KEEPING SEAFOOD SUSTAINABILITY AT THE CENTER AMID SHIFTING EATING HABITS
Largest survey of seafood consumers
Understanding the consumers in this study

General public
A representative sample of US consumers

Seafood consumers
72% of general public

Health & Eco-Conscious Eater
17% of seafood consumers

n=3,670
n=2,521
n=442
From one crisis to the next

- *2018*
  - Fieldwork for MSC/GlobeScan 2018 study
    - Feb 21 – Mar 10
  - Greta Thunberg activism gains global attention

- *2019*
  - Increased natural disasters (storms, fires)
  - First confirmed case of COVID-19 in the US (Jan)

- *2020*
  - One of the hottest years on record reported by NASA
  - 6th IPCC report warns catastrophic outcomes of climate change

- *2021*
  - Cost of living crisis in the US // record inflation

- *2023*
  - Fieldwork for MSC/GlobeScan 2022 study
    - Feb 1 – Mar 16
  - Fieldwork for MSC/GlobeScan 2020 study
    - Jan 31 – Mar 17

- *2022*
  - Fieldwork for MSC/GlobeScan 2022 study
    - Feb 1 – Mar 16

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Biggest environmental threats

Which, if any, of the potential environmental issues are you most worried about? Each respondent selected three issues.

- General public
- Seafood consumers
- Conscious eaters

### General public
- Climate change: 44%
- Pollution and waste damaging rivers and streams: 37%
- Air pollution: 33%
- Loss of animal species: 33%
- Health of the oceans and decline in fish populations: 32%
- Extreme weather events / changing weather patterns: 31%
- Loss / destruction of rainforests: 26%
- Loss of wilderness / urban sprawl: 21%

### Seafood consumers
- Climate change: 46%
- Pollution and waste damaging rivers and streams: 39%
- Air pollution: 35%
- Loss of animal species: 33%
- Health of the oceans and decline in fish populations: 36%
- Extreme weather events / changing weather patterns: 32%
- Loss / destruction of rainforests: 25%
- Loss of wilderness / urban sprawl: 21%

### Conscious eaters
- Climate change: 59%
- Pollution and waste damaging rivers and streams: 39%
- Air pollution: 35%
- Loss of animal species: 33%
- Health of the oceans and decline in fish populations: 36%
- Extreme weather events / changing weather patterns: 32%
- Loss / destruction of rainforests: 25%
- Loss of wilderness / urban sprawl: 21%
Rising concerns about climate change

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? Ocean issues, (each respondent selected three issues)

Seafood consumers

- Pollution of the ocean
- Overfishing / depletion of fish species
- The effects of climate change
- Ocean acidification and damage to coral reefs and other fragile marine environments
- GMOs or harmful chemicals in the seafood that we eat
- Illegal and prohibited fishing
- Accidental catch of sea life
- Impacts of rising sea levels
- Poor working conditions for people working in the fishing industry
- Not enough seafood for our children and grandchildren
- Slavery in the fishing industry

Top 3 issues are the same globally. Concerns about rising sea levels has increased the most since 2020 survey.
Climate change continues to rise as a concern despite economic pressure

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. Perceived seriousness of global problems, “very serious,” global, %.*

*Base: Global **The first results from the 2008 financial crash were recorded in 2009
# Changing to planet-friendly proteins

Do you eat more or less of the following foods than you did two years ago? Diet changes among consumers, 4-pt scale.

