MSC Consumer Insights 2022

Australia

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Project: 3900

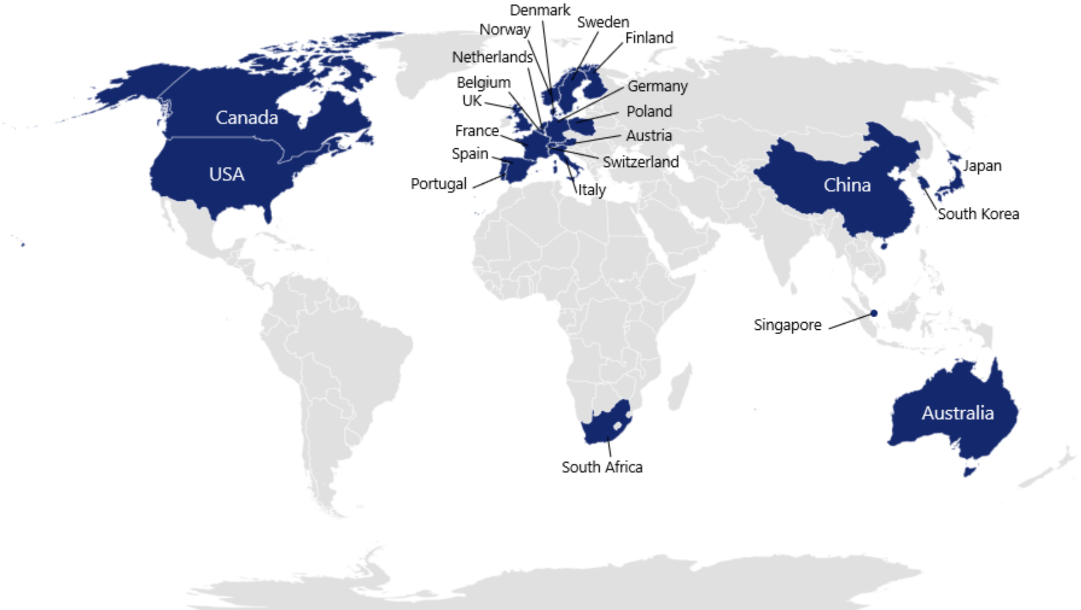
Background and Approach

Introduction and Methodology

The Marine Stewardship Council has partnered with GlobeScan to conduct four waves of a global research study into consumer perceptions. These took place in 2016, 2018, 2020 and 2022.

This year's survey (2022) was conducted in a total of 23 markets: Australia, Austria, Belgium, Canada, China, Denmark, Finland, France, Germany, Italy, Japan, Netherlands, Norway, Poland, Portugal, Singapore, South Africa, South Korea (new in 2022), Spain, Sweden, Switzerland, UK and USA. The survey was conducted online using large and reliable national consumer research panels to recruit respondents in each country. The global sample size for the main seafood consumer survey is n=20,127 seafood consumers; a minimum of 600 seafood consumers were surveyed in each country. Please find the relevant sample sizes in your market on the next page.

This report focuses on Australia. In some cases, charts only include 2020 and 2022 data so that recent trends can easily be interpreted.

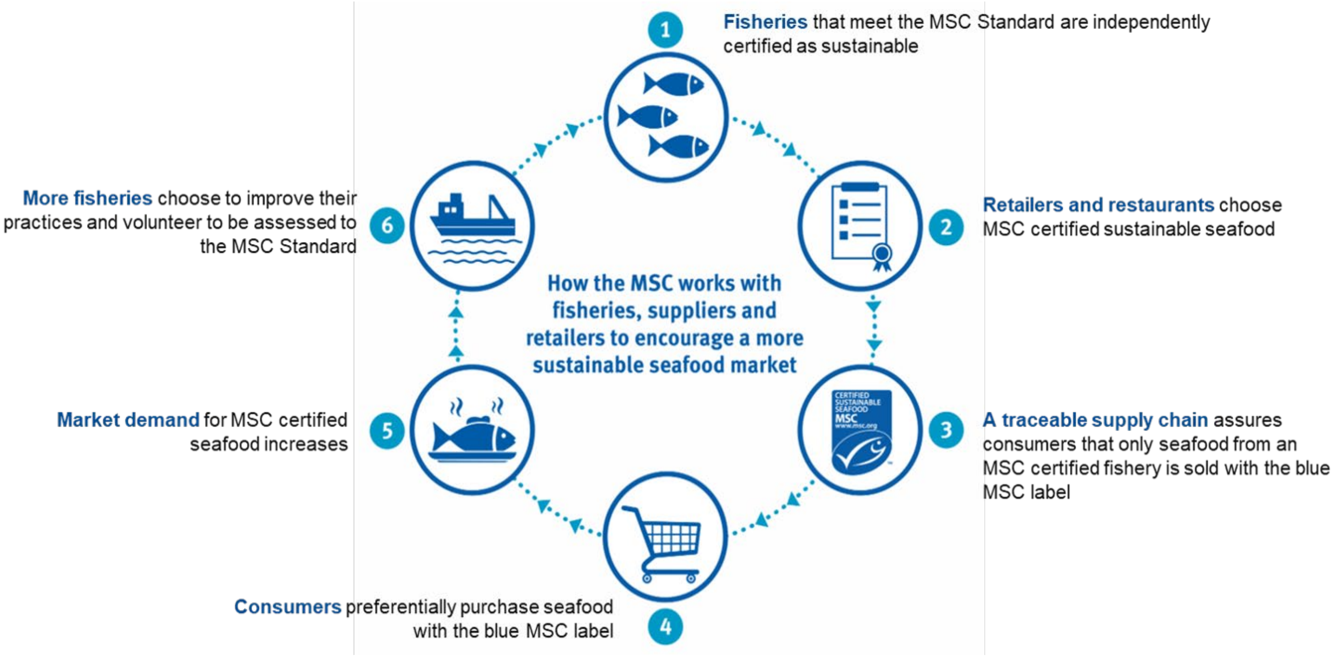


Understanding the Consumer in this Study

Type of consumer	Description	Australia sample size 2022	How do we know if changes since 2020 are significant?
General Public	A representative sample of consumers across the country (as far as possible using online surveys)	*n*=779	Differences of +/- 3 percentage points are statistically significant (approx.)
Seafood Consumers	Consumers in a household where someone has purchased seafood in the past 2 months and/or who regularly eat seafood at home or in a restaurant	*n*=605	Differences of +/- 4 percentage points are statistically significant (approx.)
MSC Aware Consumers	Seafood consumers who recall having seen the MSC label "often" or "occasionally"	*n*=236	Differences of +/- 7 percentage points are statistically significant (approx.)
MSC Blues	Seafood consumers who care about the planet alongside a love of shopping. When purchasing seafood, they value sustainability highly and prefer buying certified products	*n*=138	*No tracking included*

**Note to readers: where sample sizes are small, please approach data with caution, especially where samples are below 50 people*

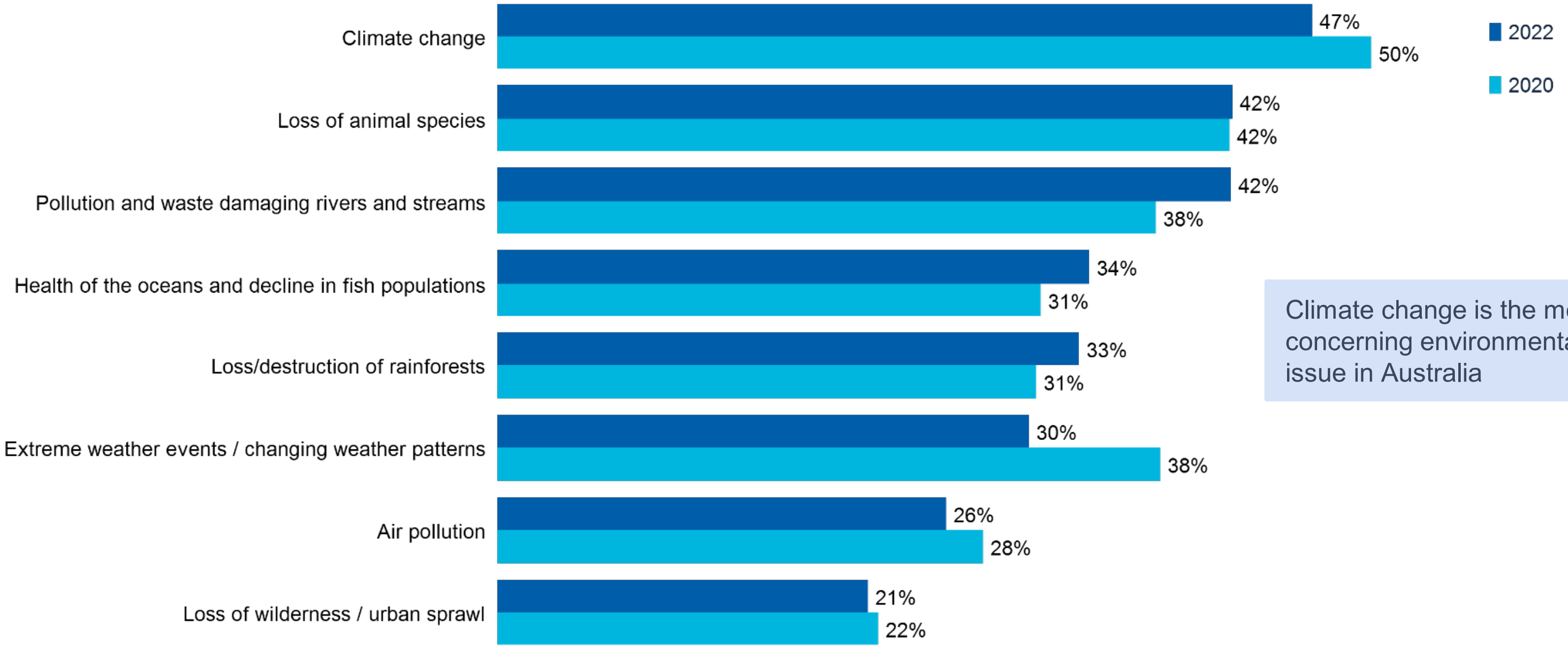
How Consumer Intelligence Supports MSC Theory of Change



