

MSC Consumer Insights 2022

Germany

Prepared by GlobeScan
May 2022



Contact Us

For more information, please contact:

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Project: 3900





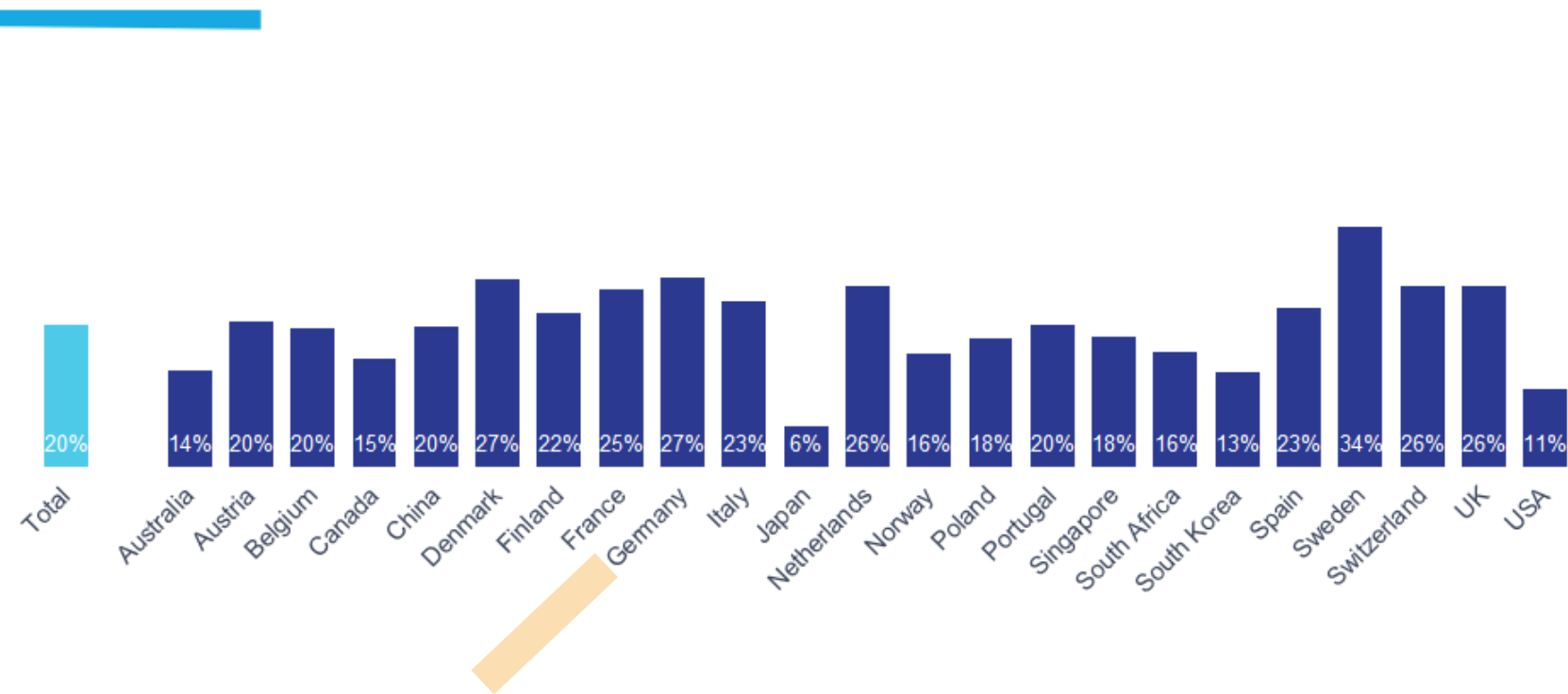
Background and Approach

Understanding the Consumer in this Study

Type of consumer	Description	Germany 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)	$n=1,371$	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	$n=1,003$	Differences of +/- 4 percentage points are statistically significant (approx.)
 MSC Aware Consumers	Seafood consumers who recall having seen the MSC label "often" or "occasionally"	$n=746$	Differences of +/- 4 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	$n=363$	No tracking included

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

The proportion of all respondents who are **climatarians** by each country



Base: All respondents, global, $n=16,141$
Q102_4. What are the reasons for changing your diet? – To reduce climate change impact

