

MSC Consumer Insights 2022

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Globe
Scan 



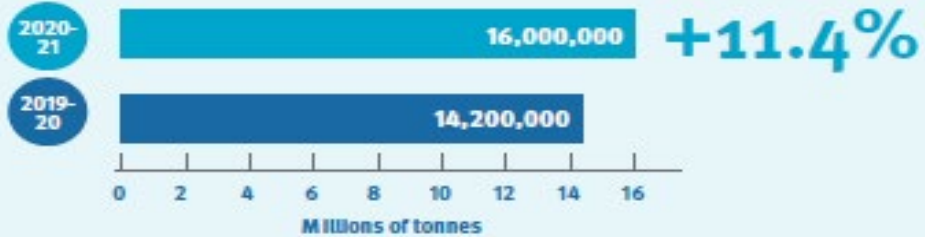
ENJOY THE
SEAFOOD
YOU LOVE ♡
TODAY, TOMORROW
AND ALWAYS



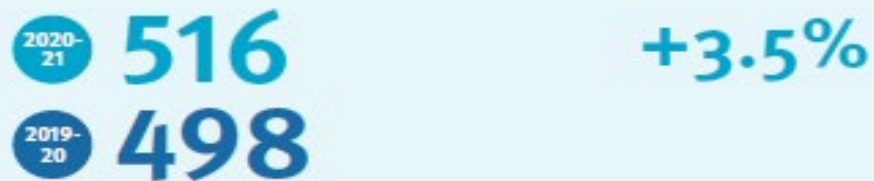
*We're on a mission to end overfishing
so future generations can enjoy the
seafood we love by choosing certified
sustainable seafood*

Global Fisheries

MSC engaged catch reached 16 million tonnes*



Number of fisheries engaged in the MSC program



55 countries engaged

*MSC 2020-21 marine catch (follows MSC exclusion policy and does not include farmed fish or inland fisheries) compared with latest UN FAO data (2018).

19% of all wild marine catch was engaged with the MSC*...

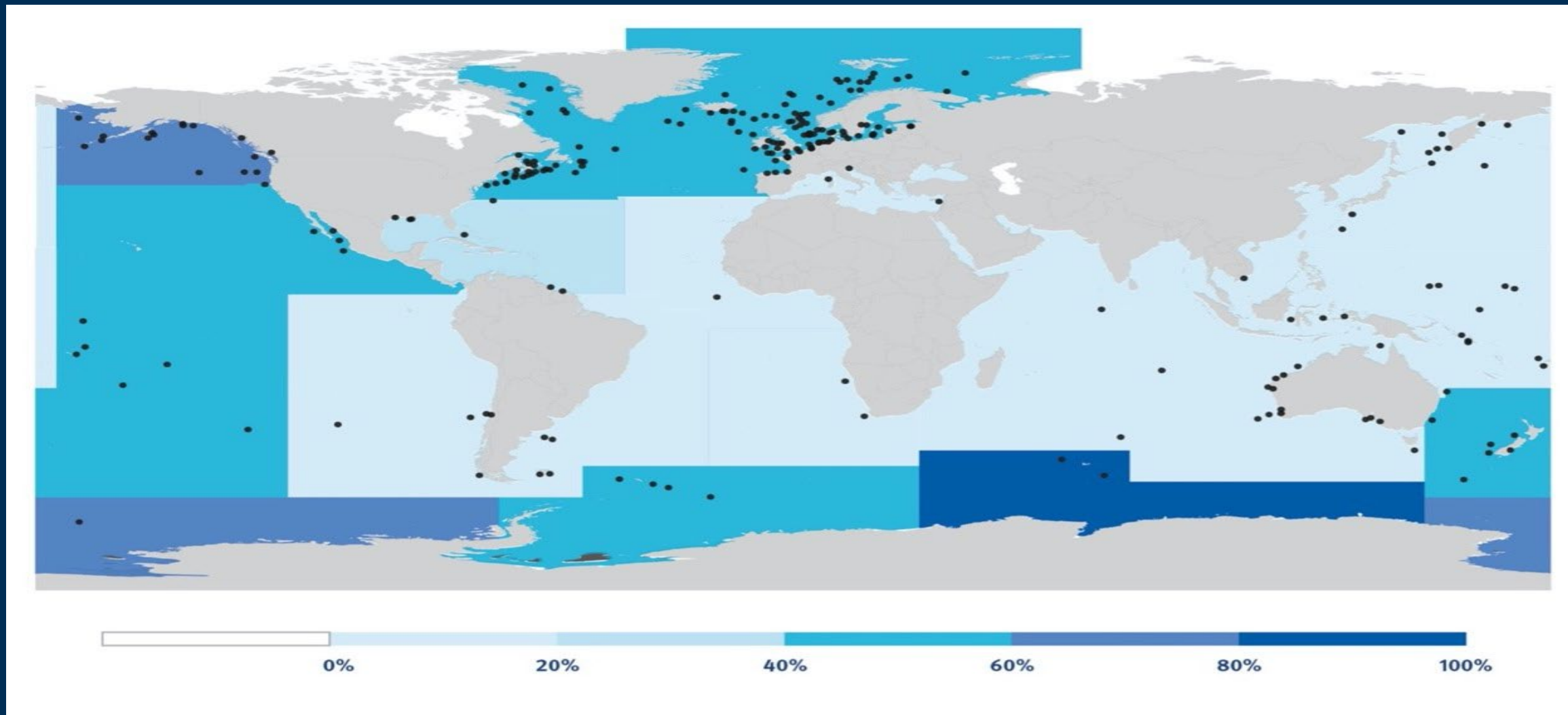


An additional 10% of global marine wild catch came from fisheries working towards MSC certification**

*Engaged means certified, suspended or in MSC assessment

**Fisheries working towards MSC certification comprise those in the In-Transition to MSC program, Pathway Projects at stage three or four, and comprehensive fisheries improvement projects listed on fisheryprogress.org that have MSC certification as an explicit end goal.

