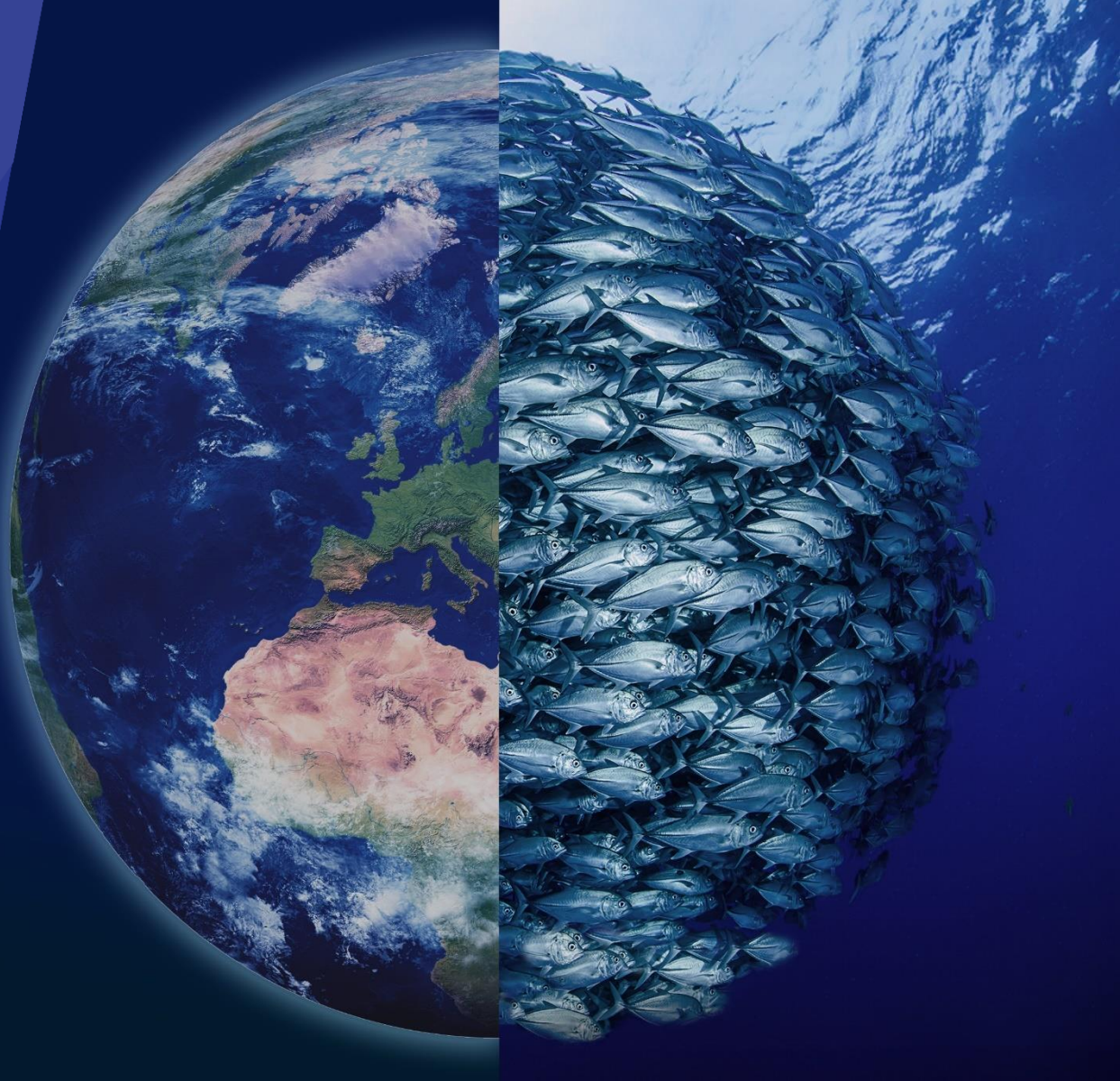


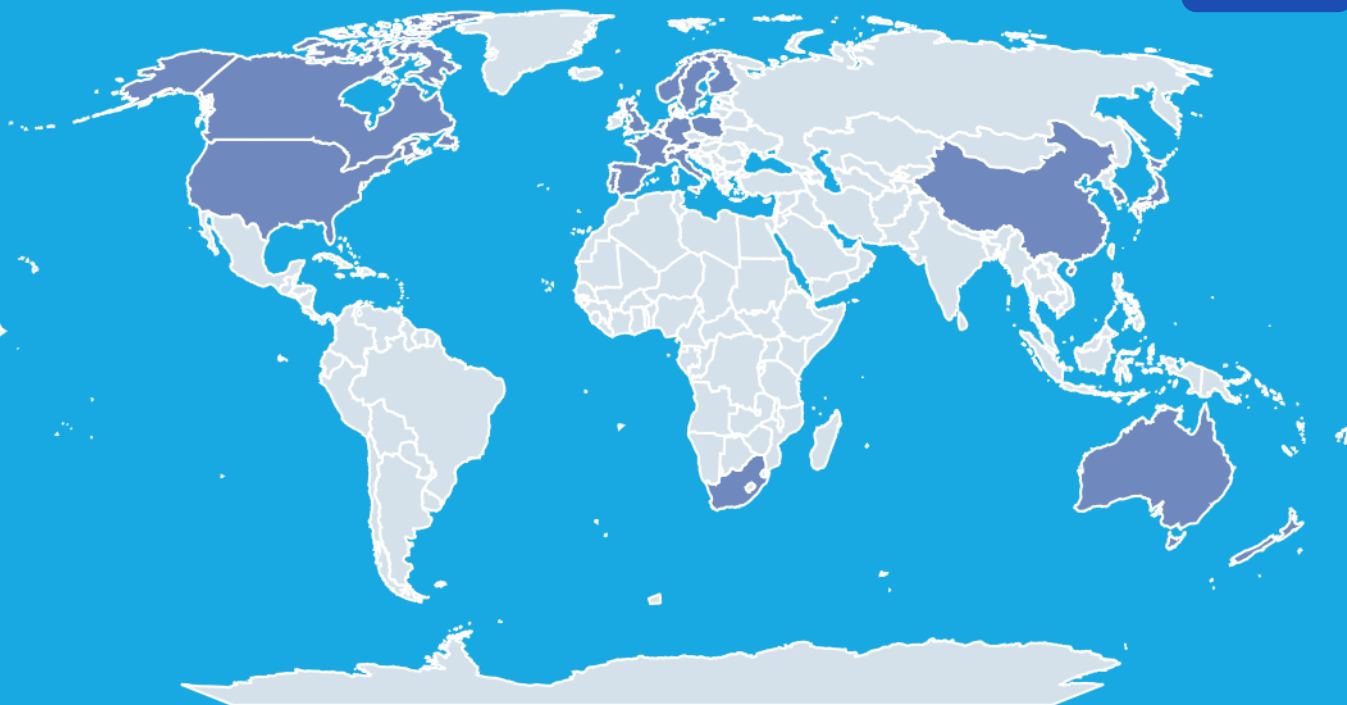
GlobeScan Seafood Consumer Perceptions Study 2024

Planet, Price, Diet: How
is Seafood Stacking up?

Presentation to
Market Advisory Council, EU
5 Jun 2024



2024 global consumer insights from GlobeScan and MSC



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

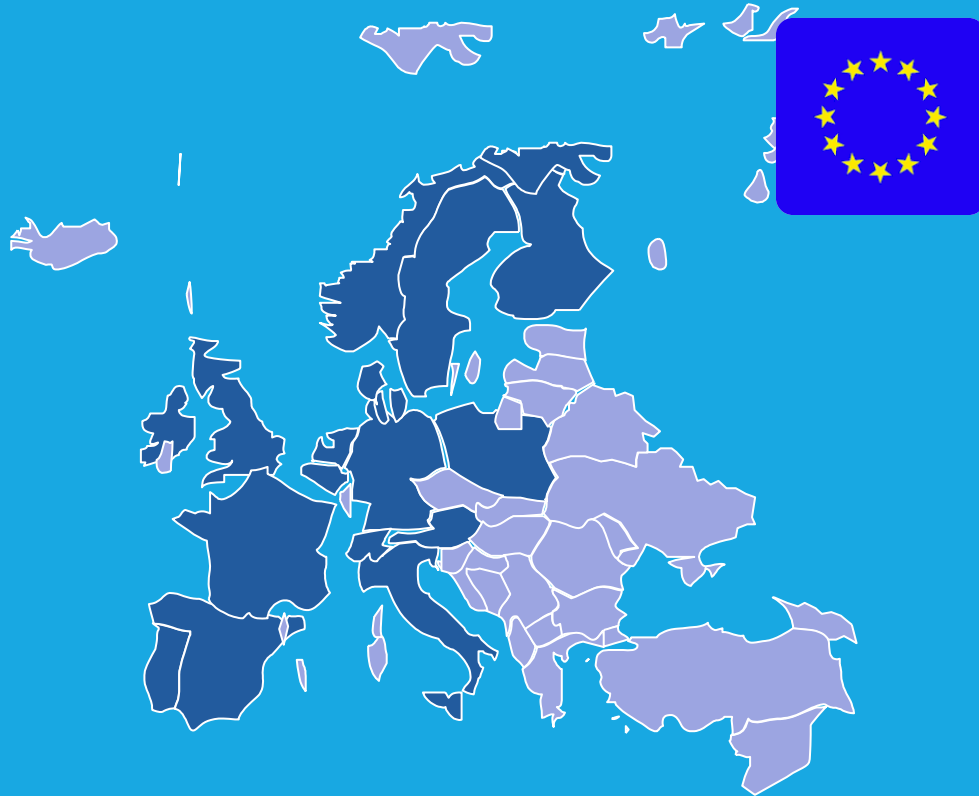


*n=27,000 general public,
n= 20,308 seafood consumers
in 23 countries
January – March 2024*

**Healthy &
Sustainable
Living**

*n=29,565 consumers
in 31 countries
July – August 2023*

Focus on countries in Europe for the MAC



15 Markets covered: Austria, Belgium, Denmark, Finland, France, Germany, Italy, Netherlands, Norway, Poland, Spain, Sweden, Switzerland, UK, and Portugal.

