The Rise of the Conscious Food Consumer:

COVID, Climate, and Conservation; How Will These Affect Consumer Habits?

MARINE STEWARDSHIP COUNCIL™

GLOBESCAN

evidence and ideas. applied

Europe November 2020

Today's Agenda

1. Welcome
2. Consumer trends – MSC GlobeScan Global Seafood Consumer Insights 2020
3. Results from GlobeScan Healthy & Sustainable Living survey
4. Q&A

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Meet the Team

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1. Consumer Trends Before COVID-19

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MSC GlobeScan Consumer Insights

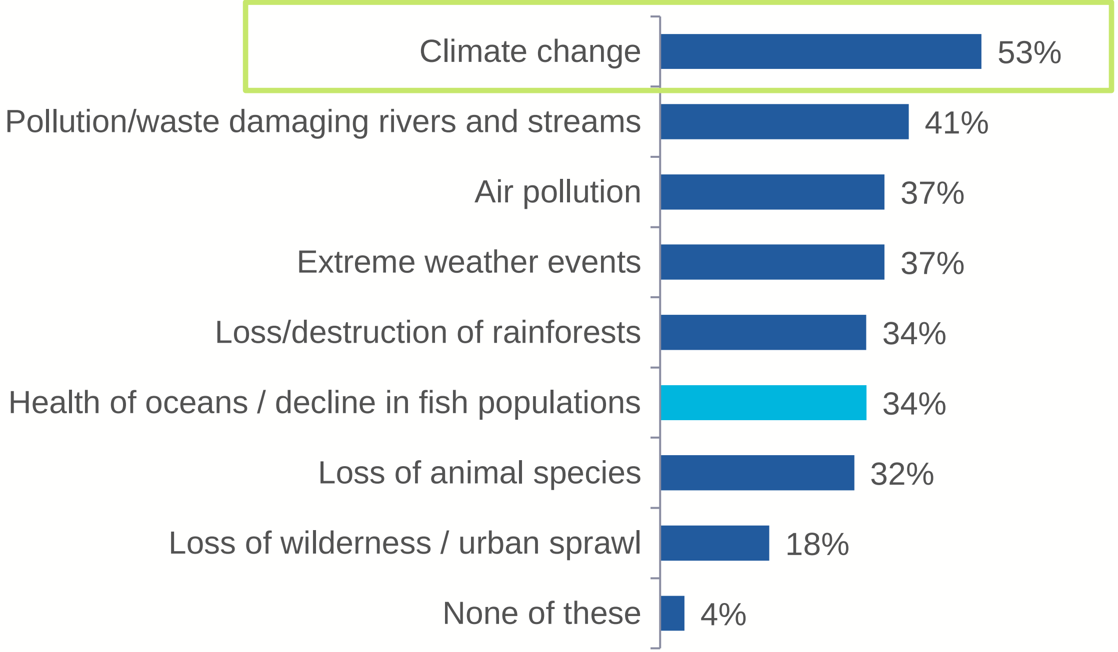
Introduction to MSC Consumer Insights for Europe 2020

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

Type of consumer	Sample
General public, Europe	*n*=14,299
Seafood consumers, Europe	*n*=11,512

Climate change is the most concerning environmental issue globally.

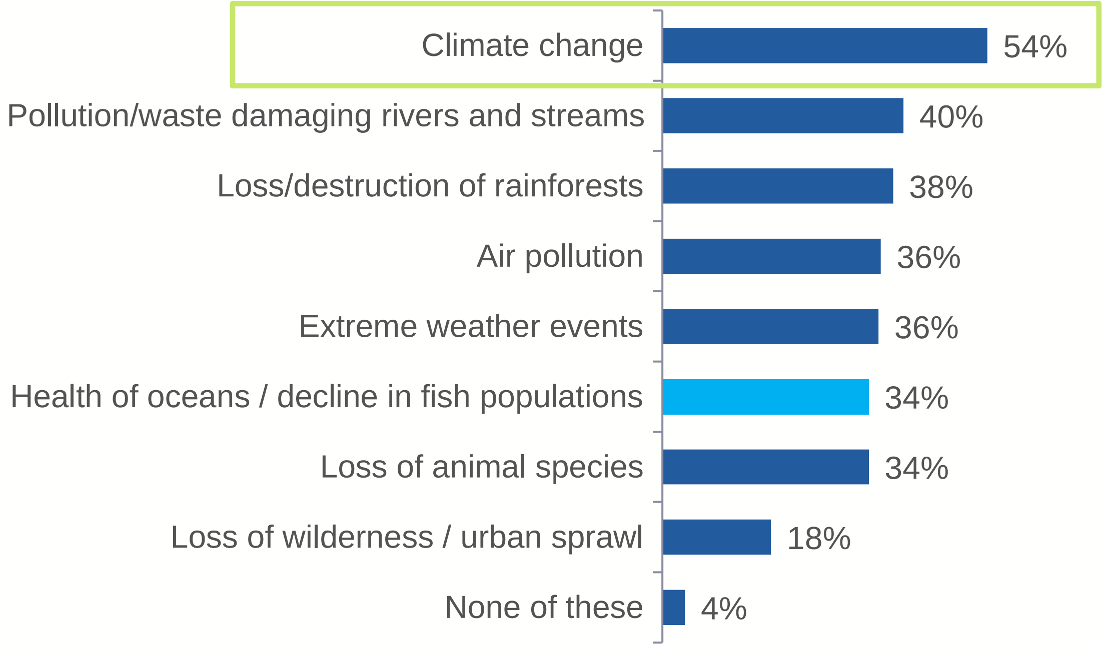
Most concerning environmental issues; percentage choosing issue in top 3, 23-country average



Base: General population, global, *n*=26,535
Q1.2: Which, if any, of the potential environmental issues are you most worried about?

Loss and destruction of rainforests is considered more concerning by consumers in Europe than globally.

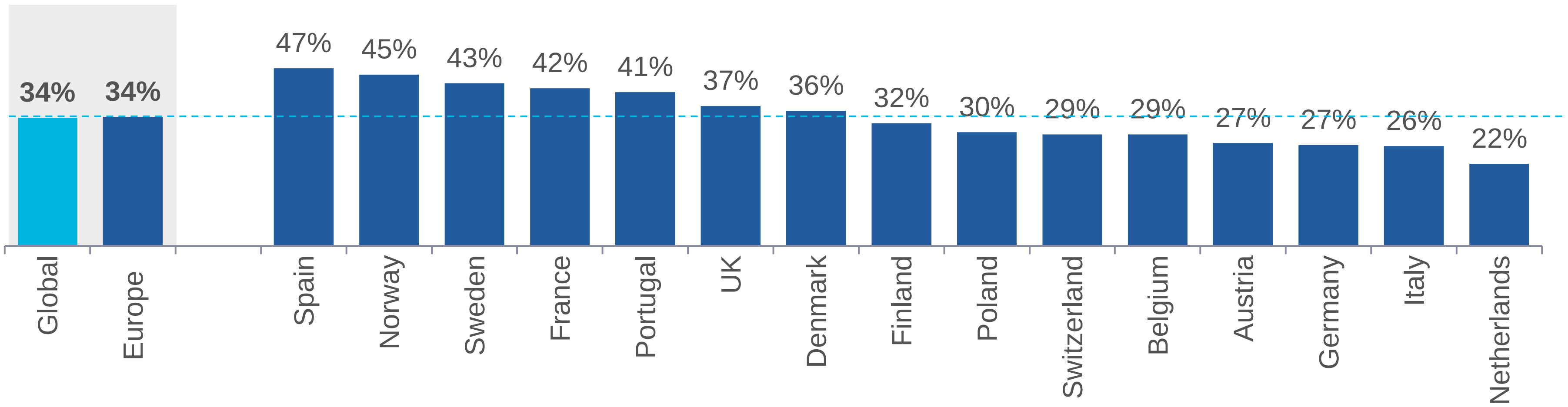
Most concerning environmental issues; percentage choosing issue in top 3, Europe



Base: General population, Europe, *n*=14,299
Q1.2: Which, if any, of the potential environmental issues are you most worried about?