Climatarians: Sample Sizes and Field Data By Market

Country	Sample size	Field dates
	Climatarians	
Australia	66	1 February – 12 March 2022
Austria	108	11 February – 14 March 2022
Belgium	94	16 February – 3 March 2022
Canada	178	16 February – 13 March 2022
China	356	17 February – 15 March 2022
Denmark	133	16 February – 13 March 2022
Finland	114	16 February – 12 March 2022
France	127	11 February – 11 March 2022
Germany	191	11 February – 14 March 2022
Italy	124	16 February – 11 March 2022
Japan	25	11 February – 13 March 2022
Netherlands	208	11 February – 14 March 2022
Norway	75	11 February – 14 March 2022
Poland	94	11 February – 14 March 2022
Portugal	108	11 February – 13 March 2022
Singapore	98	1 February – 14 March 2022
South Africa	97	1 February – 16 March 2022
South Korea	76	16 February – 13 March 2022
Spain	181	11 February – 14 March 2022
Sweden	259	11 February – 14 March 2022
Switzerland	134	11 February – 11 March 2022
UK	182	25 January – 12 March 2022
USA	246	1 February – 16 March 2022

GlobeScan advises not to proceed with a press release based on Japanese climatarian data due to the very low sample size in this market.

Caution should also be taken in markets where there are fewer than 100 climatarian responses: Australia, Belgium, Norway, Poland, Singapore, South Africa and South Korea. The key question in these markets is whether the media and other stakeholders in your country will consider the sample size to be robust enough – this is likely to vary depending on the market.

How Consumer Intelligence Supports MSC Theory of Change





Executive Summary

Executive Summary Germany (1/2)

Attitudes to ocean sustainability: German consumers are worried about the oceans and pessimistic about the future, but they feel increasingly empowered to make change through their seafood choices

- Climate change is the most concerning environmental issue in Germany, but concerns about the ocean remain high: nine in ten consumers agree that they are worried about the state of the world's oceans and seven in ten say they are more worried today than they were two years ago. German consumers tend to be more pessimistic than in other countries – close to two-thirds do not believe we will repair the damage to the oceans in the next twenty years (page 11)
- Overfishing is the second-most concerning ocean issue for seafood consumers, behind pollution of the ocean (page 13)
- Consumers feel increasingly more empowered to affect change, with two-thirds (66%) now saying that the fish/seafood choices they make can help make a difference to the health of our oceans (up from 59% in 2020) (page 14)
- Perceptions have improved of several different actors in protecting the oceans including independent certifications and fish consumers (page 16)

Consumer action and diet: Consumers move away from most animal products, for a mixture of health and environmental reasons

- Two in five (44%) German seafood consumers are willing to buy more sustainable seafood, with one in three (32%) saying they have already made this change in the last year (page 20)

Executive Summary Germany (2/2)

Motivators of purchase and ecolabels: *Sustainability is an important seafood purchase motivator in Germany; consumers demonstrate strong support for independent labelling, although this doesn't always translate into purchases*

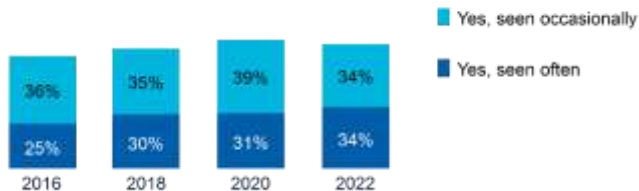
- The top motivators of seafood purchase in Germany focus on quality (taste and freshness) and health and have remained steady compared to 2020. Sustainably sourced/environmentally friendly is the fourth most important factor – higher than in many other markets – although independent certification remains a lower motivator of seafood purchase, while price has risen in importance in Germany this year (page 22)
- Despite the limited impact of ecolabelling on mainstream consumers' seafood purchase decisions, there has been an increase in positive perceptions of ecolabels since 2020. More people now think eco-labelled fish is better for health (59%, up from 53%) and say they notice eco-labels when shopping (60%, up from 55%) (page 23)
- There is a small increase since 2020 in people thinking supermarket/brand claims about sustainability and the environment need to be clearly labelled by an independent organisation (79%, up from 75%), suggesting pressure on businesses to support sustainability claims with evidence is building (page 24)

MSC awareness, trust & understanding: *Awareness and understanding of the MSC label in 2022 have remained relatively steady from 2020*