Attitudes to Ocean Sustainability

Most Concerning Broader Environmental Threats

Environmental issues (each respondent selected three issues), 2020-2022



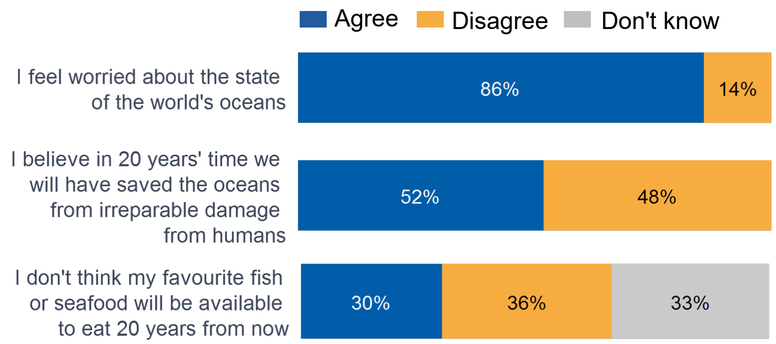
Climate change is the most concerning environmental issue in Australia

Base: General public, Australia

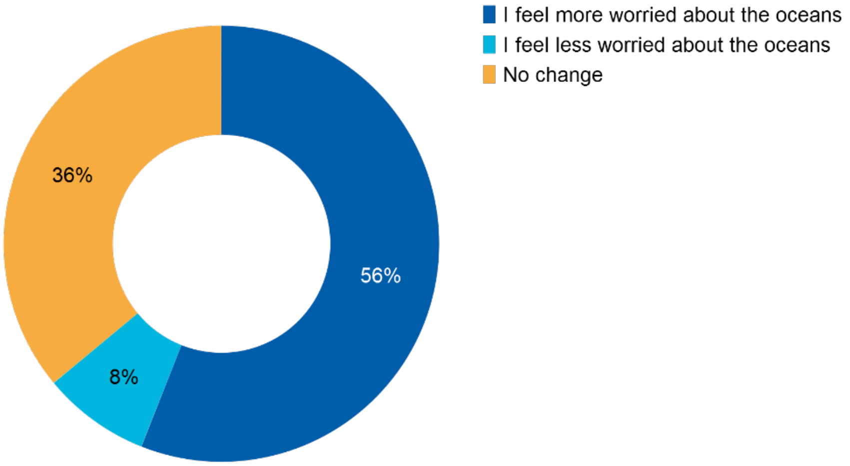
Q1.2: Which, if any, of the potential environmental issues are you most worried about?

Ocean Concern

Thoughts on favourite fish or seafood, 4 pt scale



Change in feelings about the state of the oceans in the past two years, 3 pt scale



Concerns about the ocean are high: almost nine in ten consumers agree that they feel worried about the state of the world's oceans and 56 percent say they are more worried today than they were two years ago. Consumers are split nearly 50/50 on whether there is time left to repair the damage to the oceans

Base: Seafood consumers, Australia

Q4.5:Please indicate how much you agree or disagree with the following statement (I don't think my favourite fish or seafood will be available to eat 20 years from now

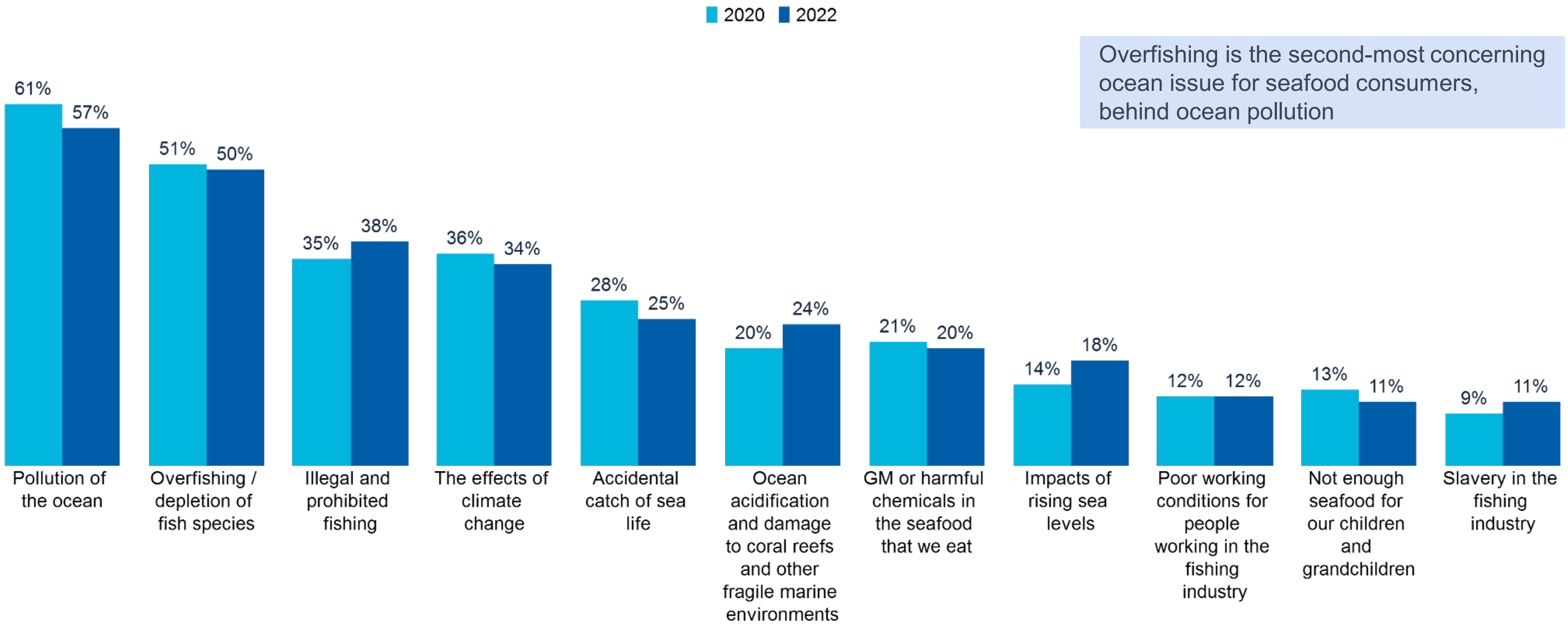
Q105: To what extent do you agree or disagree with the following statements?

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?

Most Concerning Threats to Oceans

Issues, (each respondent selected three issues)

Overfishing is the second-most concerning ocean issue for seafood consumers, behind ocean pollution



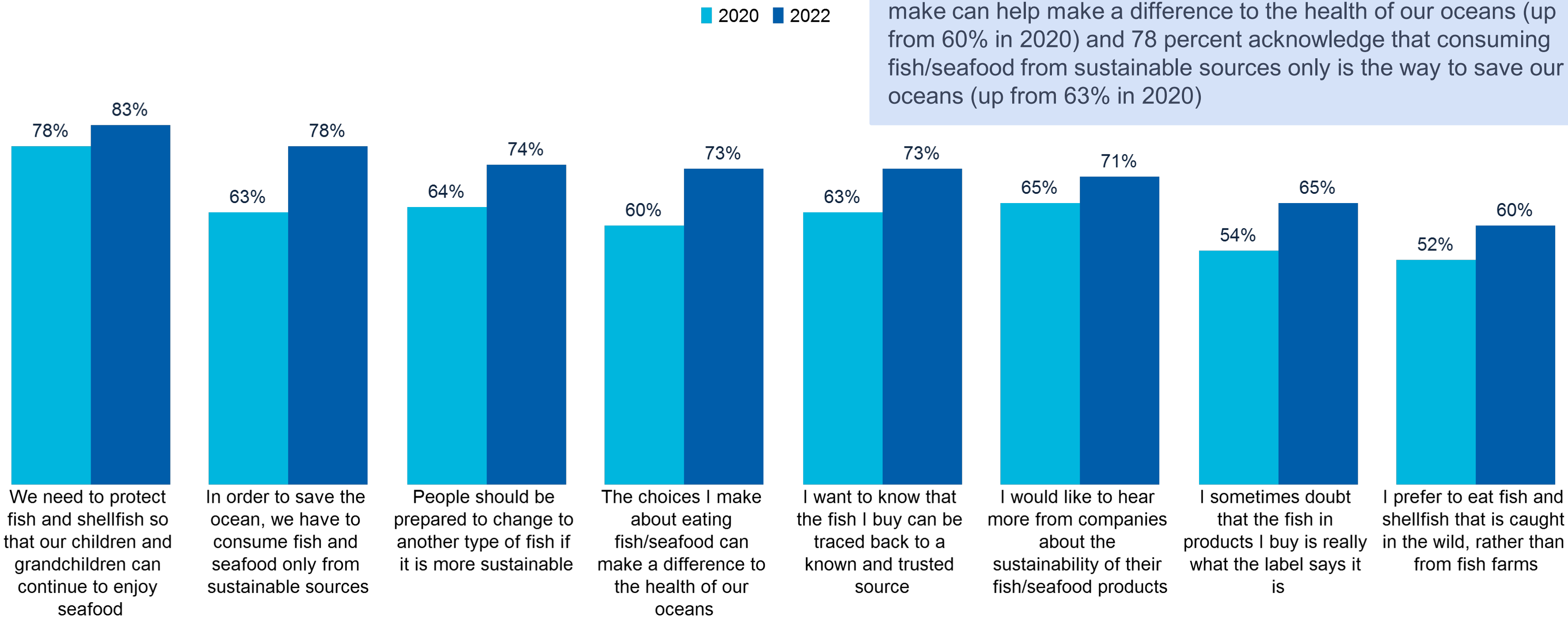
Base: Seafood consumers, Australia

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?

