

Changing Food Choices: Consumers' Responses to COVID, Cost of Living, and Climate (Europe)

November 2022



Today's Agenda



1 Welcome

2 Consumer trends –

- *MSC GlobeScan Seafood Consumer Insights 2022*
- *GlobeScan Healthy & Sustainable Living Survey 2022*

3 Q&A

Meet the Team



Caroline Holme
Senior Director at
GlobeScan



Richard Stobart
Head of Marketing at MSC



Chris Shearlock
Senior Sustainable Sourcing
Manager at Princes Limited

Introduction to consumer trends



The Marine Stewardship Council partnered with GlobeScan for their fourth **MSC Seafood Consumer Perceptions study**



Survey fieldwork dates: End of January – mid March

| Type of consumer | Sample |
|--------------------------|----------|
| Europe General public | n=11,062 |
| Europe Seafood consumers | n=10,696 |

Healthy & Sustainable Living

GlobeScan's findings from the 2022 **Healthy and Sustainable Living** research study.



Survey fieldwork dates: June – July

| Type of consumer | Sample |
|-----------------------|----------|
| Europe General public | n=8,986 |
| Global sample | n=29,293 |

Close to nine in ten agree that current environmental, social, and economic challenges are the largest the world has ever faced compared to three-quarters one decade ago

Agree the current environmental/ social and economic challenges are the largest the world has ever faced



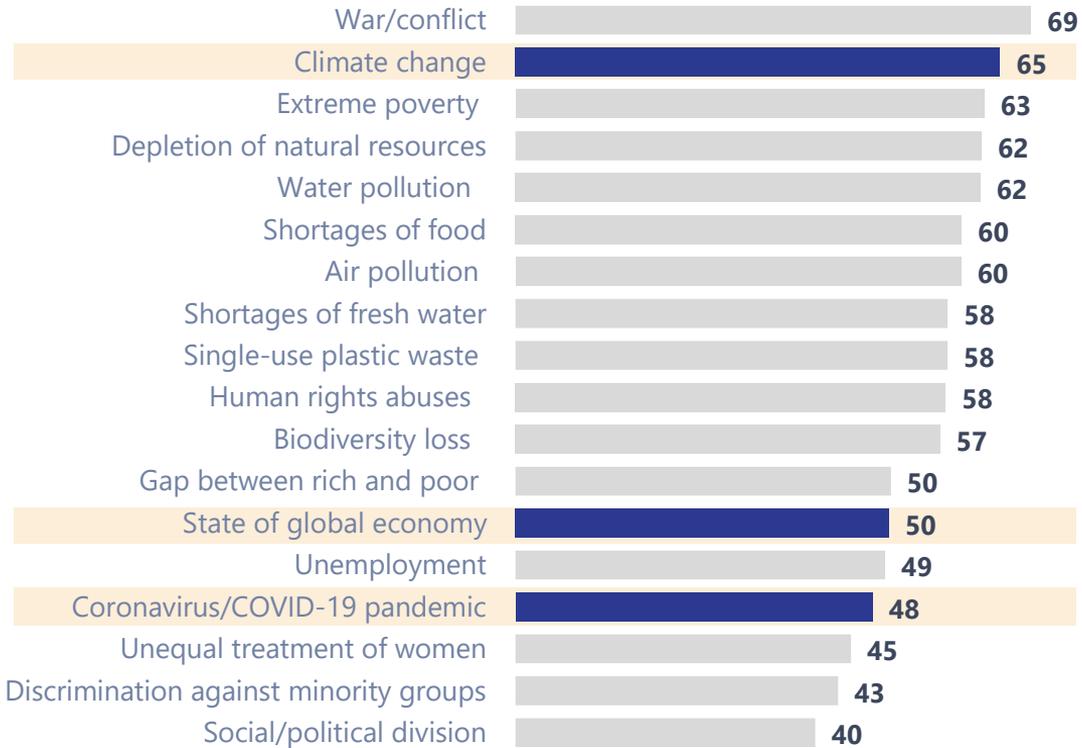
2012



2022

Concern about climate change follows closely behind concerns about war and conflict; half of global citizens consider the state of the global economy and COVID as very serious concerns