Globe
Scan



$n=14,518$ general public,
 $n= 11,171$ seafood consumers

Agenda

1.

Context-setting

What is the context and trends?

2.

Seafood Choice challenges

What are the trade-offs between price, planet and diet?

3.

Customers

How to engage seafood customers and relevance of ecolabels?





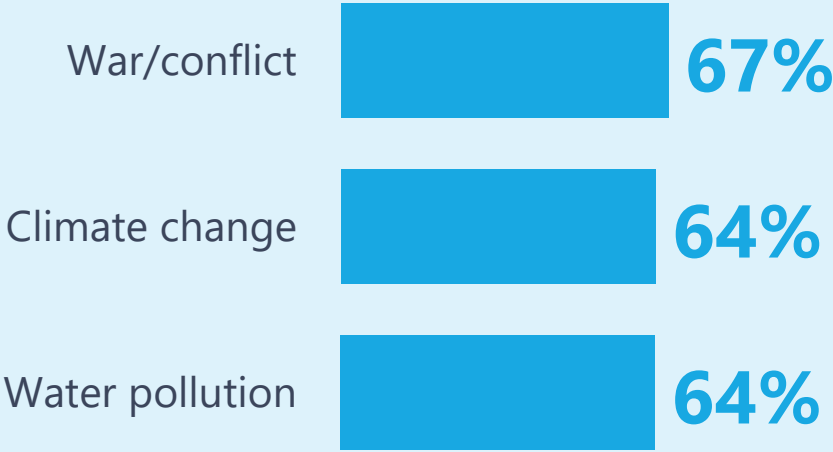
Context-setting

What is the context and trends?

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

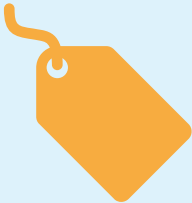


Top-of-mind **global concerns** are...



Perceived seriousness of global problems, "very serious"

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



Increased cost of living 87%



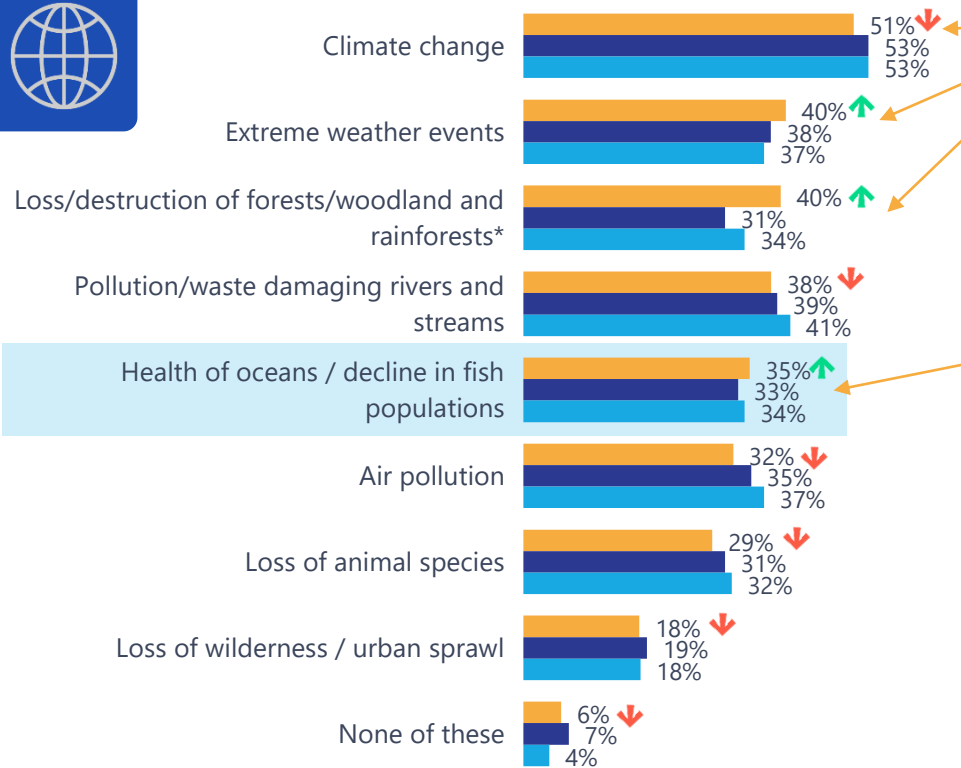
Climate change 76%

Extent personally affected by issues, "greatly"/"moderately" affected

Climate change remains the most pressing environmental issue despite a decline in concern since 2022

Most concerning environmental issues, percentage choosing issue in top three, general population, 2020–2024

Increase since 2022 (↑)
Decrease since 2022 (↓)



Climate change is the most worrying issue in most markets. The exceptions are Norway (health of oceans), Austria (loss/destruction of forests), Japan (extreme weather events), and China (air pollution). 18–34-year-olds are more likely than others to worry about climate change.

Concern about oceans compared to other issues varies by market; it is the most worrying issue in Norway, and second most worrying in Denmark, Spain, and Sweden. Meanwhile, in the Netherlands, Belgium, and Poland it is the seventh most concerning issue.

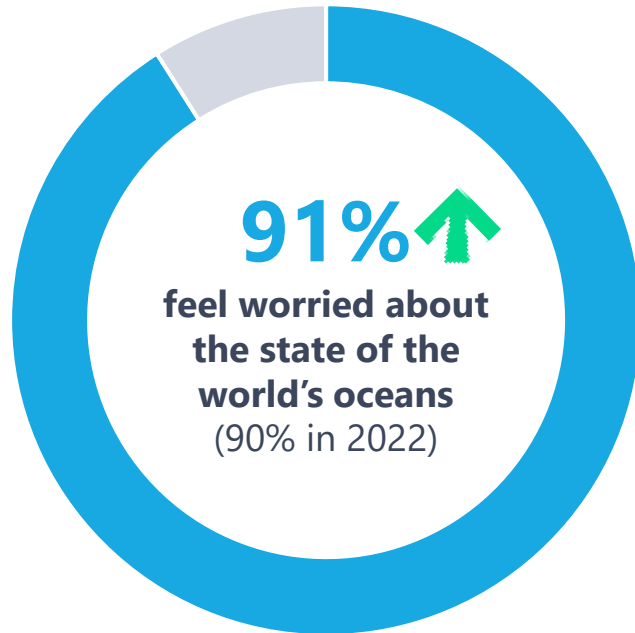
Base: General population, global, n=27,134

Q1.2: Which, if any, of the potential environmental issues are you most worried about?