Perceived importance of ocean health around Europe – in Spain, Sweden and France, this is second only to climate change.

Prioritisation of health of oceans among other environmental issues, percentage choosing issue in top three



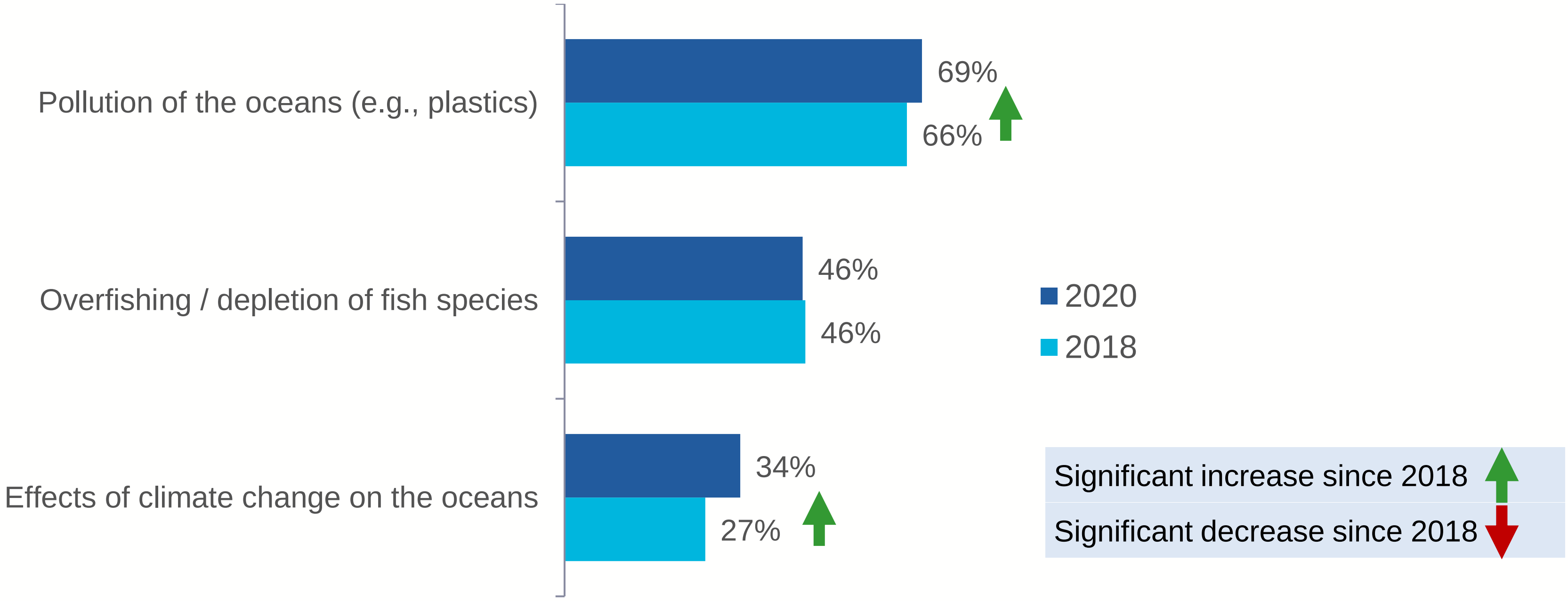
	Global	Europe	Spain	Norway	Sweden	France	Portugal	UK	Denmark	Finland	Poland	Switzerland	Belgium	Austria	Germany	Italy	Netherlands
Rank (of 8)	6th	7th	2nd	3rd	2nd	2nd	4th	4th	4th	7th	5th	6th	7th	6th	6th	6th	7th

Ranking from 1 (green) to 8 (red)

Base: General population, Europe, *n*=14,299
Q1.2: Which, if any, of the potential environmental issues are you most worried about?

There has been a significant increase in concern regarding pollution of the oceans and the impact of climate change on the oceans.

Top three most concerning ocean issues; percentage choosing each issue in top three, Europe



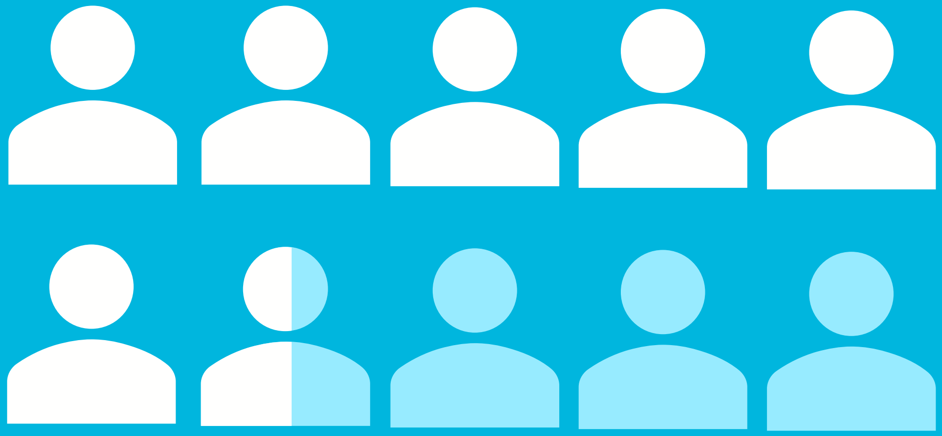
Base: Seafood consumers, Europe, *n*=11,512
Q11.2: There are many different potential threats to the world's oceans, the wildlife living there, and the people who work there. Which of these potential issues worries you the most?

Two-thirds agree that in order to save the ocean, we have to consume fish only from sustainable sources.

“Describes opinion well,” top three (5+6+7 on 7-pt scale), Europe

66%

believe that in order to save the ocean, we have to consume fish/ seafood only from sustainable sources

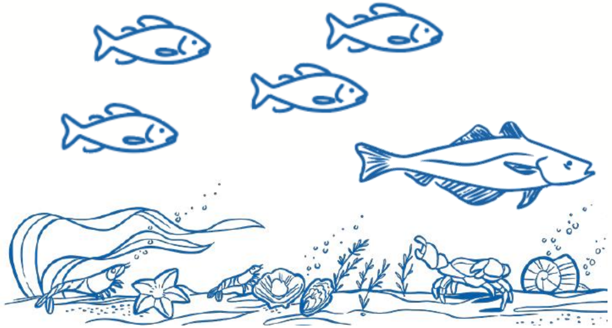


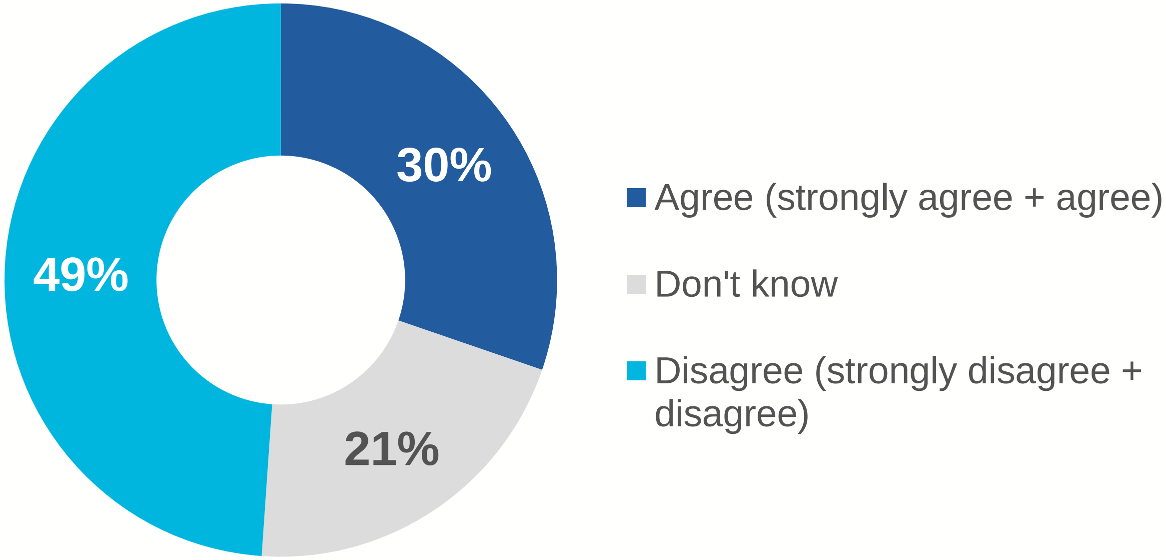
Base: Seafood consumers, Europe, *n*=11,512
Q5.1: How well does each of the following statements describe your opinions?