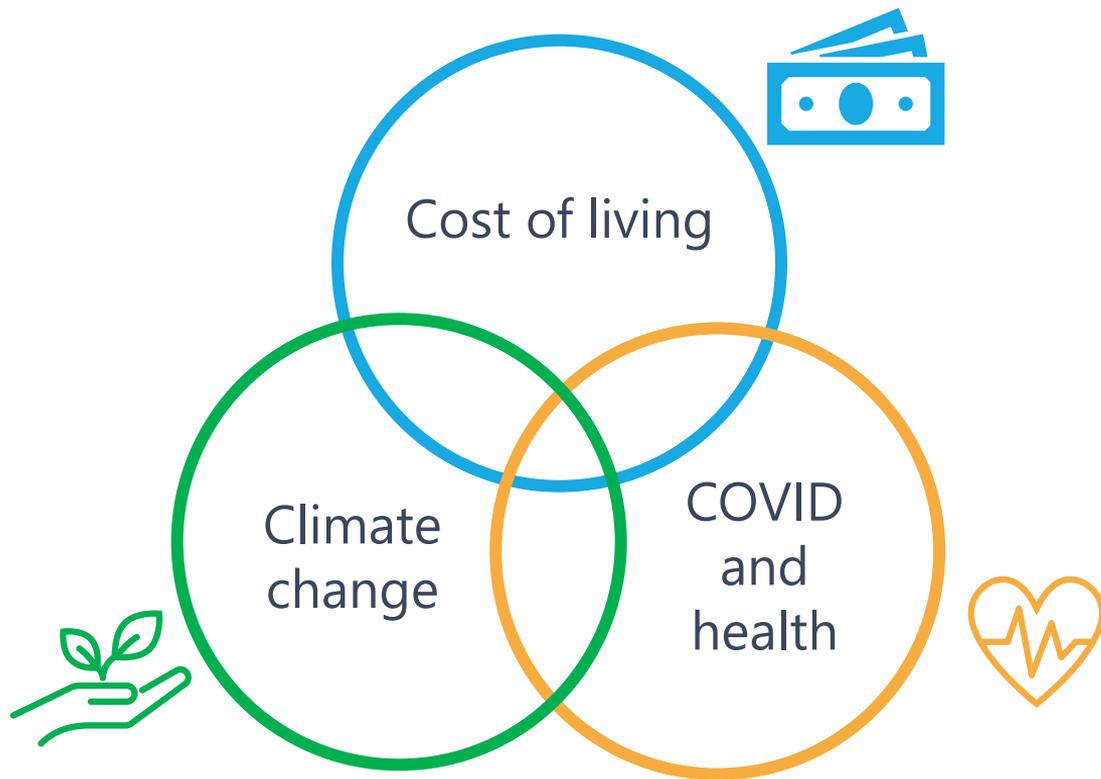
Global problems perceived as “very serious”



 = Issues we are addressing in this webinar

Base: Global
T1. For each of the following possible global problems, please indicate if you see it as a very serious, somewhat serious, not very serious, or not at all serious problem.

This webinar covers the intersection of three challenges – greater health concerns since COVID, climate change, and the growing cost-of-living crisis – and their effects on consumers

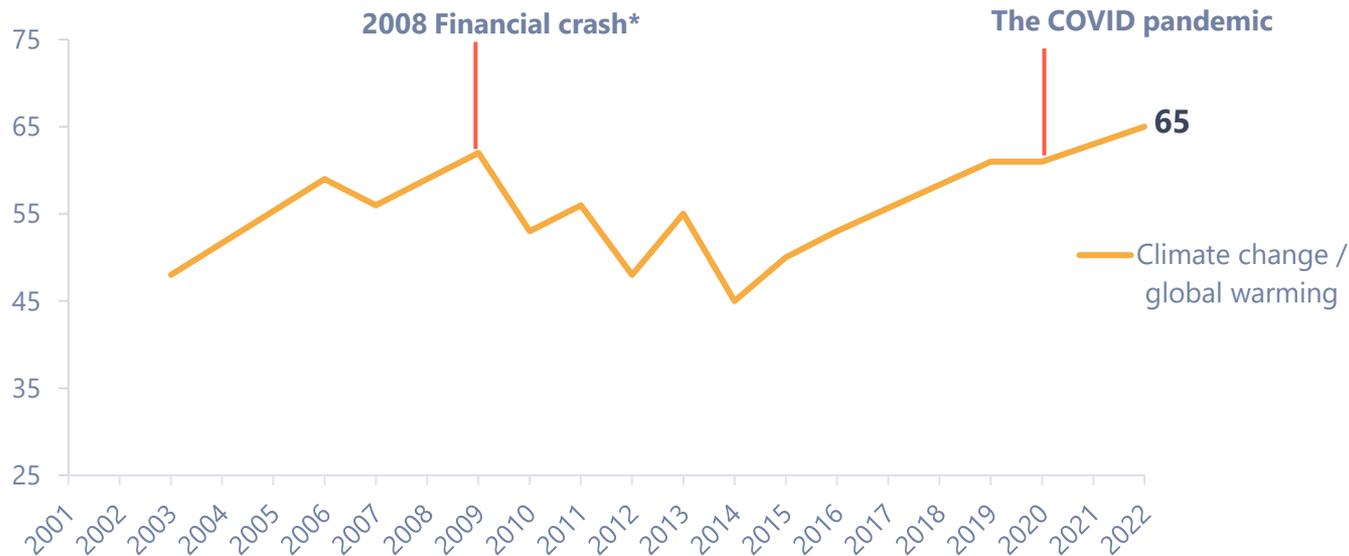




Climate change and the environment

Concern about climate change continues to rise even with economic pressure; there was a decrease in concern about climate change during the last financial crisis

Climate change is "very serious"



Europe-specific data

67%

of the European general public say climate change is very serious. This is slightly higher than 2021 (64%)

A very large majority in Europeans feel worried about the state of the world's oceans