Perspectives on Ocean Sustainability and Fish

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

Consumers feel increasingly more empowered to affect change, with 73 percent now saying that the fish/seafood choices they make can help make a difference to the health of our oceans (up from 60% in 2020) and 78 percent acknowledge that consuming fish/seafood from sustainable sources only is the way to save our oceans (up from 63% in 2020)

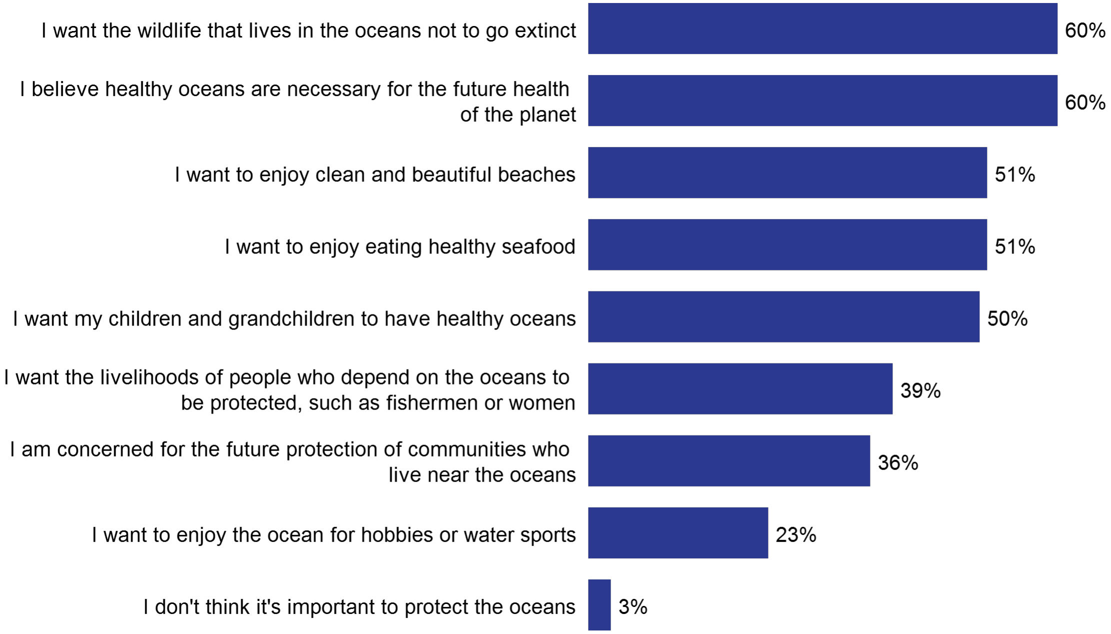


Base: Seafood consumers, Australia

Q5.1: How well does each of the following statements describe your opinions? *7-pt scale: 1 = “Does not describe my opinion very well,” 7 = “Describes my opinion very well”*

Reasons to Protect the Oceans

Reasons to protect the oceans, multi-select, seafood consumers

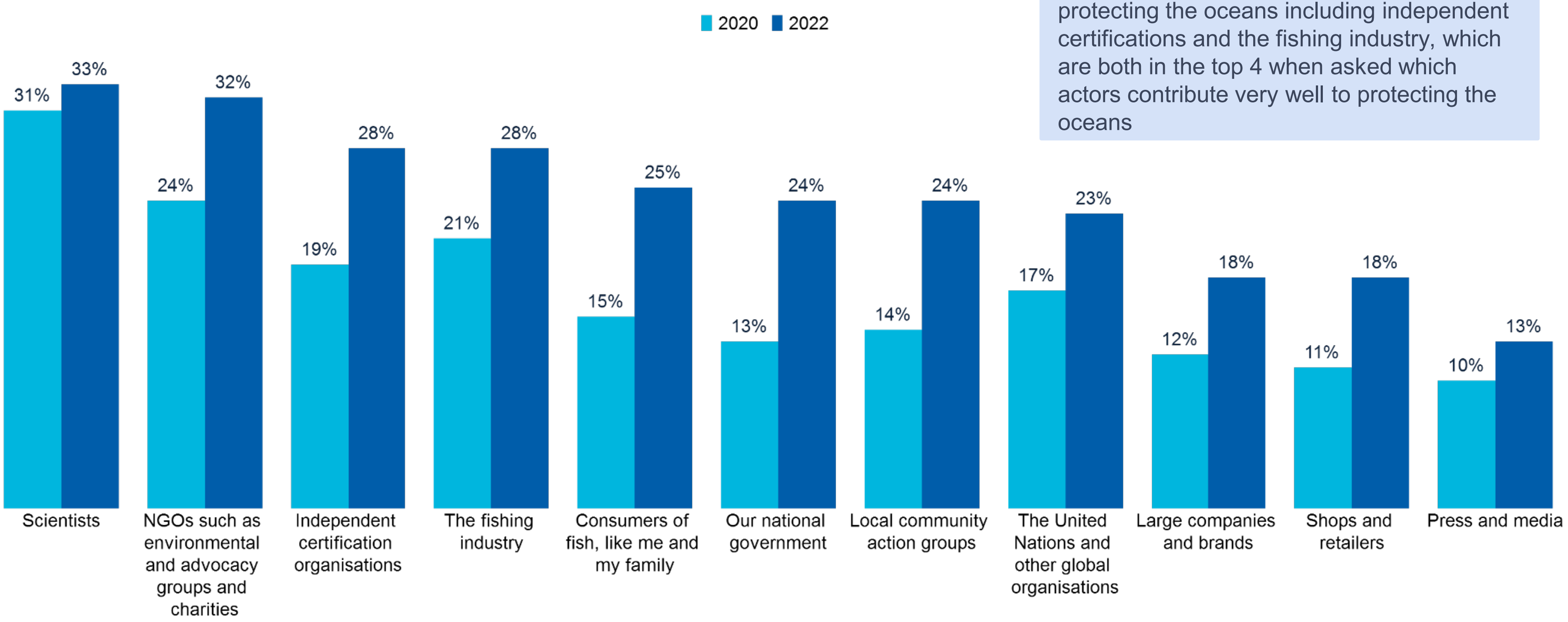


Base: Seafood consumers, Australia

Q108 Why do you think it's important to protect the oceans?

Performance of Different Groups in Protecting Oceans

Contributing “very well” to protecting oceans, top two (6+7 on 7-pt scale)



Perceptions have improved of most actors in protecting the oceans including independent certifications and the fishing industry, which are both in the top 4 when asked which actors contribute very well to protecting the oceans

Base: Seafood consumers, Australia

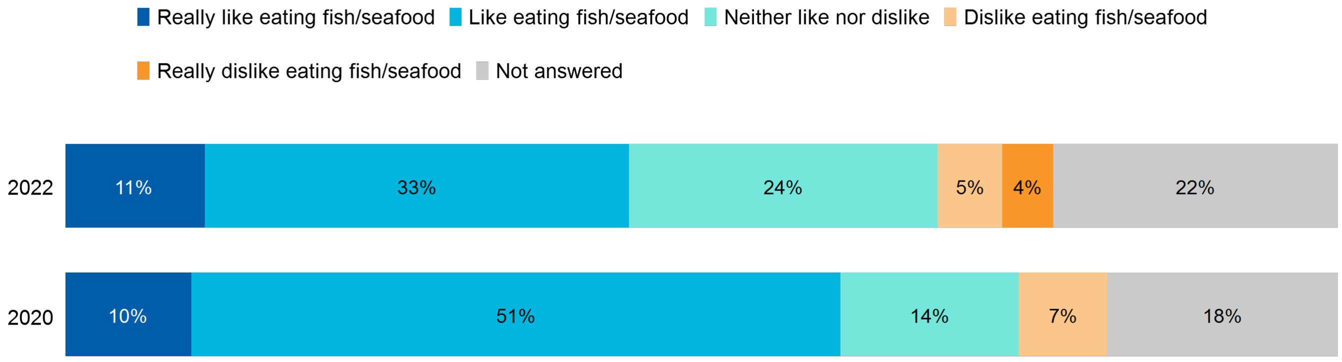
Q3.1: How well do you think the following institutions are contributing to protecting the ocean environment?

Love of Seafood

Consumer Love for Fish and Seafood

Personal enjoyment of eating fish/seafood, 5 pt scale.