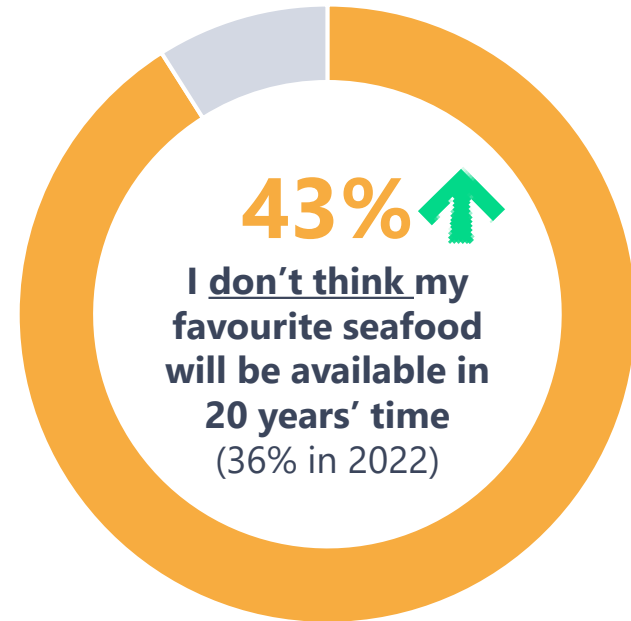
*In 2022 and 2020 the wording was "Loss/destruction of rainforests"



More worry about the oceans and increased pessimism about future availability of seafood



Perceptions of ocean health, "agree"



Perceptions of fish availability, "describes opinion well"

Optimism about the possibility of saving the oceans from irreparable damage has decreased across the board

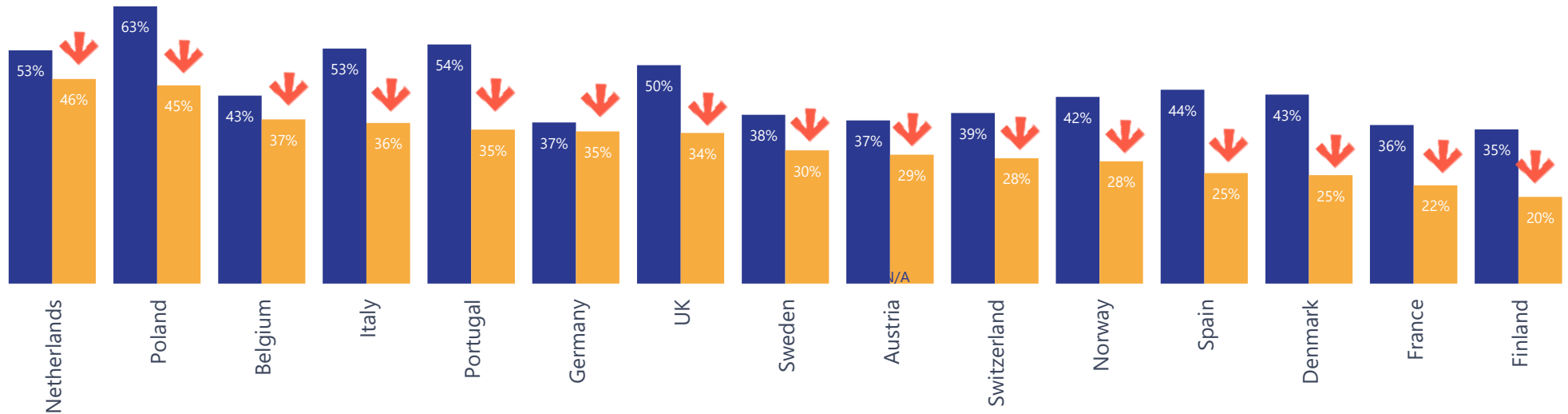


Perceptions of fish availability over time, "agree," top two (3+4 on a 4-point scale), seafood consumers, 2022 and 2024

I believe in 20 years' time we will have saved the oceans from irreparable damage from humans*

■ 2022 ■ 2024

Increase since 2022 (↑)
Decrease since 2022 (↓)



Base: Seafood consumers, global, n=20,308

Q105.2: To what extent do you agree or disagree with the following statements? – I believe in 20 years' time we will have saved the oceans from irreparable damage from humans.

Ocean concerns have changed since 2022

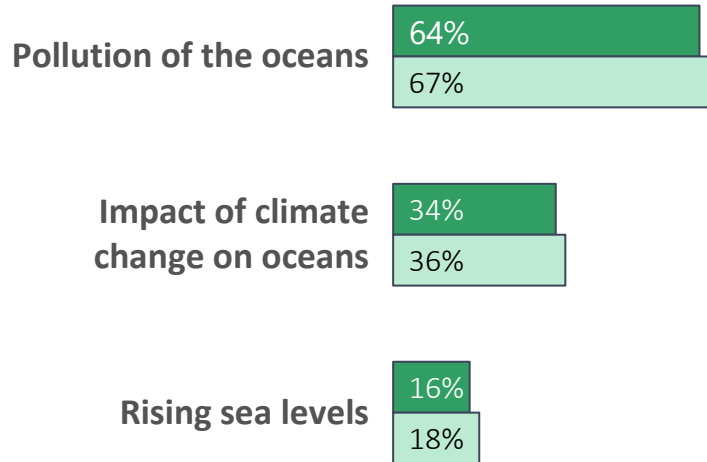


Most concerning ocean issues; percentage choosing each issue in top three

Environmental issues



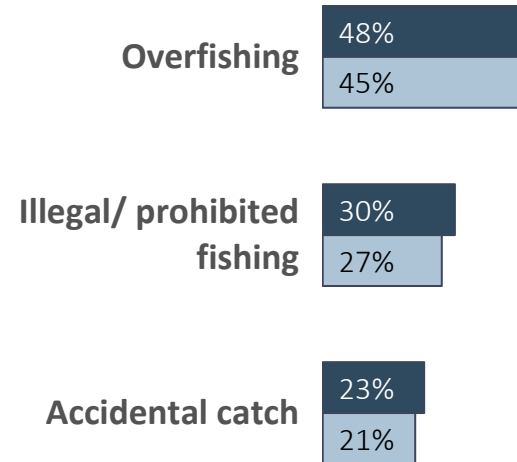
■ 2024 ■ 2022



Fishing practices



■ 2024 ■ 2022





Choice Challenges

What are the trade-offs between price, planet and diet?

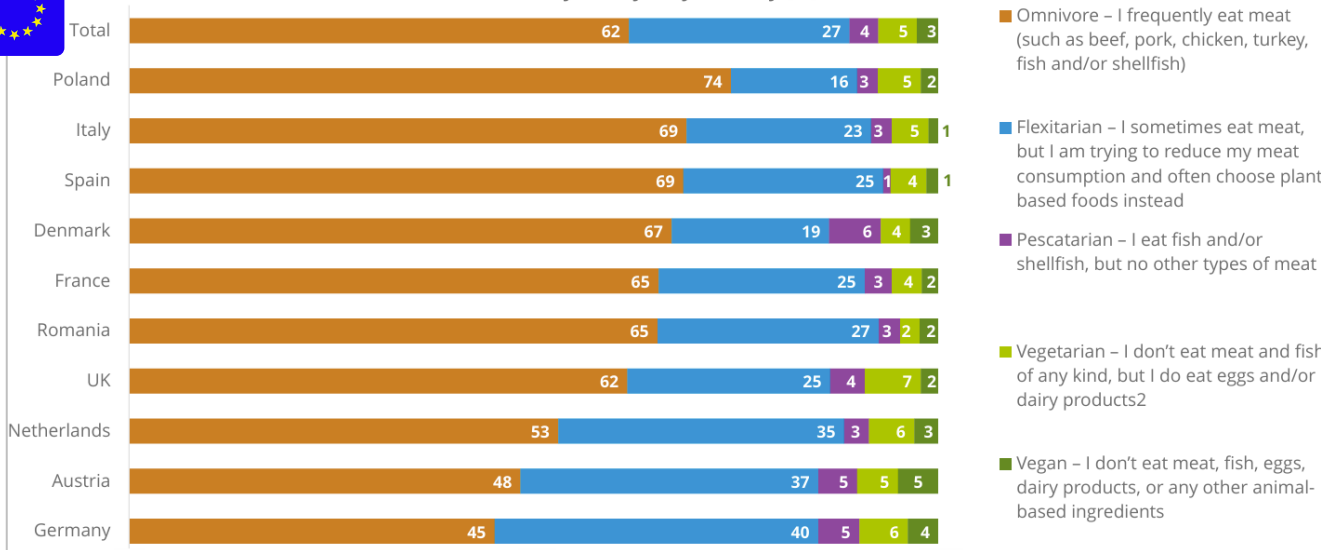
Context: Dietary trends

Several studies show a rise in flexitarianism across Europe, led by Germany

- **Vegetarianism is increasing slowly** in several developed economies around the world, such as Europe and the United States. Source: [World Economic Forum, 2022](#)
- Germany and Italy had the largest proportion of people reporting **reduced meat consumption** in the past year. Source: [Good Food Institute Europe](#).
- **Rise of flexitarians and evolving consumer tastes** in The 2023 Global Consumer Trends report by ADM. Source: [Global Consumer Trends 2023](#)
- **Dietary lifestyles by country in 2023** (see chart below): While veganism is still at relatively low levels in Europe (between 1% and 5%), over **one in four consumers say they are flexitarian**. Consumers in Germany are leading this trend, with 40 percent identifying as flexitarian. Source: [Smart-Protein-European-Consumer-Survey 2023](#) (pan-European survey funded by the EU's Smart Protein project)



Dietary lifestyle by country (%)



Increasing media coverage on the impact of diets on the environment and health



Sustainable eating is cheaper and healthier - Oxford study



A new study links plant protein to healthy aging for women



Plant-heavy 'flexitarian' diets could help limit global heating, study finds

Global adoption of diet low in meat would aid health, land and food systems as well as reducing emissions, researchers say

B B C

Vegan v flexitarian – which will save the planet?



