if you could have?

Price is the leading reason why people who would prefer to buy sustainable products ultimately decide not to

 Europe



2024: Europe n=8, 618

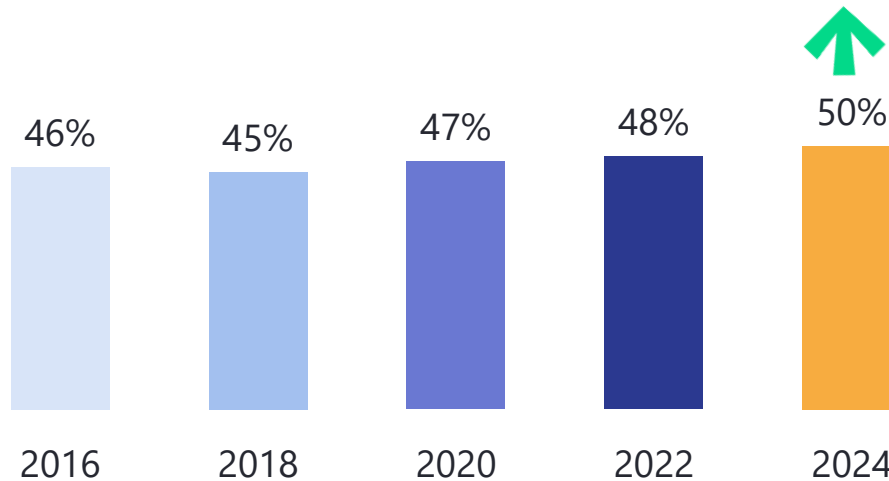
Q74. Why were you not able to buy any product that was environmentally responsible in the past month even though you would have liked to? Please choose all that apply.



However, seafood consumers are now finding it even harder to notice ecolabels

 Europe

Sustainability is important but I don't notice ecolabelled products when I'm shopping

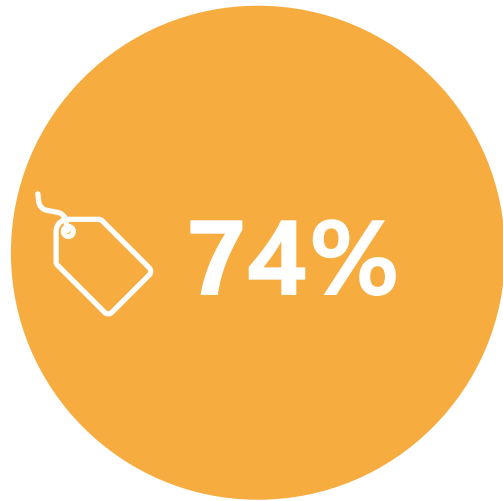




The Inevitability of Collective Action

Consumers are looking to supermarkets and brands to do more in helping them make sustainable choices

 Europe



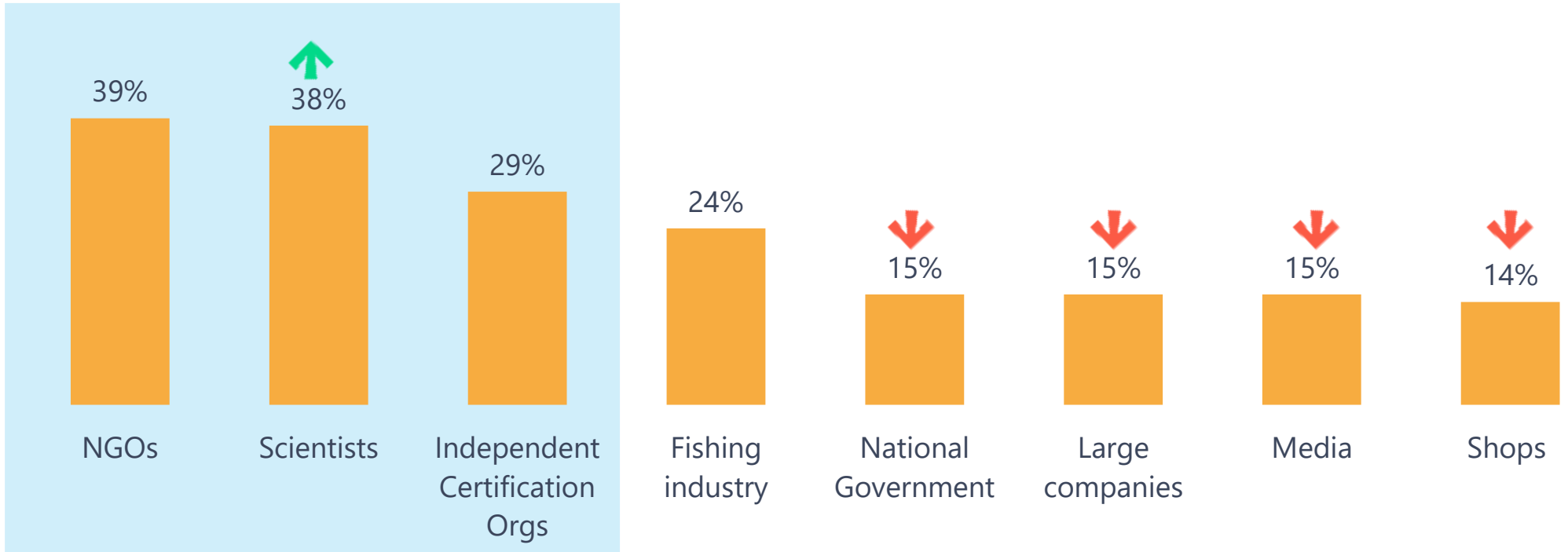
Supermarkets' & brands' sustainability claims need to be **clearly labelled** by an independent organisation