44 percent of Australian consumers like eating fish or seafood, a decline of 17 points since 2020 (61%)

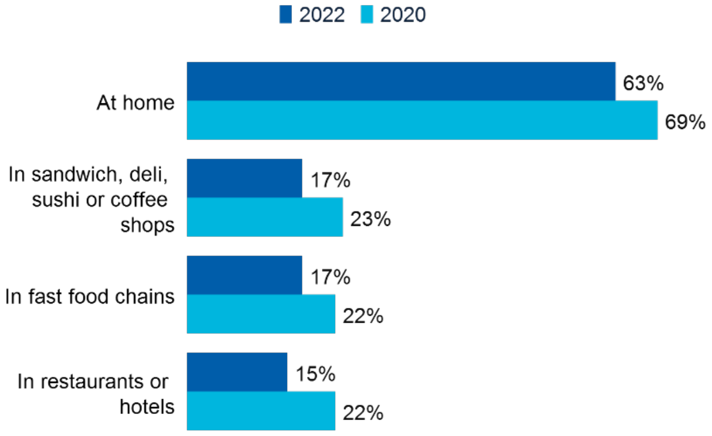


Base: General public, Australia

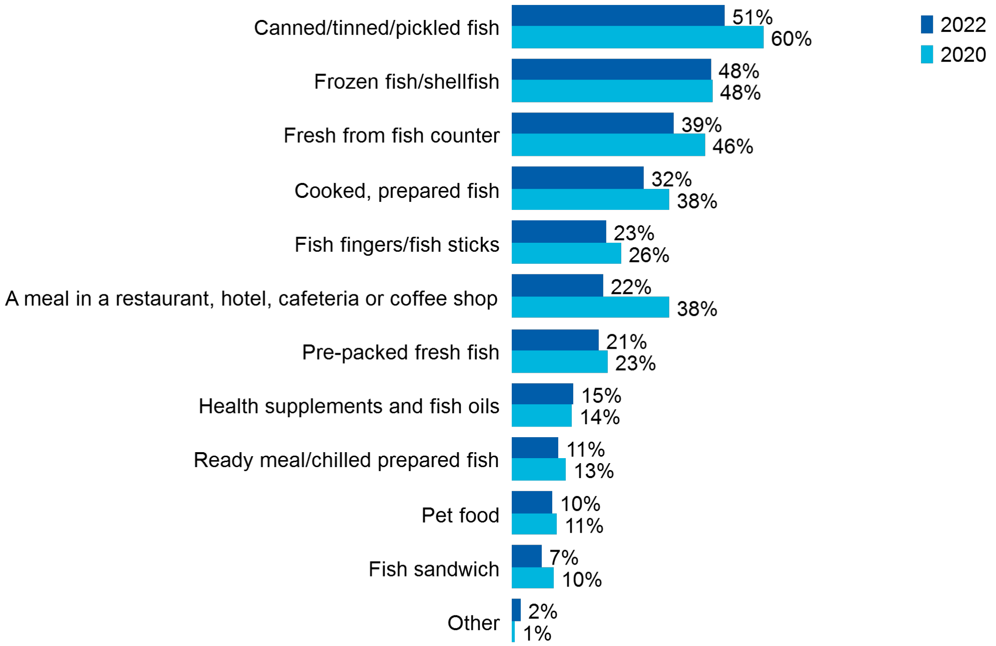
Q2.7: How much would you say you personally enjoy eating fish and other seafood? 5-pt scale: 1 = *"Really dislike eating fish/seafood," 5 = "Really like eating fish/seafood"*

Frequency & Type of Fish/Seafood Consumption

Frequency of fish/seafood consumption, Often (at least monthly), by location



Types of fish/seafood purchased frequently, by consumer type



Base: General public, Australia

Q2.6: How regularly do you eat fish or seafood in the following locations?

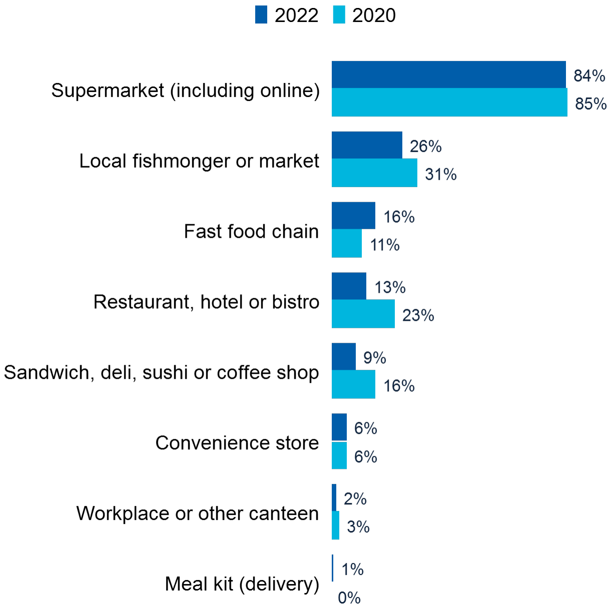
Base: Seafood consumers, Australia

Q4.1: Which types of fish or seafood do you purchase frequently?

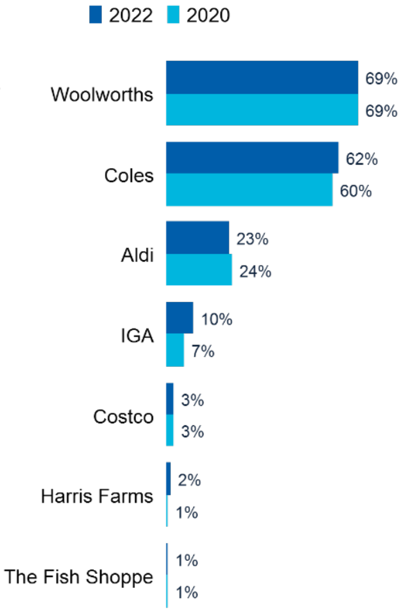
Fish/Seafood Purchase, by Outlet and Supermarket

Seafood purchases, multiselect

Fish/seafood purchase, by type of outlet



Fish/seafood purchase in each supermarket



Online grocery shopping

24%

shop for their groceries more online than they did two years ago

9%

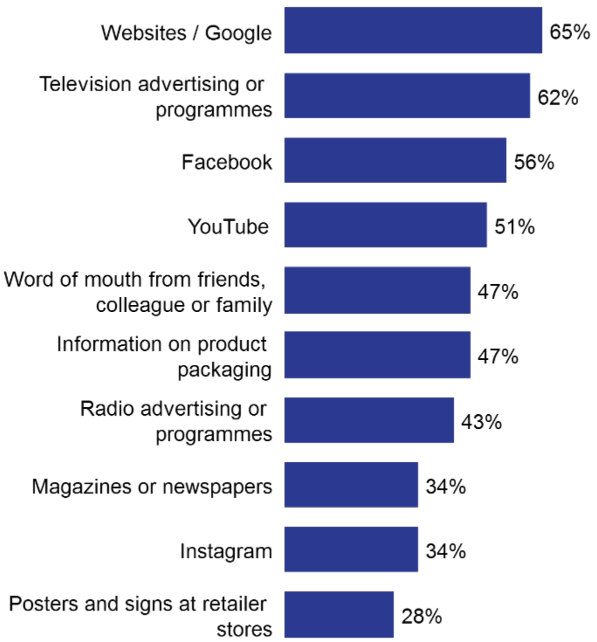
shop for their groceries more in store than they did two years ago

Q2.3: Where do you/your family usually buy fish and seafood products from?
Base for Q2.3: Seafood consumers, Australia
Q2.4: Which supermarket do you/your family usually buy fish and seafood products from?
Base for Q2.4: Consumers purchasing fish in supermarkets, Australia
Q103: How, if at all, has your grocery shopping changed in the last two years?
Base for Q103: Seafood consumers, Australia

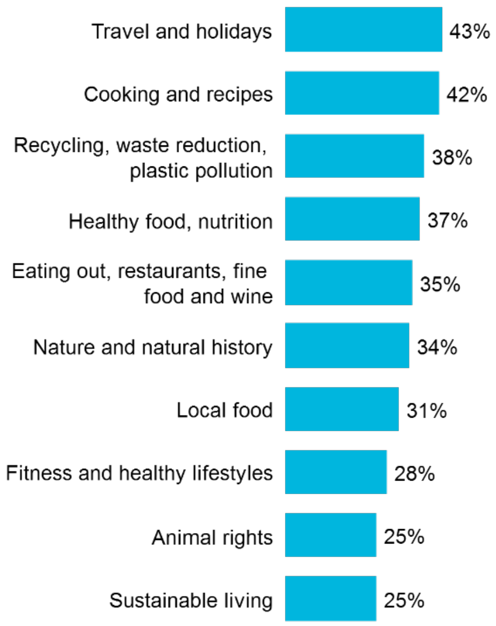
Targeting Seafood Consumers

How to target consumers

Preferred media channels, at least weekly (top 10 shown)



Hobbies and interests (top 10 shown)

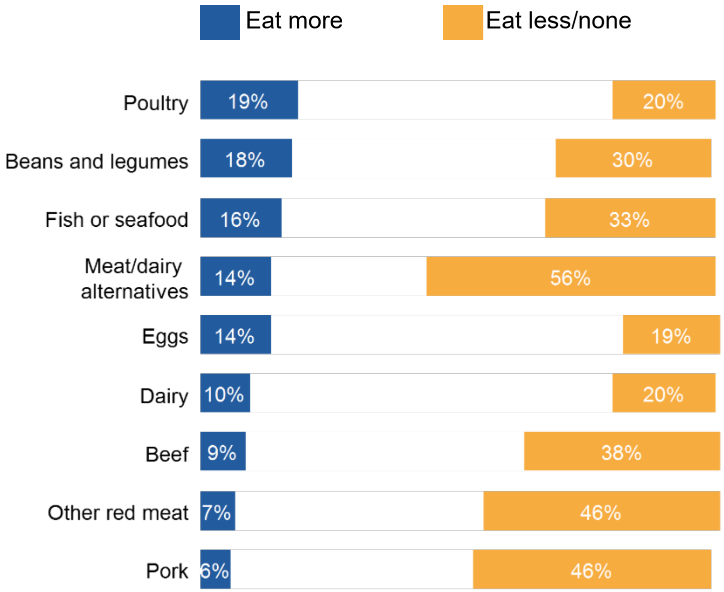


Base: Seafood consumers, Australia
Q13.2: How often do you use, read or visit the following types of media?
D10: Which of the following hobbies or interests do you have?