- Awareness of the MSC label has remained similar to 2020 – overall awareness (seen “often” and “occasionally”) has dropped very slightly from 70% to 68% this year but the proportion of people who recall seeing the label “often” has risen from 31% to 34%. Fish and seafood packaging and supermarkets/grocery stores are the most recalled places to see the MSC label (page 26)
- Half (51%) of consumers have at least some understanding of the MSC label, spontaneously associating it with either ocean sustainability or certification – similar to previous years in Germany and higher than global averages (page 27)
- Trust in MSC is high amongst MSC-aware seafood consumers at 73%, again similar to previous years. Likelihood to recommend amongst MSC-aware consumers has remained steady over the last two years with 58% of German consumers likely to recommend MSC-certified products (page 28)
- Seven in ten (70%) correctly identify the MSC label as an independent, third-party initiative, an increase since 2020 (65%). In the last survey we saw significant confusion in Germany about the MSC being managed by retailers – this has now dropped (page 30)

MSC Germany Dashboard

MSC Awareness General Public, Germany



Unprompted Understanding Seafood Consumers, Germany

Have at least some understanding, mentioning **sustainability and/or certification**



Trust in MSC MSC Aware Consumers, Germany



Love of Seafood and the Oceans



73% Recently purchased seafood
Base: General Public, Germany

58% Enjoy eating seafood
Base: General Public, Germany

73% Believe we need to switch to only sustainable sources
Base: Seafood consumers, Germany

92% Concerned about the state of the world's oceans
Base: Seafood Consumers, Germany

Top six motivators of seafood purchase (of 19 factors tested):

Taste
Fresh
Good for my health / my family
Sustainably sourced / enviro friendly
Non-GMO
Price

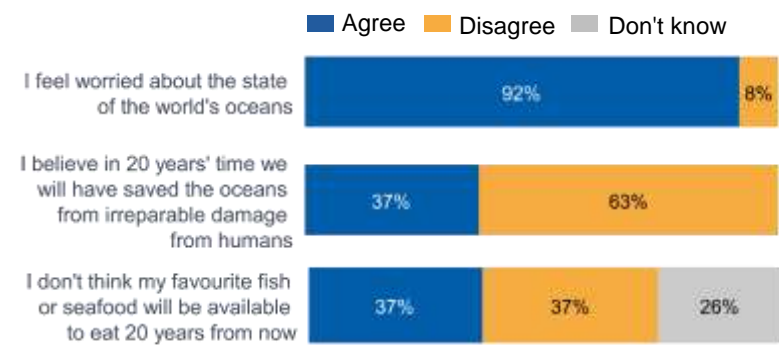
▲ +4 ranks



Attitudes to Ocean Sustainability

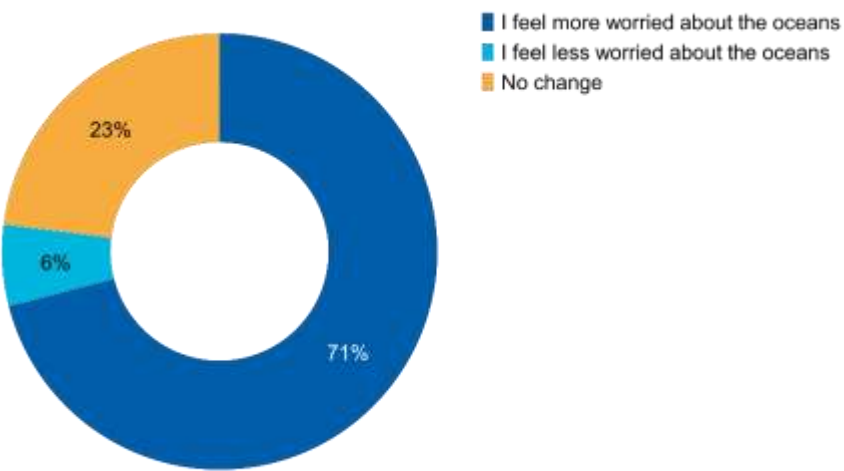
Ocean Concern

Worry and level of optimism/pessimism about the oceans, 4 pt scale



Concerns about the ocean remain high: nine in ten consumers agree that they are worried about the state of the world's oceans and seven in ten say they are more worried today than they were two years ago. German consumers tend to be more pessimistic than in other countries – close to two-thirds do not believe we will repair the damage to the oceans in the next twenty years

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



Base: Seafood consumers, Germany

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?