Three in ten seafood consumers in Europe think that their favourite fish species will not be available to eat 20 years from now.

Perceptions of fish availability over time, Europe

I don’t think [favourite fish species]* will be available to eat 20 years from now

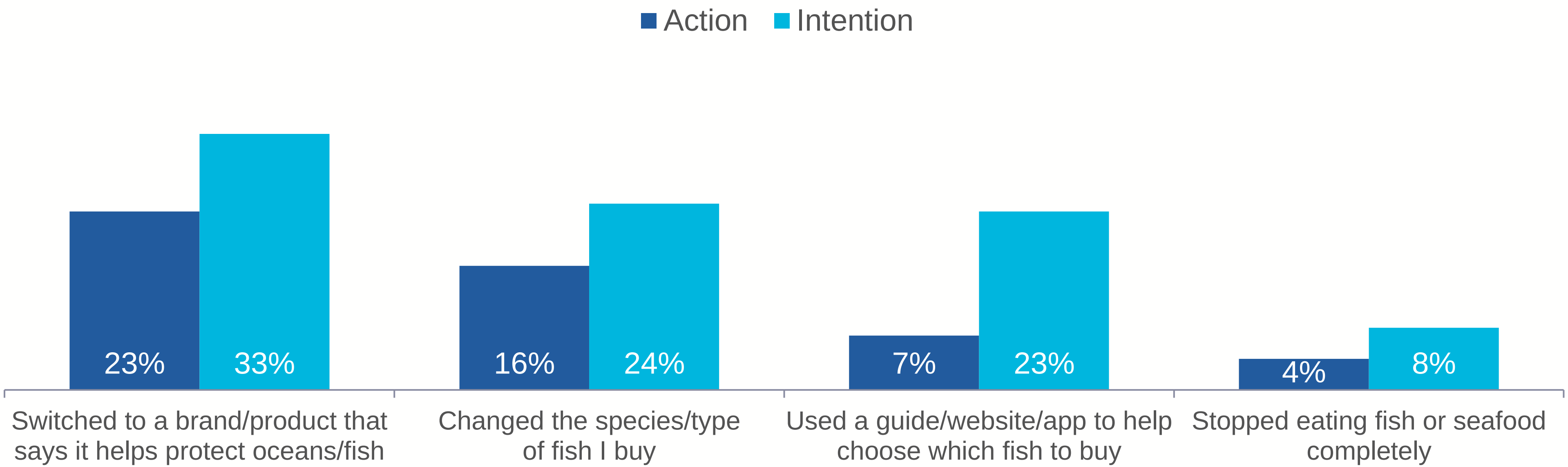




Base: Seafood consumers, Europe, *n*=11,512
*Fish species shown was the preferred species of each respondent
Q4.5: Please indicate how much you agree or disagree with the following statement: I don’t think [fish species] will be available to eat 20 years from now.

There is a large gap between the actions taken to protect fish and seafood (action) and those that people are willing to take in the future (intention).

Actions taken in the last year to protect fish and seafood and actions willing to take in the future, total mentions, Europe



Base: Seafood consumers, Europe, *n*=11,512
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?

There is a thirst for more information on sustainability and traceability of fish and seafood products.

Attitudes toward ocean sustainability issues, “describes opinion well,” top three (5+6+7 on 7-pt scale), Europe

87%

want **better information** so they can be confident that they are **not buying unsustainable** fish or seafood products*

71%

would like to **hear more from companies** about the **sustainability** of their fish and seafood products

66%

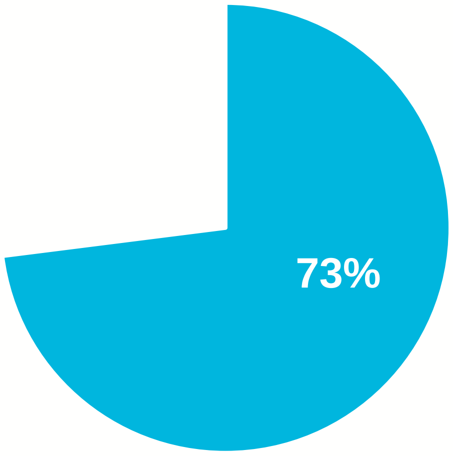
want to know that the fish they buy can be **traced back to a known and trusted source**

Base: Seafood consumers, Europe, *n*=11,512
*Q11.3: Please indicate how much you agree or disagree with the following statements; “agree” (3+4 on a 4-pt scale)
Q5.1: How well does each of the following statements describe your opinions?

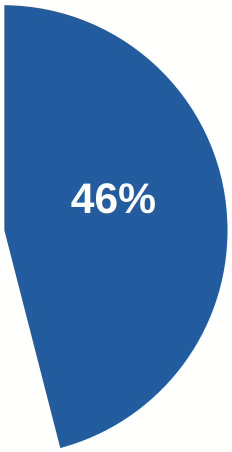
Nearly three-quarters agree that claims about sustainability should be labelled by an independent organisation while just under half say they notice ecolabels.

Attitudes toward ecolabels, “describes opinion well,” top three (5+6+7 on 7-pt scale), Europe

Supermarkets’ and brands’ claims about sustainability should be clearly labelled by an independent organisation



I notice ecolabelled products when I’m shopping



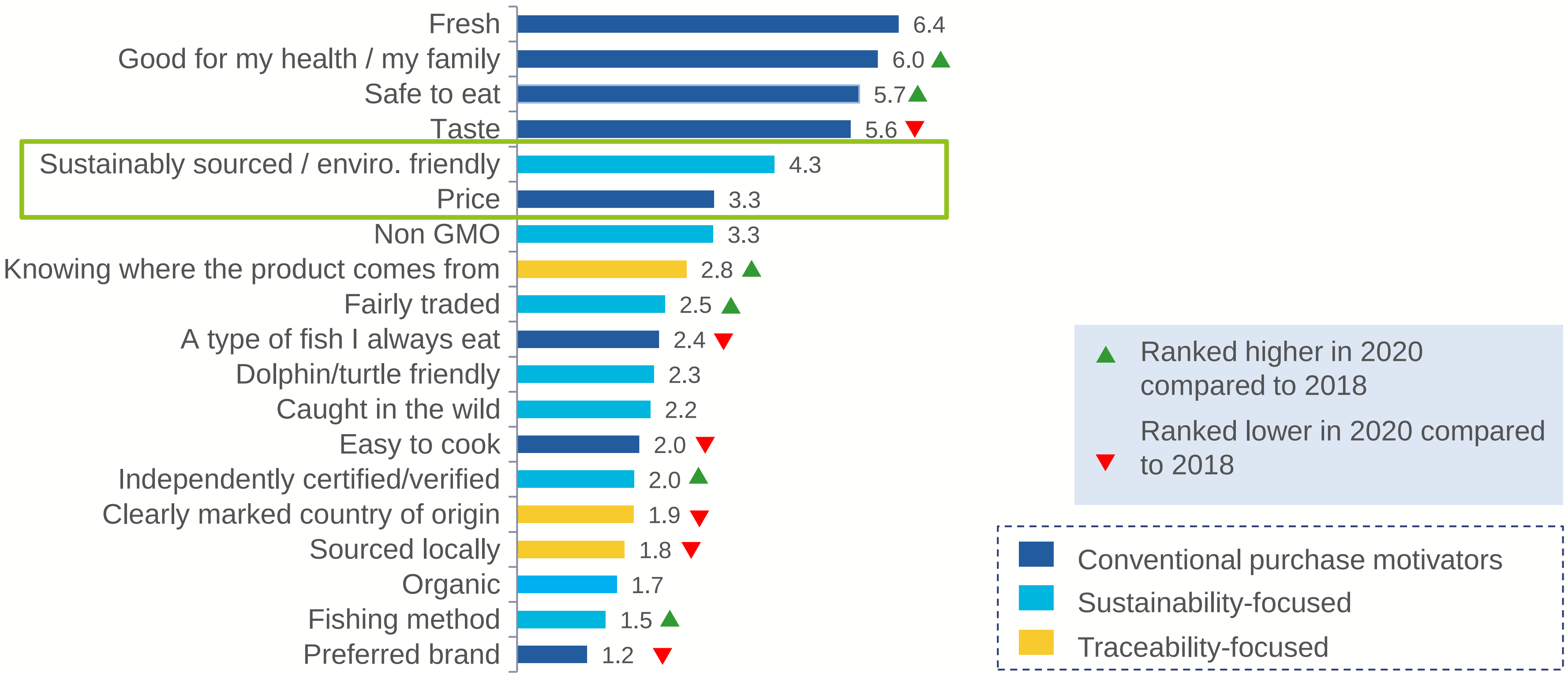
Base: Seafood consumers, Europe, *n*=11,512
Q5.1: How well does each of the following statements describe your opinions?
Q8.1: How well does each of the following statements describe your opinions about ecolabels?

