

Making Sustainable Seafood Choices Irresistible

Closing the Values-Action Gap

5th December 2024



WELCOME

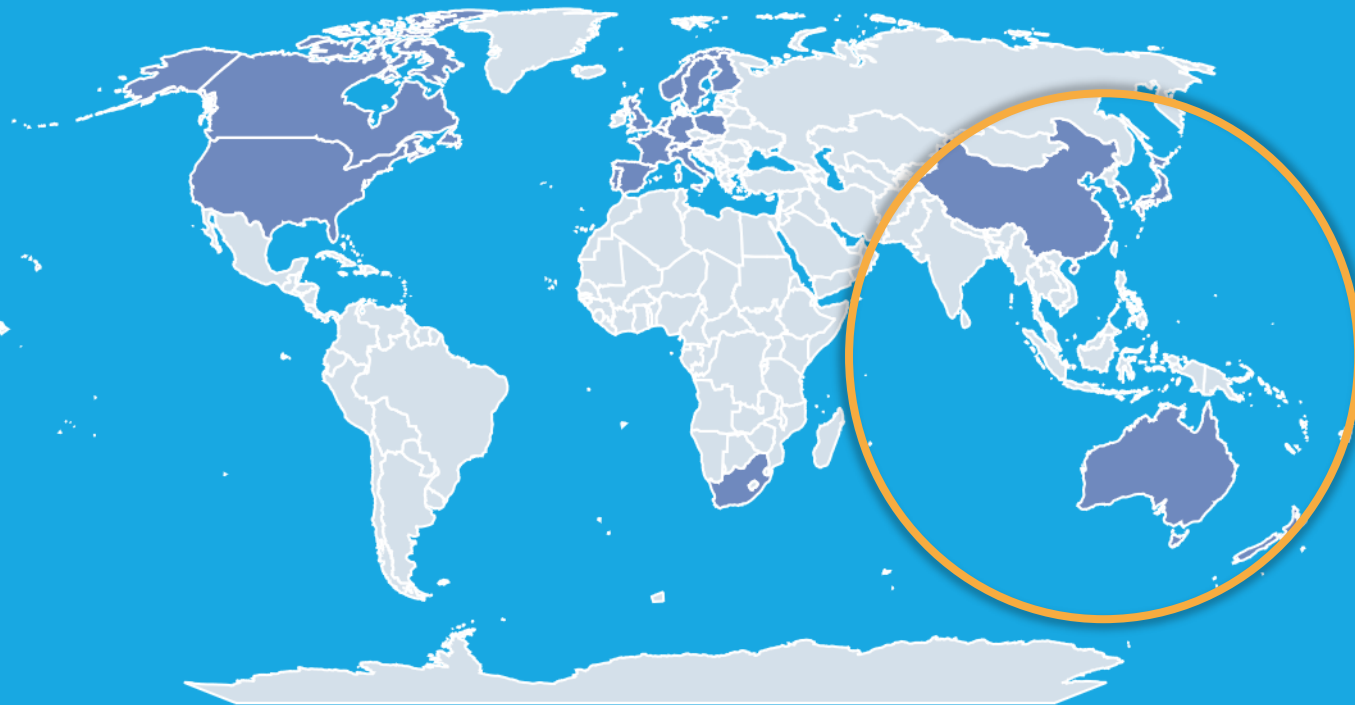


Know your world.
Lead the future.

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

n=4,445 APAC seafood consumers
January – March 2024

**Healthy &
Sustainable
Living**

n=30,216 consumers in 31 countries
n=9,055 APAC 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.