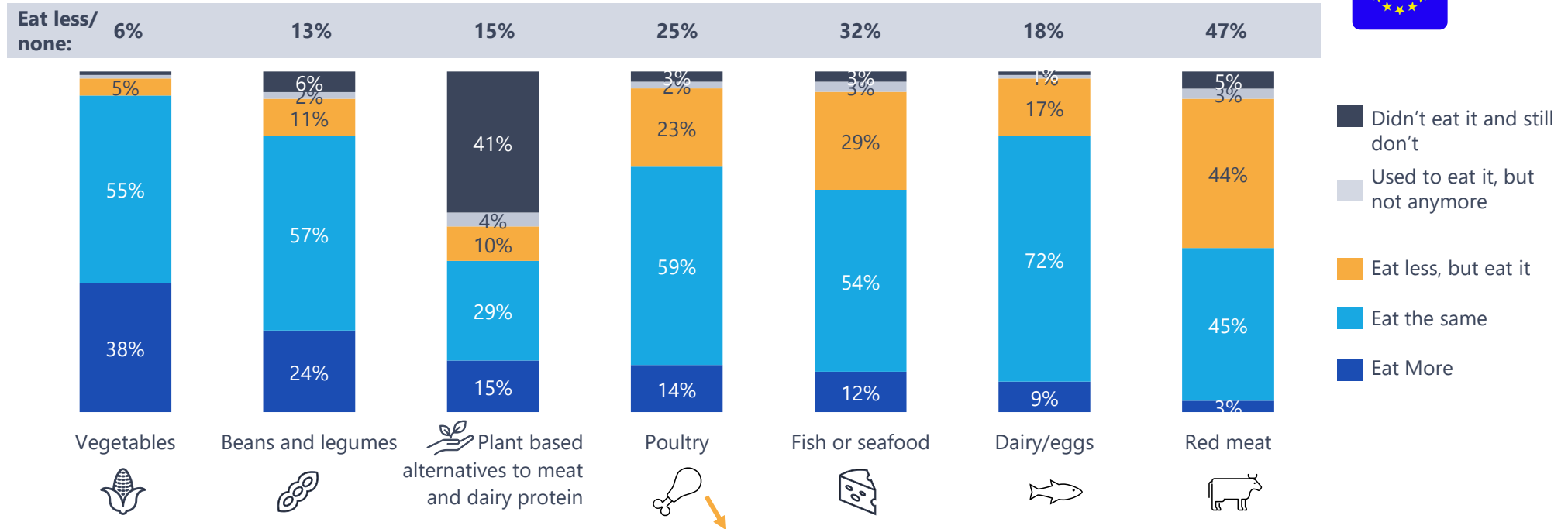
Swapping red meat for herring, sardines and anchovies could save 750,000 lives, study suggests

Switch could also cut prevalence of disability linked to diet-related disease and help tackle the climate crisis, researchers found



Vegetables and other plant-based options have seen the largest increase in consumption compared to two years ago, and more people eating less seafood than more.

Changes in food consumption compared to two years ago, general population, 2024

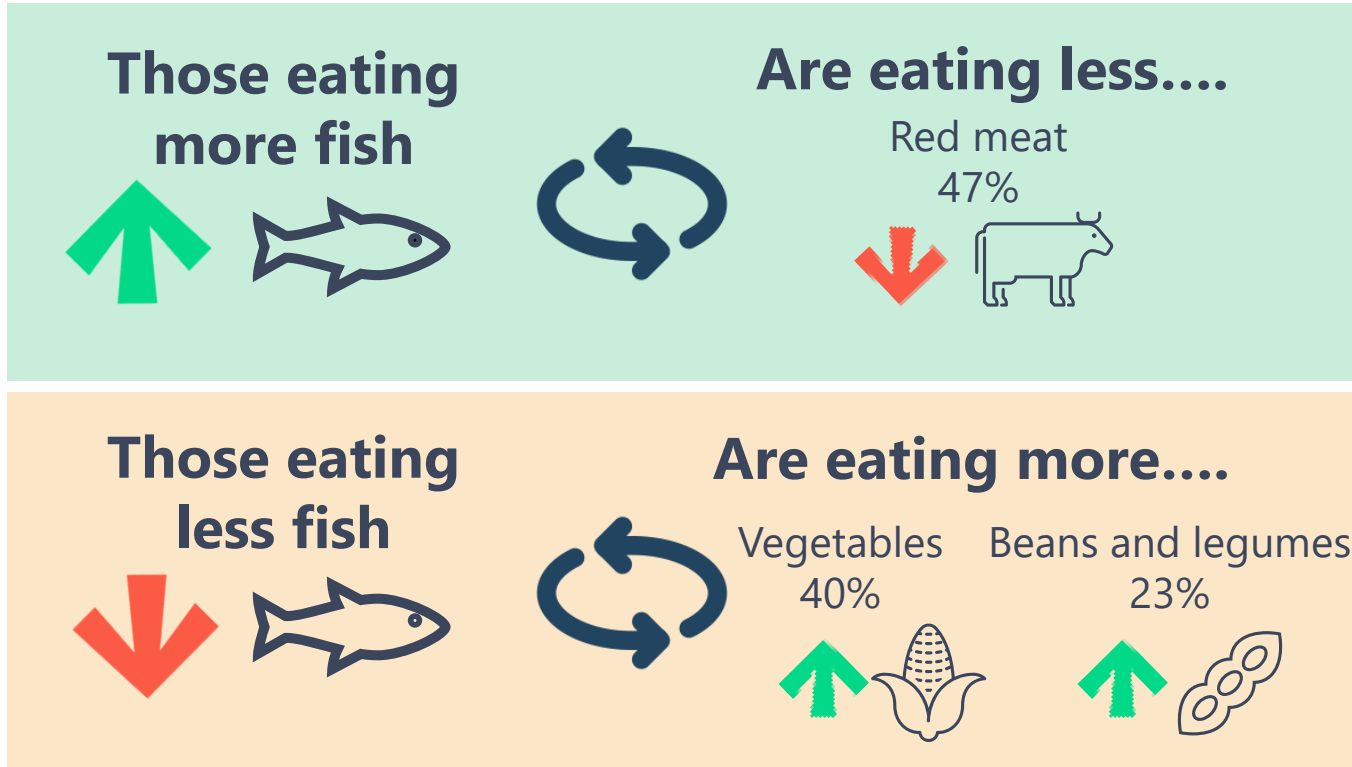


Globally 20 percent of 18–24s are eating more poultry vs two years ago – higher than any other age groups.

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



Changes in seafood consumption compared to two years ago, general population, 2024



Reasons for swaps are health, cost and environment



Top five reasons for changing diet compared to two years ago



Eat more fish (n=3,008)

- 73% Health
- 42% Quality
- 30% Change in cooking habits
- 29% Save money
- 23% Food from a more sustainable source



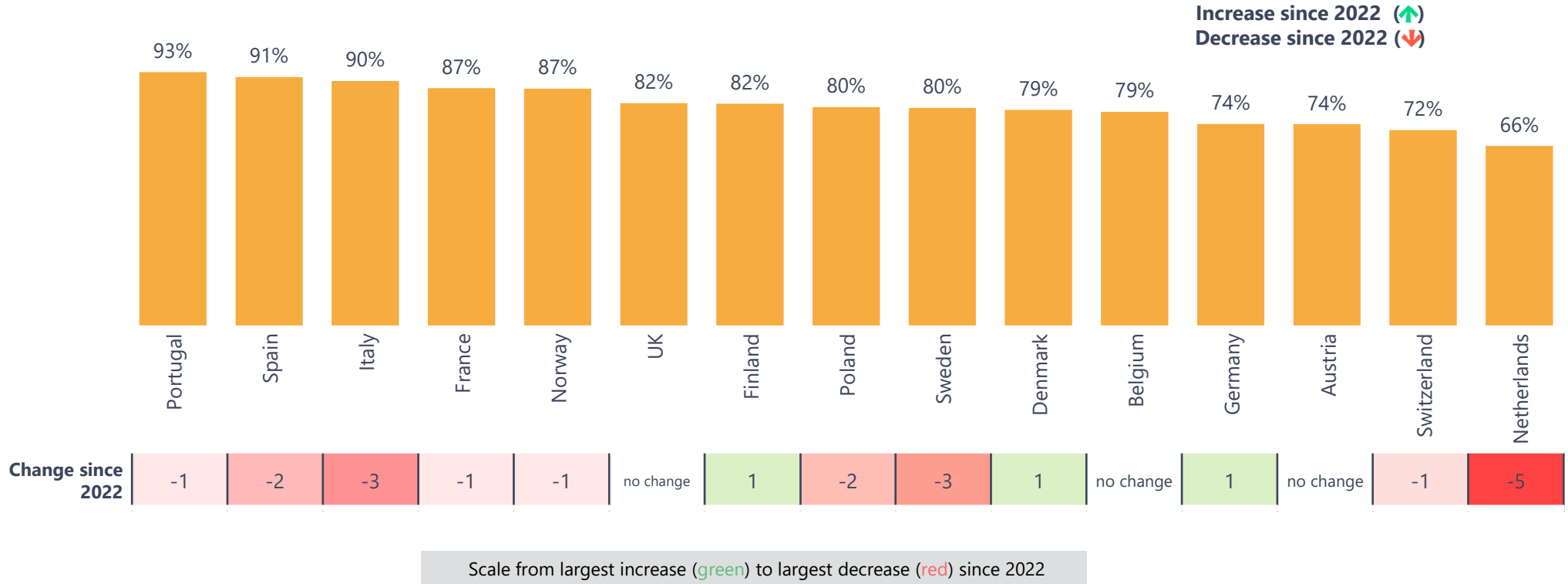
Eat less fish (n=9,483)