Global progress in sustainable fishing

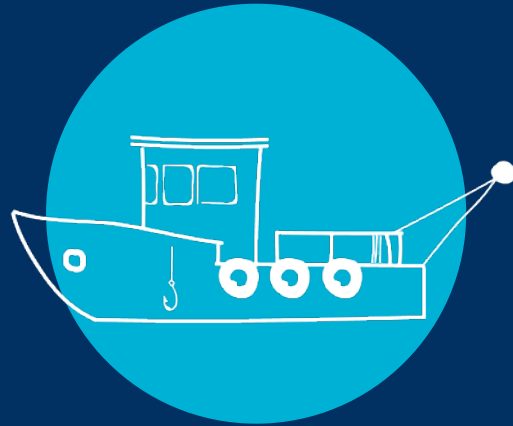


25 years of partnerships



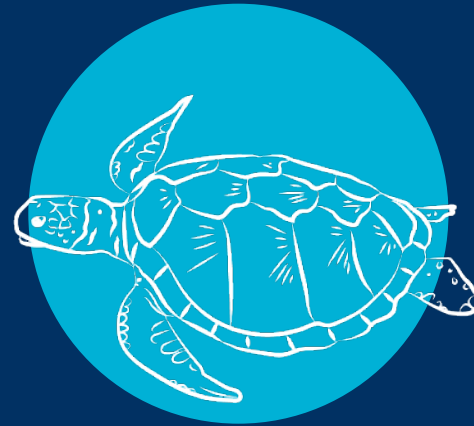
19%

of wild marine
catch engaged



539

fisheries certified



2,000

fishery
improvements made



\$12.9 billion

retail sales value

*engaged = certified suspended and in assessment; certified includes suspended fisheries; Data: fishery data March 2022 and FAO 2019, improvement and market data as of March 2021.