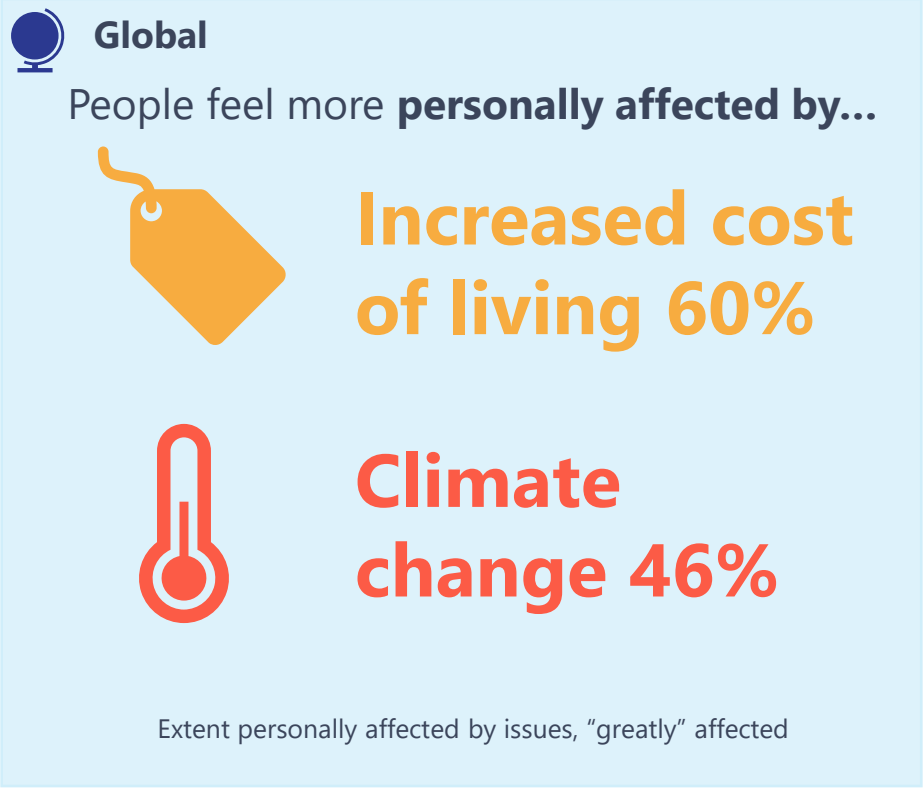
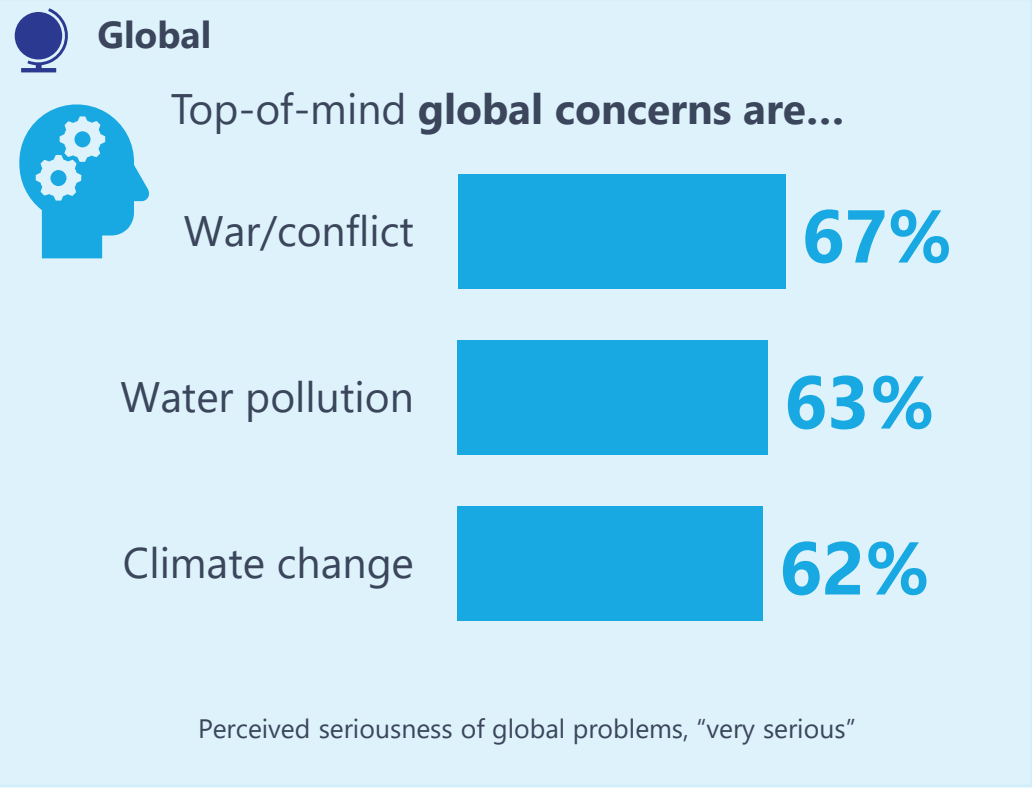
Who Creates Change: Consumers are one part of the collective action needed to have positive impact



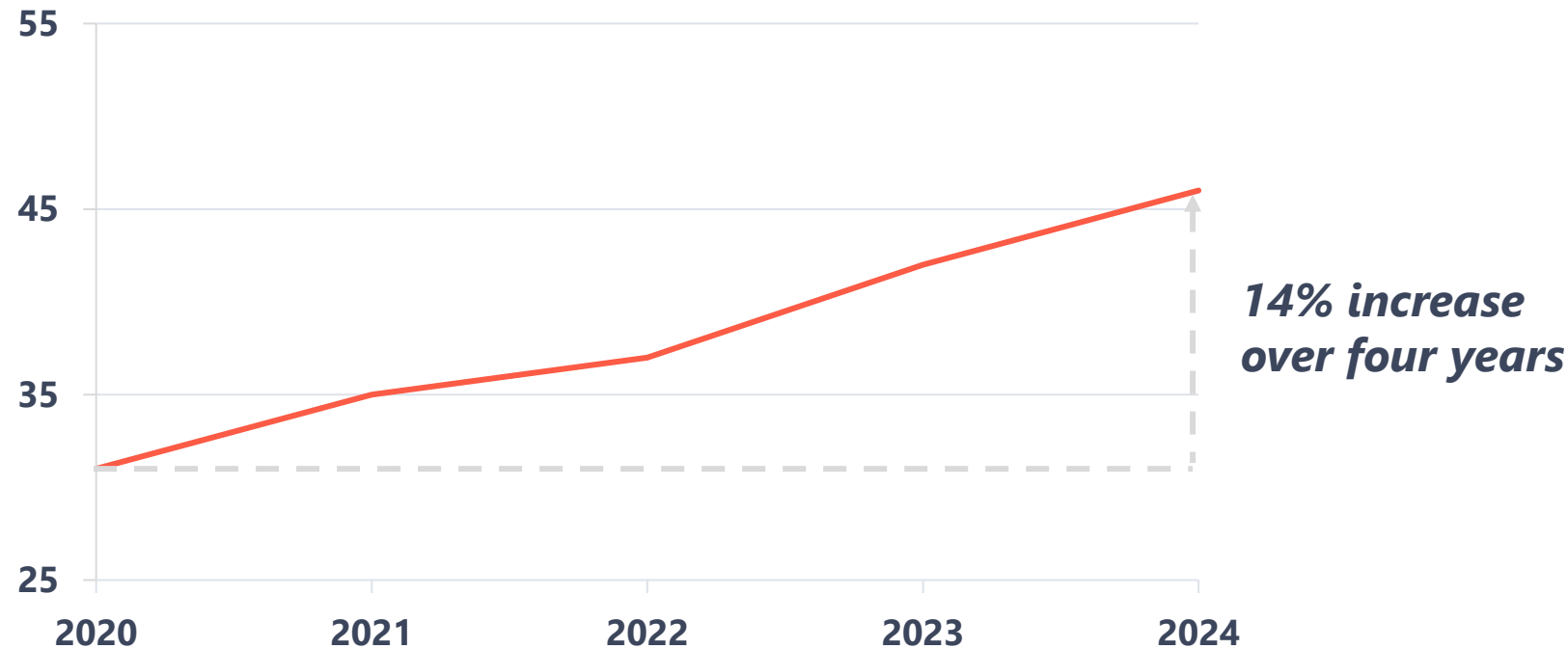


How are consumers feeling in 2024?

