

Making Sustainable Seafood Choices Irresistible

Closing the Values-Action Gap

November 14, 2024

The background of the slide is a composite image. On the left, a portion of the Earth is visible, showing the Americas. On the right, a large school of fish is shown swimming in the ocean. A semi-transparent circle is overlaid on the center, containing the word "WELCOME".

WELCOME

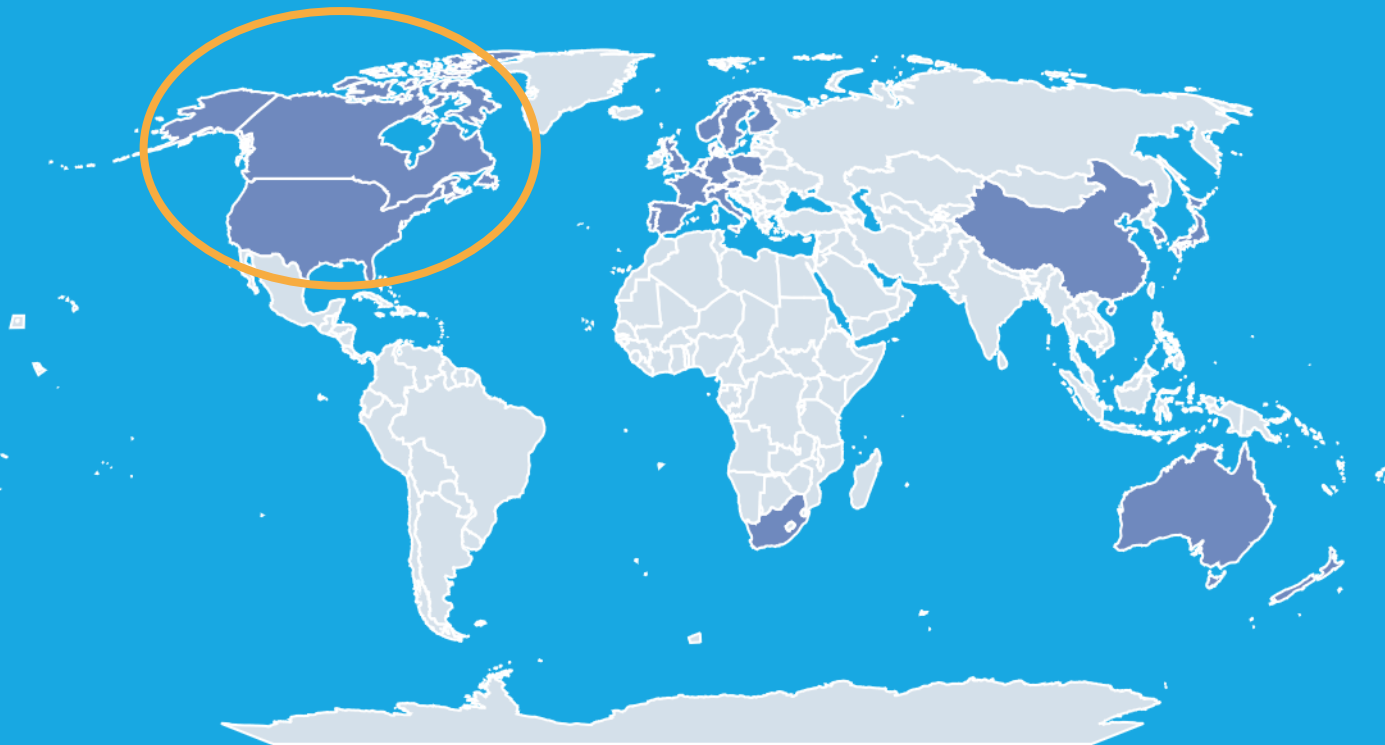


Know your world.
Lead the future.

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 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
January – March 2024*

**Healthy &
Sustainable
Living**

*n=30,216 consumers
in 31 countries
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: Don't "Greenshift" – consumers are just part of a collective action





How are consumers feeling in 2024?

Worries about conflict, hunger, and clean water are top of mind in North America



Top-of-mind concerns are...

% rating as
“Very serious”