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

Top drivers of purchase remain the same, with sustainably sourced continuing to rank above price in Europe.

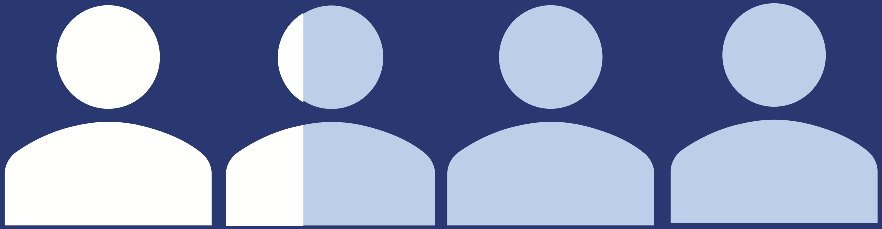
Motivators: max diff analysis, importance score, Europe



Base: Seafood consumers, Europe *n*=11,512
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?

Recognition of the MSC label has risen significantly in 2020, as has trust.

Awareness and trust in the MSC label, Europe



54% of consumers recall seeing the MSC label

up from 47% in 2018

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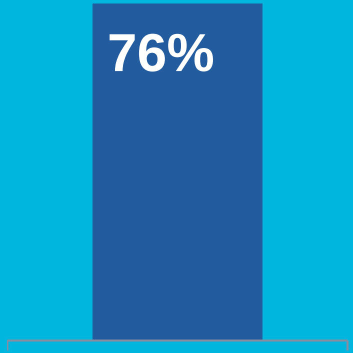


76% of those aware of the MSC say they trust the label

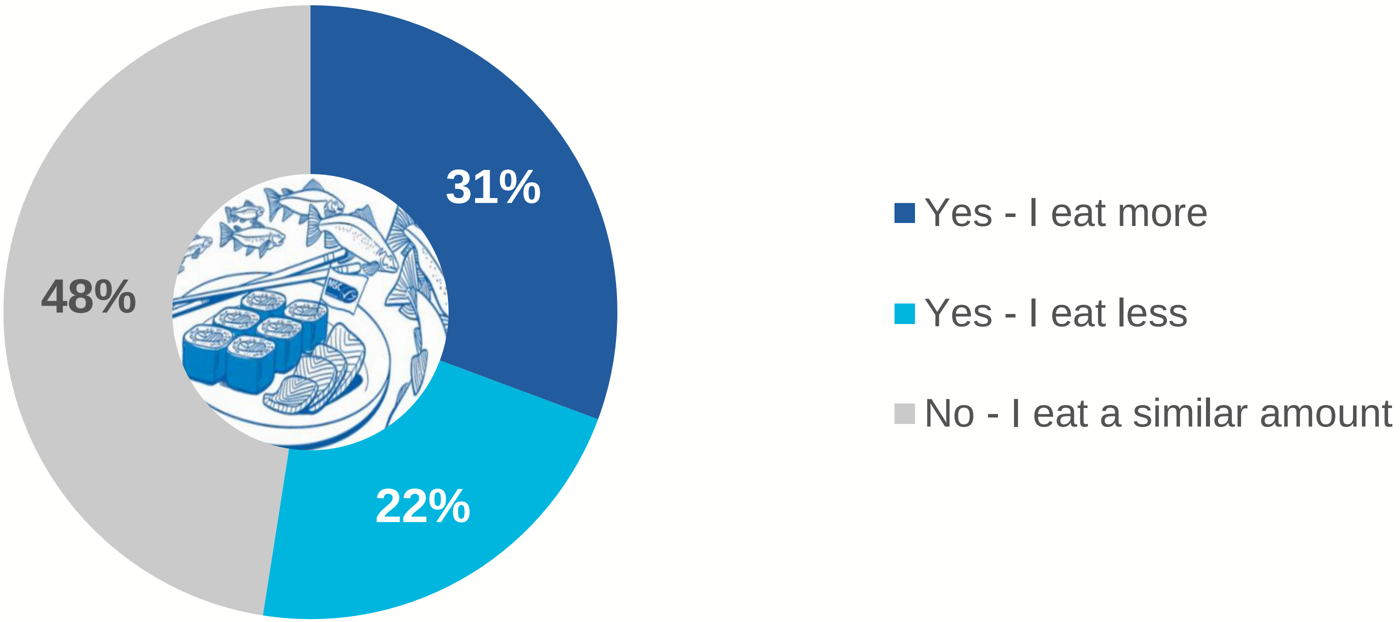
up from 69% in 2018

Base: General population, Europe, *n*=14,299; MSC-aware seafood consumers, Europe, *n*=6,529
Q1.1: Have you ever seen the following logos?
Q9.2: How much trust do you have in the claims of each of the following initiatives/organisations? *7-pt scale: 1 = "No trust," 7 = "A lot of trust"*

Among seafood consumers, three in ten say they are eating more fish now than five years ago.

Changes in seafood consumption, Europe

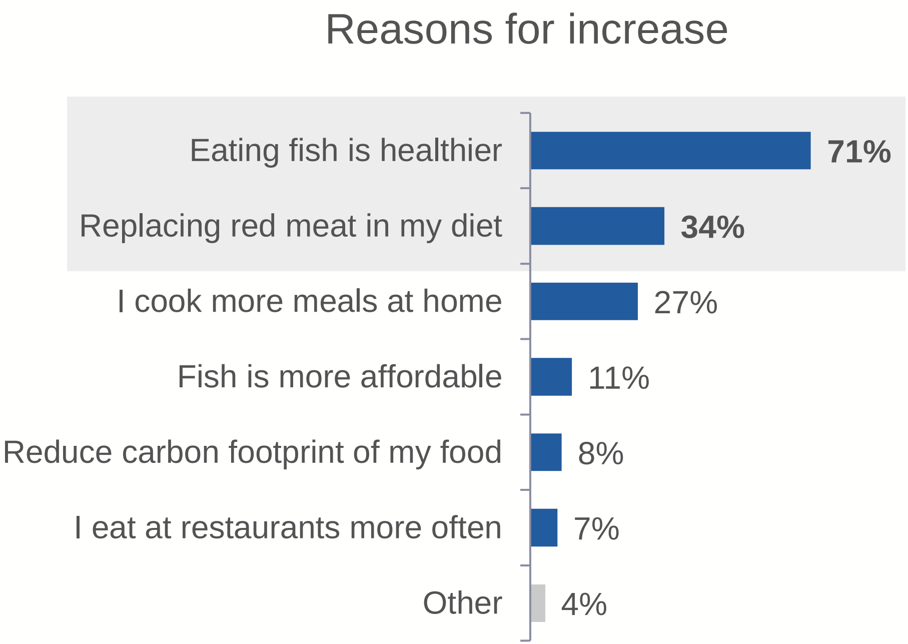
Compared to five years ago, has the amount of fish and seafood you eat changed?