#SFF2022

Ocean stewardship fund



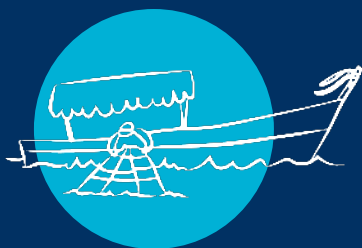
\$2.8 million
awarded



18 countries
covered



24 research projects

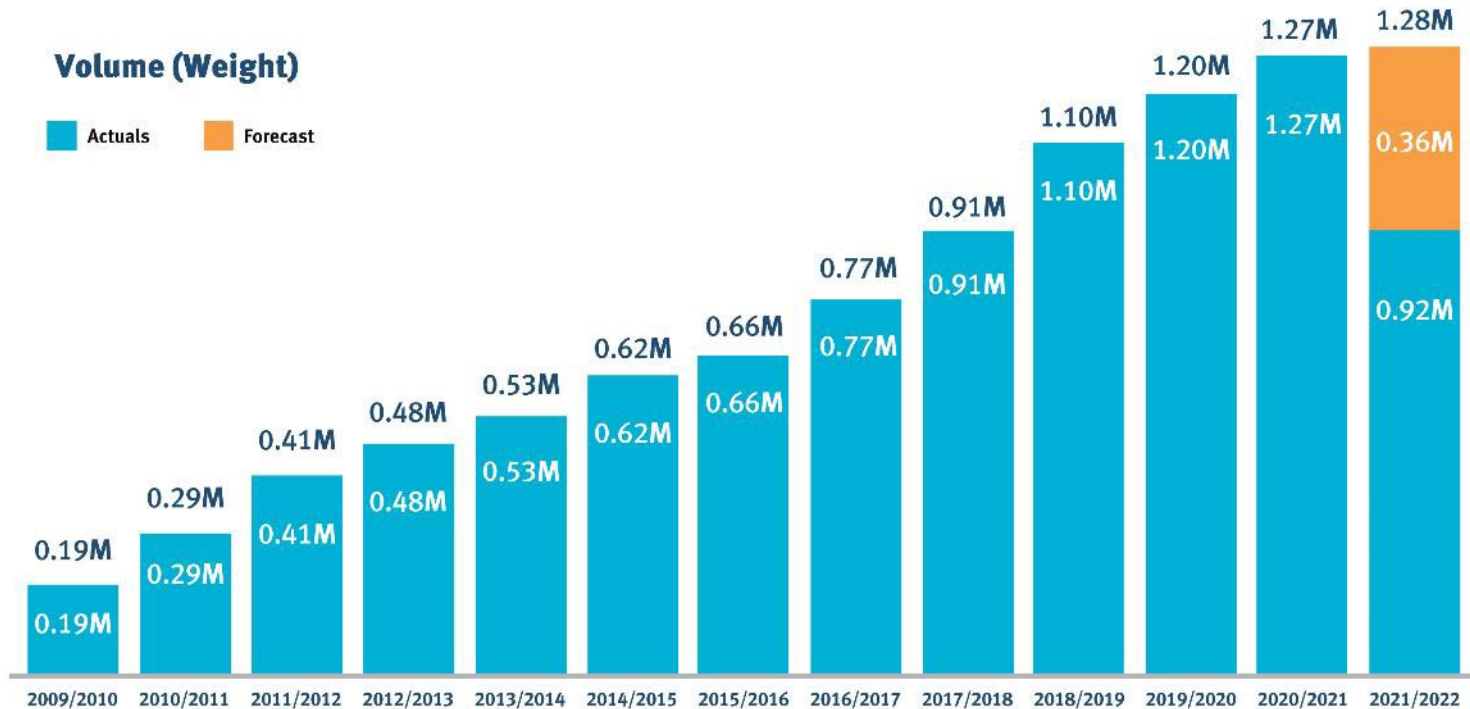


\$1.1 million
developing economy grants



#SFF2022

Number of products with the MSC I



20,000+ products
with the blue MSC label

60+ nations
where consumers can buy MSC
labelled products

1.28M tonnes
2021-2022 volume of sales forecast

MSC Consumer Insights 2022

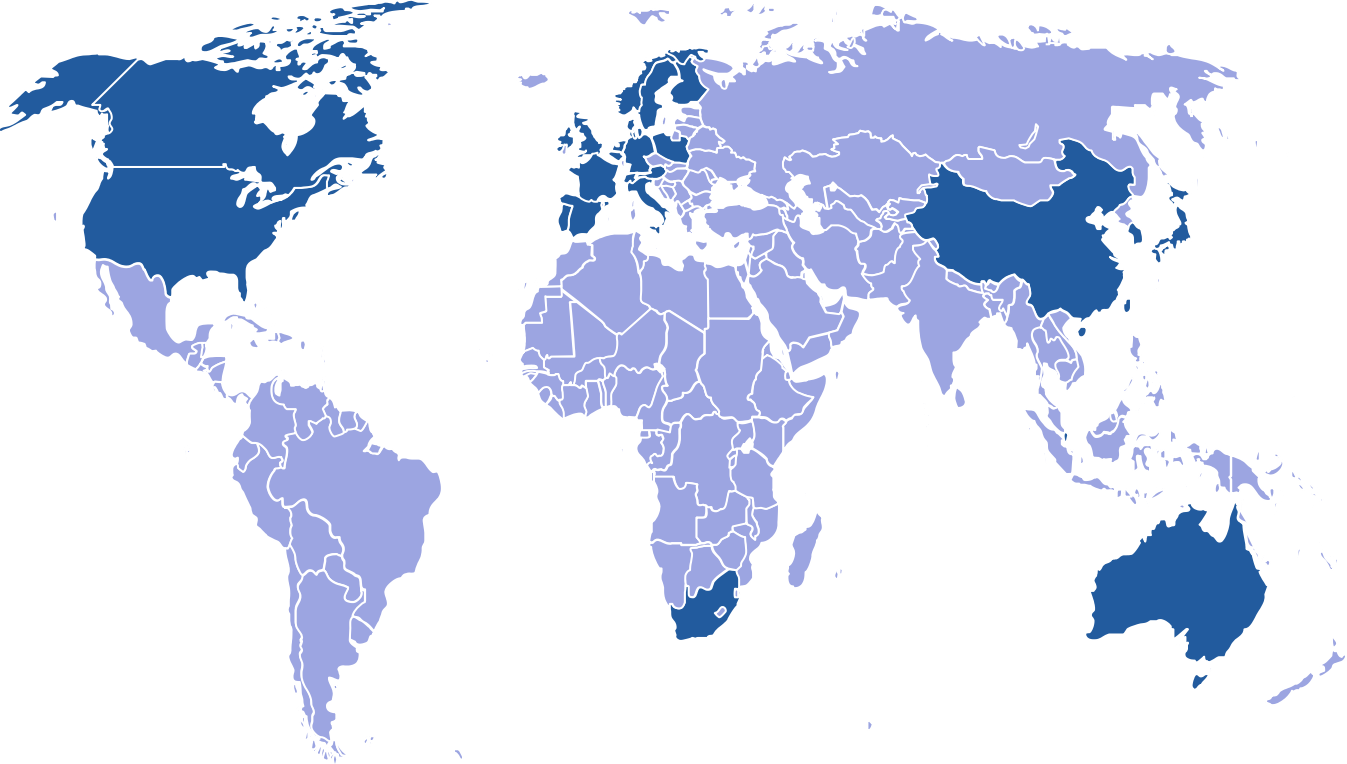
Themes:

1. Eco-anxiety increases
2. Shift to healthier diets
3. Consumers as part of the solution



Introduction to MSC Consumer Insights 2022

The Marine Stewardship Council has partnered with GlobeScan to conduct four waves of a global research study into consumer perceptions. The latest online consumer survey took place between 25th of January and 16th March 2022, following similar surveys in 2020, 2018 and 2016. 23 markets were included, with a minimum of 600 seafood consumers per market surveyed.



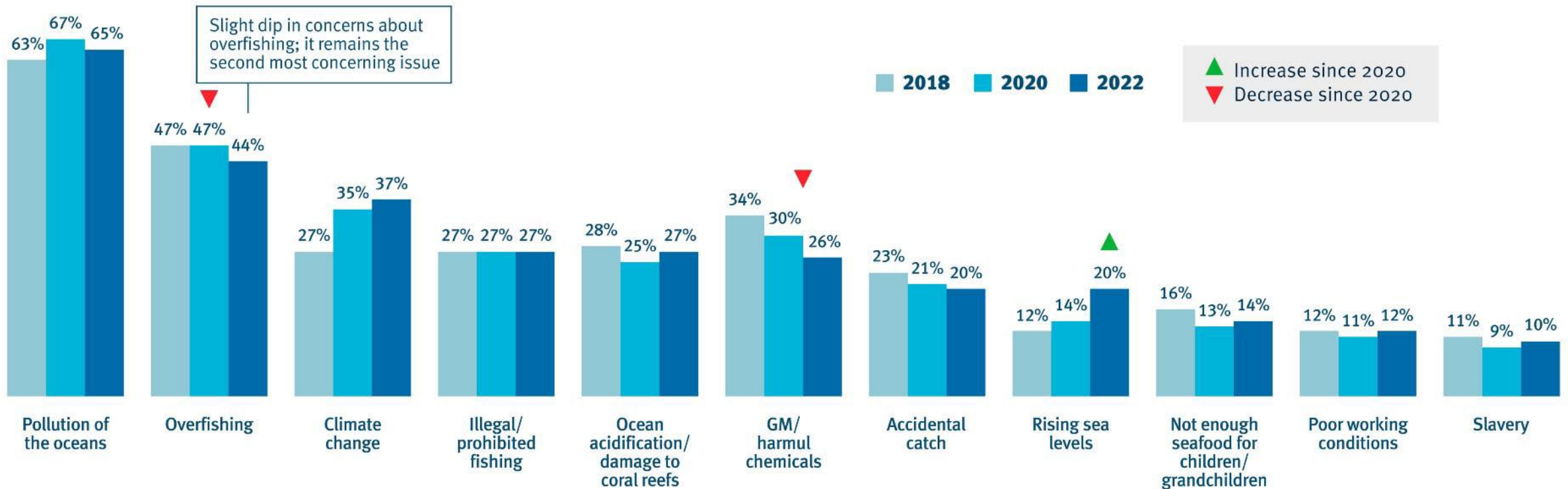
This we believe is the largest global consumer survey of seafood consumers. This year saw South Korea added to the list of countries included and the survey now includes newly 26K consumers of which over 20K are seafood consumers. The survey work was carried out in February this year so represents a period when many countries were effectively coming out of covid restrictions.

Theme 1: Eco-anxiety increases

- Post-Covid, people more concerned about environmental issues
- Generally more concerned about everything
- Ocean issues high up on agenda in many countries