North America

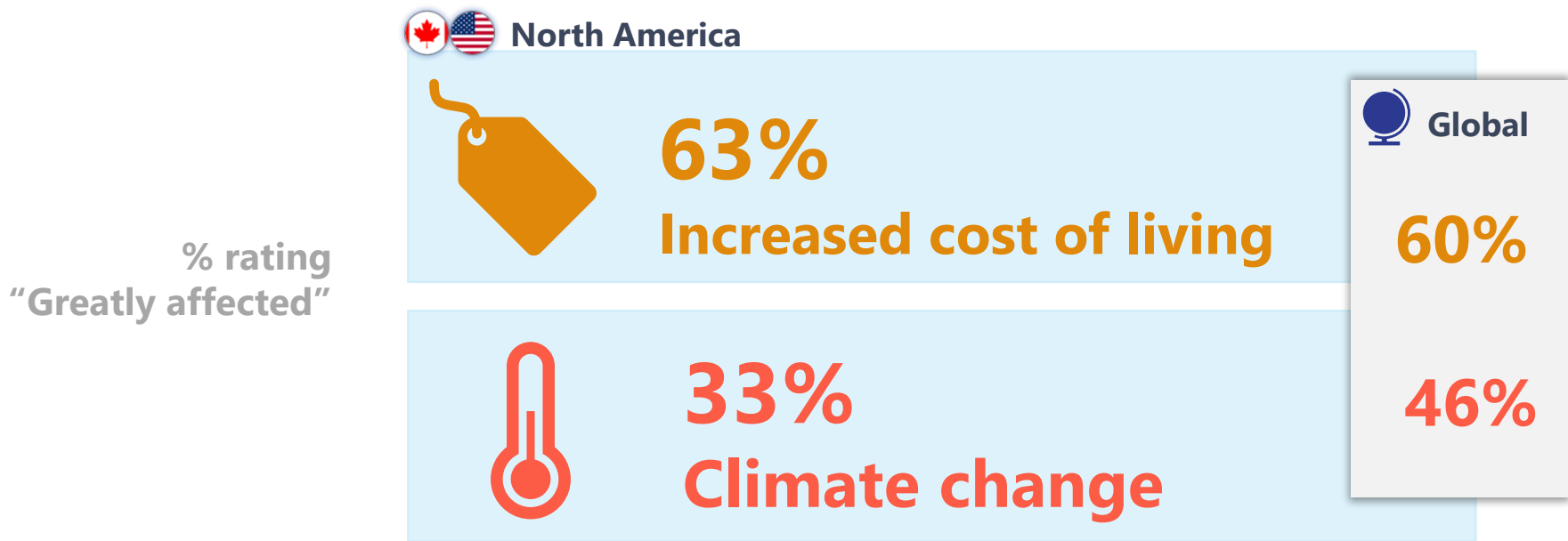


Global



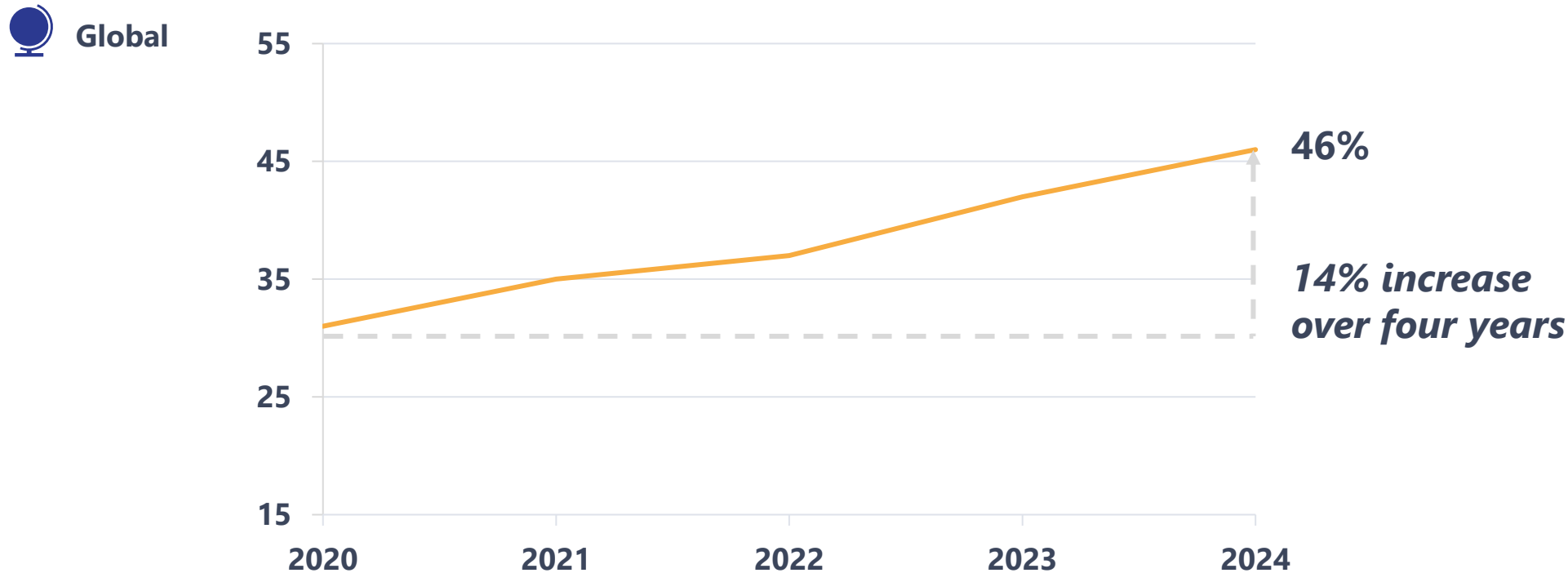
People are feeling the effects of cost of living and climate change in North America and around the world

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



Globally, people report feeling increasingly personally affected by climate change

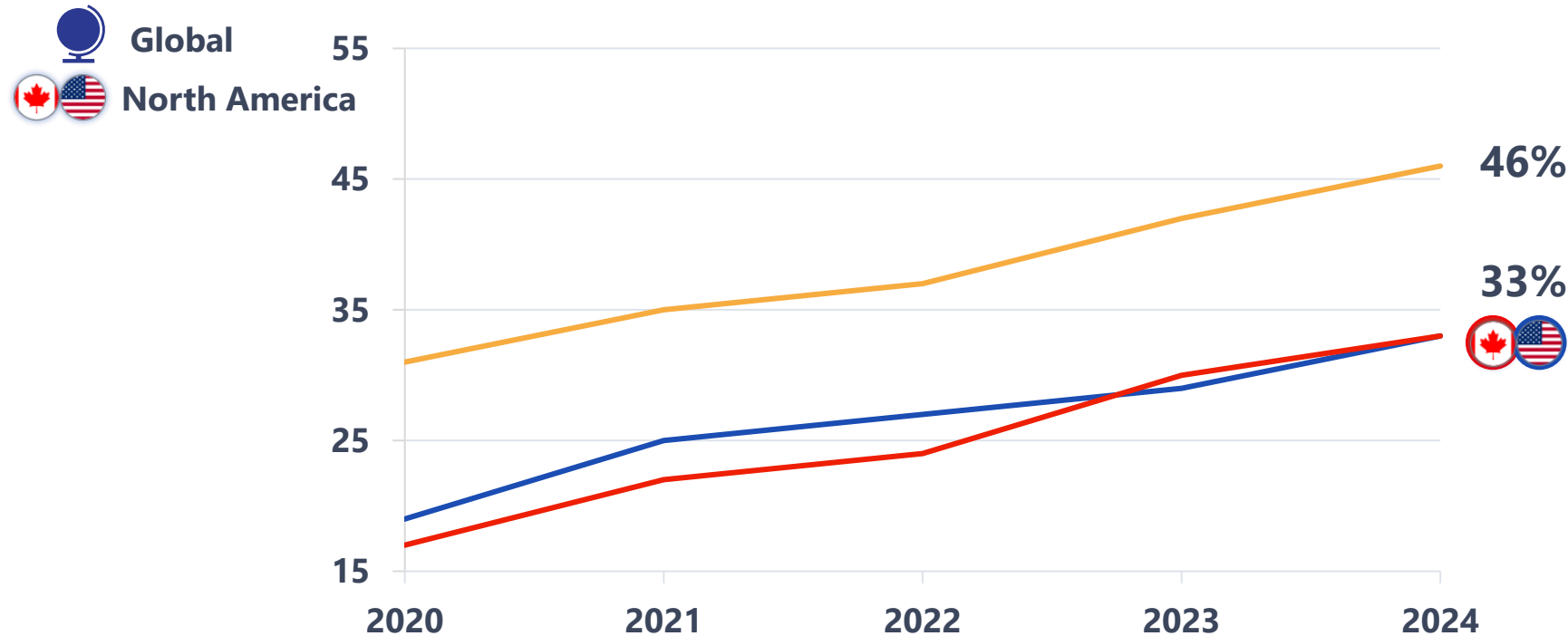
“Greatly Affected” by Climate Change, Average of 26 Countries,* 2020–2024