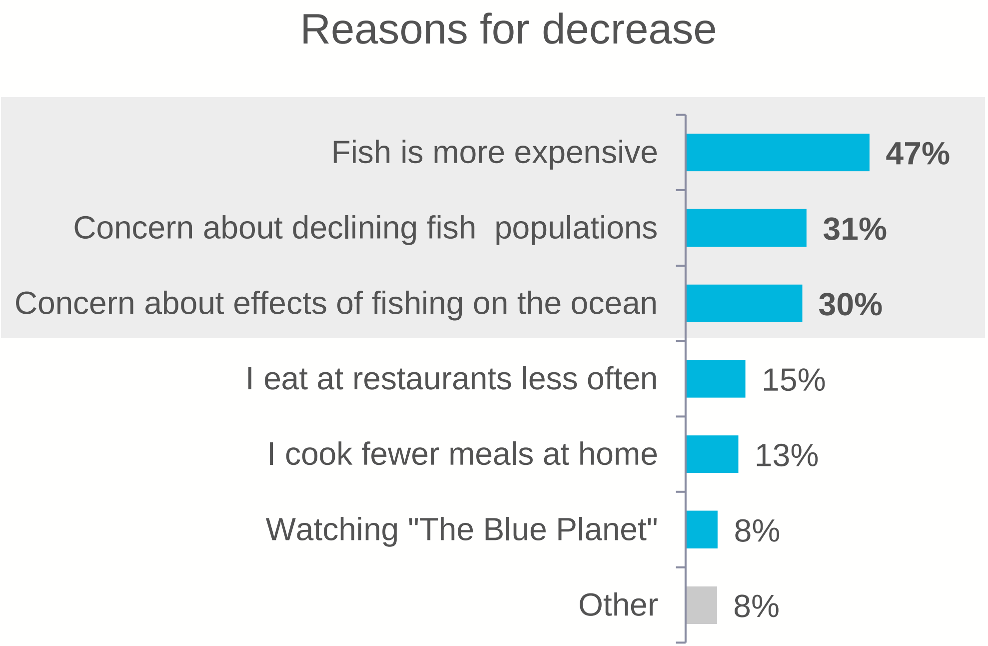


Base: Seafood consumers, Europe, *n*=11,512
Q4.6: Compared to five years ago, has the amount of fish and seafood you eat changed?

Health is the most cited reason for increase in seafood consumption, followed by replacing red meat.

Reasons for change, Europe



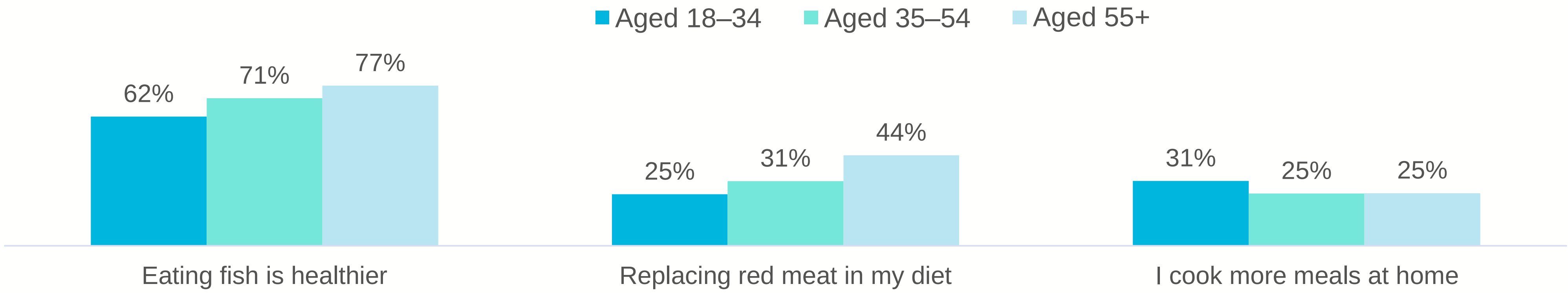


Base: Seafood consumers who say they have increased their consumption, Europe, *n*=3,505; Seafood consumers who say they have decreased their consumption, Europe, *n*=2,514

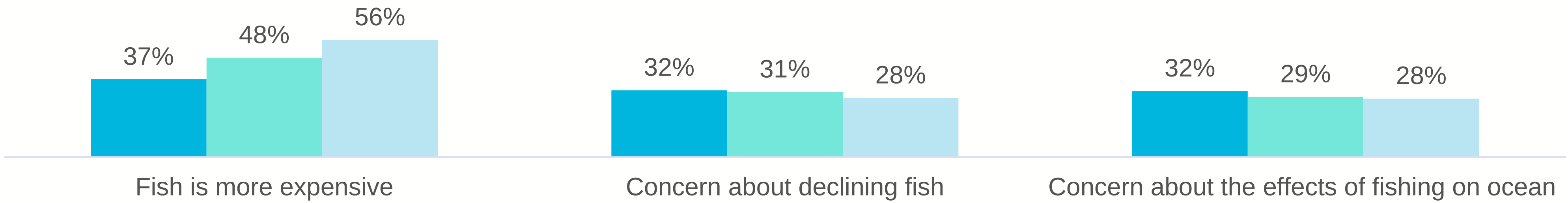
Q4.7a: What are the reasons for this change? [Increase] / Q4.7b: What are the reasons for this change? [Decrease]

Older consumers are more likely to be eating more fish because it is healthier and as in replacement of red meat in their diet.

Top 3 reasons for increase in consumption compared to five years ago, Europe

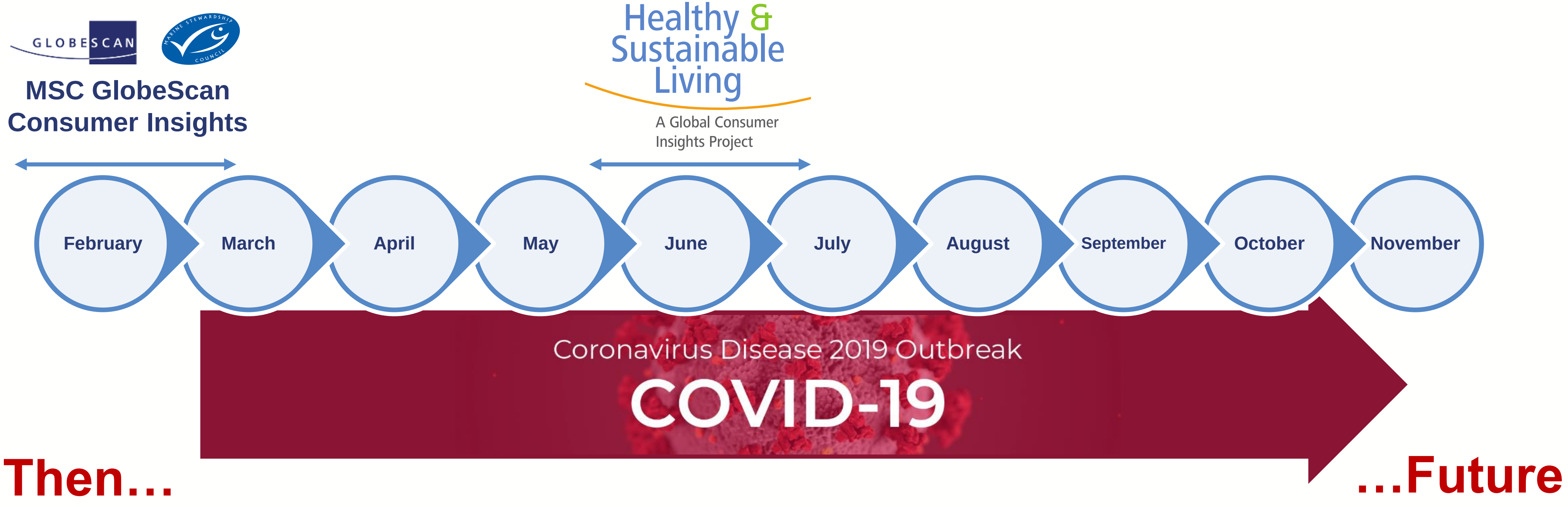


Top 3 reasons for decrease in consumption compared to five years ago, Europe



Base: Seafood consumers who have increased consumption, Europe, *n*=3,505; Seafood consumers who have decreased consumption, Europe, *n*=2,514
Q4.6: Compared to five years ago, has the amount of fish and seafood you eat changed?
Q4.7a: What are the reasons for this change? [Increase] / Q4.7b: What are the reasons for this change? [Decrease]