- 59% Health
- 43% Save money
- 31% Quality
- 25% Protect the environment
- 24% Food from a more sustainable source

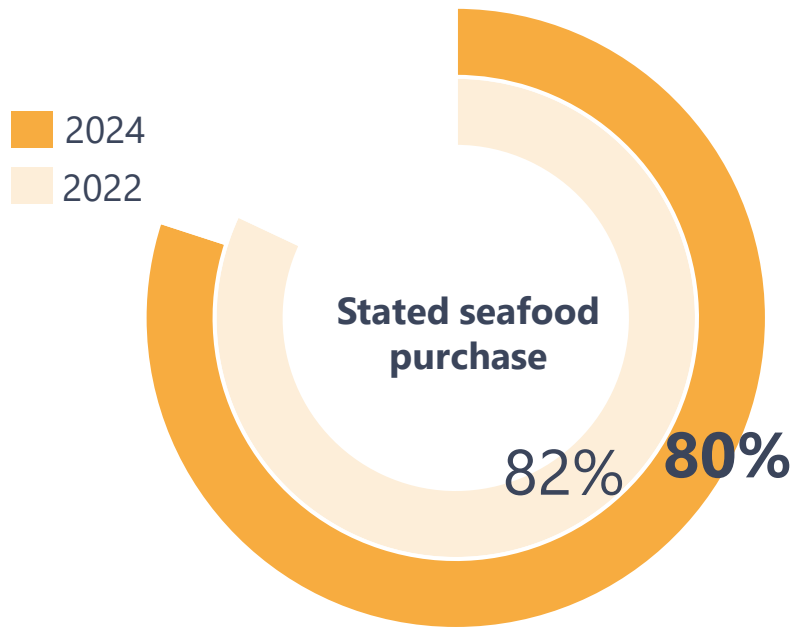
Stated seafood purchase has declined compared to 2022



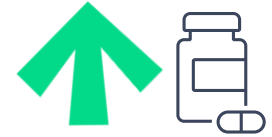
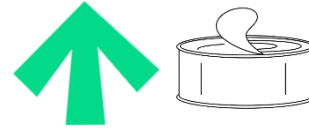
Households that claim they have purchased fish/seafood in past two months, general population, 2022 and 2024



Consumer seafood purchase patterns in a cost of living crisis



WHAT...

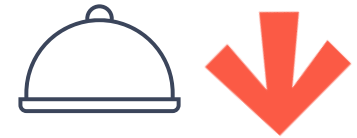


Health supplements/
fish oils

WHERE...



Eating at home



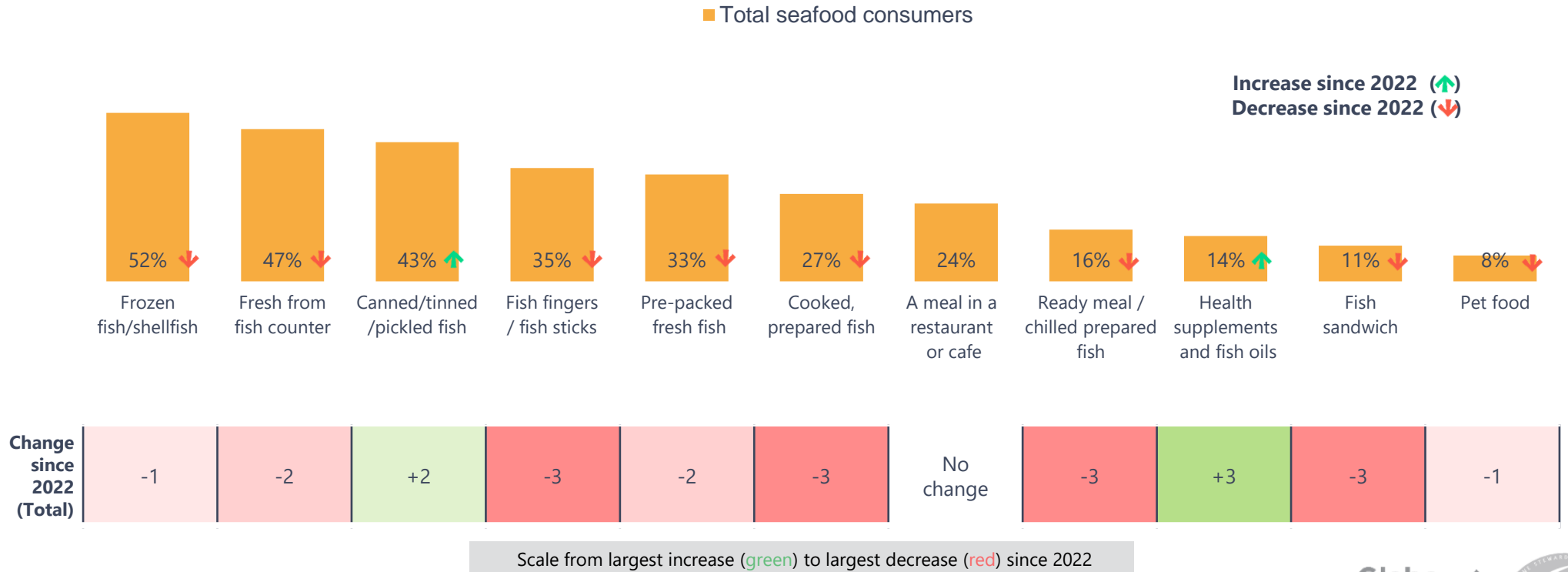
Eating out

Households that claim have purchased fish/seafood in past two months, Europe, general population $n=14,518$

Claimed purchase of most seafood types has declined since 2022; canned fish and health supplements are the only products with an increase in claimed purchase



Types of fish/seafood purchased frequently, seafood consumers, 2022 and 2024





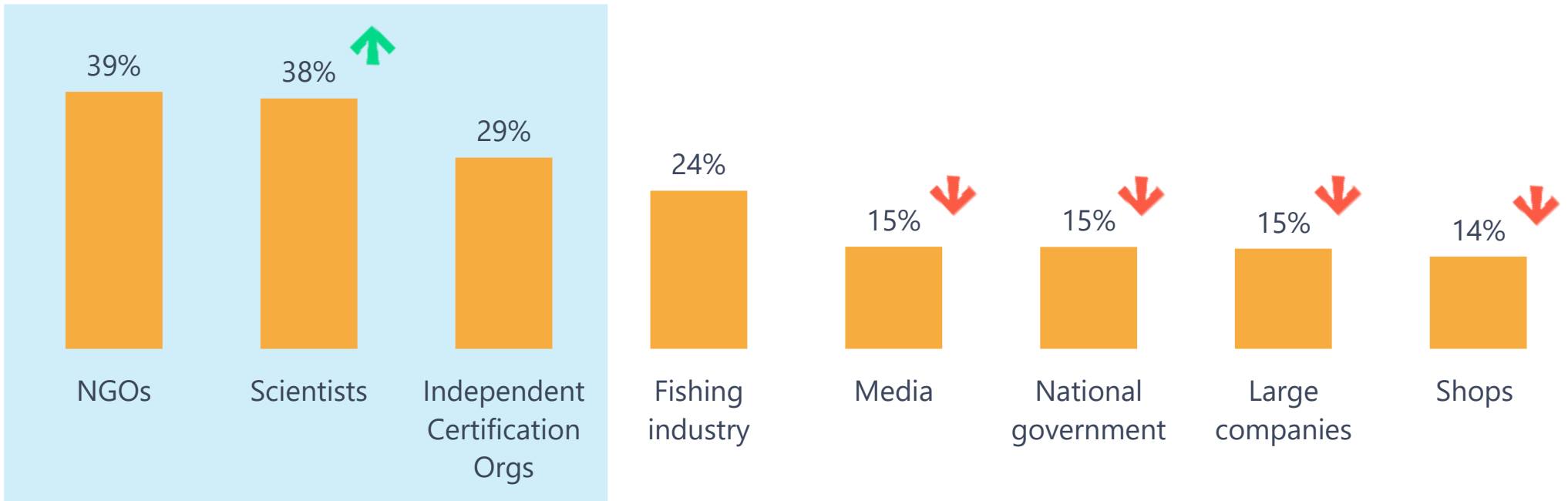
Customers

What can the industry do
to engage customers?