<table>
<thead>
<tr>
<th></th>
<th>Eat more</th>
<th>Eat less</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Other red meat (e.g. lamb and venison)</strong></td>
<td>6%</td>
<td>-38%</td>
</tr>
<tr>
<td></td>
<td>6%</td>
<td>-28%</td>
</tr>
<tr>
<td></td>
<td>6%</td>
<td>-26%</td>
</tr>
<tr>
<td><strong>Pork</strong></td>
<td>9%</td>
<td>-43%</td>
</tr>
<tr>
<td></td>
<td>9%</td>
<td>-30%</td>
</tr>
<tr>
<td></td>
<td>9%</td>
<td>-30%</td>
</tr>
<tr>
<td><strong>Dairy</strong></td>
<td>13%</td>
<td>-29%</td>
</tr>
<tr>
<td></td>
<td>18%</td>
<td>-20%</td>
</tr>
<tr>
<td><strong>Beef</strong></td>
<td>13%</td>
<td>-27%</td>
</tr>
<tr>
<td></td>
<td>13%</td>
<td>-26%</td>
</tr>
<tr>
<td><strong>Meat/dairy alternatives (e.g. tofu and plant-based proteins)</strong></td>
<td>15%</td>
<td>-13%</td>
</tr>
<tr>
<td></td>
<td>35%</td>
<td>-13%</td>
</tr>
<tr>
<td></td>
<td>-12%</td>
<td></td>
</tr>
<tr>
<td><strong>Eggs</strong></td>
<td>14%</td>
<td>-22%</td>
</tr>
<tr>
<td></td>
<td>18%</td>
<td>-16%</td>
</tr>
<tr>
<td></td>
<td>18%</td>
<td>-16%</td>
</tr>
<tr>
<td><strong>Beans and legumes</strong></td>
<td>21%</td>
<td>-14%</td>
</tr>
<tr>
<td></td>
<td>38%</td>
<td>-17%</td>
</tr>
<tr>
<td></td>
<td>19%</td>
<td></td>
</tr>
<tr>
<td><strong>Fish and seafood</strong></td>
<td>22%</td>
<td>-18%</td>
</tr>
<tr>
<td></td>
<td>27%</td>
<td>-16%</td>
</tr>
<tr>
<td></td>
<td>39%</td>
<td>-18%</td>
</tr>
<tr>
<td><strong>Poultry</strong></td>
<td>24%</td>
<td>-15%</td>
</tr>
<tr>
<td></td>
<td>27%</td>
<td>-12%</td>
</tr>
<tr>
<td></td>
<td>37%</td>
<td>-13%</td>
</tr>
</tbody>
</table>
Switching to foods with lower carbon footprint

What are the reasons for changing your diet? Those that answered “to reduce climate change impact”.

General public
Increasing desire to lead a healthier lifestyle
What are the reasons for changing your diet in the last two years? Select all that apply.

- To protect the oceans
- To support local food producers
- To reduce climate change impact
- To protect animal welfare
- To protect the environment
- The pandemic caused me to rethink my priorities
- To eat food from a more sustainable source
- My cooking habits have changed
- My tastes have changed
- To save money
- To eat better quality food
- To be healthier

General public
Seafood consumers
Conscious eaters
Connecting human and planetary health

Perspectives on ecolabels. Describes opinion well, top three (5+6+7 on 7-pt scale).

- **Ecolabeled fish and seafood is better for our health**
  - Seafood consumers: 46%
  - Conscious eaters: 66%

- **By buying ecolabeled seafood I am helping ensure plenty more fish left in the sea for future generations**
  - Seafood consumers: 53%
  - Conscious eaters: 72%
The importance of protecting the ocean for the future

I believe healthy oceans are necessary for the future health of the planet

I want the wildlife that lives in the oceans not to go extinct

I want to enjoy eating healthy seafood

I want to enjoy clean and beautiful beaches

I want my children and grandchildren to have healthy oceans

I want the livelihoods of people who depend on the oceans to be protected, such as fishermen or women

I am concerned for the future protection of communities who live near the oceans

I want to enjoy the ocean for hobbies or water sports

I don't think it's important to protect the oceans

Seafood consumers

Conscious eaters

59% 54% 49% 46% 45% 36% 30% 22% 2%
Ocean optimism and a belief that we can make a difference

Those that agree with the following statements about the ocean and their ability to make a positive impact.