I feel worried about the state of the world's oceans



90%

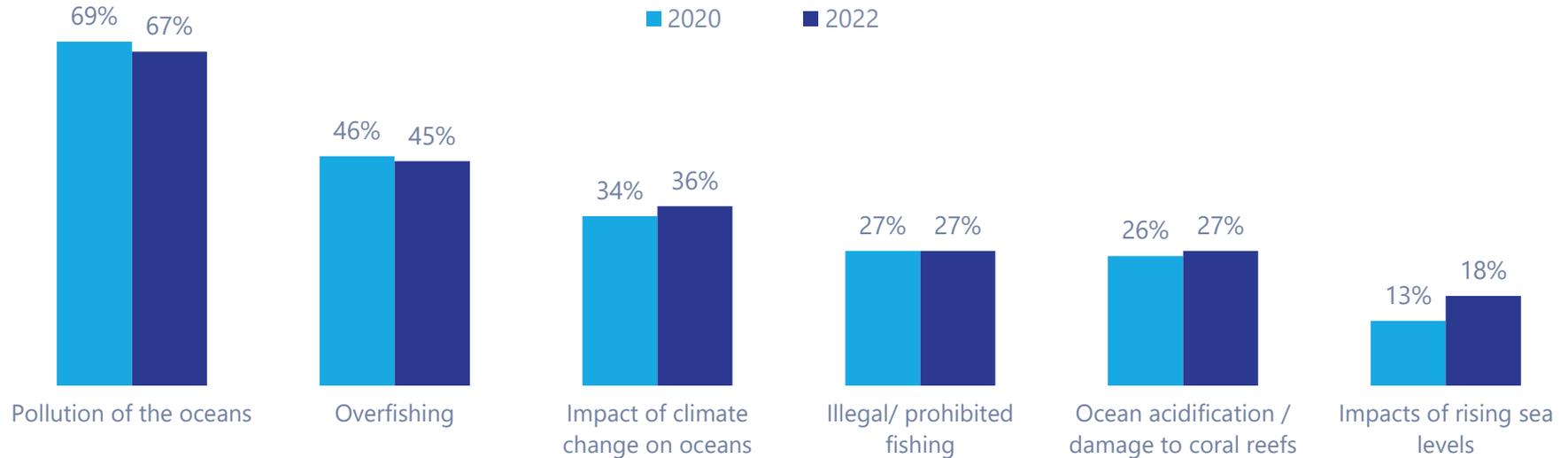
I feel more worried about the state of the oceans compared to two years ago



69%

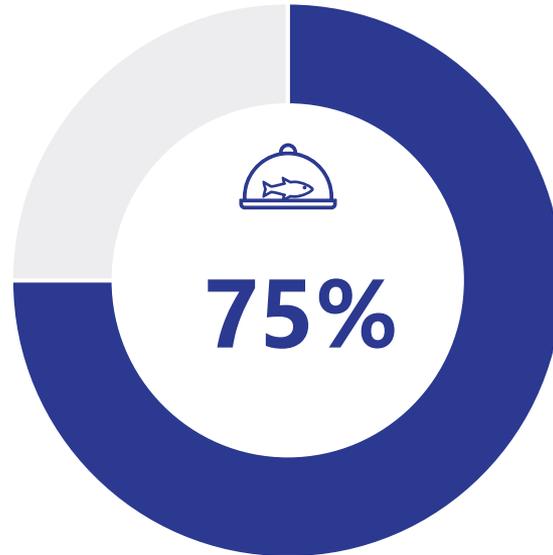
Pollution of the oceans and overfishing are the two biggest concerns; people are increasingly worried about climate change and rising sea levels