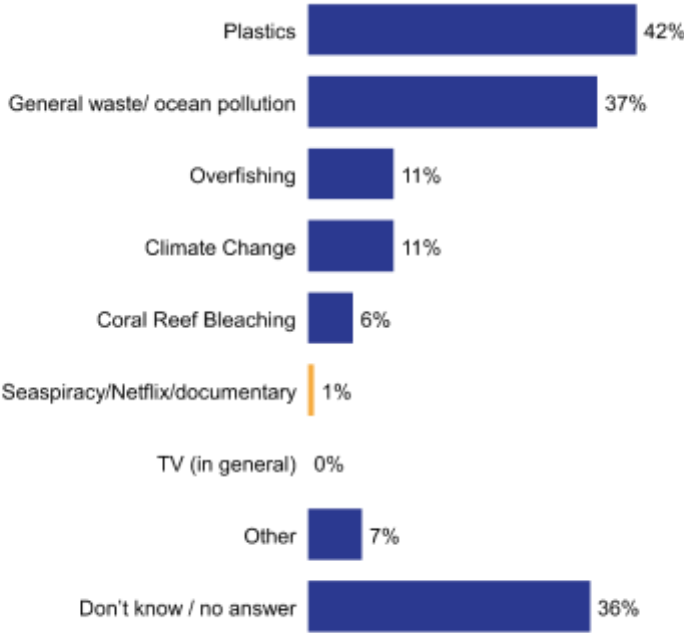
Q106: Which of the following statements best describes how your feelings about the state of the oceans have changed, if at all, in the last two years?



Information Recalled About the State of the Oceans



Spontaneous recall of information seen causing concern on the state of the oceans, unprompted



Only 1% in Germany spontaneously mention Seaspiracy as a source of information about the oceans. This figure is also very low globally.