8 Source: GlobeScan’s Healthy and Sustainable Living Survey 2024 31-country total n=30,216

With steady rises also seen in North America

“Greatly Affected” by Climate Change, Average of 26 Countries vs North America,* 2020–2024



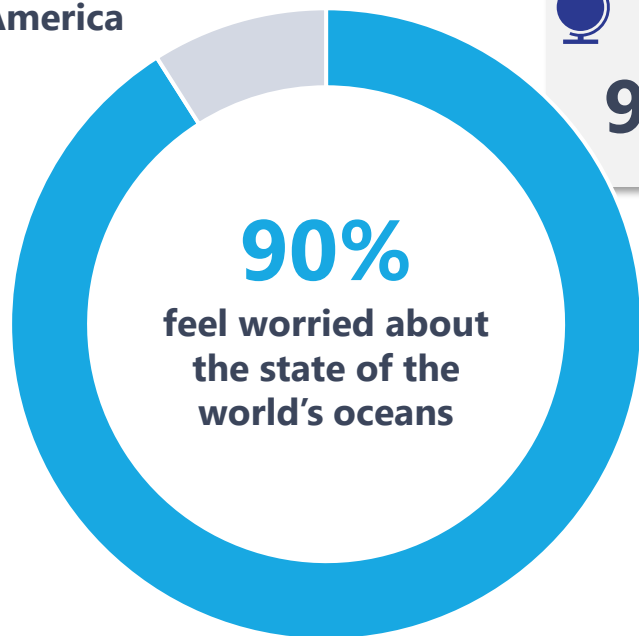
*For consistent tracking, this chart does not include Colombia, Egypt, Netherlands, Peru, and Portugal as these markets were not surveyed in 2020.

T2. How much are you personally affected by each of the following? – Climate change or global warming

North Americans are also worried about the oceans and nearly half are pessimistic about the future