Consumers' Concerns

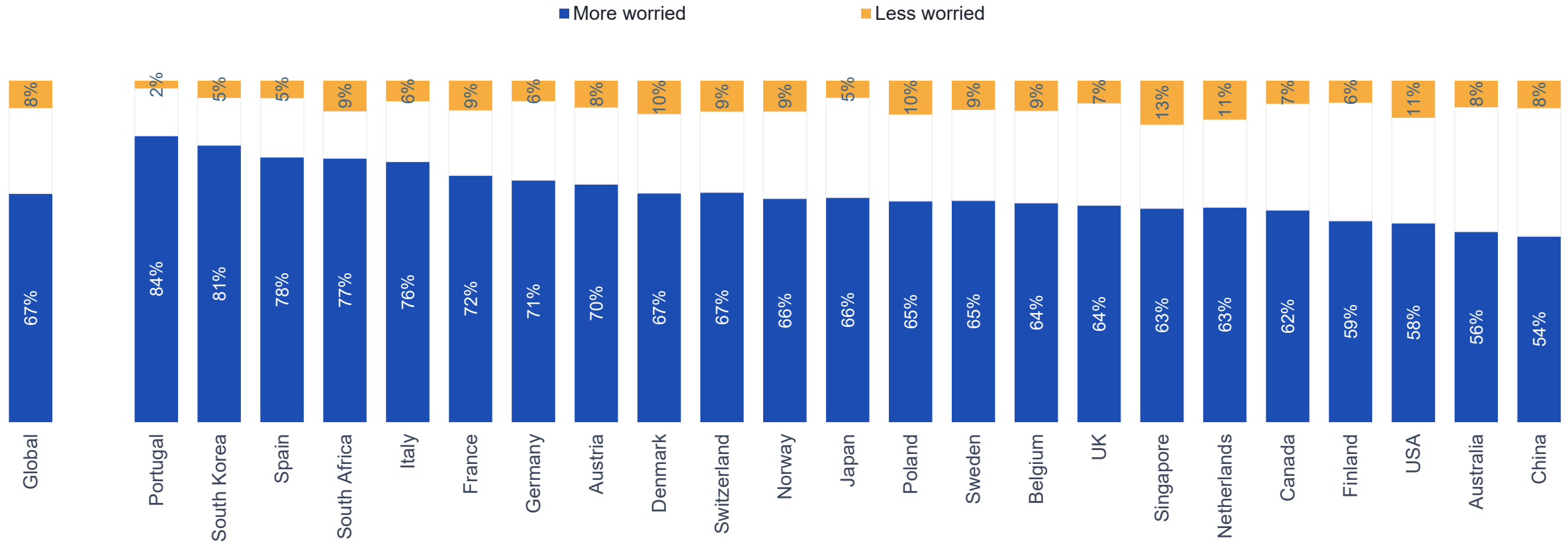


Base: Seafood consumers, global, n=20,127

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?

Seafood consumers become more worried, rather than less worried about the state of the oceans in the last two years

How feelings about the state of oceans have changed in last two years

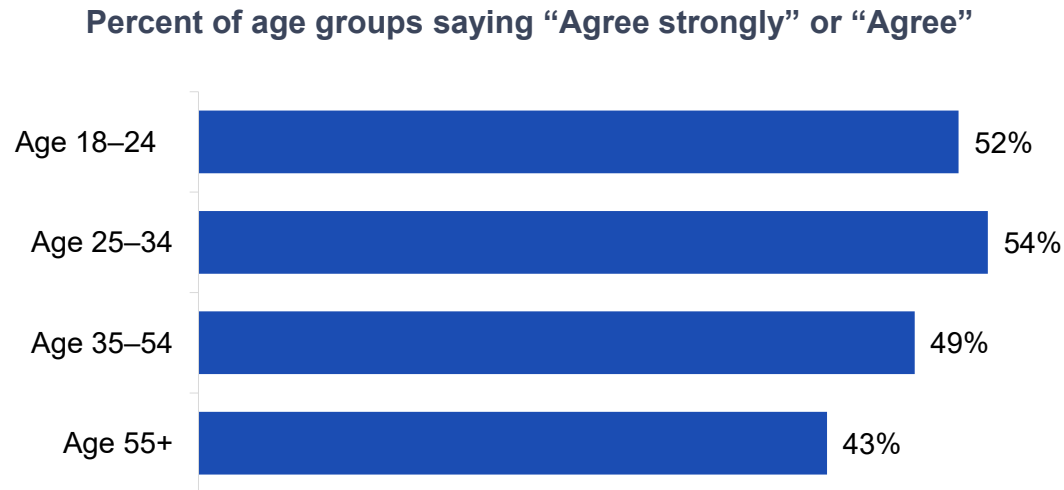
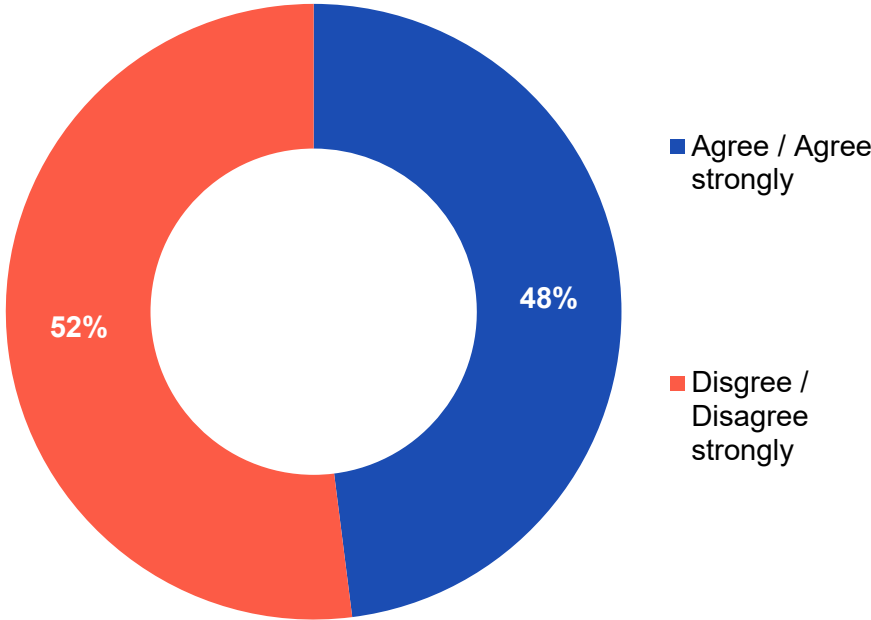


Base: Seafood consumers, global, n=20,127

Q106. Which of the following statements best describes how your feelings about the state of the oceans have changed, if at all, in the last two years?

Seafood consumers split 50:50 about possibility of saving the oceans; younger people more optimistic, those over 55 are least optimistic

I believe in 20 years' time we will have saved the oceans from irreparable damage from humans



Base: Seafood consumers, global, n=20,127

Q105.2: To what extent do you agree or disagree with the following statements?: I believe in 20 years' time we will have saved the oceans from irreparable damage from humans