I would like to **hear more from companies about sustainability** of fish/seafood products

NGOs, scientists and independent certifications seen as leaders in ocean protection

 Europe



Base: Seafood consumers, Europe, n=11, 171

Some people believe that action needs to be taken to protect the world's ocean environment. How well do you think the following groups or institutions are contributing to protecting the world's ocean environment?

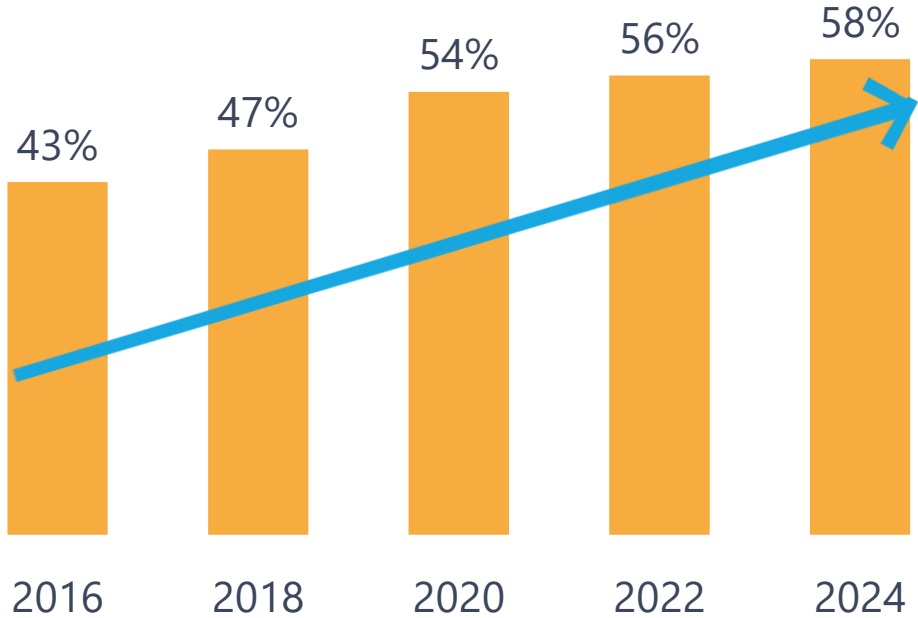


The MSC label awareness has grown significantly in Europe, and trust is high

 Europe



Awareness of the MSC label



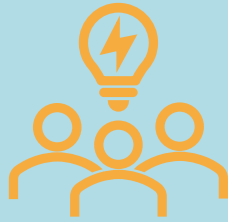
Awareness of the MSC label, "seen often / occasionally", Base: General population, Europe n= 14,618
Trust the claims of the MSC label, Base: Those who have seen the MSC label



How to encourage people to eat sustainable seafood

Collective effort

- Build consumer trust through a united effort with businesses, governments, and organizations
- Show action on issues people care about



Closing the value-action gap



Make sustainability irresistible

- Connect sustainable choices with health benefits and cost savings
- Make them easier to find and identify in stores and supermarkets
- Make younger consumers aware that seafood can be a sustainable and healthy protein option

Tackling consumer pessimism and eco-concern

- Guide consumers to make informed decisions
- Empower individuals to recognize that their sustainable choices make a meaningful impact



Thank You

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**Know your world.
Lead the future.**