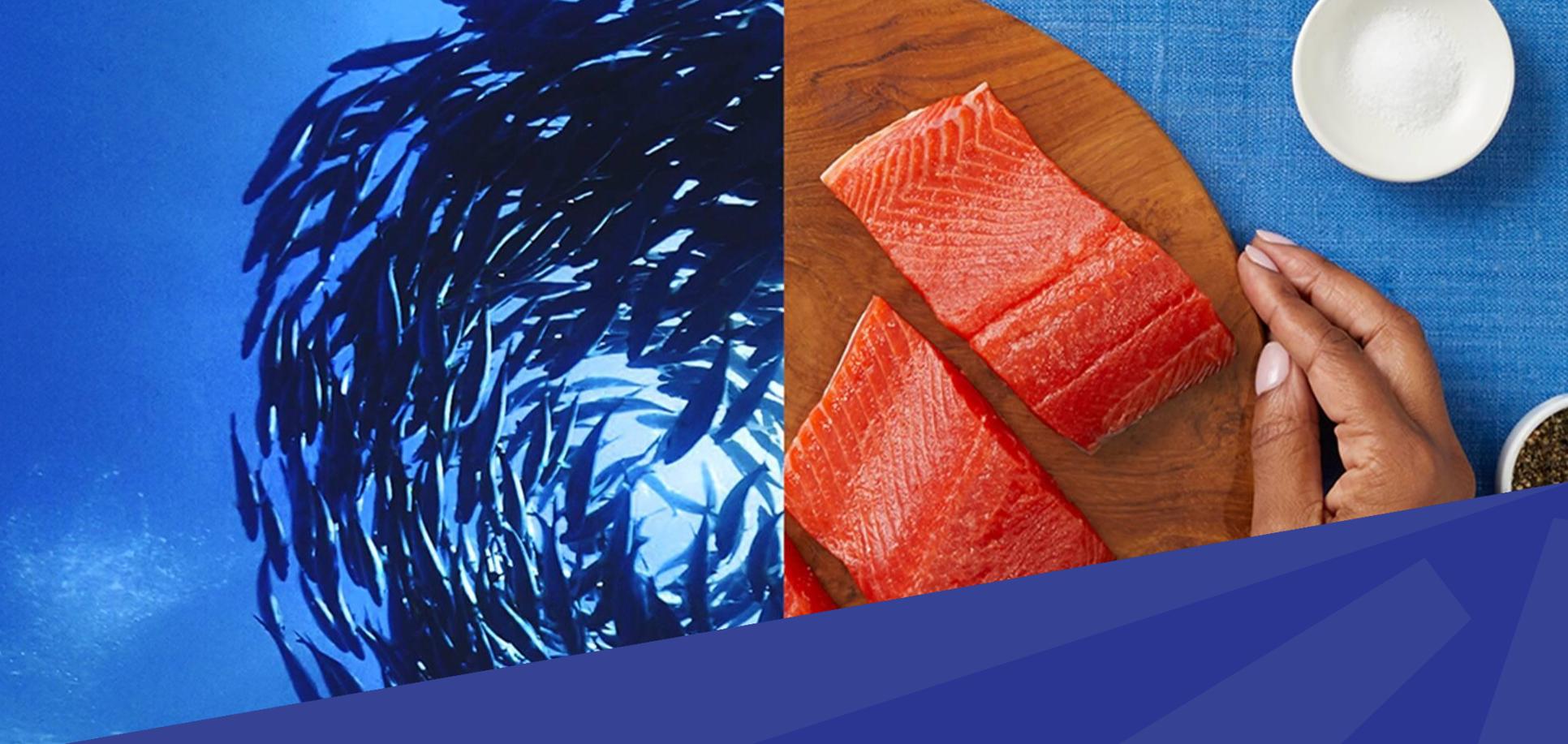
Most concerning ocean issues



Three in four of European consumers are aware of the need to consume seafood from a sustainable source in order to save the ocean

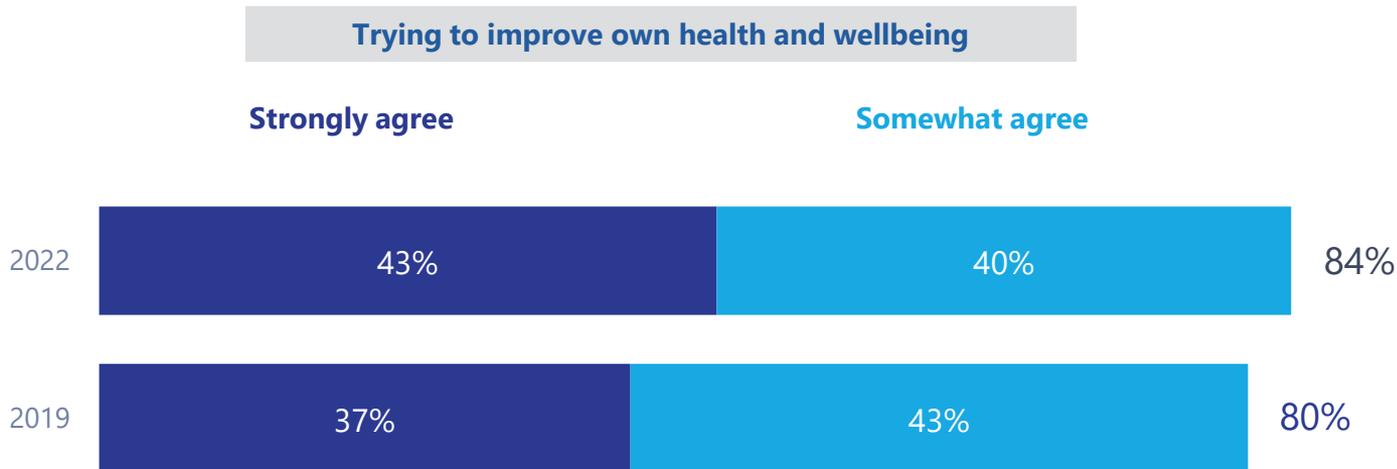
In order to save the ocean, we have to consume seafood only from sustainable sources





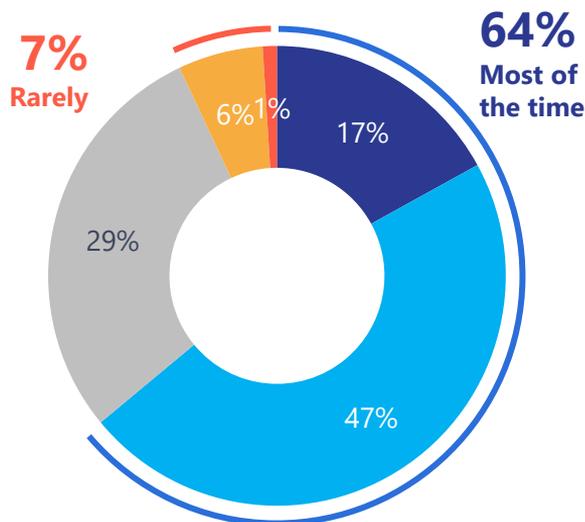
COVID, health, and changes in diet

Compared to before the pandemic, people are now more likely to say they are trying to improve their own health and well-being