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



People are increasingly feeling personally affected by climate change

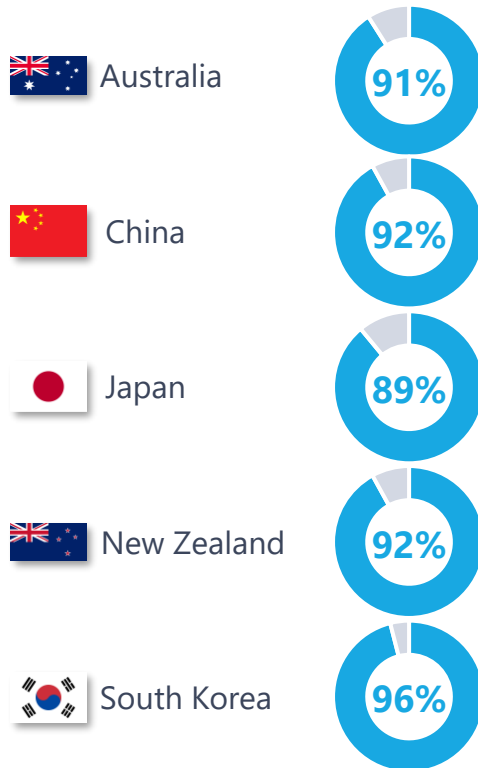


7 Base: 31-country total n=30,216
T2. How much are you personally affected by each of the following? – Climate change or global warming.

Across all countries seafood consumers are worried about the oceans and are feeling pessimistic about the future

feel worried about the state of the world's oceans

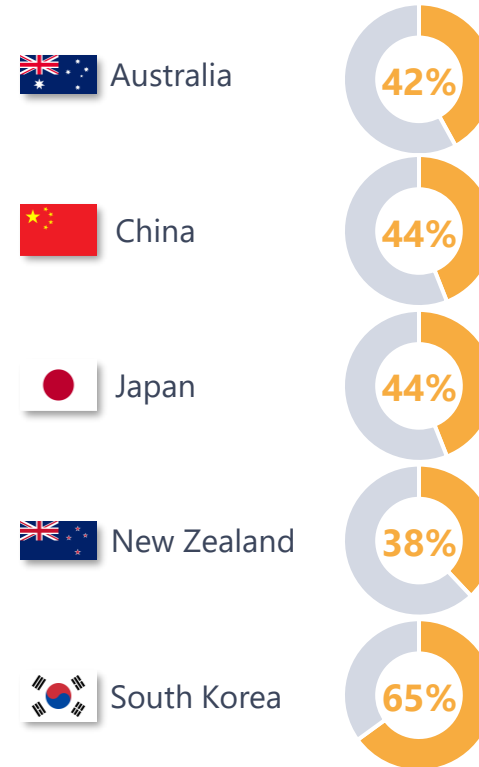
Perceptions of ocean health, "agree"



23-country
average
91%

I doubt my favourite seafood will be available in 20 years

Perceptions of fish availability, "describes opinion well"



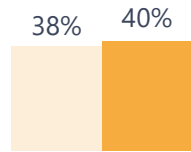
23-country
average
43%



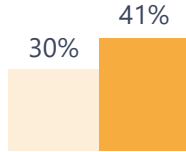
**Globe
Scan**

Increased weather concern is high in APAC, with seafood consumers linking it to protecting the ocean

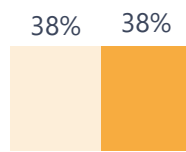
■ =2022 ■ =2024



Global

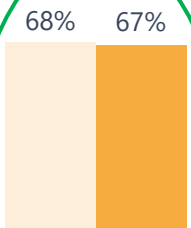


Australia



China

Air pollution is the biggest issues in China at 58%

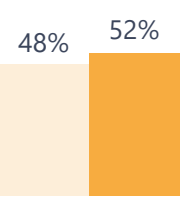


Japan

59%



New Zealand



South Korea



23-country average

64%



APAC

68%

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

Base: Seafood consumers, APAC, n=4,445, question not asked in New Zealand in 2022

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?



Section overview

- People are concerned about climate change and are feeling more personally affected by it.
- Consumers are linking effects of climate change with the need to protect the oceans
- Concern about the state of the oceans is at an all time high, whilst consumers are feeling pessimistic about the future of seafood

Recommendation: Empower consumers to make sustainable choices, and emphasise the benefits of choosing sustainable seafood



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

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



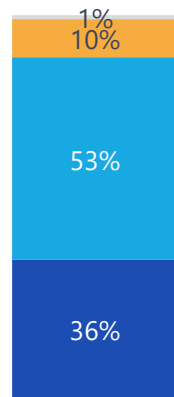
APAC

■ Eat more

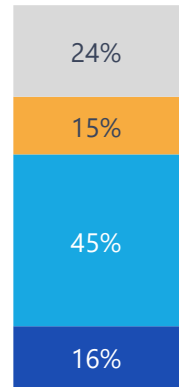
■ Eat the same

■ Eat less

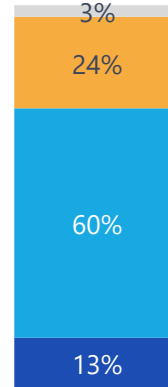
■ Didn't eat two years ago and still don't



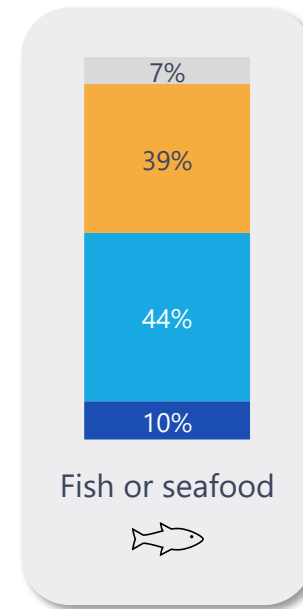
Vegetables



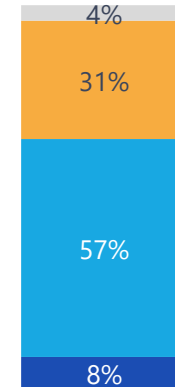
Plant-based alternatives
to meat and
dairy protein



Poultry



Fish or seafood



Red meat



Base: General population, APAC, n=5,816

Q101: Do you eat more or less of the following foods than you did two years ago?