Timeline of 2020



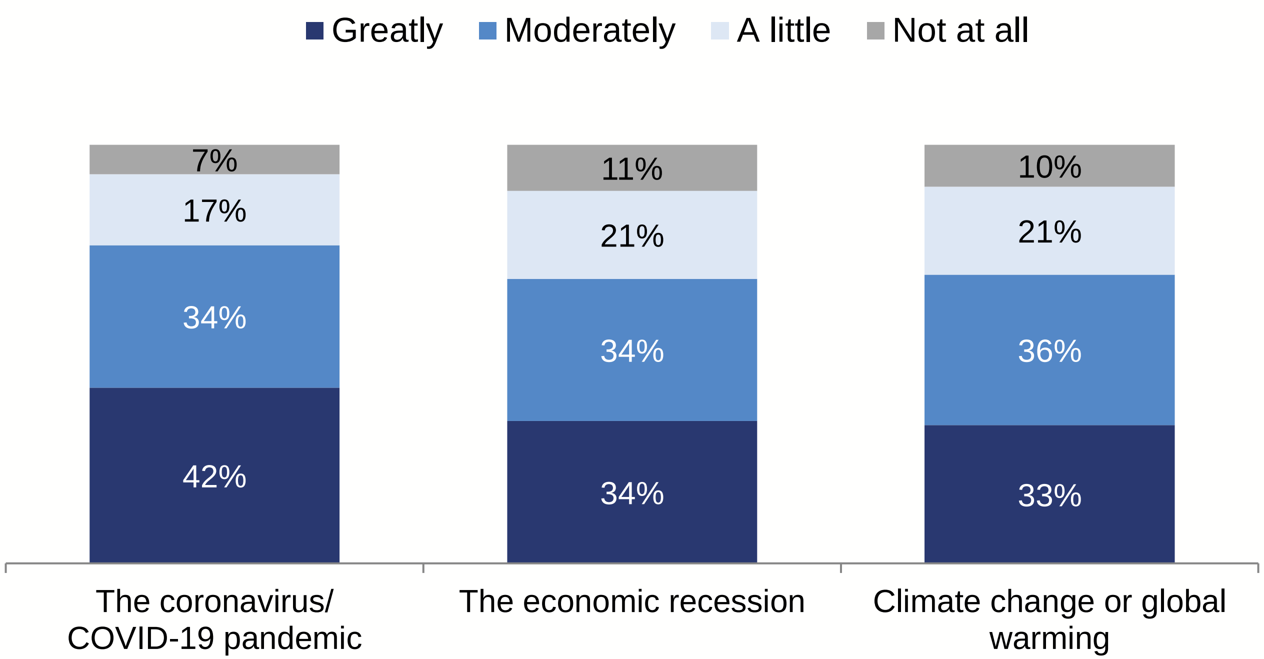
2. Results from Healthy and Sustainable Living 2020

Healthy & Sustainable Living

A Global Consumer Insights Project

Over four in ten European consumers say they have been greatly affected by the COVID-19 pandemic.

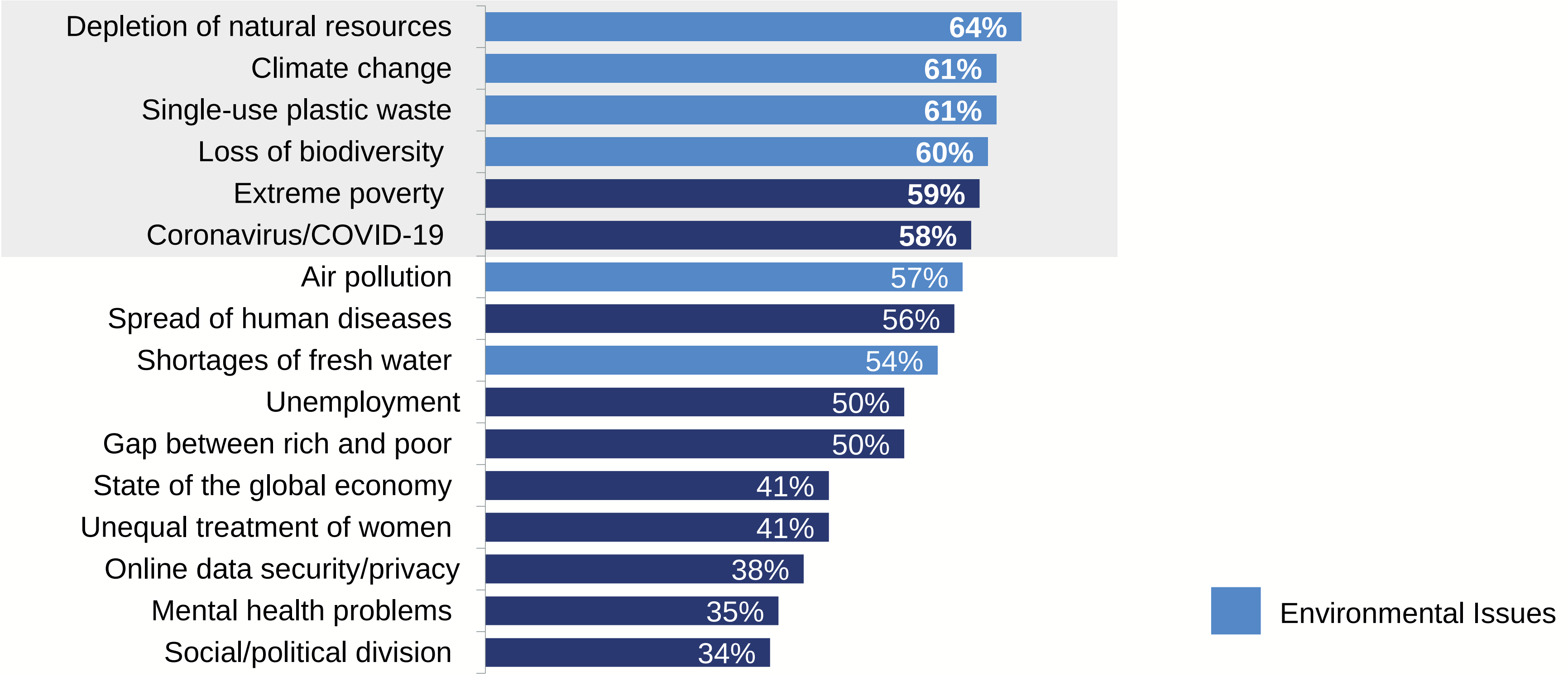
Extent personally affected by issues, Europe



Base: Europe, *n*=8,278
T2: How much are you personally affected by each of the following problems?

In Europe, environmental issues prevail as the most serious global problems – this is unique to Europe, as in other regions COVID-19 dominates.