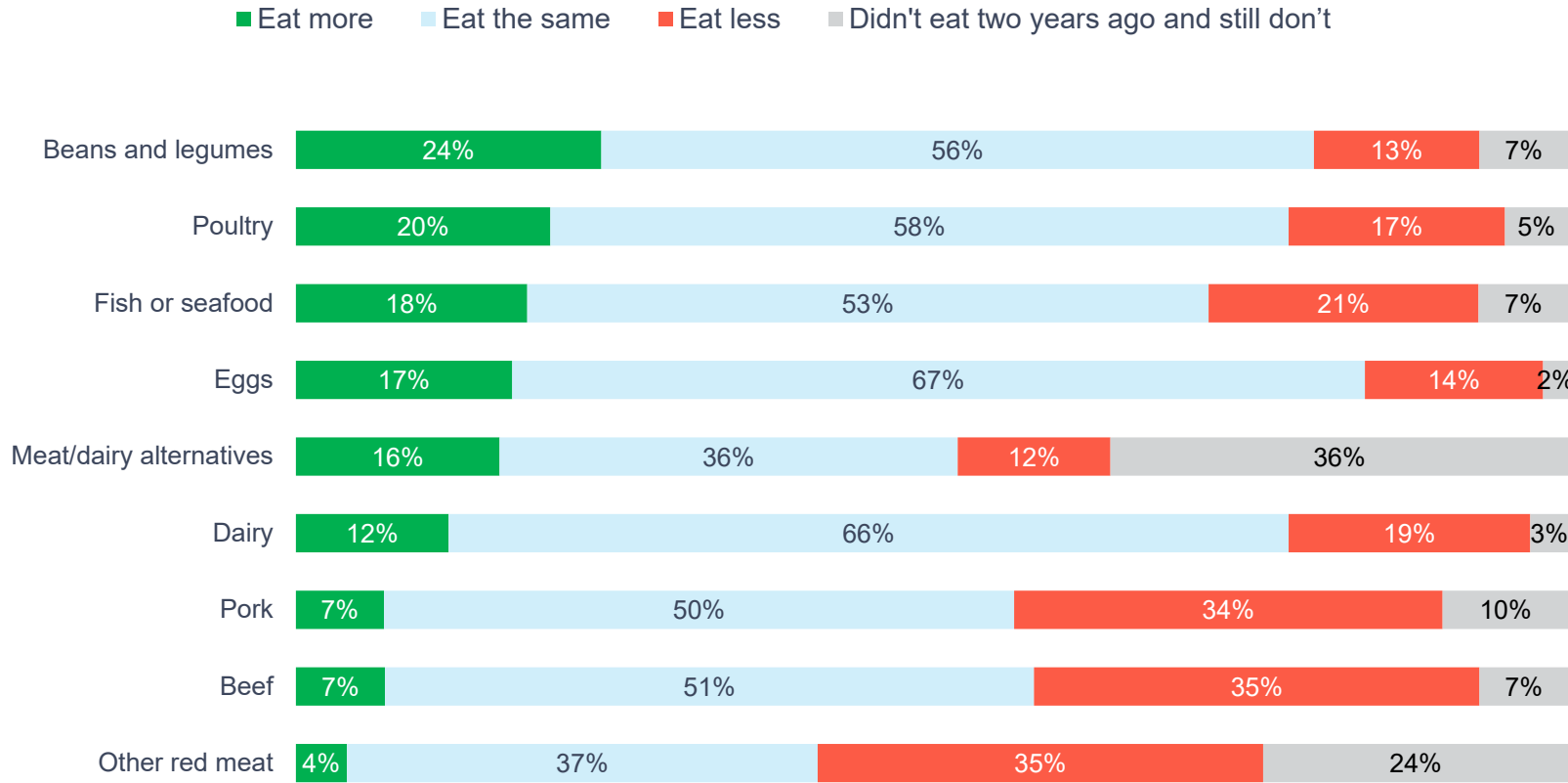
Theme 2: A shift to healthier diets

- Consumers reconsidering their diets, primarily for health but also environmental reasons
- Significant numbers of people are making incremental changes to their diets
- But by no means are we all becoming vegan / vegetarian (still less than 5% of people in most countries)



Beans and legumes see largest increase in consumption, while pork, beef, and other red meat have largest decreases; nearly 2/10 consumers say they eat more seafood, though another 2/10 say they are eating less

Changes in food consumption compared to two years ago



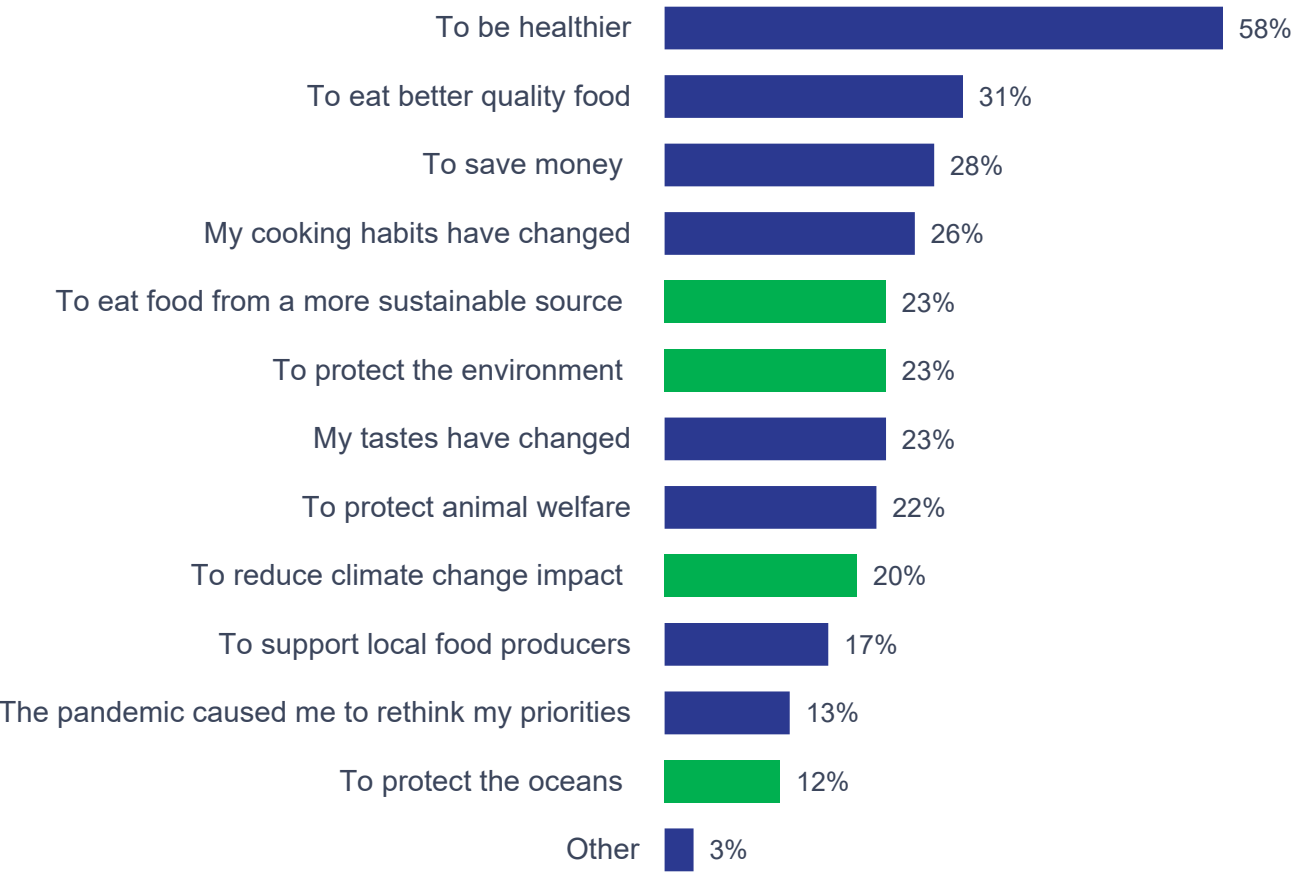
Eating less fish/seafood is higher among 18–24s (29%) and lower among 55+ (17%)