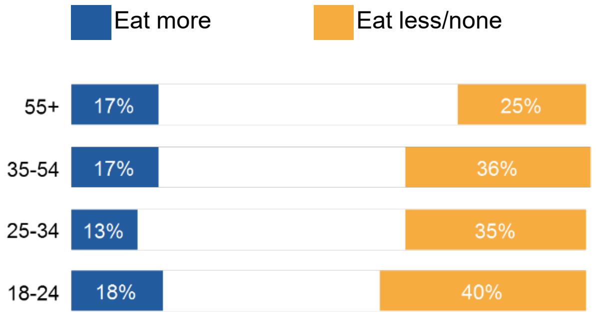
Consumer Action and Diet

Diet Changes

Diet changes amongst consumers, 4 pt scale



Fish/seafood consumption trend by age



Only 16 percent of Australian consumers say they are eating more fish/seafood, and this is similar across different age groups, although a larger number of young consumers say they are eating less or no seafood (40%) indicating a potential shift in diet

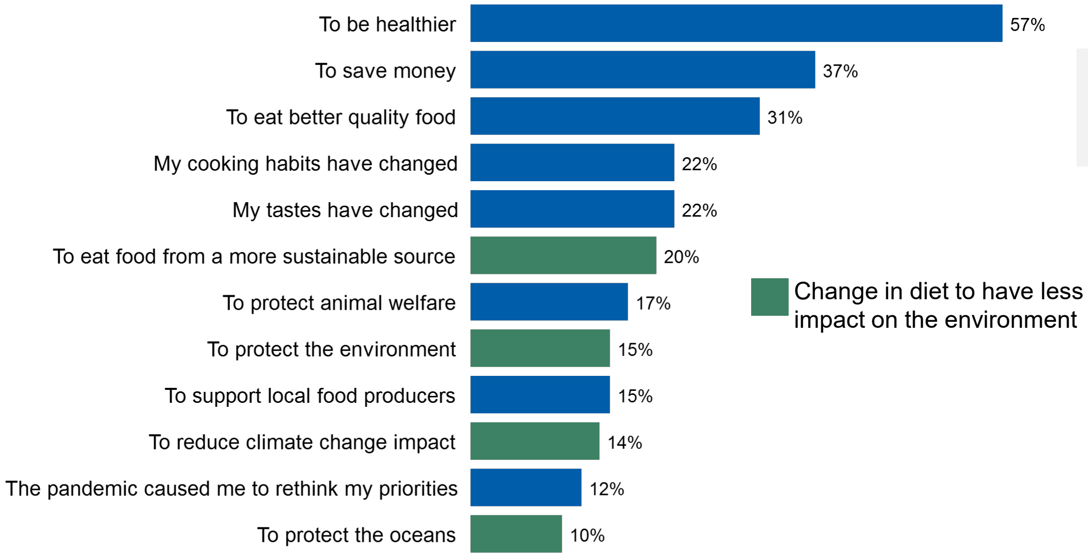
There has been a shift away from eating meat, with 38 percent of Australian consumers saying they have eaten less or no beef and almost half (46%) saying they have eaten less or no pork, compared to two years ago.

Base: General public, Australia

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

Reasons for Diet Changes

Reasons for changes in diet, multiselect



32% of people in total have changed their diet to have less impact on the environment (marked in green on the chart)

Consumers are mainly changing their diets to be healthier, although 32 percent of those who have changed their diet have done so because of an environmental reason

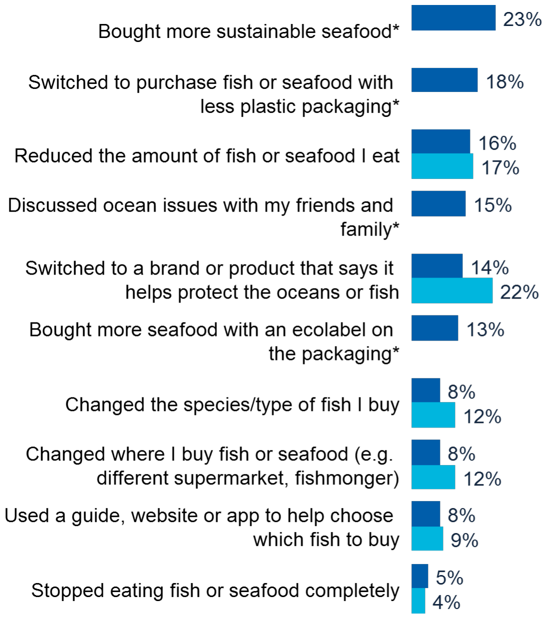
Base: All general public who say they have changed their diet in the last two years

Q102 What are the reasons for changing your diet? Please select all that apply.

Current and Future Consumer Actions to Protect Seafood

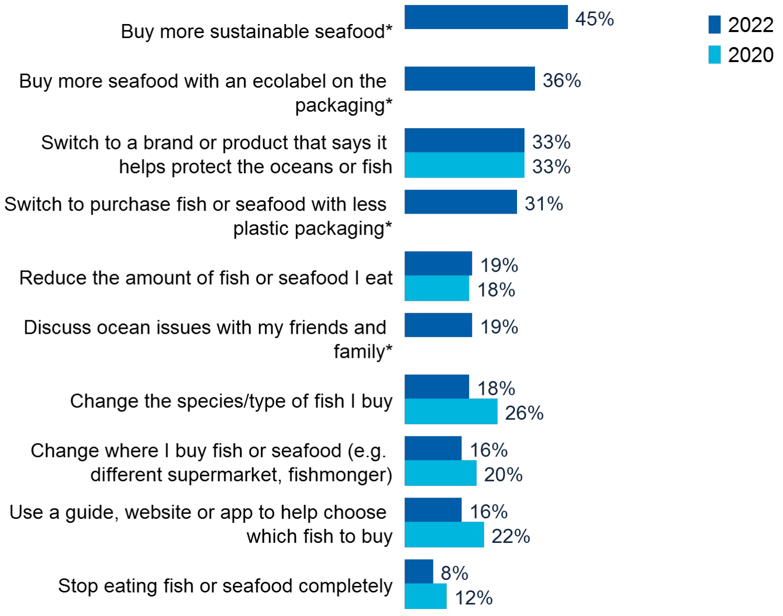
Actions consumers have taken and would be willing to take to protect the fish and seafood in our oceans, multiselect

Action taken



45 percent of Australian seafood consumers are willing to buy more sustainable seafood with just over two in ten (23%) saying they have already made this change in the last year; this represents an opportunity gap to reach consumers who are wiling to take action

Willingness to take action



Base: Seafood consumers, Australia

*Statements with no 2020 data were added in 2022

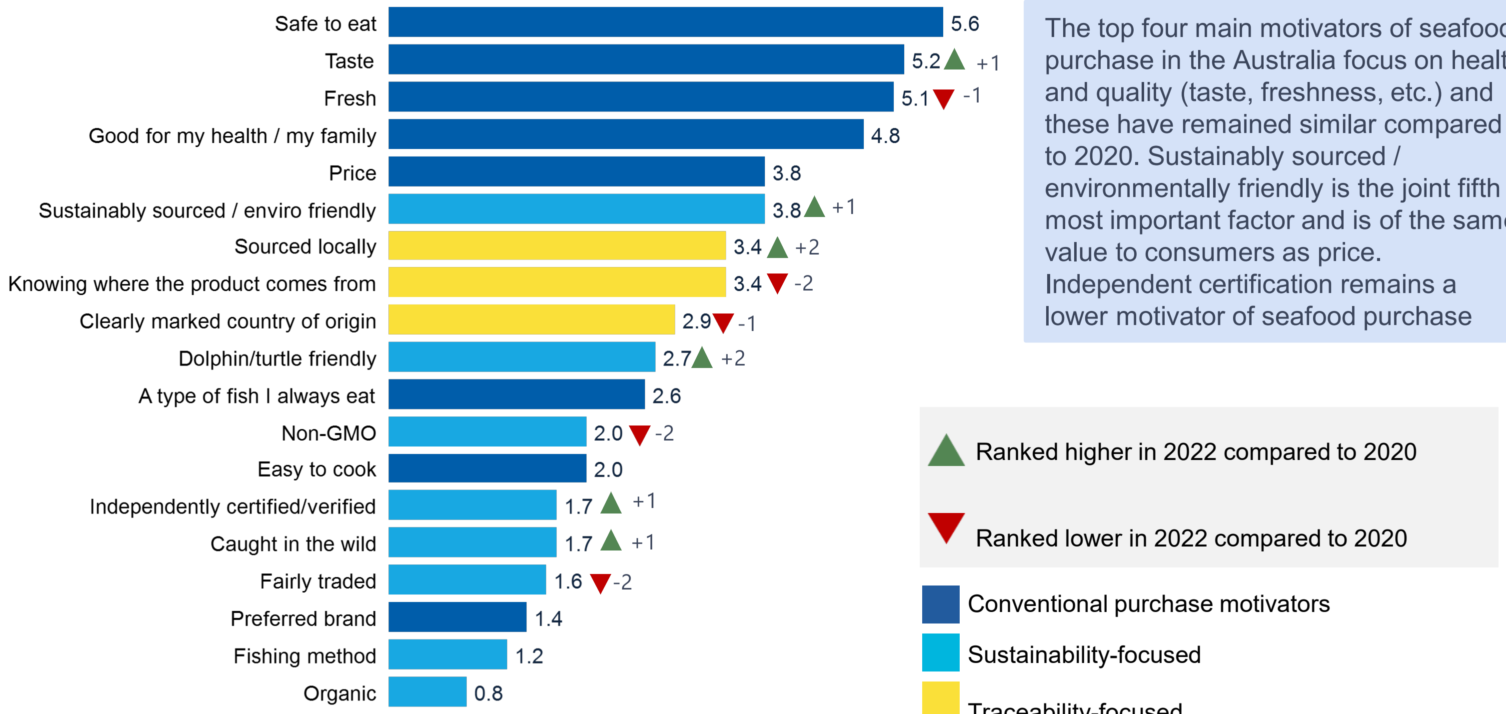
Q11.4a: Which, if any, if the following actions have you taken in the last year to help protect the fish and seafood in our oceans?