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



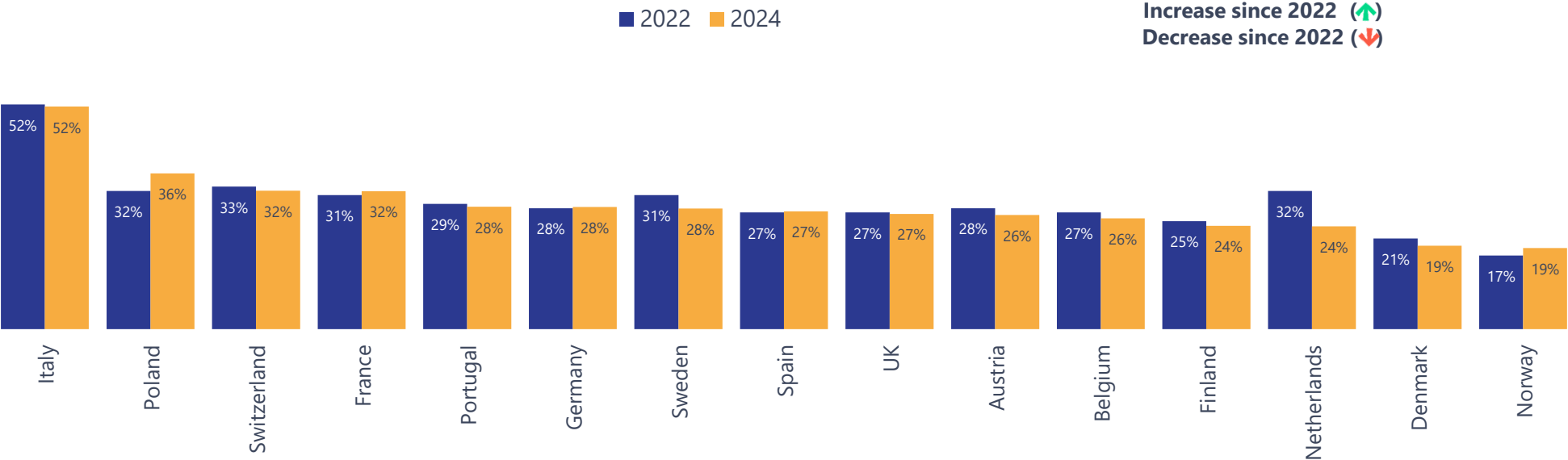
Who is perceived to be contributing "very well" to protecting the ocean environment



On average, around three in ten think certifications contribute well to ocean protection



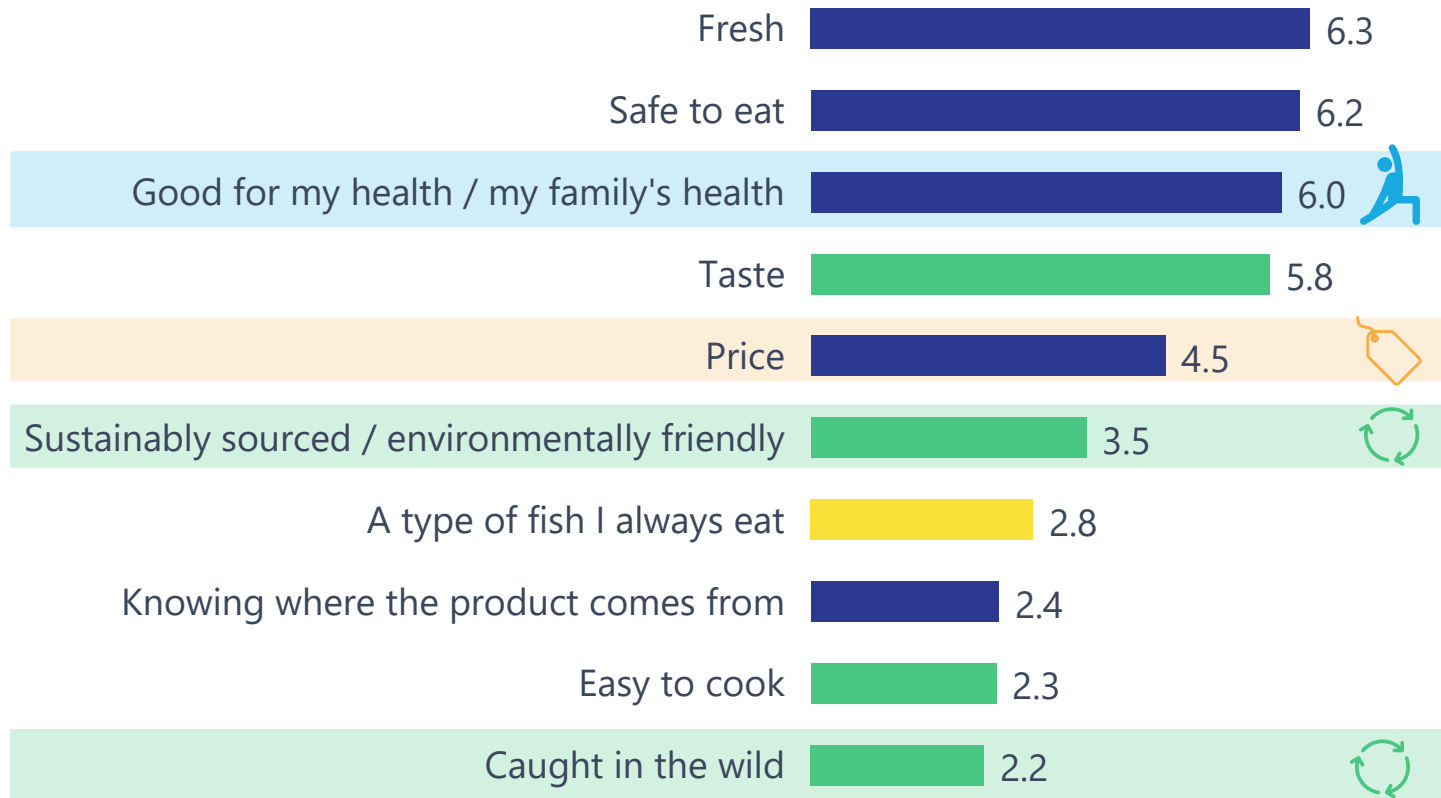
Perceived to be contributing “well” to protecting the ocean environment: Independent certification organisations, (6+7 on a 7-point scale), seafood consumers, 2022 and 2024



Top purchase motivators are quality, health, price – sustainability still highly important in seafood category



Motivators: max diff analysis, importance score, top 12, seafood consumers, 2024



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

When asked what would encourage them to eat more seafood, people say lower prices are key