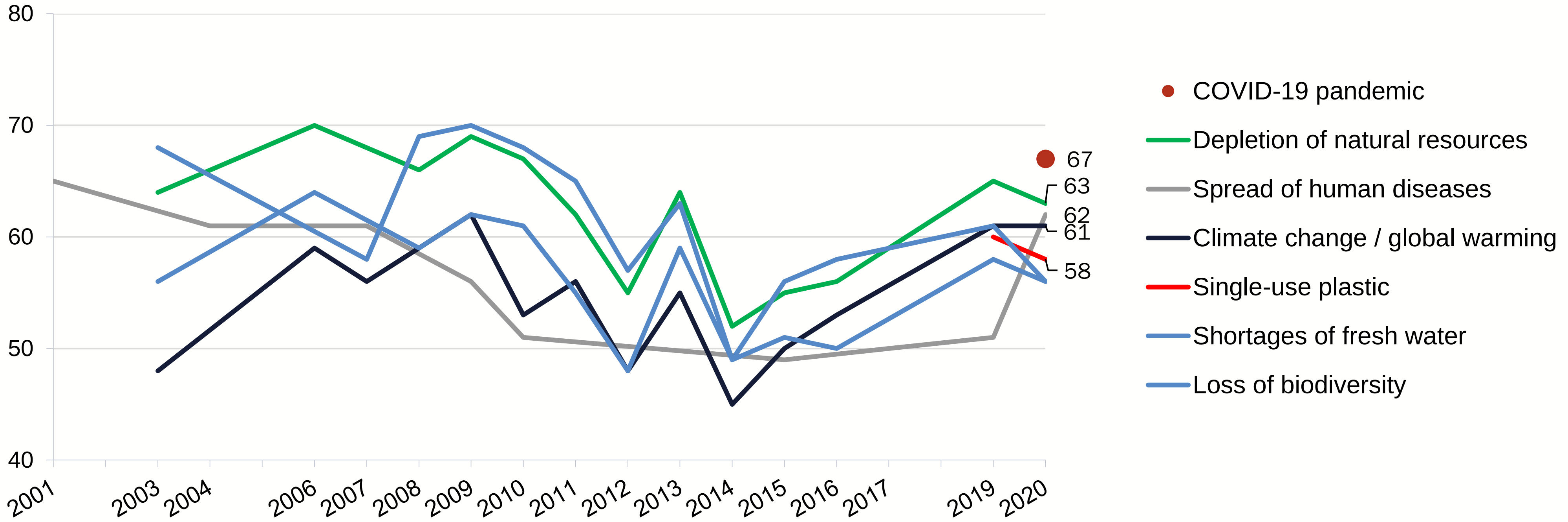
Seriousness of global problems, “very serious,” Europe



Base: Europe, *n*=5,703:
T1: For each of the following global problems, please indicate if you see it as a very serious, somewhat serious, not very serious, or not at all serious problem?

Following the COVID-19 pandemic, concern about the spread of disease has risen sharply, globally; perceived seriousness of climate change remains high.

Seriousness of global problems, “very serious,” average of 17 countries,* 2001–2020

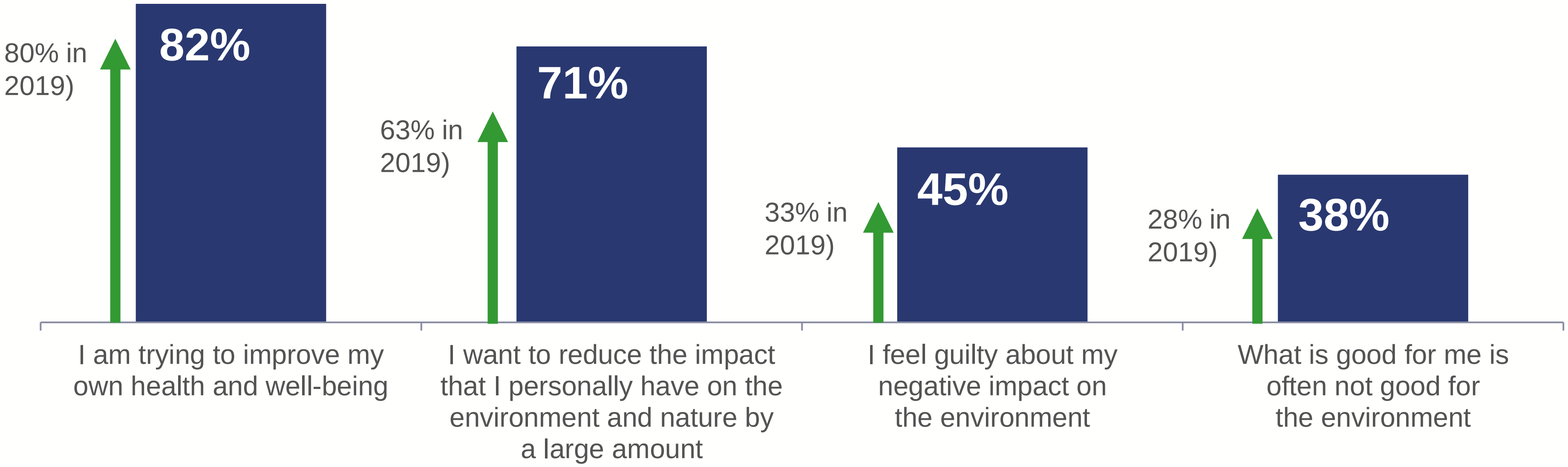


*Includes Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Italy, Kenya, Mexico, Nigeria, Russia, Spain, Turkey, UK, and USA
Not asked in all countries in all years. Before 2019 this question was asked using an in-person and telephone methodology.

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

Consumer opinion has intensified in the past year; over seven in ten want to reduce their environmental impact.

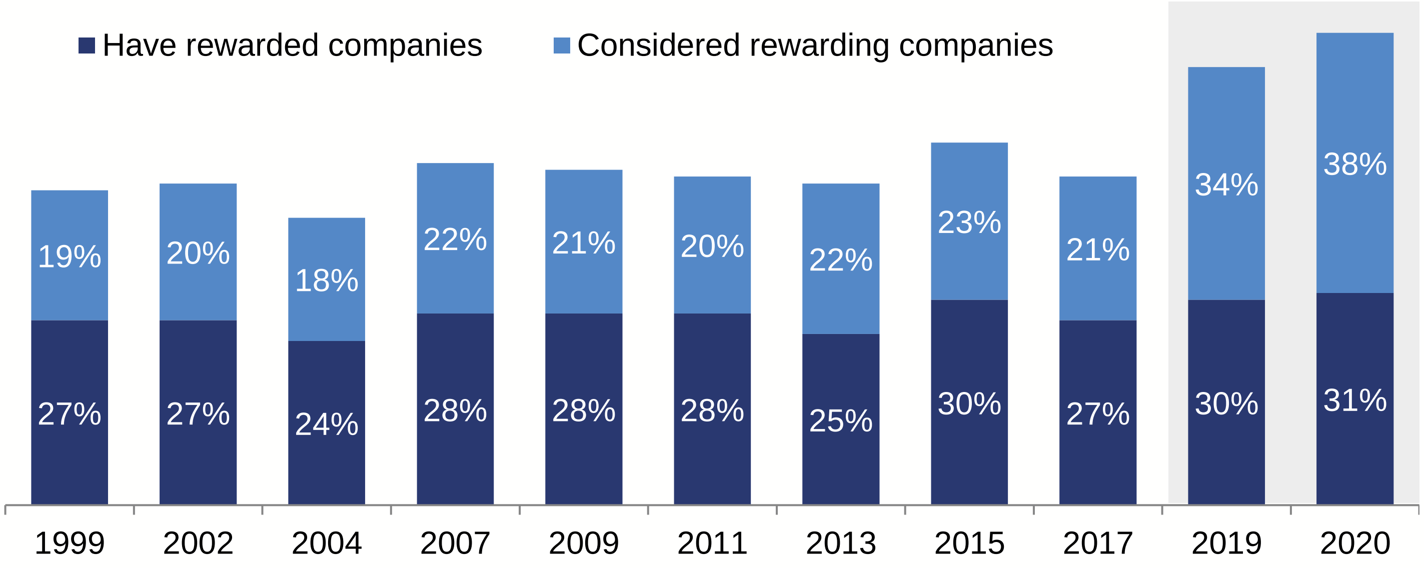
Environmental attitudes, “strongly agree” and “somewhat agree,” Europe



Base: Europe, *n*=8,278
Q11: Please indicate whether you strongly agree, somewhat agree, neither agree nor disagree, somewhat disagree, or strongly disagree with each of the following statements.