North America

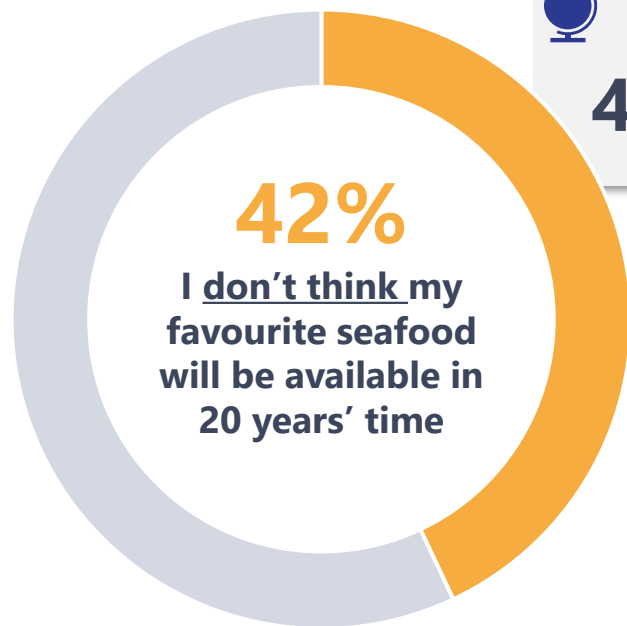


Perceptions of ocean health, "agree"
General Population



Global

91%



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



Global

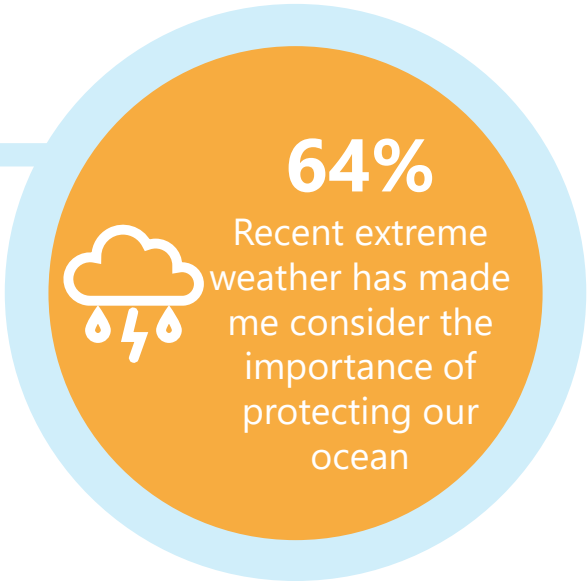
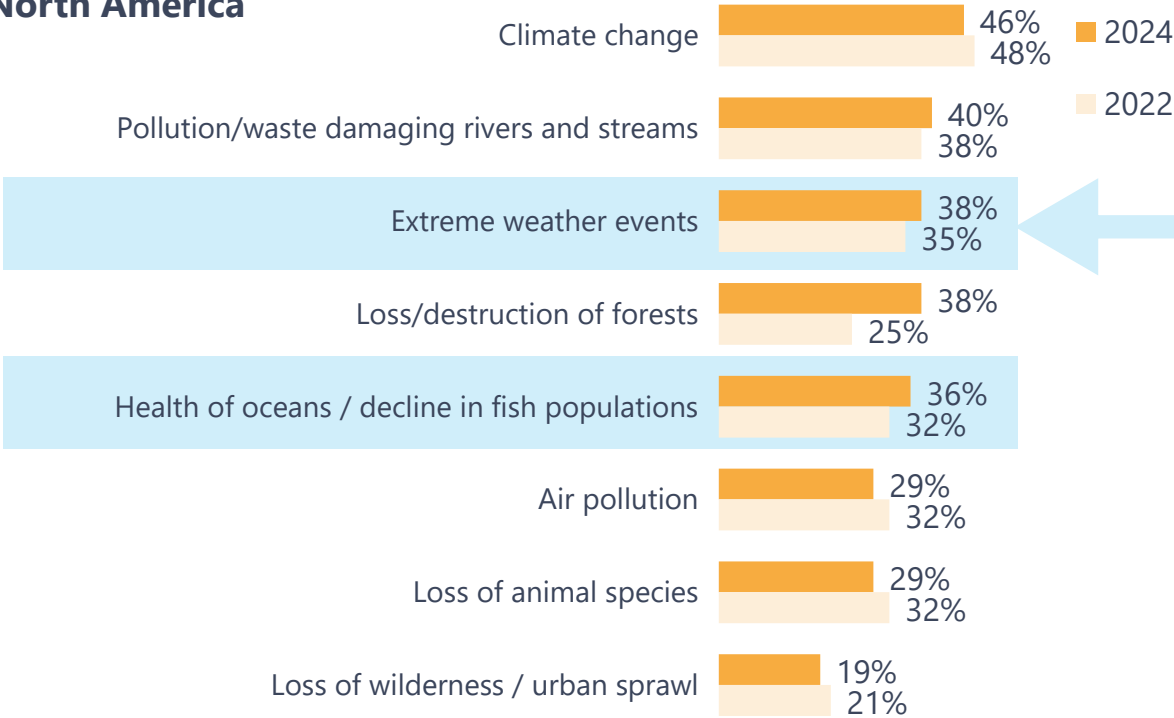
43%



They express growing concerns on many issues as more than two in three connect extreme weather with oceans



North America



Base: General Population, North America, n=5,901
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?








The Values-Action Gap

Seafood consumers want to do their part to protect fish and seafood but the value-action gap persists

North America

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



Base: Seafood consumers, North America, $n=4,088$

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?

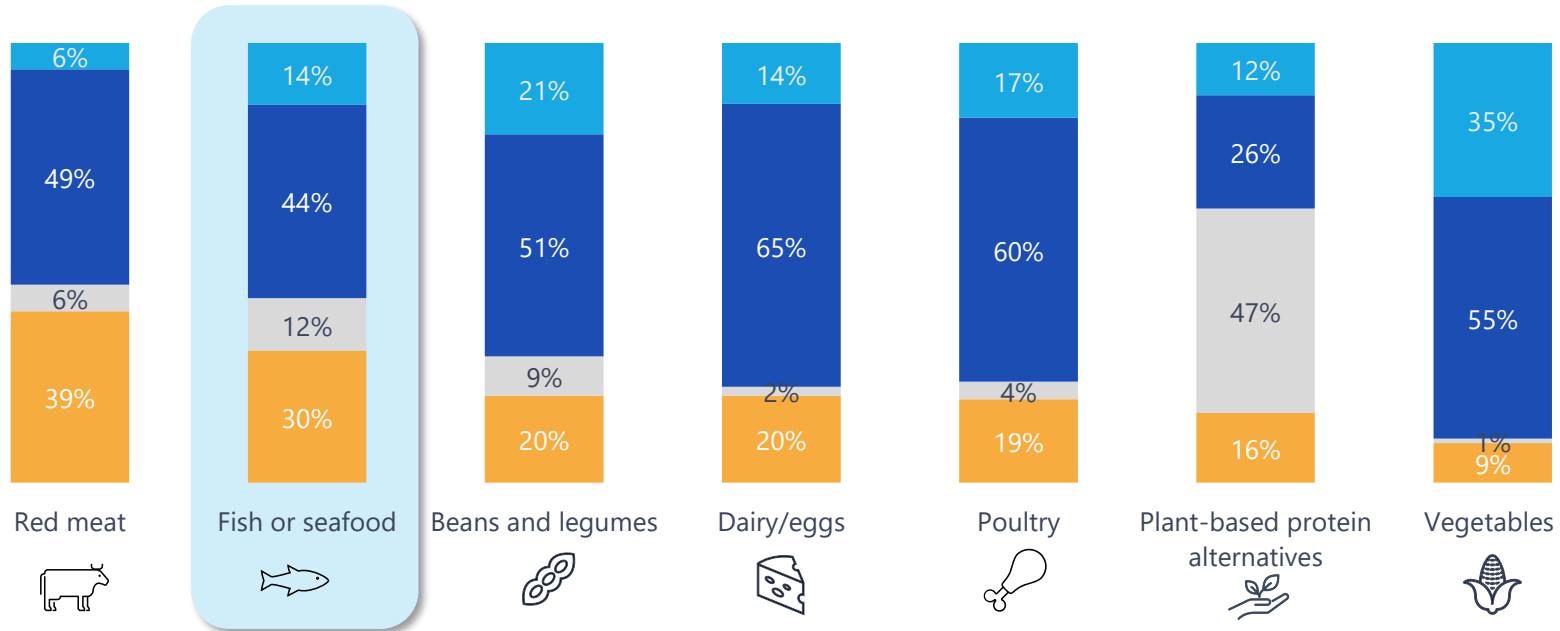


When it comes to diet, North Americans are eating less meat and seafood, more vegetables and beans/legumes