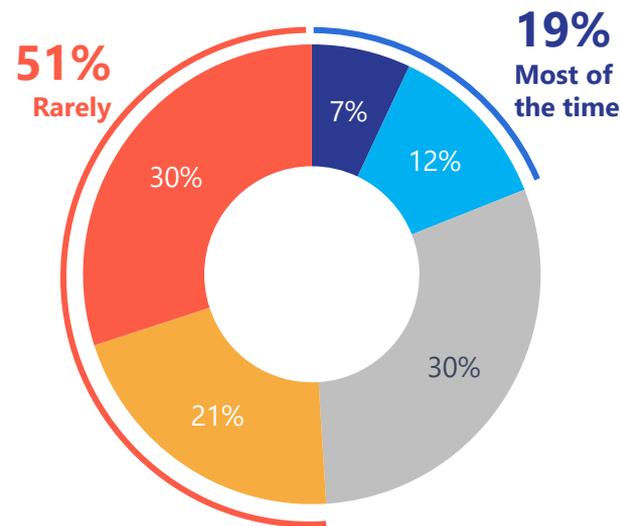


European consumers often say they eat healthy food, though this does not imply they are turning to vegetarian or vegan food

I eat healthy food



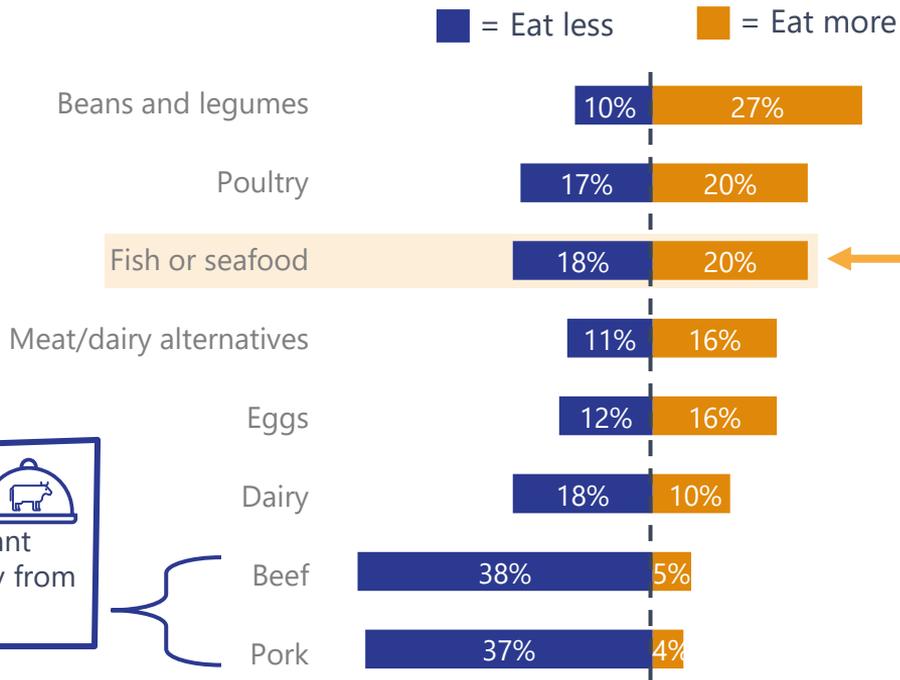
I eat vegetarian and vegan food



- All of the time
- Most of the time
- Sometimes
- Rarely
- Never

Actual diet changes made show beans and legumes have seen the largest increase, while beef and pork have seen the largest decreases

Changes in food consumption compared to two years ago



There is a similar number of people eating more seafood as there are eating less seafood.

There is a significant claimed shift away from beef and pork.

Health is the largest reason European consumers have changed their diet in the past two years, while almost half say they changed their diet because of an environmental reason

Reasons for changing diet

60%

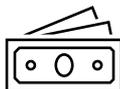
changed their diet to be **healthier**.



Consumers aged **65+ (64%)** are more inclined to change their diet due to health reasons.

24%

changed their diet to save **money**.



People tend to make diet changes for a mixture of reasons.

48%

changed their diet for **environmental** reasons.



Consumers aged **18–24 (54%)** are more inclined to change their diet due to environmental reasons.



Atlantic Salmon, Fillet
Wild, previously frozen
Canada, West Coast
Mild flavour
Bake, broil, deep-fry, pan-fry, auté, grill

Cod, Fillet
Wild, previously frozen
Canada, West Coast
Mild flavour
Bake, broil, deep-fry, pan-fry, auté, grill



CERTIFIED SUSTAINABLE SEAFOOD MSC
www.msc.org

Sockeye Salmon, Fillet
Wild, fresh
USA, West Coast
Medium mild flavour
Bake, broil, grill, steam

CERTIFIED SUSTAINABLE SEAFOOD MSC
www.msc.org

Haddock, Fillet
Wild, previously frozen
Canada, East Coast
Delicate, mild flavour
Bake, broil, deep-fry, pan-fry