Diet swaps from red meat to fish and fish to vegetarian / vegan, wide range in APAC of those eating less seafood



APAC

Those eating more fish



11%
23-country average

10%
Australia

11%
China

11%
Japan

11%
New Zealand

8%
South Korea



Are eating less....

Red meat
34%

Poultry
19%

Those eating less fish



34%
23-country average

38%
Australia

54%
China

23%
Japan

36%
New Zealand

52%
South Korea



Are eating more....

Vegetables
41%



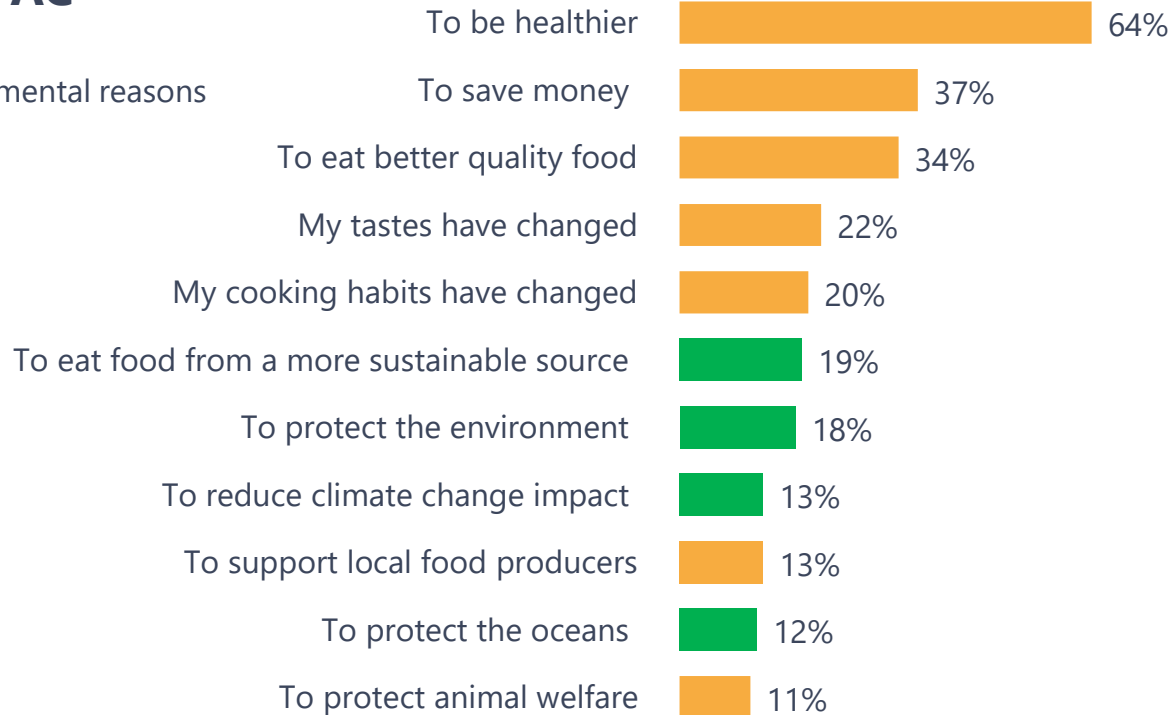
Diet changes are motivated by a combination of health, money and being better for the environment



APAC



Environmental reasons



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



APAC

36%



Australia

35%



China

62%



Japan

19%



New Zealand

29%



South Korea

27%



Base: Europe, Those who eat more or less of any of the listed foods
Q102: What are the reasons for changing your diet in the last two years?

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

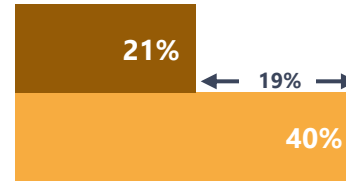


APAC

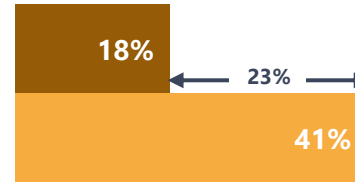
- Actions taken in the last year
- Actions willing to take in the future

↔ Value-action gap

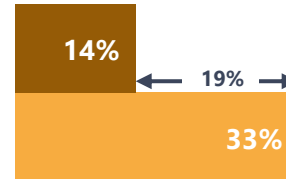
Bought/buy more sustainable seafood



Bought/buy more seafood with an ecolabel on the packaging



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



Base: Seafood consumers, APAC, $n=4,445$ 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?