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?

Motivators of Purchase and Ecolabels

Motivators when Purchasing Fish and Seafood

Relative importance scores



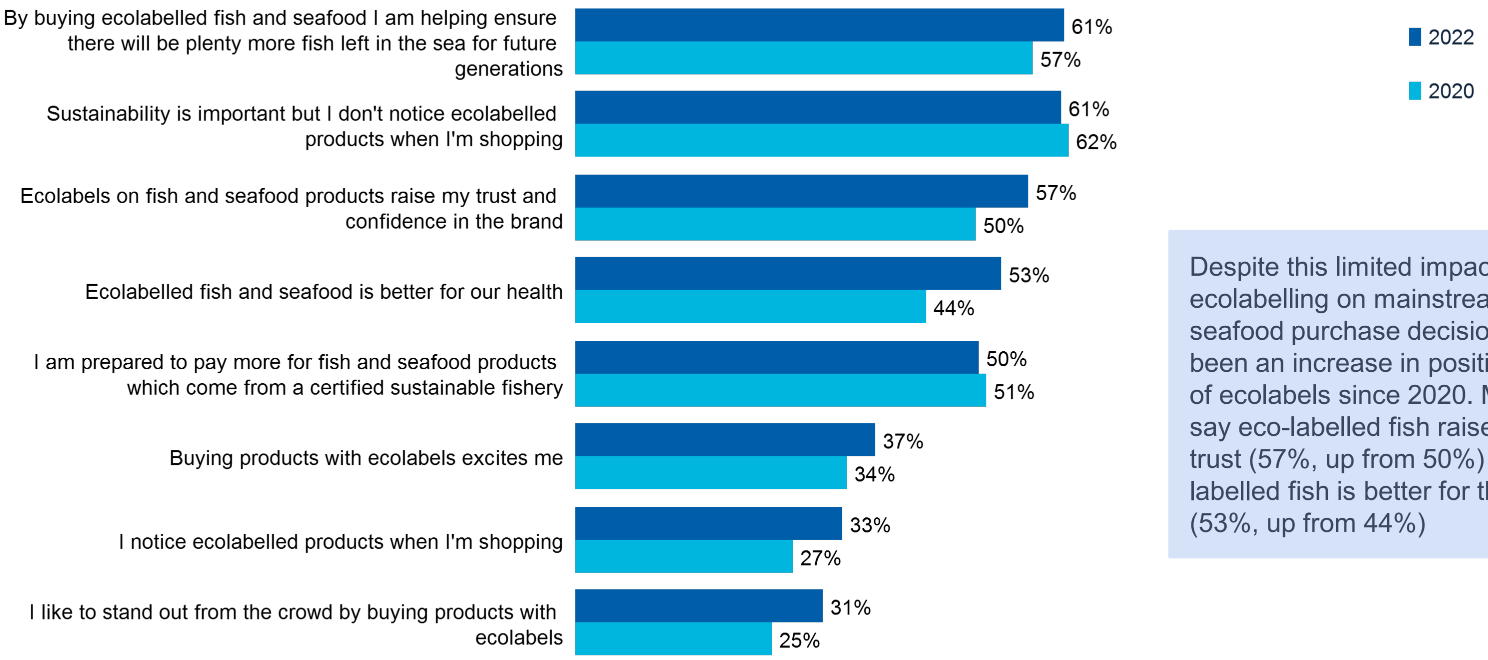
The top four main motivators of seafood purchase in the Australia focus on health and quality (taste, freshness, etc.) and these have remained similar compared to 2020. Sustainably sourced / environmentally friendly is the joint fifth most important factor and is of the same value to consumers as price. Independent certification remains a lower motivator of seafood purchase

Base: Seafood consumers, Australia

Q4.2: Thinking about your recent purchase of "[type of seafood]," which of the following five considerations was the most important and which was the least important?

Attitudes toward Ecolabels

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



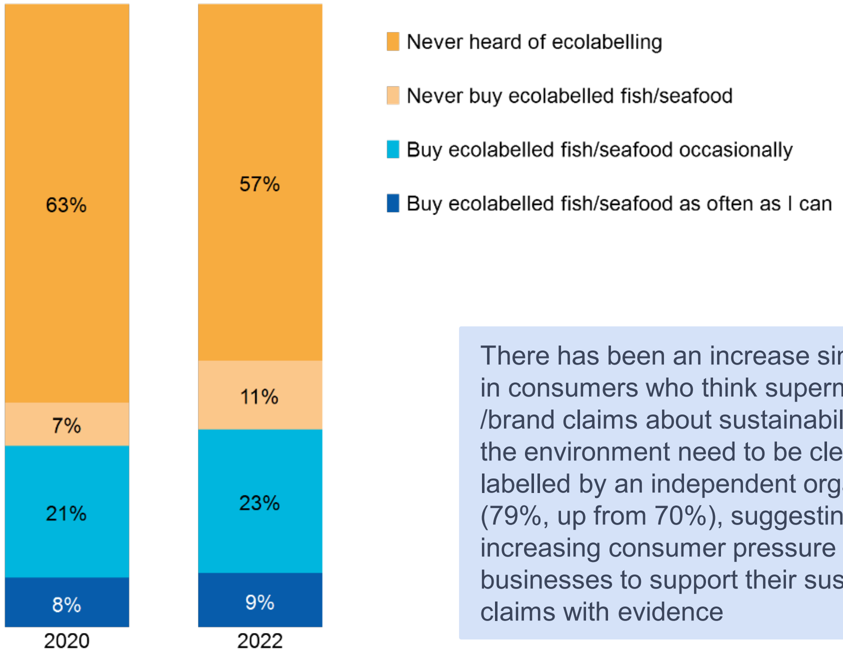
Despite this limited impact of ecolabelling on mainstream consumers' seafood purchase decisions, there has been an increase in positive perceptions of ecolabels since 2020. More people say eco-labelled fish raises their brand trust (57%, up from 50%) and say eco-labelled fish is better for their health (53%, up from 44%)

Base: Seafood consumers, Australia

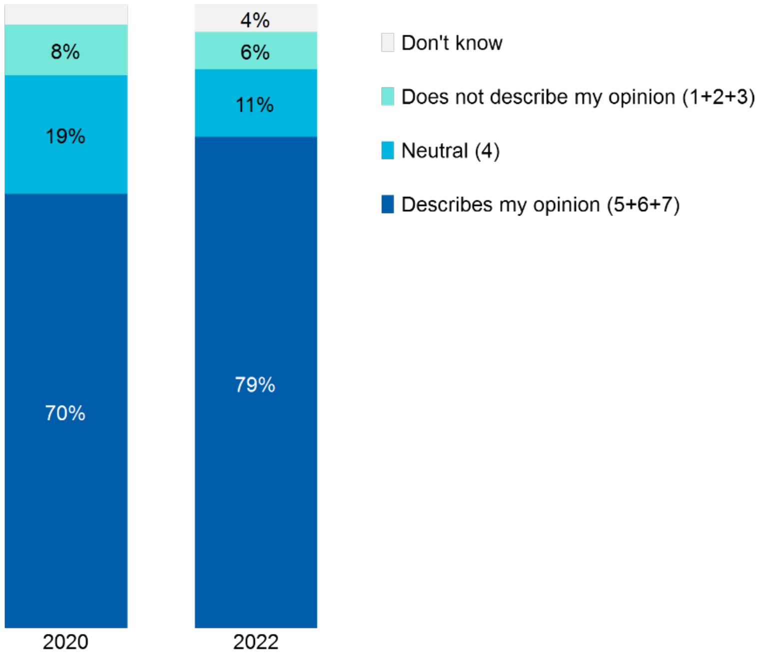
Q8: How well does each of the following statements describe your opinions about ecolabels? *7-pt scale: 1 = "Does not describe my opinion very well," 7 = "Describes my opinion very well"*

Demand for Labelling & Recalled Purchase of Ecolablled Fish

Frequency of purchase of ecolabelled fish



“Supermarkets' and brands' claims about sustainability and the environment need to be clearly labelled by an independent organisation”



There has been an increase since 2020 in consumers who think supermarket /brand claims about sustainability and the environment need to be clearly labelled by an independent organisation (79%, up from 70%), suggesting there is increasing consumer pressure on businesses to support their sustainability claims with evidence

Base: Seafood consumers, Australia

Q7.1 How often do you buy ecolabelled fish and seafood products?