North America

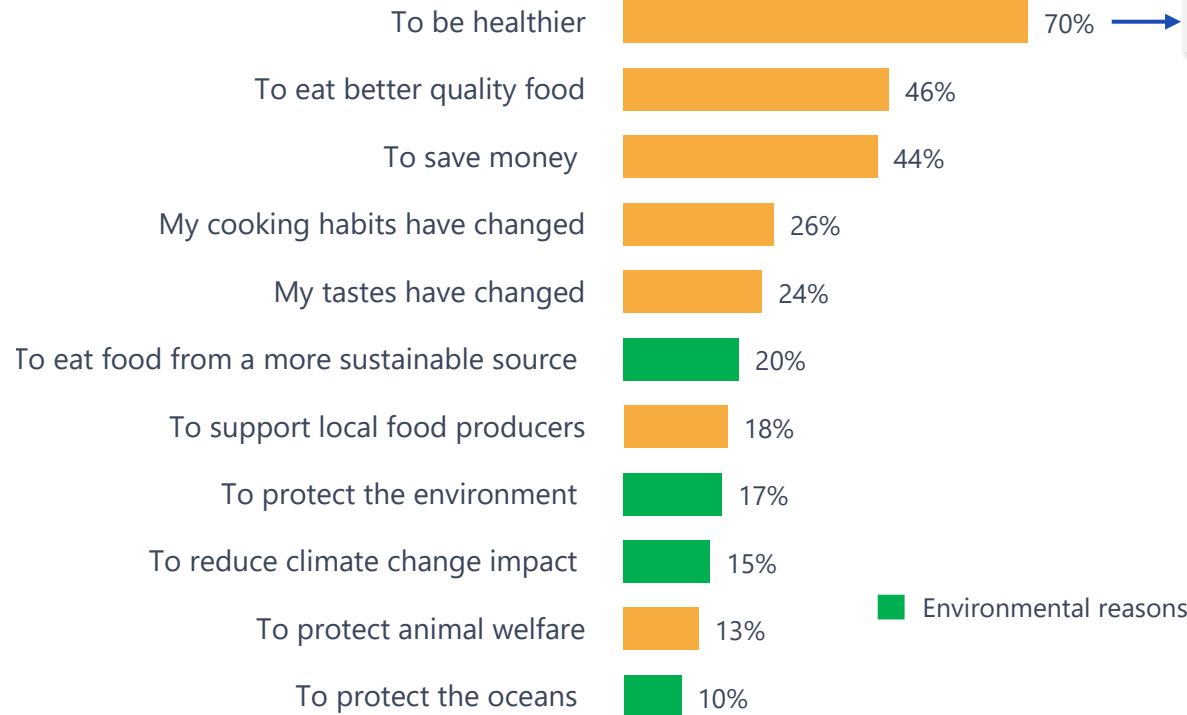
■ Eat less ■ Didn't eat two years ago and still don't ■ Eat the same ■ Eat more



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



North America



Global

43%

35%

Have changed diet for environmental reasons

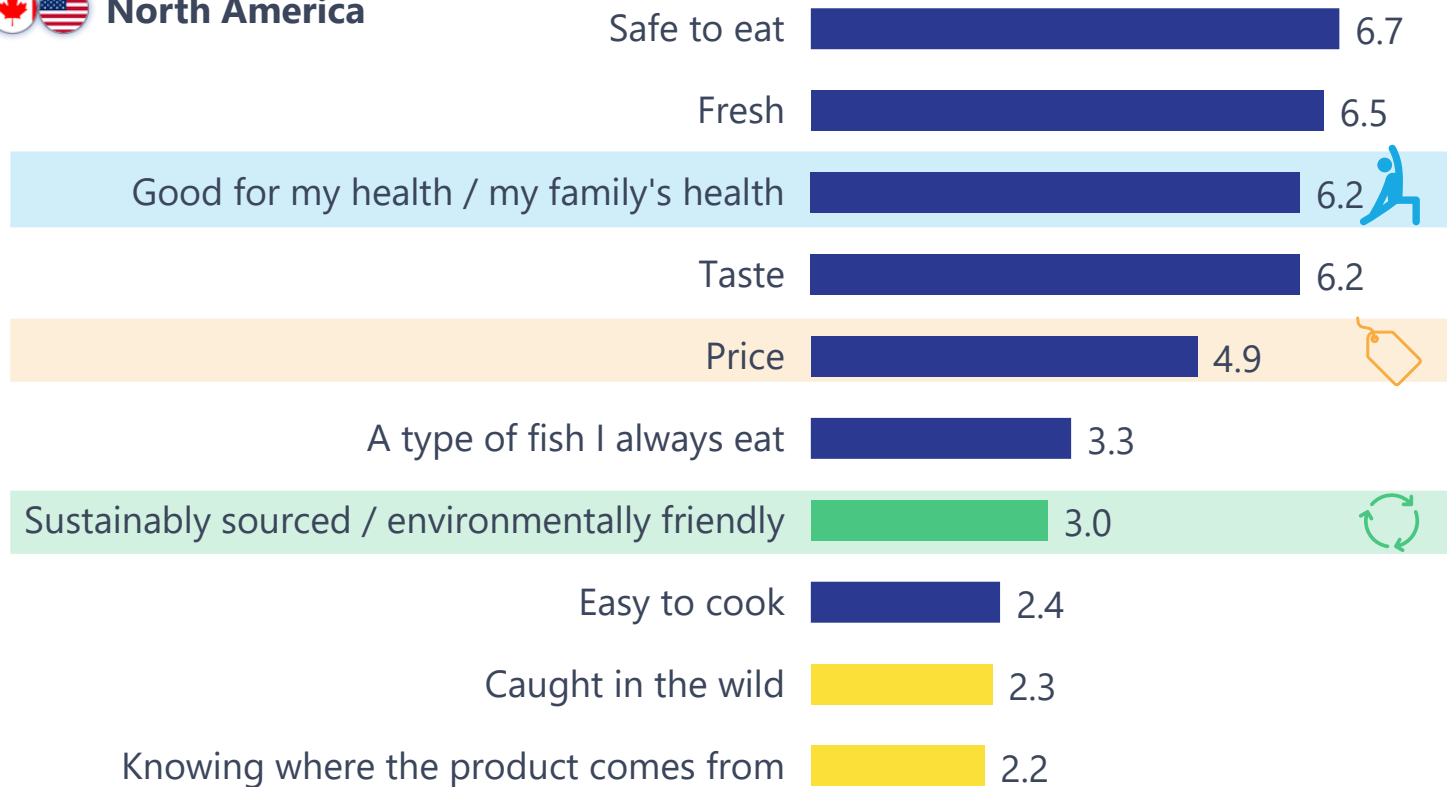
Environmental reasons



People who buy seafood are motivated by quality, health, and price, with sustainability holding steady



North America



Key:

- Conventional purchase motivators
- Sustainability-focused
- Traceability-focused

Base: Seafood consumers, North America $n=4,088$

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?