Section overview

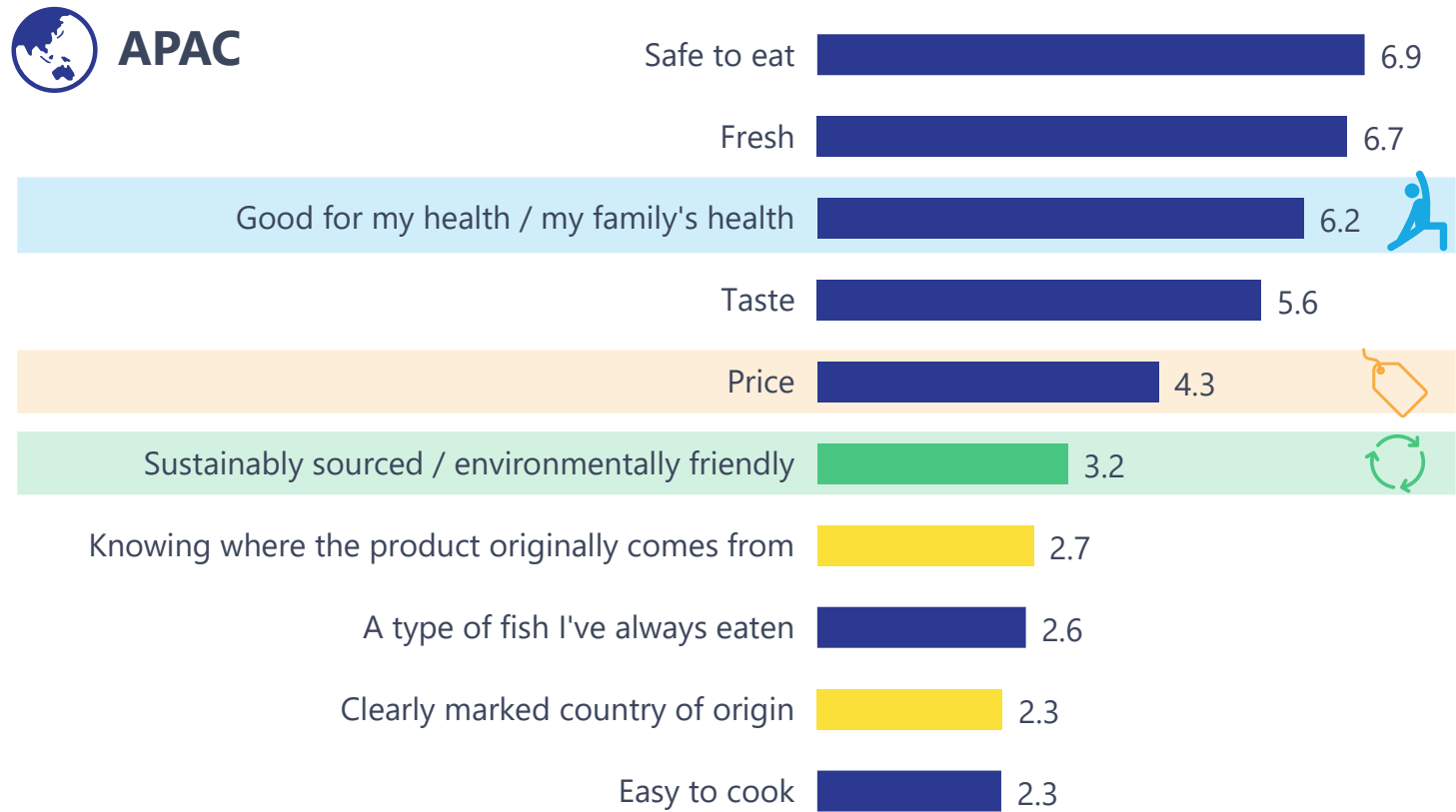
- People are eating less meat and seafood, often replacing them with vegetables.
- These changes are driven by health, cost, and sustainability considerations.
- Despite this, a values-action gap persists, with many expressing a desire to eat more sustainable seafood in the future but not yet making the shift.

Recommendation: Encourage sustainable seafood as a healthy, affordable alternative to meat, raise awareness of its environmental benefits, and promote plant-seafood meal options.



Making Sustainable Choices Irresistible

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



Key:

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

Base: Seafood consumers, APAC, n=4,445

18 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



APAC



Lower price



Knowing it could lead to a longer more active life



More availability when I shop



Fish produced without harming the ocean

Highest scoring country



Japan 64%



New Zealand 64%



China 39%



Japan 31%



Australia 27%



China 27%



Base: Seafood consumers, APAC, n=4,445

Q111: Which of the following reasons would encourage you to eat more fish/seafood per week?

Price is the main driver in both Europe and North America, with health being more influential in North America and sustainability in Europe



**North
America**

57%
price

Lower price

30%
health

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

27%
sustainability

*Fish produced without
harming the ocean*

23%
availability

*More availability
when I shop*



Europe

53%
price

Lower price

29%
sustainability

*Fish produced without
harming the ocean*

22%
availability

*More availability
when I shop*

18%
health

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

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



APAC

53%

Have bought a sustainable product
in the past month



50%



Global

42%



Australia

60%



China

25%



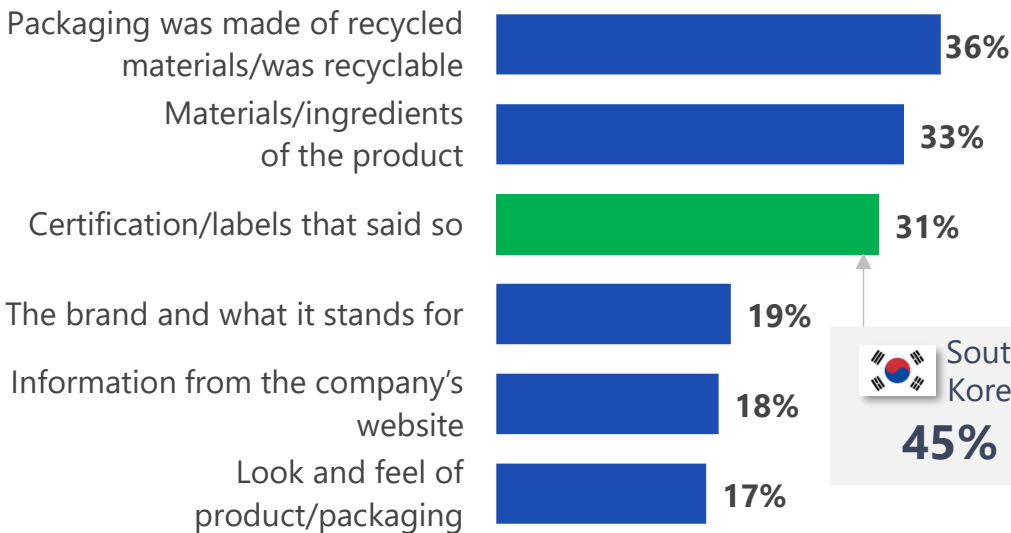
Japan

37%



South
Korea

How did you know the product was sustainable?