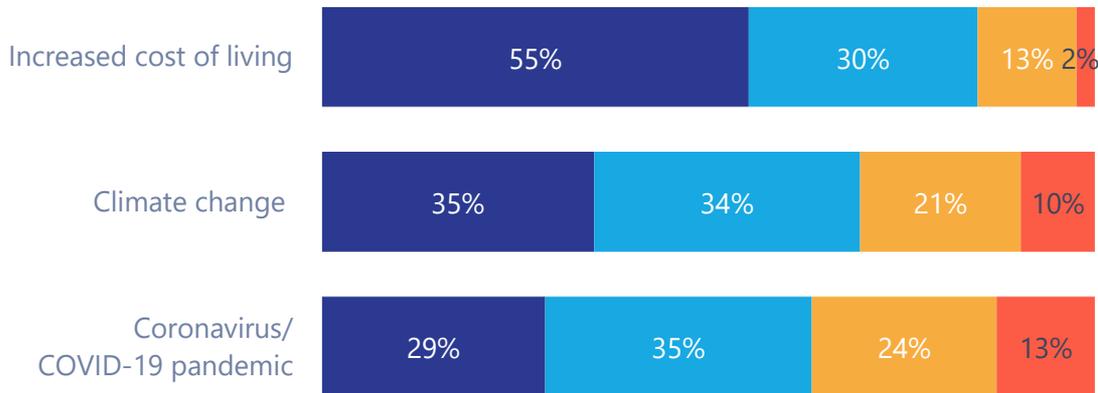


Cost-of-living crisis

More than half of European consumers are personally affected by the increased cost of living; they are less affected by COVID and climate change compared to other regions

Affected by personal issues

■ Greatly ■ Moderately ■ A little ■ Not at all



Global data

Looking at global results, more people are greatly affected by increased cost of living (60%), climate change (38%) and COVID-19 pandemic (42%).

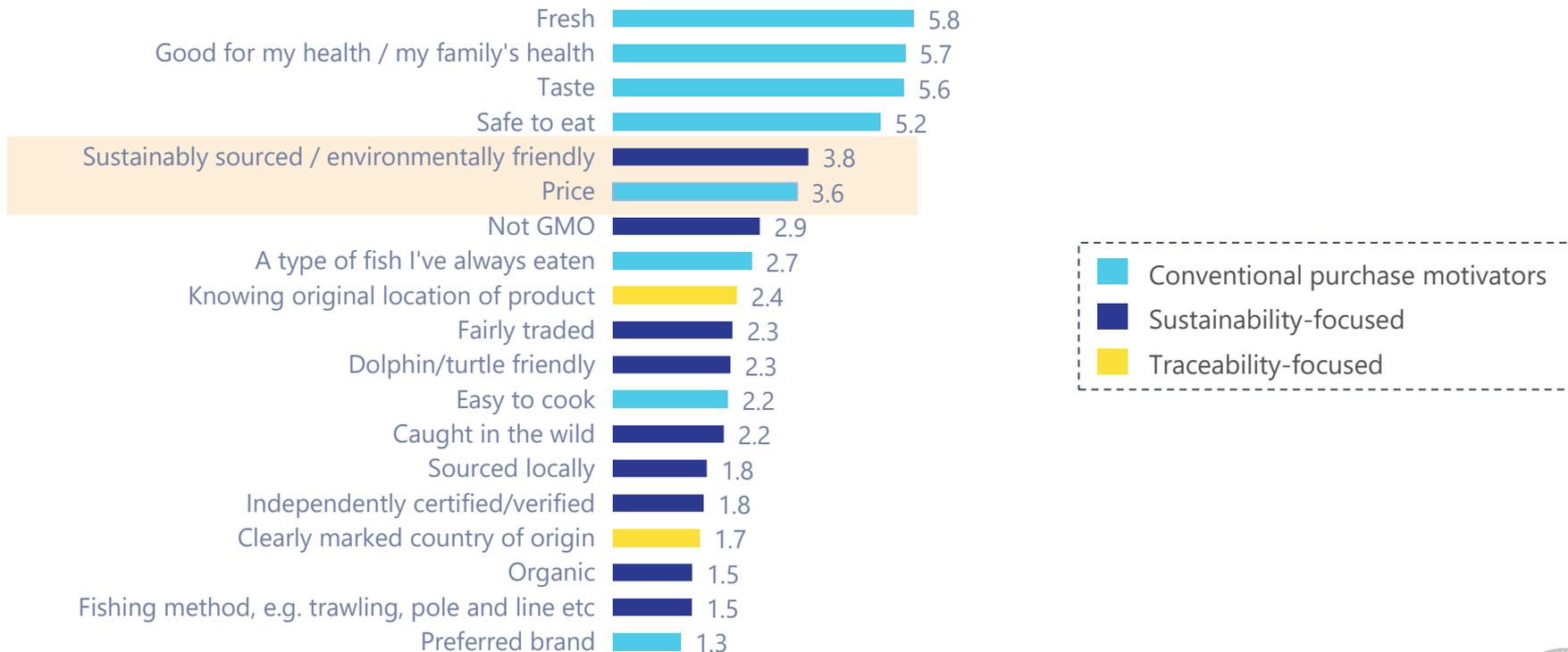
What motivates consumers when purchasing seafood?