Ways to encourage people to eat more fish/seafood per week



Lower price



Fish produced without harming the ocean

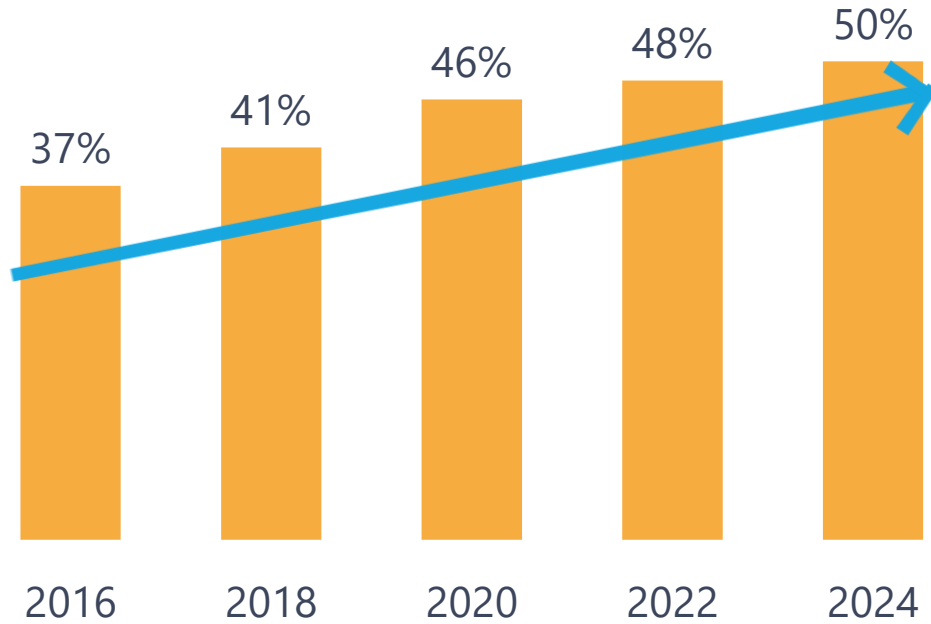


More availability when I shop

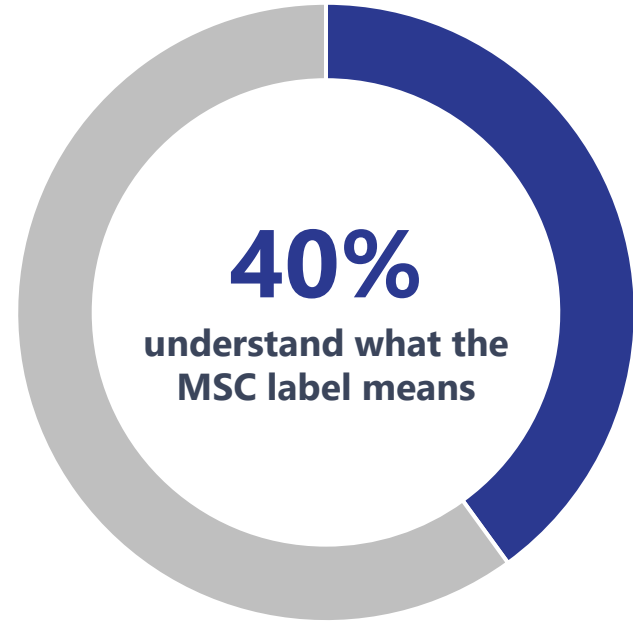


Knowing it could lead to a longer more active life

50% of consumers globally now recognise the MSC label



Awareness of the MSC label, general population, "seen often / occasionally",
Base: General population, global, n=27,134

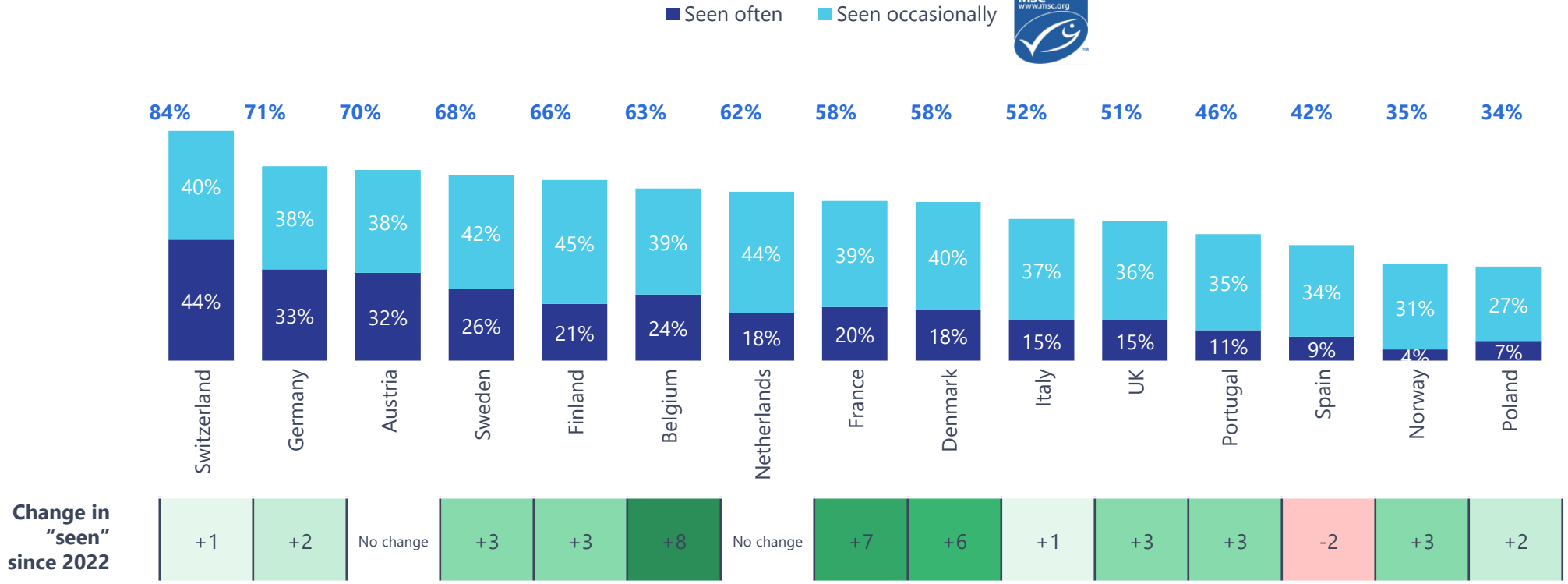


Unprompted understanding of the MSC label, "ocean/fish sustainability" or "certifications/standards",
Base: Seafood consumers, global, n=20,308

There are high levels of recognition of MSC in most markets, with increases since 2022 across most; awareness continues to be highest in Europe



Awareness of the MSC label, by country, general population, 2022 and 2024



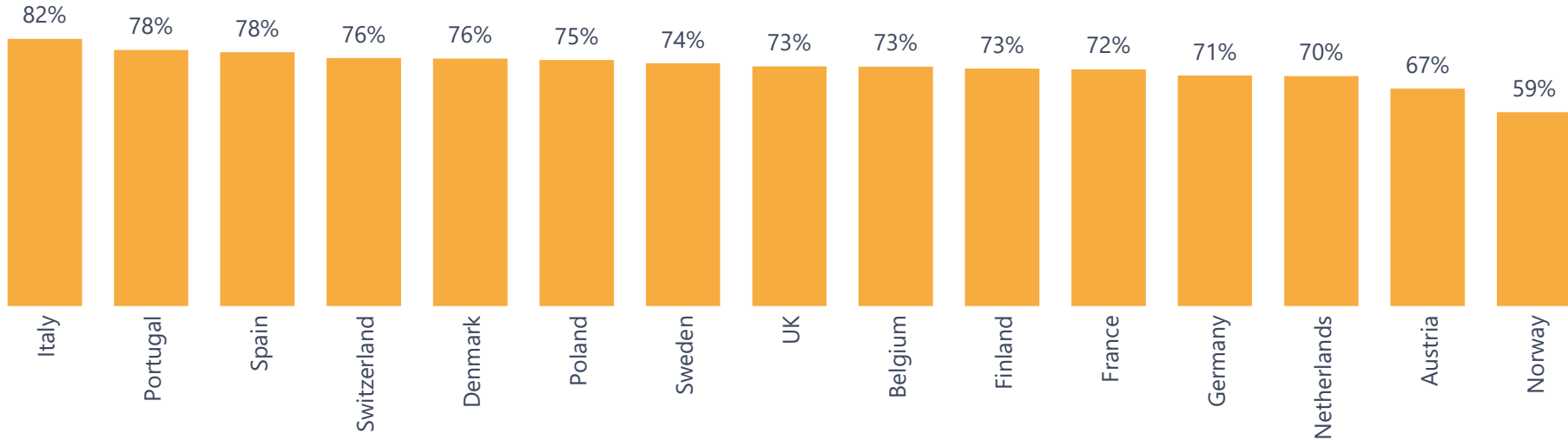
Scale from largest increase (green) to largest decrease (red) since 2022



Trust in MSC remains high across European Markets



Trust in the MSC label (5+6+7 on 7-point scale), by country, MSC-aware seafood consumers, 2022–2024

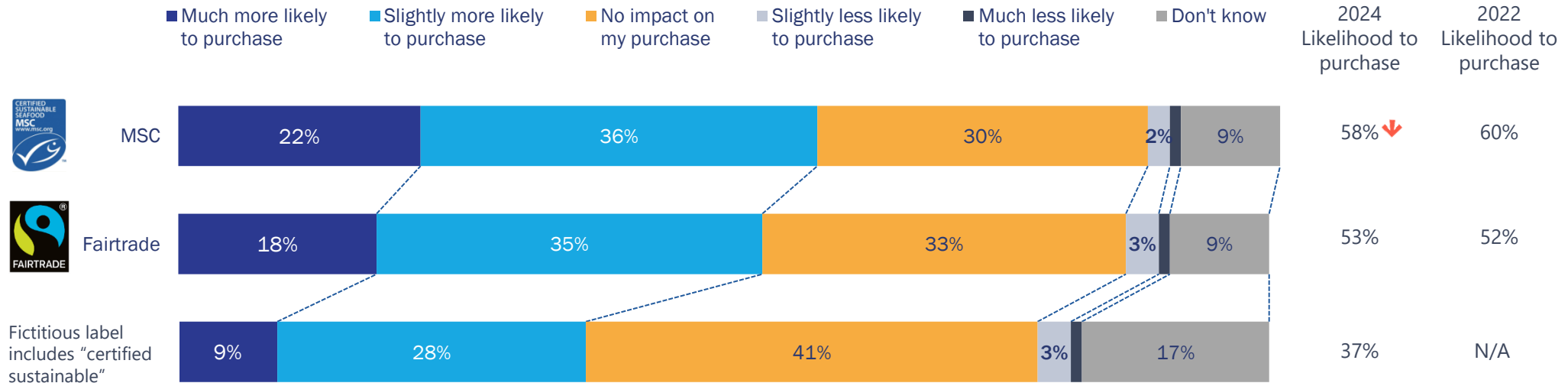


A majority of seafood consumers say seeing the MSC label would make them more likely to purchase a product