People can be encouraged to eat more seafood through price, health, and availability



North America



These can be emphasized in communications



Lower price

Global
53%



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

Global
20%



*Fish produced without
harming the ocean*

Global
27%





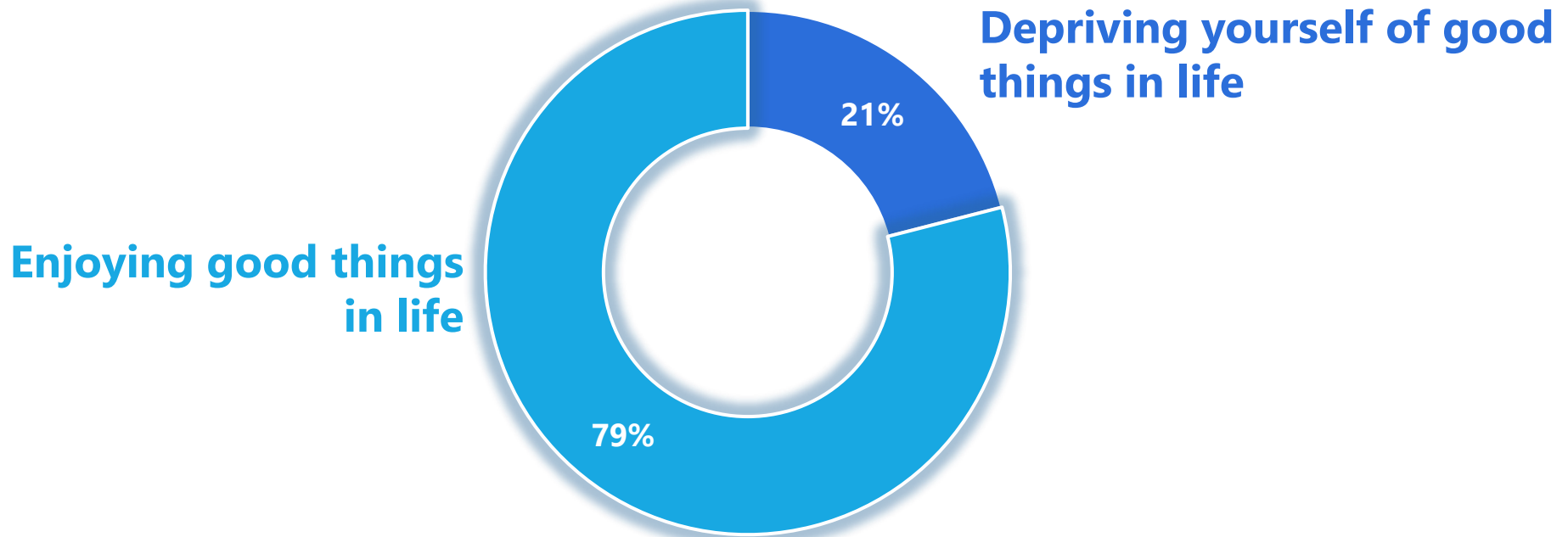
Making Sustainable Choices Irresistible

Considering a sustainable lifestyle, people overwhelmingly associate it with enjoying good things in life



North America

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



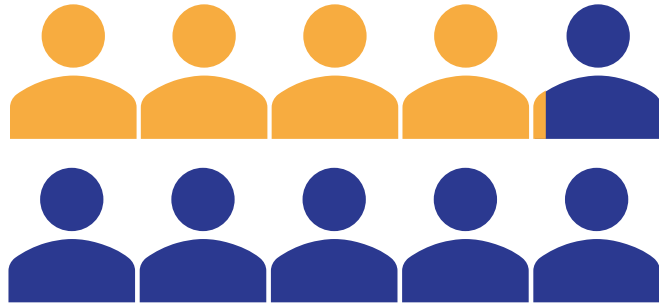
Four in ten North Americans have bought a sustainable product in the past month



North America

42%

Have bought a sustainable product
in the past month



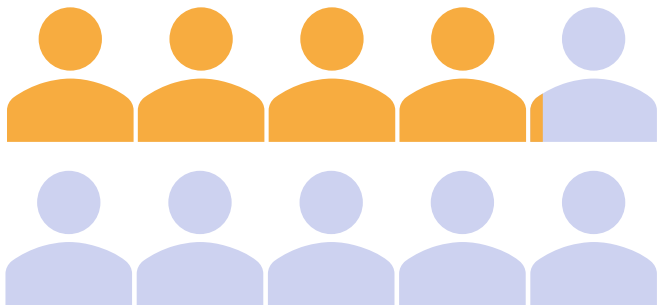
People who have bought sustainable products are most likely cued by packaging or ecolabels



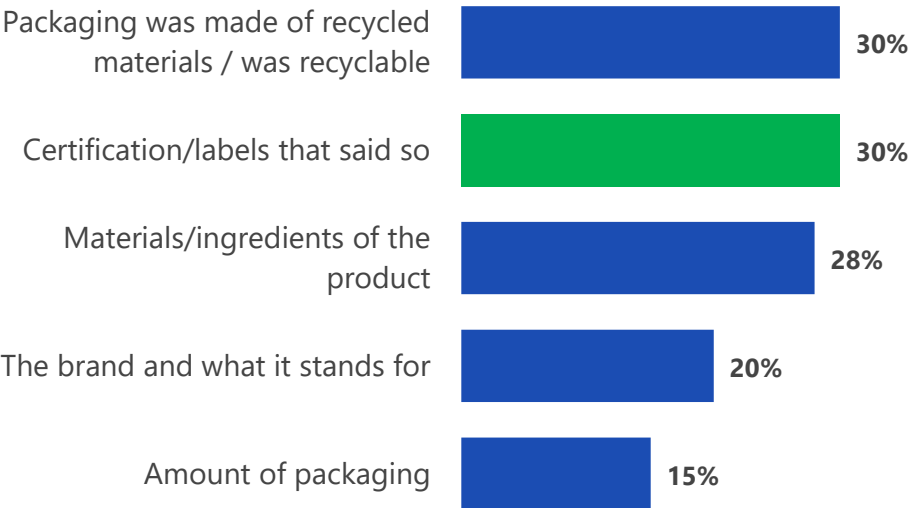
North America

42%

Have bought a sustainable product
in the past month



How did you know the product was sustainable?