| |
|---|
| Fresh |
| Preferred brand |
| Price |
| Safe to eat |
| Taste |
| Easy to cook |
| Good for health |
| A type of fish I've always eaten |
| Caught in the wild |
| Dolphin/turtle friendly |
| Organic |
| Fairly traded |
| Fishing method |
| Sustainably sourced |
| Independently certified/verified |
| Is not GMO |
| Clearly marked country of origin |
| Sourced locally |
| Knowing where the product originally comes from |

Sustainability and price are similar motivators of seafood purchase, with sustainability slightly more important in Europe

Motivators in seafood purchase



Legend:

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

People's willingness to pay more for sustainability has slightly decreased globally, however over half of consumers are still willing to pay more



"strongly" and "somewhat agree," global



"describes opinion well," top three (5+6+7 on 7-pt scale), global

Base: Global
 Q6. Please indicate whether you strongly agree, somewhat agree, neither agree nor disagree, somewhat disagree, or strongly disagree with each of the following statements.
 Base: Seafood consumers, global
 Q8.1: How well does each of the following statements describe your opinions about ecolabels?

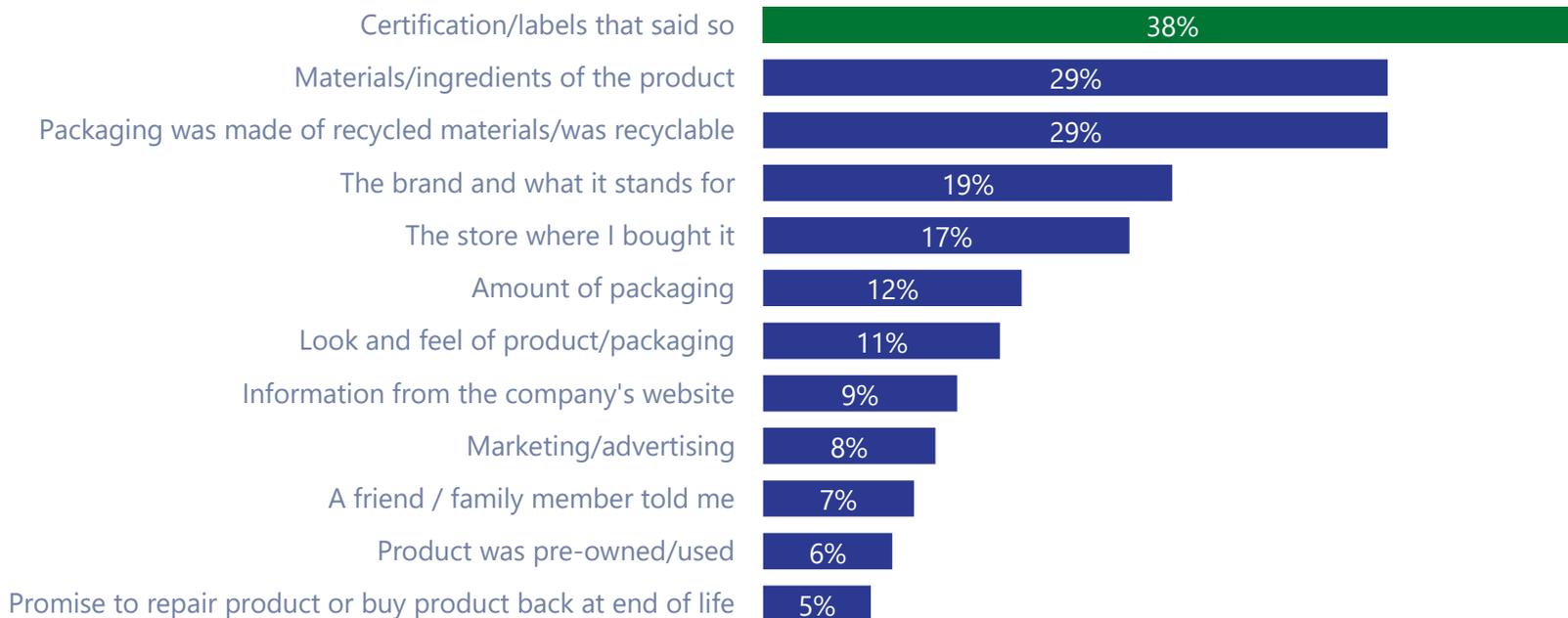




Certifications and future intent

Certifications are a major reason that Europeans consider a product to be environmentally responsible