Consumers are increasingly likely to consider rewarding socially responsible companies, but the proportion doing so remains stable.

"Have rewarded companies seen as socially responsible" vs "considered this, but did not actually do," Average of 16 countries, * 1999–2020



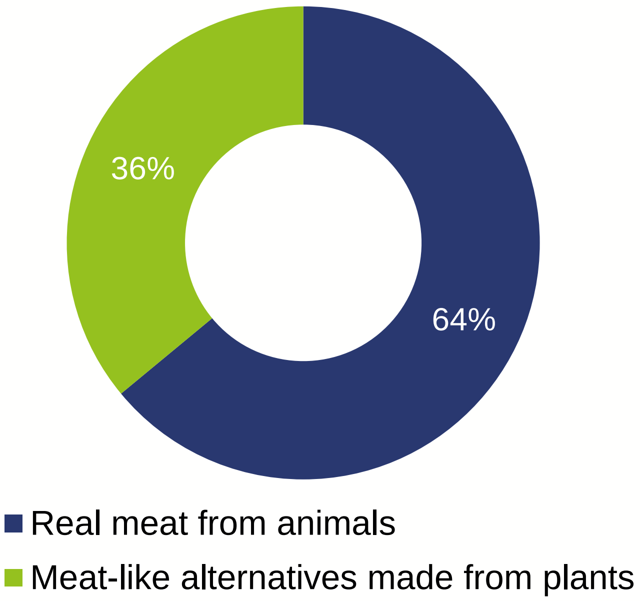
*Includes Argentina, Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Nigeria, Russia, Spain, Turkey, UK, and USA. Not all countries were asked in all years. Before 2019 this question was asked using an in-person and telephone methodology.

T24: Over the past year, have you considered rewarding a socially responsible company by either buying their products or speaking positively about the company to others? Would you say you have…?

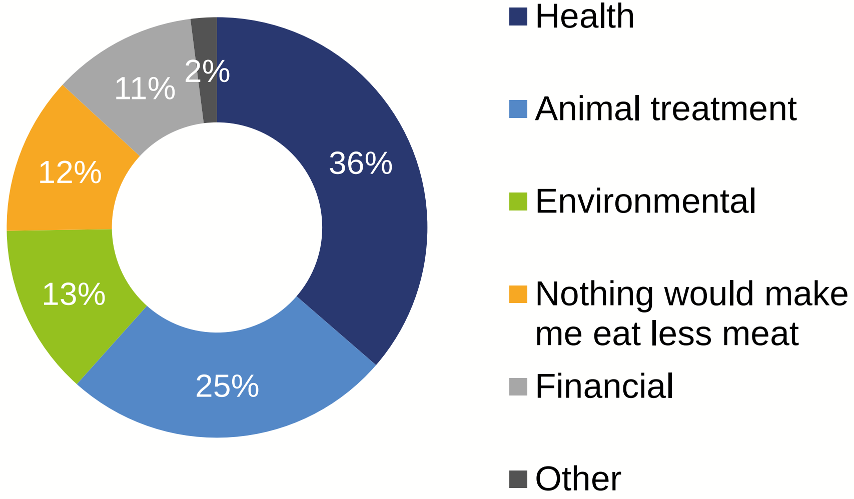
Over a third of meat-eaters favour plant-based alternatives; health and animal treatment are the key reasons for reduction in meat consumption.

Preference for meat and reasons to reduce meat consumption, all who eat meat, Europe

Assuming equal **taste**, **nutritional value**, and **cost, meat eaters prefer**…



Most important **reasons for meat eaters to reduce** their consumption…



Base: Europe, *n*=7,576:
Q13. Assuming each tasted equally good, had equal nutritional value, and cost the same, which one of the following do you prefer?
Q14. What would be the most important reason, if any, for you to reduce the amount of meat you eat?

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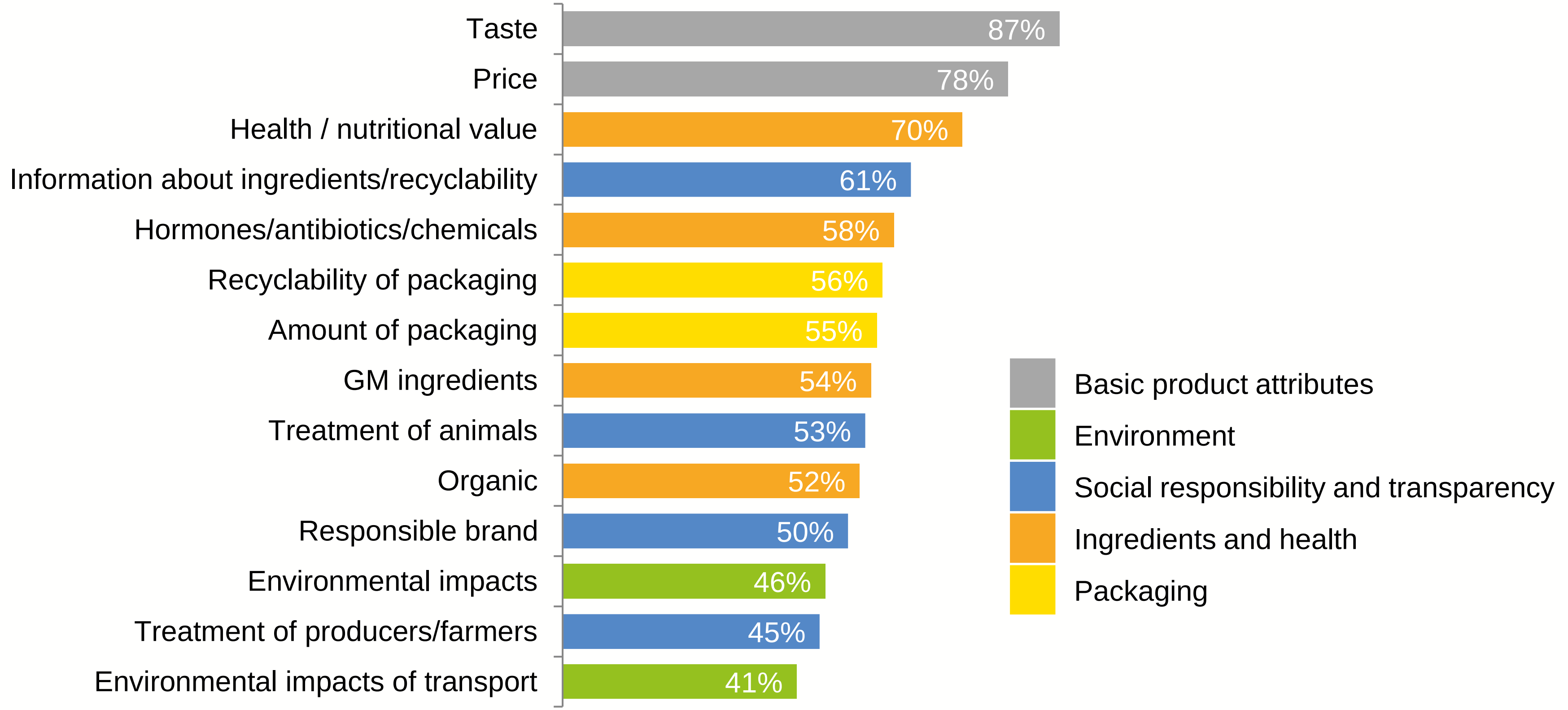
Taste, price, and health continue to be determinants for food/drinks purchase choices; environmental impacts are less likely to be top priorities.

Food and drink purchase considerations, “always” and “often,” Europe



Base: Europe, *n*=5,929:
Q17. Thinking of the foods and drinks that you choose and how they are produced, distributed, and sold, please indicate how often you consider each of the following in your choices.

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Richard Stobart
Head of Marketing at MSC

v

Annelie Selander
Sustainability Director at
Nomad Foods Europe

The impact of Covid-19 on the conscious food consumer

Q & A

Thank you

For future MSC events, please register at:

msc.org/en-us/about-the-msc/contact-us

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