Q5.7 How well does each of the following statements describe your opinions? 7-pt scale, 1= '"Does not describe my opinion very well," 7= "Describes my opinion very well"

MSC Awareness, Trust, and Understanding

Who we are talking to:

The MSC Blues

People who consume seafood, and have enough basic knowledge (of the oceans, fishing, and the origins of food) to digest the MSC's value proposition.*

When shopping, they "aspire" to a better, healthier life and balancing "right thing to do" with their other purchase considerations (i.e., they will only buy products which do not compromise on price, quality or brand). They share "values" and are represented across every age, culture, geography, and income.

*Wild. Certified. Sustainable.

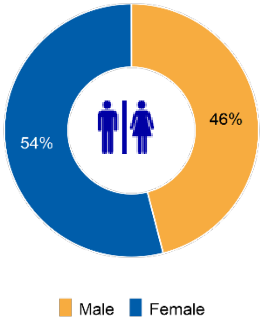
Introducing the MSC Blues: Australia

23%
of seafood consumers in Australia are MSC Blues

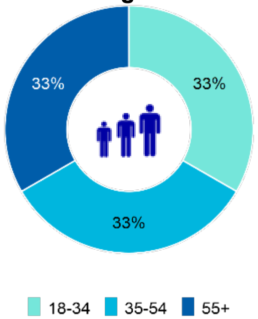
The MSC Blues are seafood consumers who care about the planet alongside a love of shopping. When purchasing seafood, they value sustainability highly. The MSC Blues are more likely to notice ecolabels on products than their peers and prefer buying certified products.

Demographics

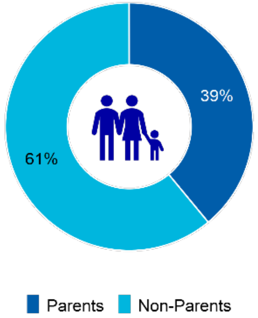
Gender



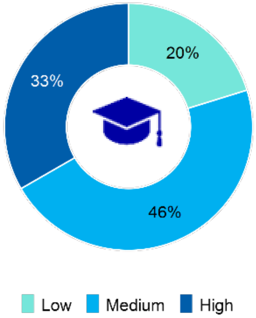
Age



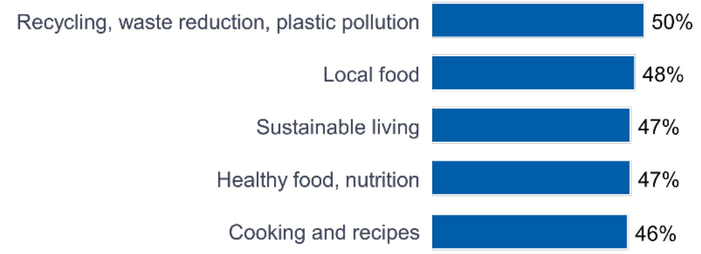
Parents



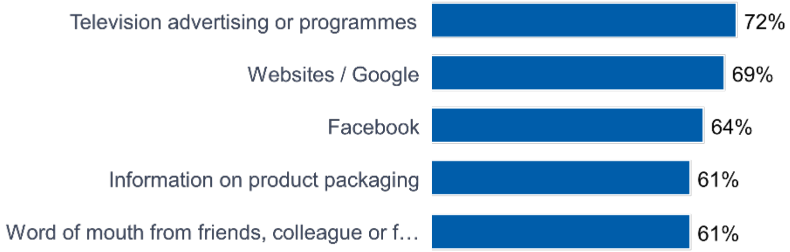
Education



Hobbies, top five



Preferred channels (at least weekly use)

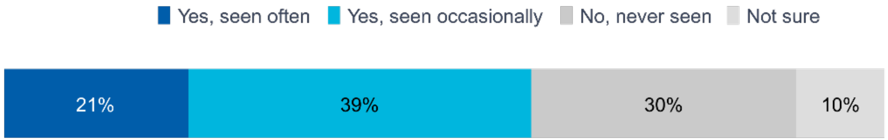


Base: MSC Blues, Australia

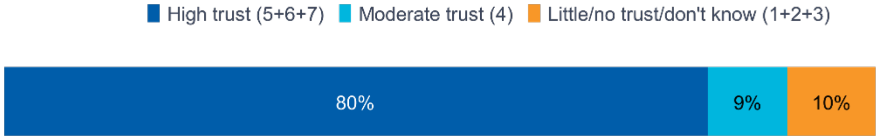
Introducing the MSC Blues: Australia (continued)

MSC KPIs

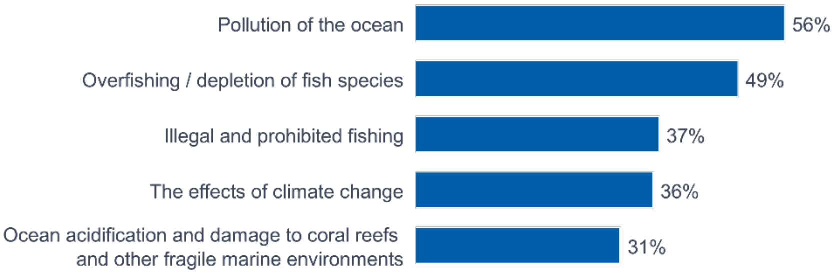
MSC awareness



MSC trust



Most concerning ocean issues, top five

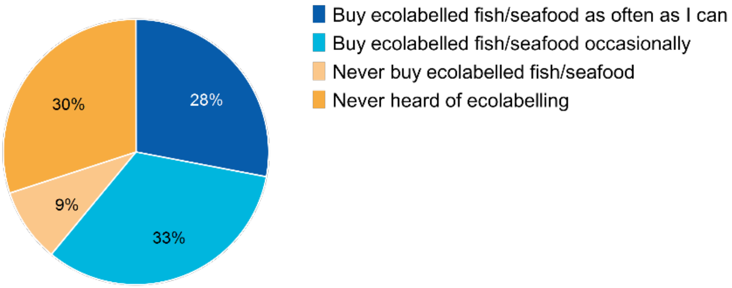


Labelling and purchasing

Independent labelling

96% think supermarkets' and brands' claims about sustainability should be clearly labelled by an independent organisation
("Describes my opinion well" – 5+6+7 on a 7-pt scale)

Ecolabelled purchases



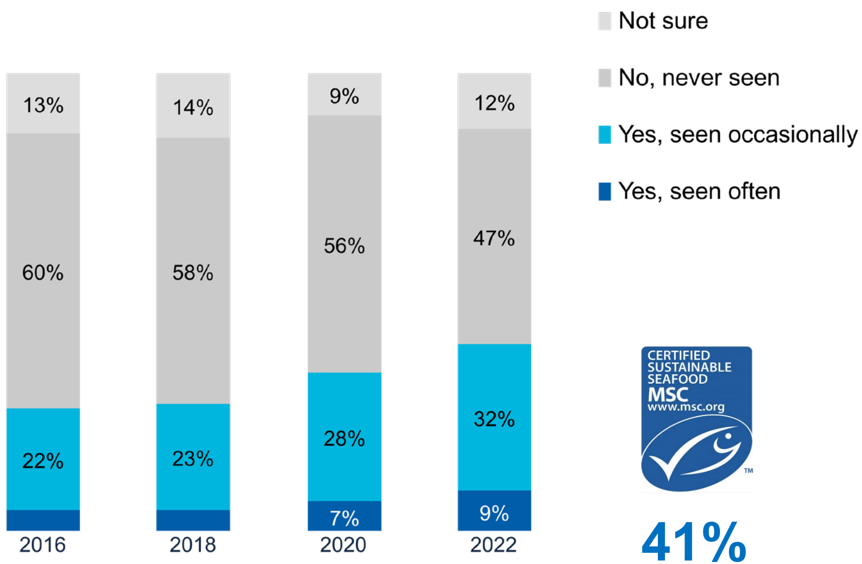
Motivators of seafood purchase, top six

Sustainably sourced / enviro friendly
Safe to eat
Fresh
Good for my health / my family
Sourced locally
Knowing where the product comes from

Base: MSC Blues, Australia

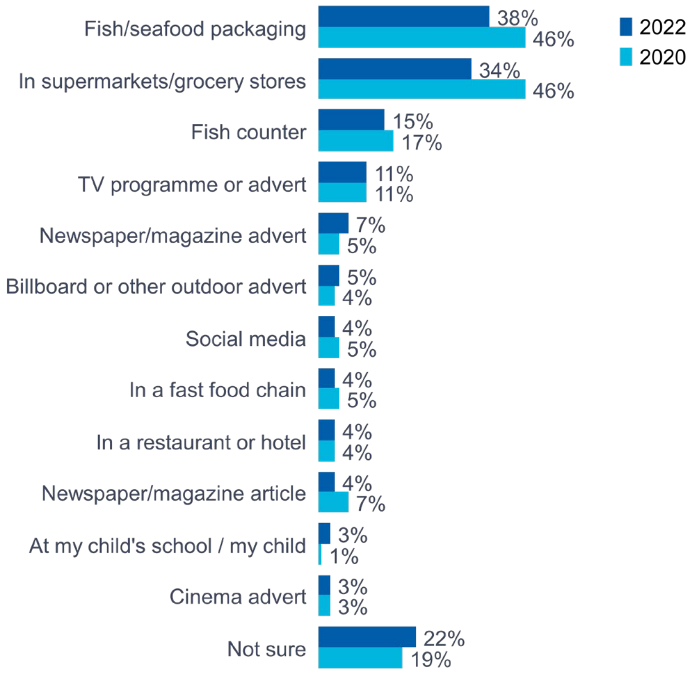
Awareness of the MSC Label Among Seafood Consumers

Frequency of seeing the MSC label



41%
of seafood shoppers have seen the label.