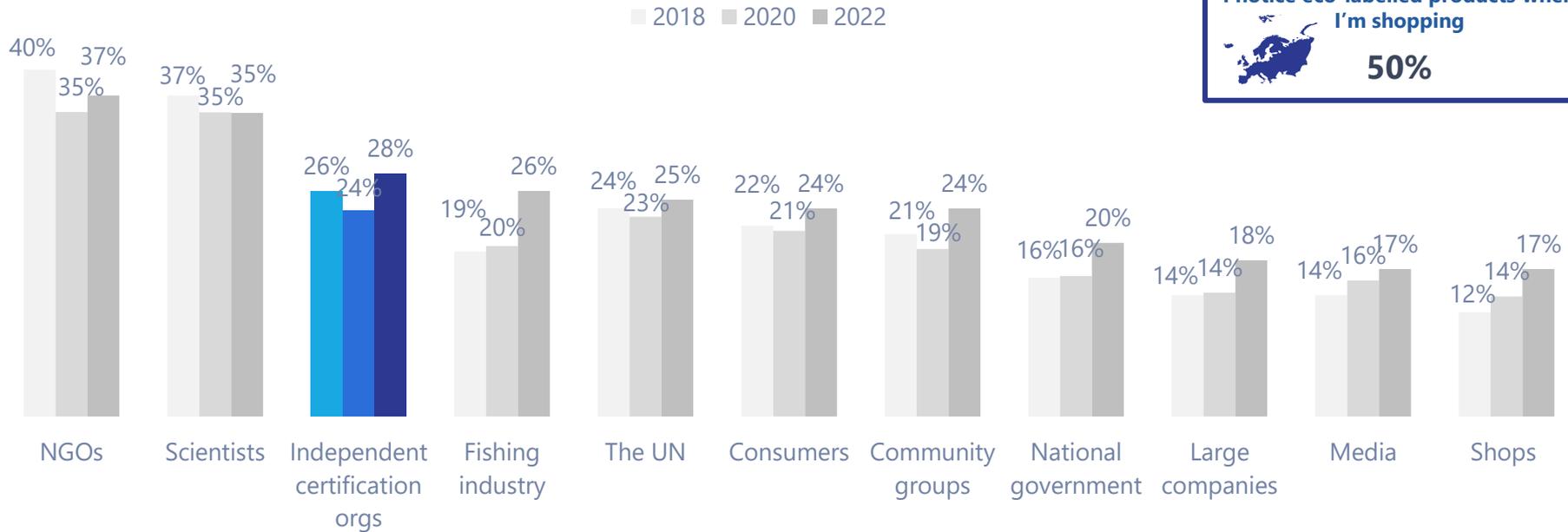
Reasons consumers knew that the product was environmentally responsible



Independent certification organisations are becoming more important as they are increasingly more trusted in protecting the ocean



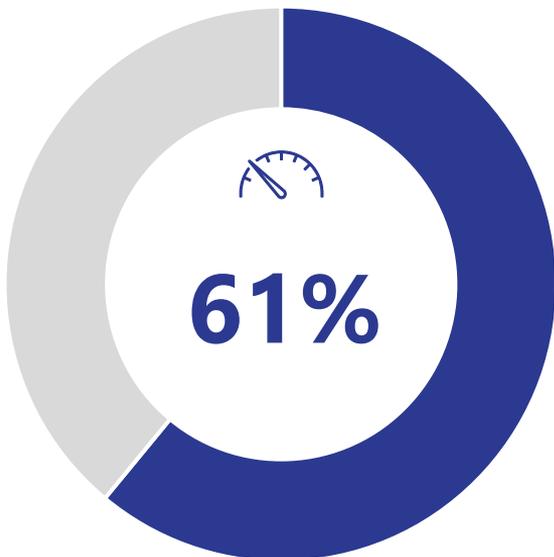
Actors perceived to be contributing very well to protecting the ocean environment



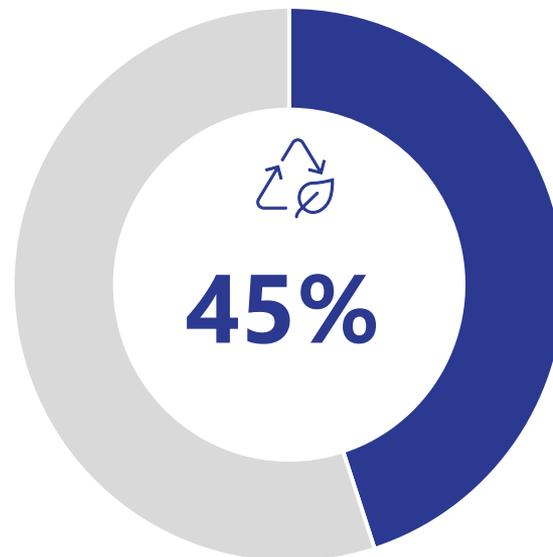
I notice eco-labelled products when I'm shopping
50%

Europeans say they are willing to reduce their consumption, but are less optimistic on whether most people will be living in an environmentally friendly way

I would be willing to reduce my consumption by half to avoid environmental damage and climate change



Most people will be living environmentally friendly lifestyles in the next decade



 Global data

Global results show 54% think people will be living a more environmentally friendly lifestyle.

Base: Europe

Q6. Please indicate whether you strongly agree, somewhat agree, neither agree or disagree, somewhat disagree, strongly disagree with the following statements. – I would be willing to reduce consumption by half to avoid environmental damage / climate change.

Q40. How likely do you do you think it is that each of the following will happen in the next ten years? – Most people will be living environmentally friendly lifestyles.

Q&A



Caroline Holme
Senior Director, Europe at
GlobeScan



Richard Stobart
Head of Marketing at MSC



Chris Shearlock
Senior Sustainable Sourcing
Manager at Princes Limited

How to support consumers in making sustainable and healthy food choices affordable