Eating less beef is higher among 55+ (39%) and lower among 18–24s (30%) and 25–34s (29%)

Among those who have changed their diet in the past two years, largest proportion has done so to improve health, while 44% say they changed their diet because of an environmental reason



Reasons for changing diet compared to two years ago

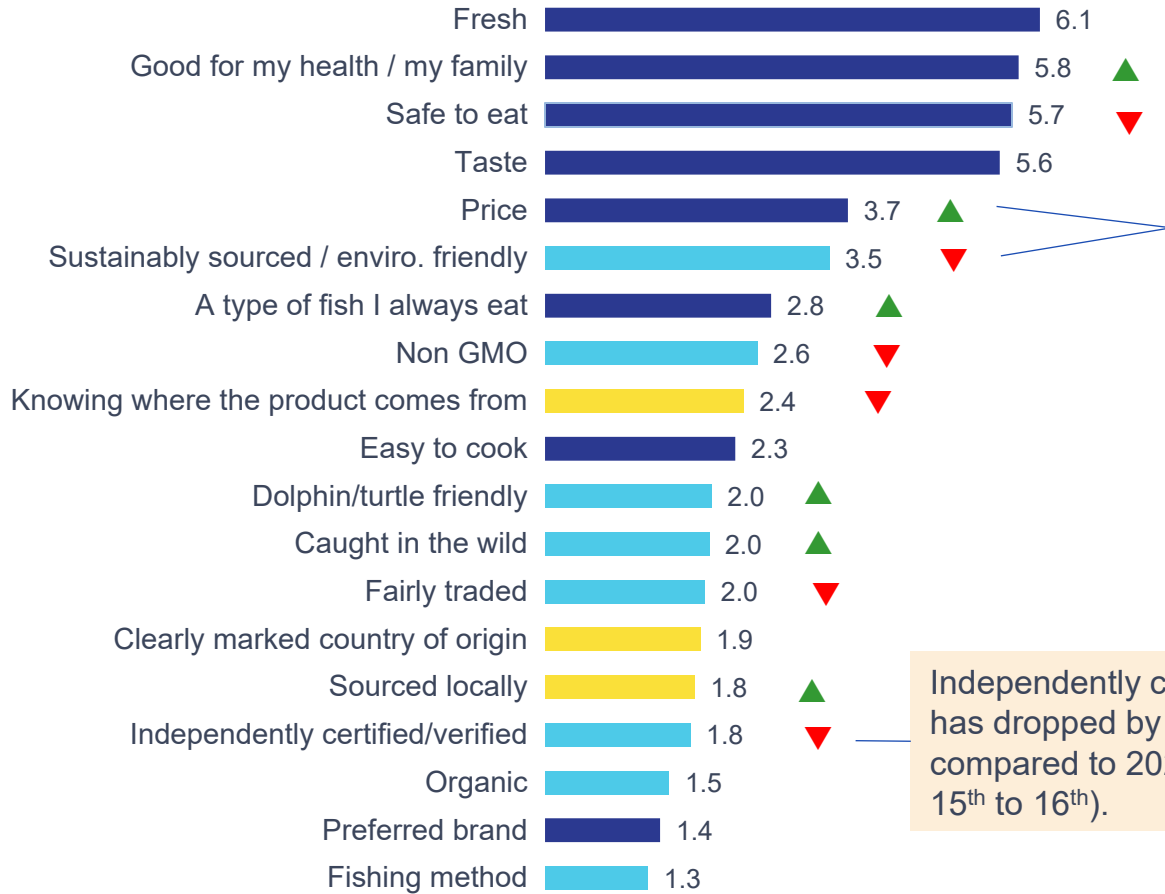


- Combined Environmental – 44%
- All other reasons

The top drivers of purchase remain freshness, health benefits, safety, and taste; sustainable sourcing and environmental friendliness remains a secondary motivator that has slightly declined in ranking compared to 2020

Motivators: max diff analysis, Importance score, globally

▲ Ranked higher in 2022 compared to 2020
▼ Ranked lower in 2022 compared to 2020



Sustainably sourced has dropped just below price in overall importance – now the sixth most important driver.
Sustainably sourced ranks above price in 11 countries – Austria, China, Denmark, France, Germany, Italy, South Africa, Spain, Sweden, Switzerland, and the UK (just slightly).

There is no difference between age breaks on top motivators to purchase.

Independently certified has dropped by one rank compared to 2020 (from 15th to 16th).

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



Theme 3: Consumers increasingly see themselves as part of the solution

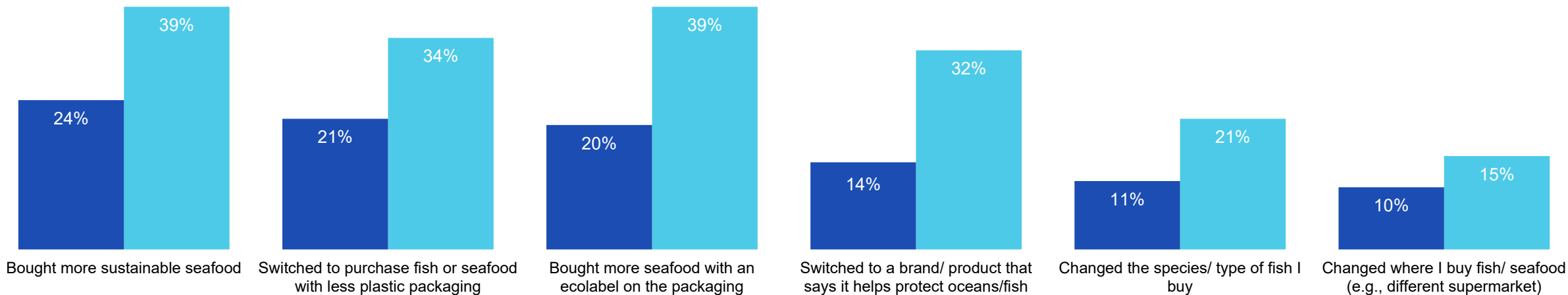
- Consumers trust NGOs, along with scientists and independent certification organisations to contribute the most to protecting the ocean
- However, consumers also increasingly see themselves as having a role, as they believe that they can make a difference and are prepared to make changes
- They notice ecolabels slightly more than 2 years ago