Locations where consumers recall seeing the MSC label

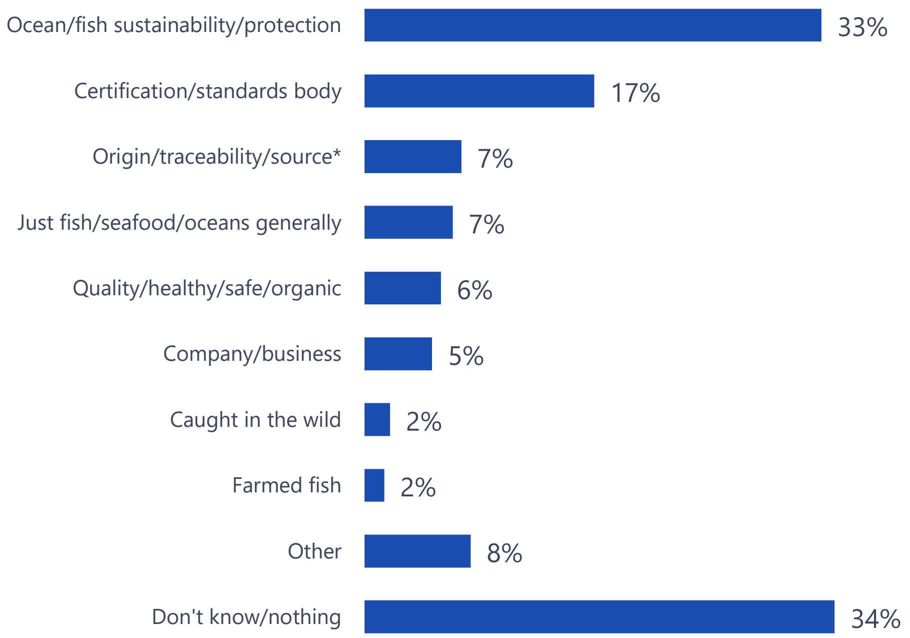


Base: General public, Australia Canned, Frozen, Fresh, Out of home
Q1.1: Have you ever seen the following logos?

Base: MSC aware, Australia Canned, Frozen, Fresh, Out of home
Q9.4: Earlier, you mentioned that you remember seeing this label. Where have you seen it?

Understanding of the MSC Label Among Those Who Recall Seeing the Label

Unprompted associations with MSC label, among MSC-aware seafood consumers, 2022



MSC
www.msc.org

42%

have at least some understanding, mentioning sustainability and/or certification

Base: MSC-aware seafood consumers, Australia

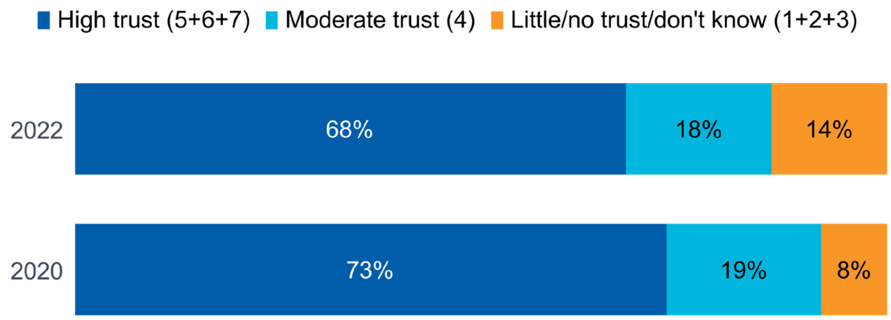
Q6.1: What does this logo mean or represent?

*Origin/traceability/source was not recorded in previous years as it wasn't a significant theme

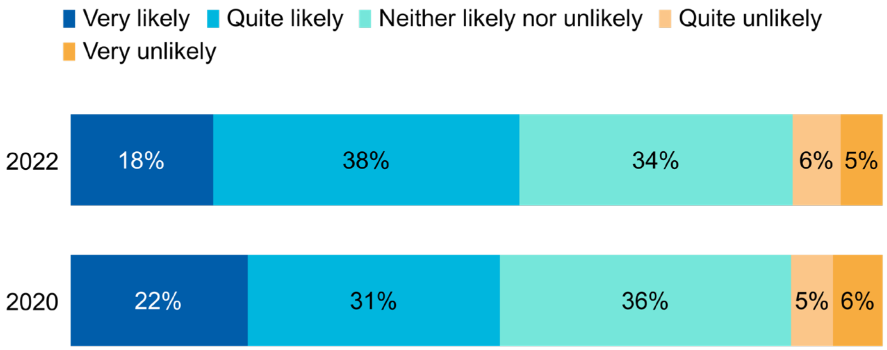
GlobeScan

Trust in the MSC Label and Recommendation of MSC

Trust in the MSC label among MSC-aware consumers, 7-pt scale



Likelihood of recommending MSC-certified products, likelihood scale

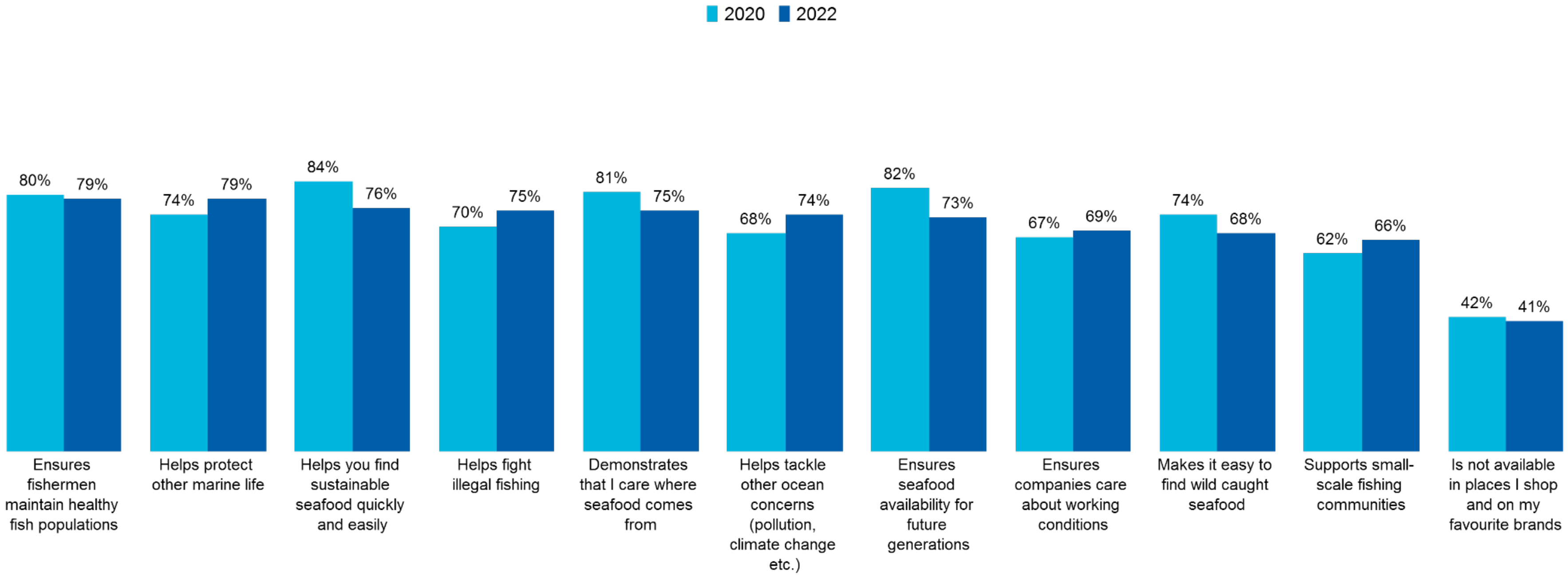


Base: MSC aware, Australia Canned, Frozen, Fresh, Out of home

Q9.2: How much trust do you have in the claims of the following organisations? *7-pt scale: 1 = "No trust," 7 = "A lot of trust"*
Q12.2: How likely are you to recommend MSC-certified products to the people you know?

Perceptions of MSC: Sustainability Impact & Consumer Benefits

Describes MSC well, top three (5+6+7 on 7-pt scale)



Base: MSC aware, Australia

Q11.1: How well do you think the following statements describe the Marine Stewardship Council (MSC) and the ecolabel?
7-pt scale: 1 = "Does not describe MSC at all," 7 = "Describes MSC completely"

MSC calendar plan

CAMPAIGN CALENDAR 2023

SALT WATER SCHOOLS

MSC
www.msc.org

Summer | Autumn | Winter | Spring | Summer

Jan | Feb | March | April | May | June | July | Aug | Sep | Oct | Nov | Dec

Fish Forever campaign
(27 March – 10 April)

large

World Tuna Day
(2 May)

World Ocean Day
(8 June)

small

Shark Awareness Day
(14 July)

National Science Week
(14-20 August)

small

World Fisheries Day
(21 November)

Christmas prawn campaign
(Dec wide)

medium

Always on PR, education and digital advertising:

what is sustainable fishing, what is the label, where can I find it, why does it matter?

Know your world.
Lead the future.

GlobeScan is a global insights and advisory consultancy working at the intersection of brand purpose, sustainability, 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.

We combine over 30 years of data-driven insights with a global network of experts and the ability to engage any stakeholder or consumer. Our unique research programs and global capabilities help to know what's new, what's next, and what's needed. And our advisory services help turn that knowledge into smart, strategic decisions.

Established in 1987, we have offices in Cape Town, Hong Kong, London, Mumbai, Paris, San Francisco, São Paulo, and Toronto. As a proudly independent, employee-owned company, we're invested in the long-term success of our clients and society. GlobeScan is a Certified B Corp and a participant of the United Nations Global Compact.