- **I feel more worried about the ocean in the last two years**
  - Seafood consumers: 91%
  - Conscious eaters: 82%

- **I feel that in 20 years time we will have saved the ocean from irreparable damage from humans**
  - Seafood consumers: 56%
  - Conscious eaters: 64%

- **The choices I make about eating seafood can make a difference to the health of our oceans**
  - Seafood consumers: 62%
  - Conscious eaters: 82%
The expectation of businesses to be transparent and accountable

Perspectives on ocean health, sustainability, and traceability. Describes my opinion well, top three (5+6+7).

<table>
<thead>
<tr>
<th>Statement</th>
<th>Conscious Eaters</th>
<th>Seafood Consumers</th>
</tr>
</thead>
<tbody>
<tr>
<td>I would like to hear more from companies about the sustainability of their fish/seafood products</td>
<td>62%</td>
<td>85%</td>
</tr>
<tr>
<td>I want to know that the fish I buy can be traced back to a known and trusted source</td>
<td>64%</td>
<td>82%</td>
</tr>
<tr>
<td>Supermarkets' and brands' claims about sustainability and environment need to be clearly labeled by an independent organization</td>
<td>65%</td>
<td>81%</td>
</tr>
</tbody>
</table>

Demand for independent labeling rose globally as well as in the US with 74% demanding third-party verification in 2022 versus 71% in 2020.
Actions consumers took to protect the ocean

Which, if any, of the following actions have you taken in the last year to help protect the fish and seafood in our oceans?

<table>
<thead>
<tr>
<th>Action</th>
<th>Seafood consumers</th>
<th>Conscious eaters</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>40%</td>
<td>43%</td>
</tr>
<tr>
<td>Bought more sustainable seafood</td>
<td>11%</td>
<td>21%</td>
</tr>
<tr>
<td>Reduced the amount of fish or seafood I eat</td>
<td>28%</td>
<td>18%</td>
</tr>
<tr>
<td>Switched to purchase fish or seafood with less plastic packaging</td>
<td>16%</td>
<td>30%</td>
</tr>
<tr>
<td>Discussed ocean issues with my friends and family</td>
<td>16%</td>
<td>31%</td>
</tr>
<tr>
<td>Switched to a brand or product that says it helps protect the ocean</td>
<td>14%</td>
<td>26%</td>
</tr>
<tr>
<td>Bought more seafood with an ecolabel on the packaging</td>
<td>12%</td>
<td>26%</td>
</tr>
<tr>
<td>Changed the species/type of fish I buy</td>
<td>10%</td>
<td>20%</td>
</tr>
<tr>
<td>Changed where I buy seafood (e.g. different supermarket, fishmonger)</td>
<td>10%</td>
<td>20%</td>
</tr>
<tr>
<td>Used a guide, website or app to help choose which fish to buy</td>
<td>9%</td>
<td>9%</td>
</tr>
<tr>
<td>Stopped eating fish or seafood completely</td>
<td>5%</td>
<td>9%</td>
</tr>
<tr>
<td>Other</td>
<td>5%</td>
<td>9%</td>
</tr>
</tbody>
</table>
Addressing the intent versus action gap

Which, if any, of the following actions have you taken in the last year or willing to take in the future to help protect the fish and seafood in our oceans?

Seafood consumer
- Intent: 67%
- Action: 45%
- 22% point gap

Conscious eater
- Intent: 84%
- Action: 70%
- 14% point gap
Engaging the conscious consumer

- Reassurance of health and environmental benefits
- Provable positive impact
- Messaging at point of choice (online and offline)
- Leverage optimists, but don’t discount pessimists
- Transparency and openness
- No to greenwashing, but also greenhushing
- Verified environmental claims
- Lowering barriers to choosing sustainable
- Hearing more about your commitments

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WHEN WE TAKE CARE OF OUR OCEAN
OUR OCEAN TAKES CARE OF US

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