Buying more sustainable seafood is the most common action taken by seafood consumers, with almost 4/10 saying they would be likely to do this in the future

Actions taken in the last year to protect fish and seafood and actions willing to take in the future, multi-select

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



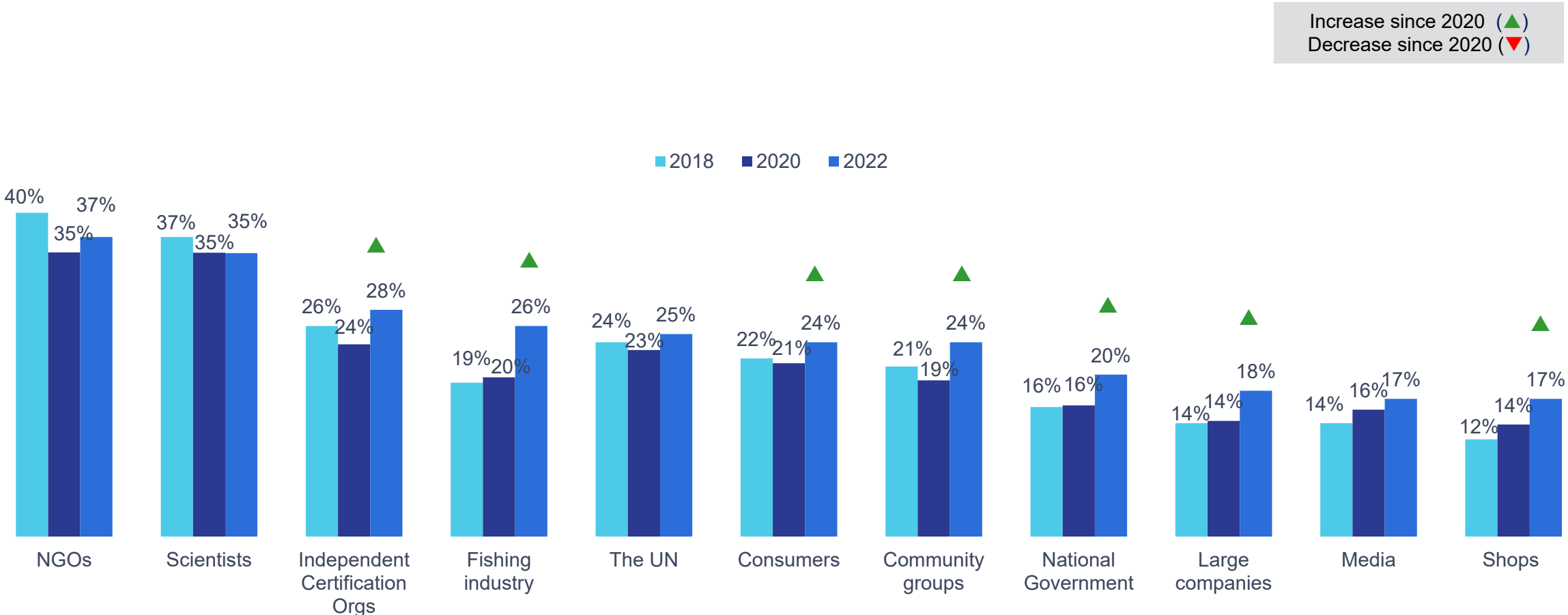
Base: Seafood consumers, global, n=20,127

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?

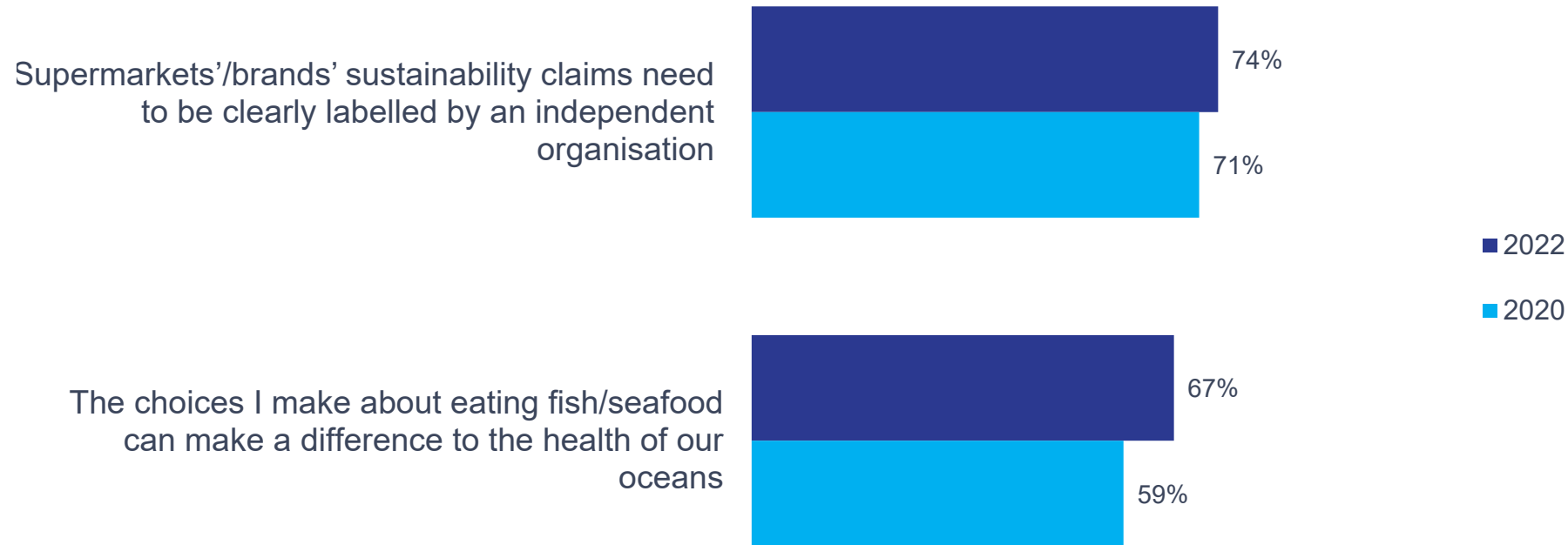
There has been an increase in the perceived positive impact of independent certification organisations on protecting the ocean; positive perceptions of most other actors have also increased, especially the fishing industry