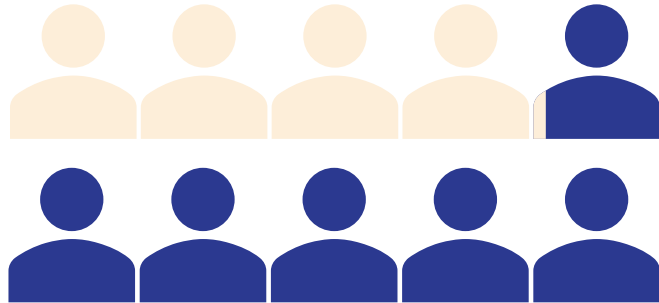
People who haven't bought sustainable products recently would have liked to, if they could have



North America

58%

Have not bought a sustainable product
in the past month



... but **73%** of them

would have liked to buy a sustainable product if they could have

Price, knowledge, and availability are focus areas to encourage consumers toward sustainable products



North America

Why were you not able to buy any product that was environmentally responsible in the past month even though you would have liked to?



Too expensive

Global
53%



Didn't know about it

Global
38%



Didn't find it

Global
35%



The Inevitability of Collective Action

Seafood consumers are interested in learning from companies about seafood sustainability



North America



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

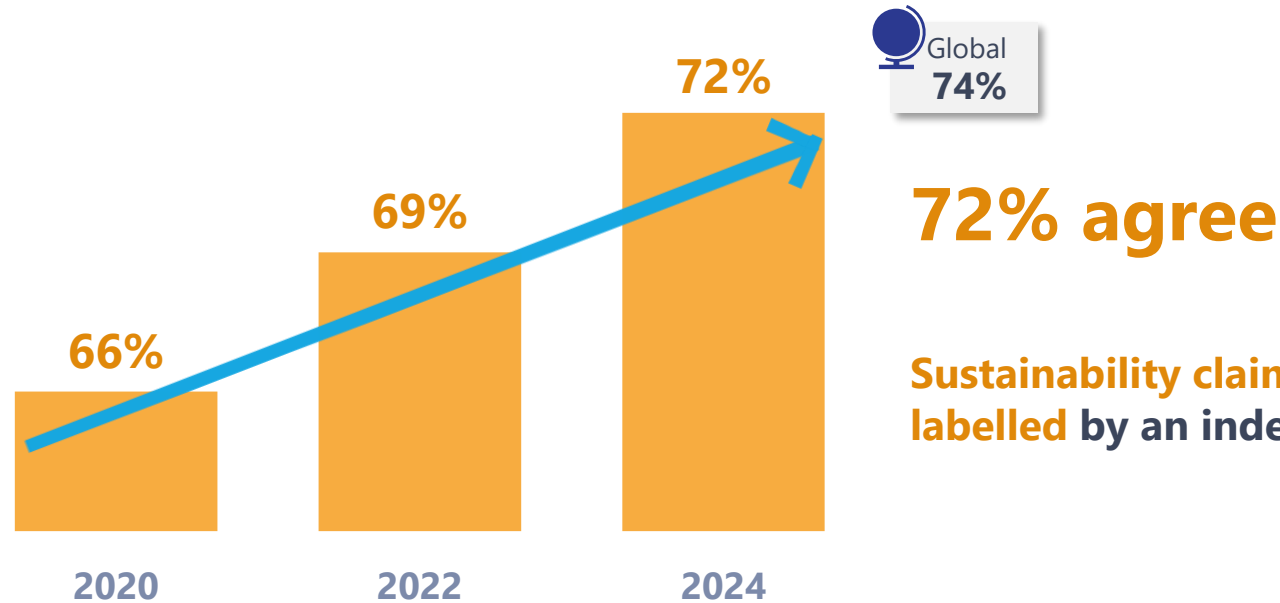


Increase since 2022

And increasingly looking for validation on brands' and supermarkets' sustainability claims