Impact on likelihood to purchase, seafood consumers, 2022 and 2024

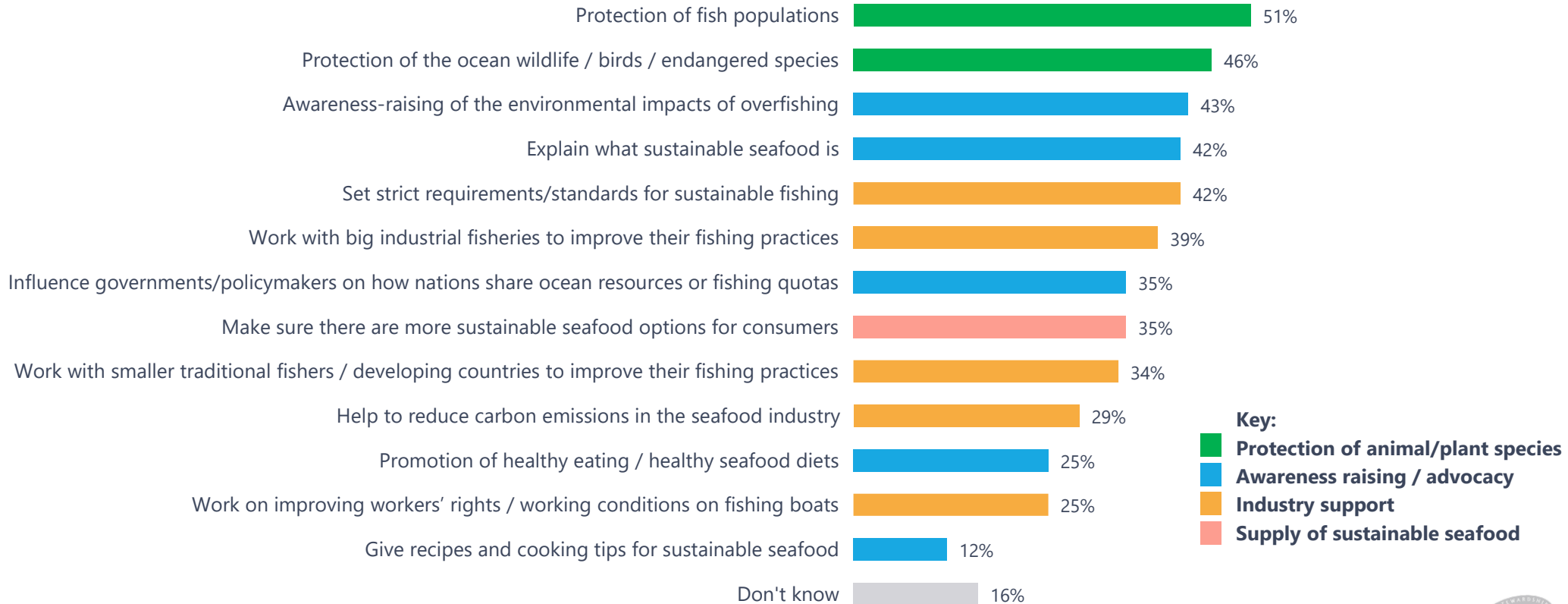
Increase since 2022 (↑)
Decrease since 2022 (↓)



Protection of fish populations and ocean wildlife are considered areas where MSC should play a role; seafood consumers see a strong role for MSC in education and awareness-raising about sustainable seafood and overfishing



Areas where MSC should play a role, multi-select, seafood consumers, 2024



Trust Path analysis



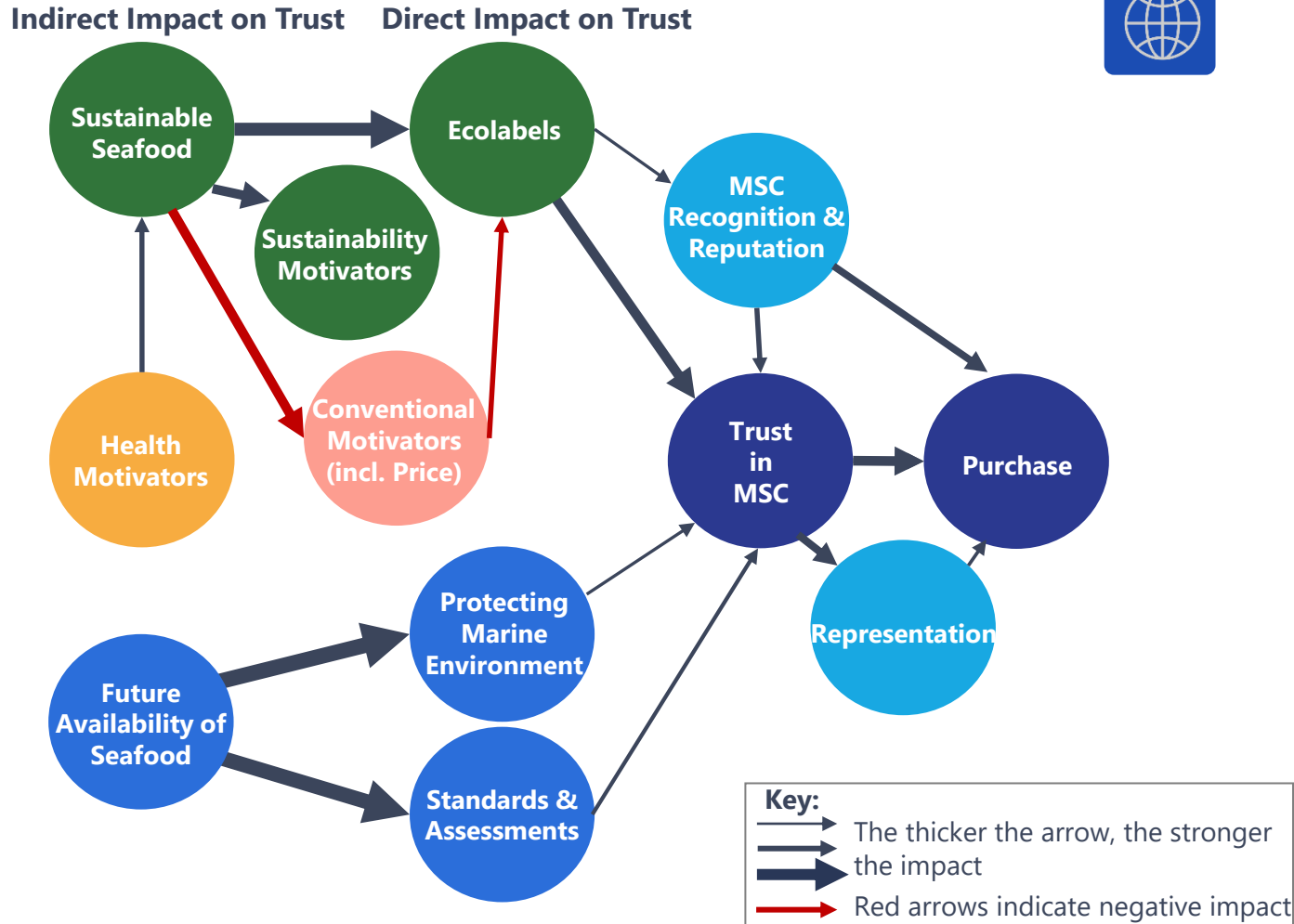
The diagram shows three narratives to build trust in MSC: **health and sustainable seafood**; value of **ecolabels generally**; and MSC’s vision and role in ensuring **future availability of seafood**.

Health purchase motivators and attitudes towards **seafood sustainability** have an indirect influence on trust in MSC and purchase. These two areas strongly support consumer opinions about ecolabels.

Perceptions of **Ecolabels** generally have a direct impact on trust in MSC.

A third pathway relates to MSC’s vision to safeguard seafood for **future generations**. Consumers connect this with two key aspects of MSC’s role – protecting the **marine environment** and **setting strict standards and assessments**. These perceptions directly drive trust in MSC.

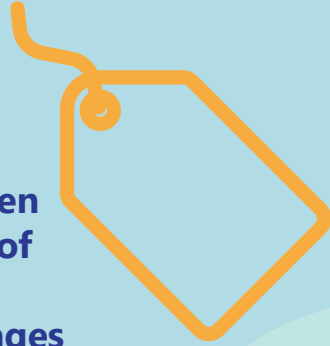
There is one negative pathway – people’s concern about price negatively influences their trust in ecolabels.



How to engage consumers

Price

- Concerns about price have risen
- Promote seafood for a range of budgets
- Mitigate through other messages



Health benefits

- Health is an increasingly strong motivator for seafood purchase
- There is an intrinsic association with 'my health' and 'health of oceans' that can be leveraged



Sustainability Credentials

- There is more concern than ever about environment, oceans and fishing practices
- Brands should address sustainability issues



Thank You

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