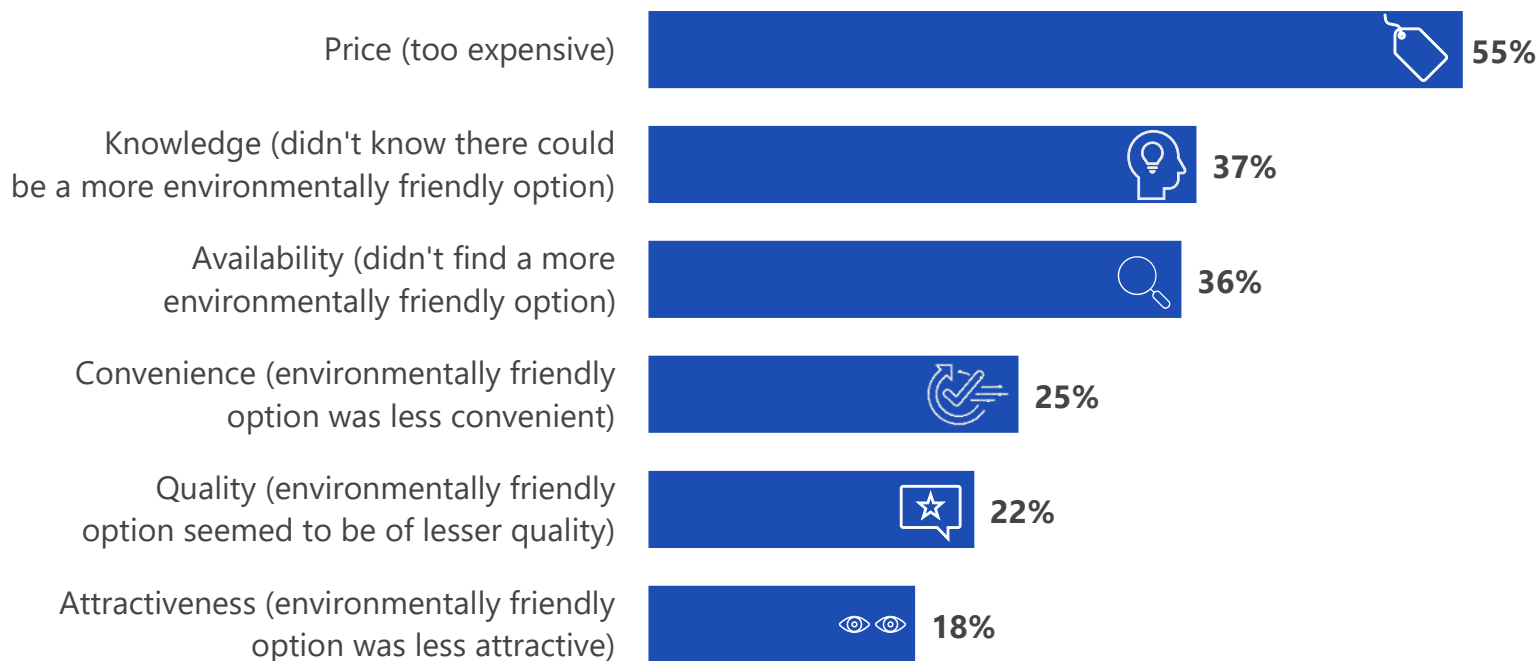
South
Korea

45%

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



APAC



Highest reason in all MSC APAC countries apart from China, Availability is the biggest issue in China

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

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



APAC

60%

52%



Global

59%



Australia

49%



China

66%



Japan

67%



New
Zealand

59%



South
Korea



Section overview

- Price health and sustainability all motivate sustainable seafood purchases.
- Consumers are using certifications, as well as packaging and materials to know a product is sustainable
- However, they are finding it hard to know what is sustainable and identify sustainable products

Recommendation: Connect sustainable choices with health benefits and cost savings, and make sustainable choices easier to identify

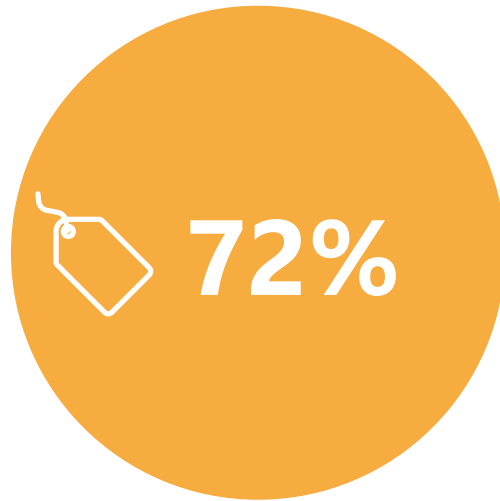


The Inevitability of Collective Action

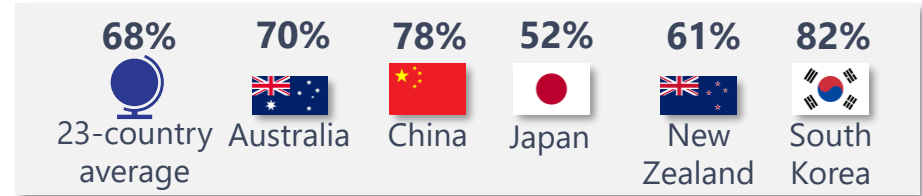
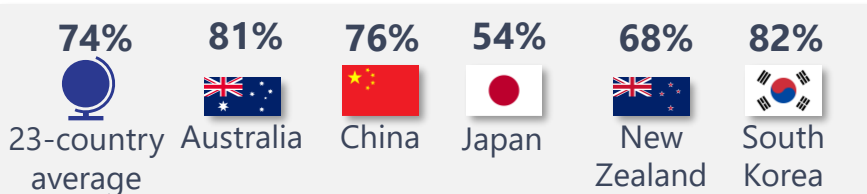
Consumers are looking to supermarkets and brands to do more in helping them make sustainable choices