North America

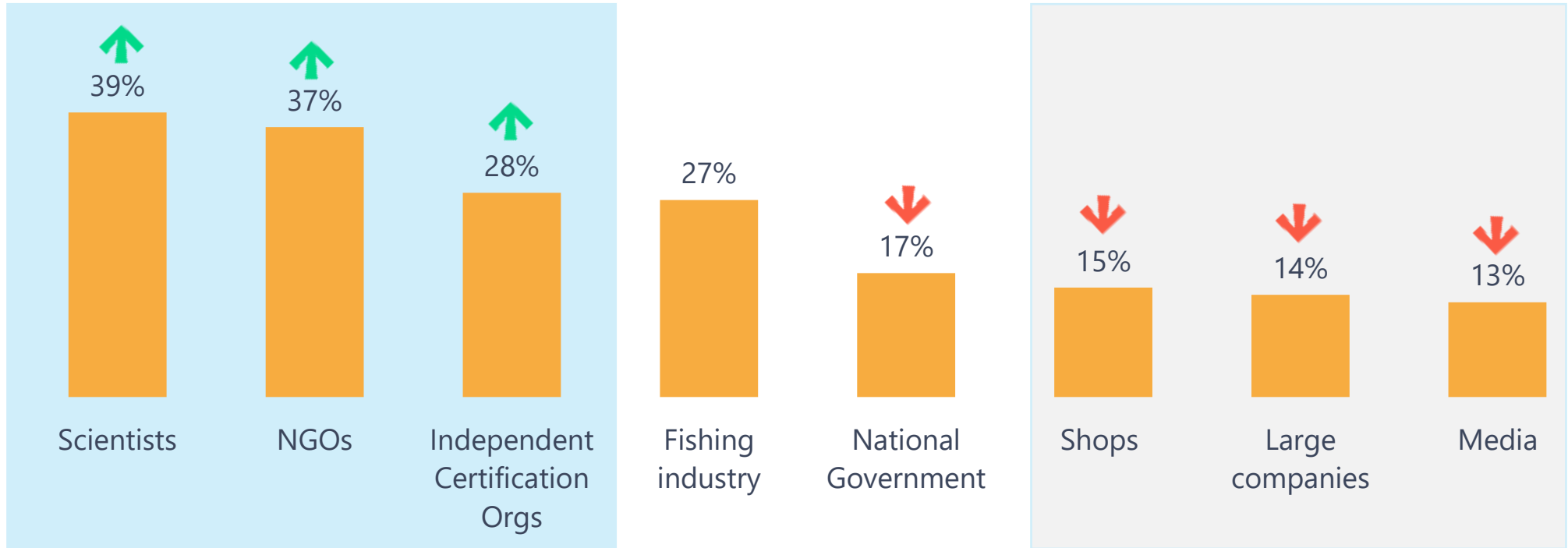


Sustainability claims need to be clearly labelled by an independent organization

It will take a system approach to rebuild consumer trust that retailers, media, and governments are protecting oceans



North America



Base: Seafood consumers, North America, $n=4,088$

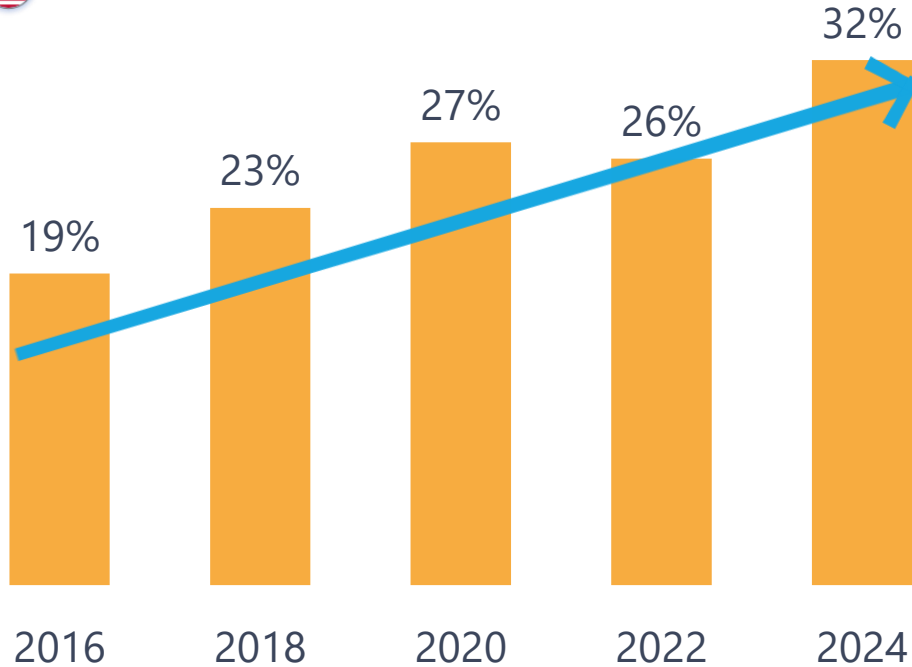
Some people believe that action needs to be taken to protect the world's ocean environment. How well do you think the following groups or institutions are contributing to protecting the world's ocean environment?



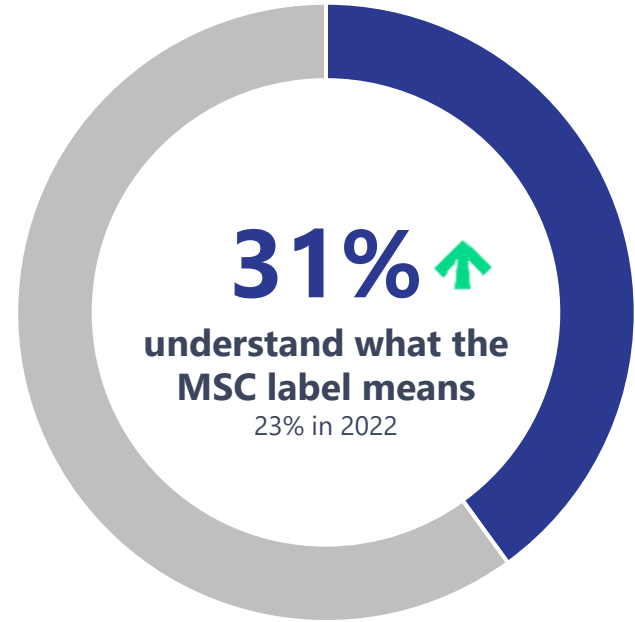
MSC label awareness has grown significantly in North America, as well as understanding



North America



Awareness of the MSC label, general population, "seen often / occasionally",
Base: General population, North America = 5,901



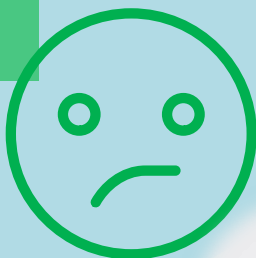
Unprompted understanding of the MSC label, "ocean/fish sustainability" or "certifications/standards",
Base: Seafood consumers, North America, n=4,088



How to encourage people to eat sustainable seafood

Tackle consumer pessimism and eco-concern

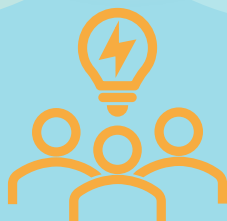
- Guide consumers to make informed decisions
- Empower individuals to recognize that their sustainable choices make a meaningful impact



Make sustainability irresistible

- Connect sustainable choices with health benefits and wallet friendly options
- Make them easier to find and identify in stores and supermarkets

Closing the value-action gap



Collective effort

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

Thank You

The Marine Stewardship Council (MSC)

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