Actors perceived to be contributing "very well" to protecting the ocean environment, top 2 (6+7 on a 7-pt scale)



Seafood consumers more likely over past two years to say purchasing choices can make a difference

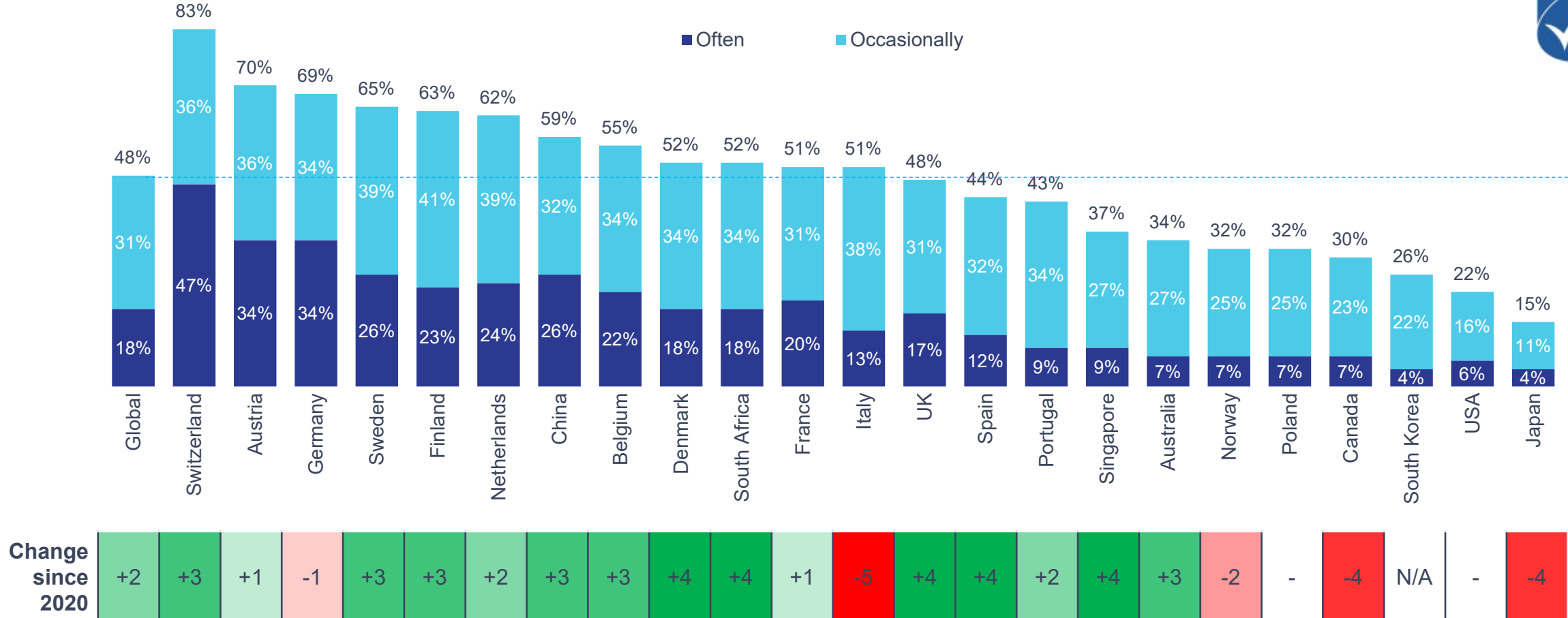
Attitudes toward ocean sustainability issues, "describes opinion well," top three (5+6+7 on 7-pt scale)



High levels of recognition are seen across most markets; largest increases in recognition have taken place in Denmark, South Africa, Singapore, Spain, and UK



Awareness of the MSC label, by country



Over half (60%) of seafood consumers say seeing the MSC label would make them more likely to purchase a product

Impact on likelihood to purchase

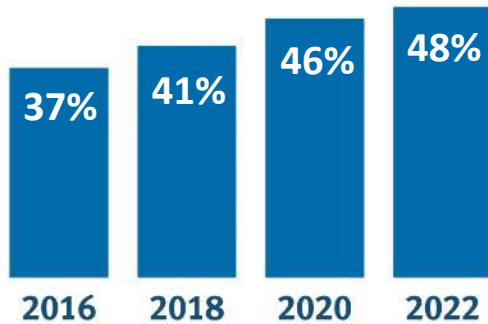


Positive trends continue



Awareness

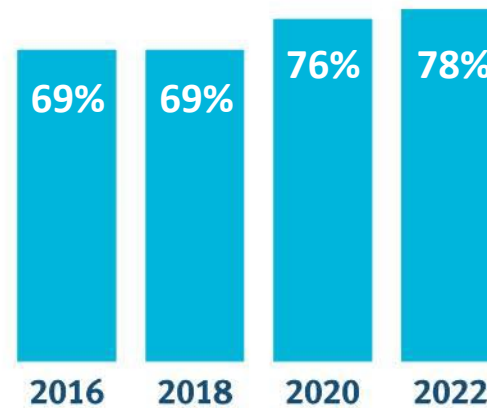
"Seen Often" + "Seen Occasionally"



General population
n = 25,869

Trust

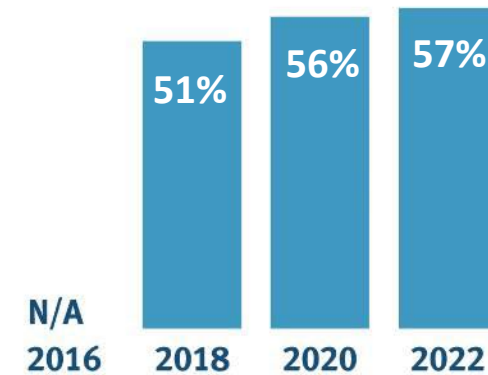
5+6+7 on 7-pt scale



MSC aware seafood consumers
n = 9,826

Likelihood to Recommend

"Very likely" + "Likely"



Headline Findings:

- Consumers globally are worried about the oceans and are divided on whether to feel optimistic about the future
- People feel more empowered to affect change on the oceans through their seafood choices
- Perceptions of ecolabels and of the wider fishing industry have both improved this year, indicating limited reputational impact from *Seaspiracy* in 2021
- Consumers continue to subconsciously weigh up sustainability against price and there is a disconnect between consumer support for ecolabels and the influence they make through purchase power
- Consumer recognition of the MSC is moving in the right direction, trust and awareness are high
- Understanding of MSC has increased, although there remains confusion about what the label stands for
- Maintaining trust it is increasingly important to demonstrate how MSC tackles wider ocean issues



How we roll this out