APAC



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



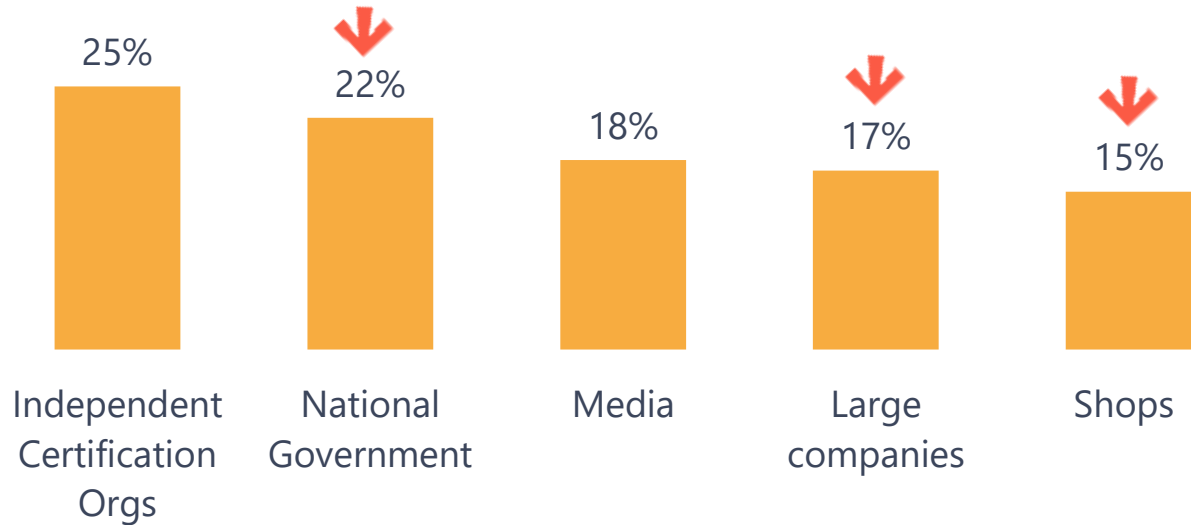
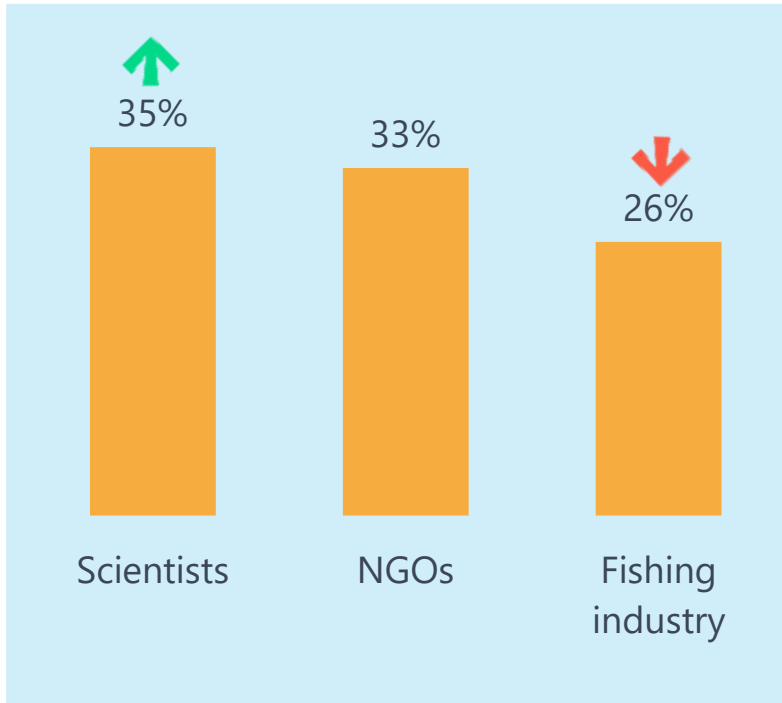
Base: Seafood consumers, APAC, n=4,445

Q5: How well does each of the following statements describe your opinions?

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



APAC



Top 3...



North America

Scientists, NGOs, Independent cert



Europe

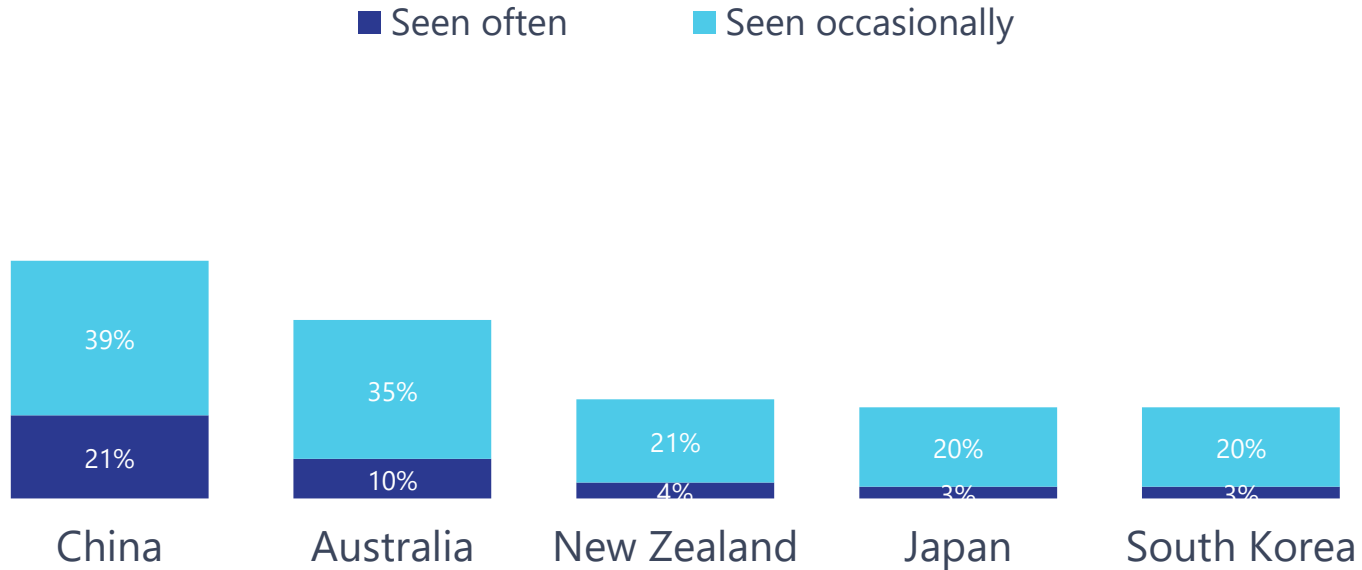
NGOs, Scientists, Independent cert

Base: Seafood consumers, APAC, $n=4,445$

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 remained at one-third in APAC, especially high in China and Australia



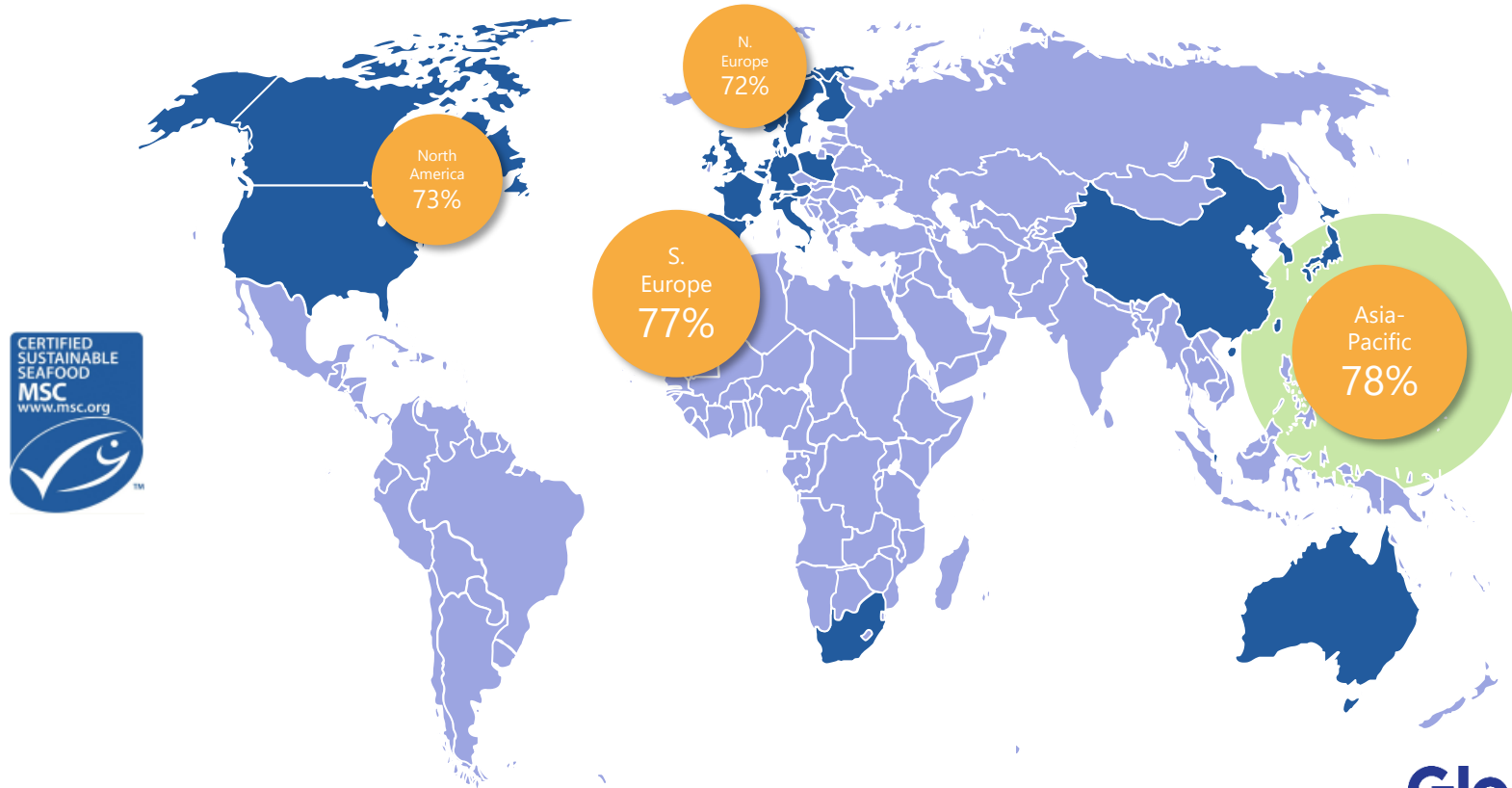
Base awareness: Seafood Consumers

Awareness of the MSC label, "seen often / occasionally", Trust the claims of the MSC label, Base: Those who have seen the MSC label



Asia-Pacific has the highest level of trust in MSC

Trust in the MSC label by region, MSC-aware seafood consumers, 2024



Section overview

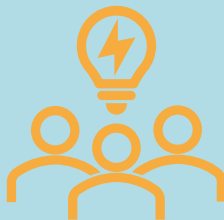
- Consumers would like to hear more from supermarkets and brands
- They currently think scientists, NGOs and the fishing industry are contributing well to protecting the ocean, but would like to see more from governments, large companies and shops
- Trust in the MSC label in APAC is strong for those who know about it

Recommendation: Clearly labelling sustainable seafood with trusted brands is key to guiding consumers on where to make sustainable choices.

How to encourage people to eat sustainable seafood

Collective effort

- Build consumer trust through a united effort
- 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

Tackling consumer pessimism and eco-concern

- Empower individuals to recognize that their sustainable choices make a meaningful impact



Thank You

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Know your world.
Lead the future.