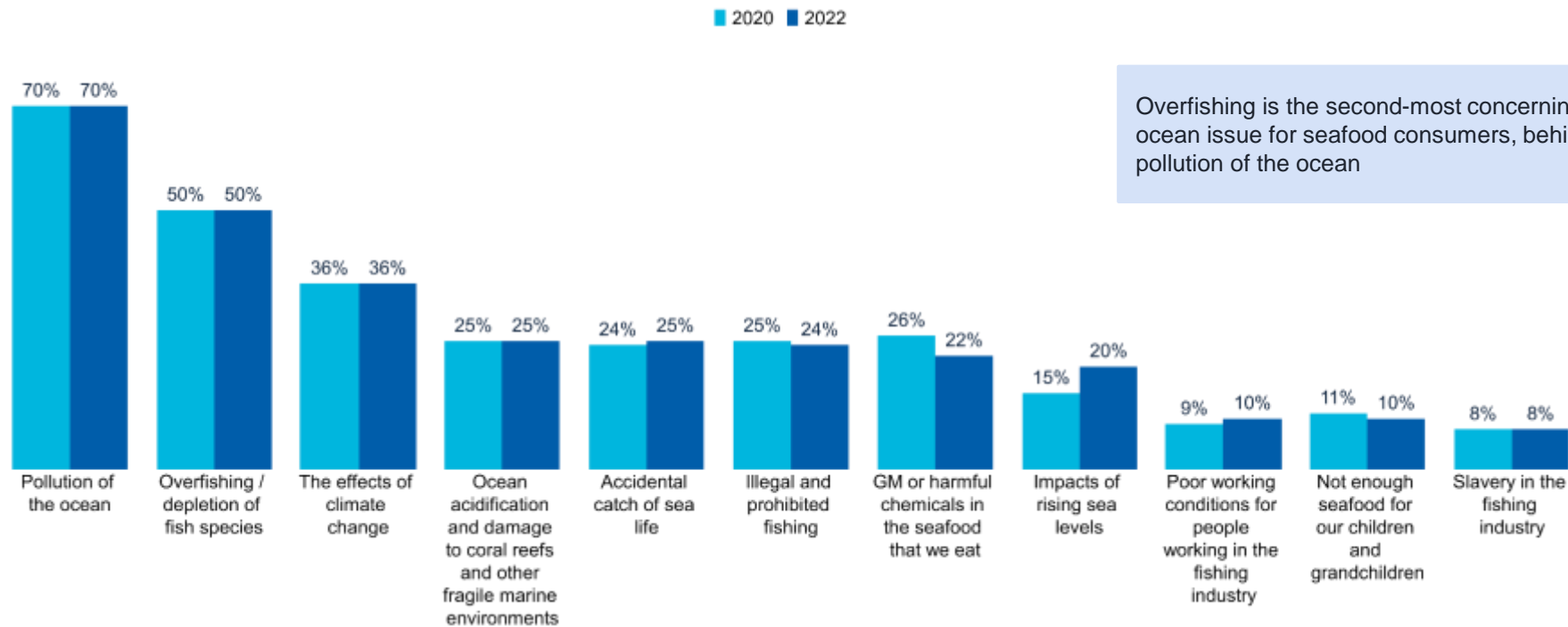
Base: Seafood Consumers

Q107 Please describe any information you have seen or heard about the state of the oceans that's caused you concern in the last year



Most Concerning Threats to Oceans

Issues, (each respondent selected three issues)



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

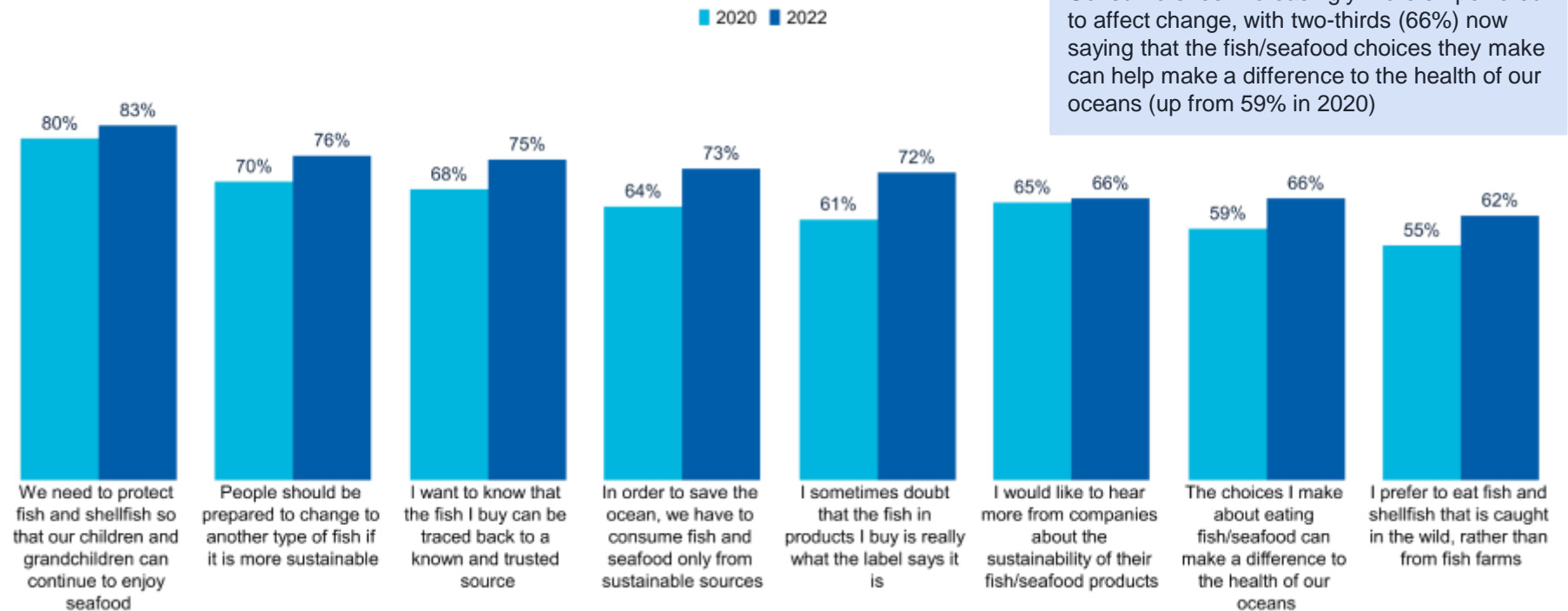
Base: Seafood consumers, Germany

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)



Base: Seafood consumers, Germany

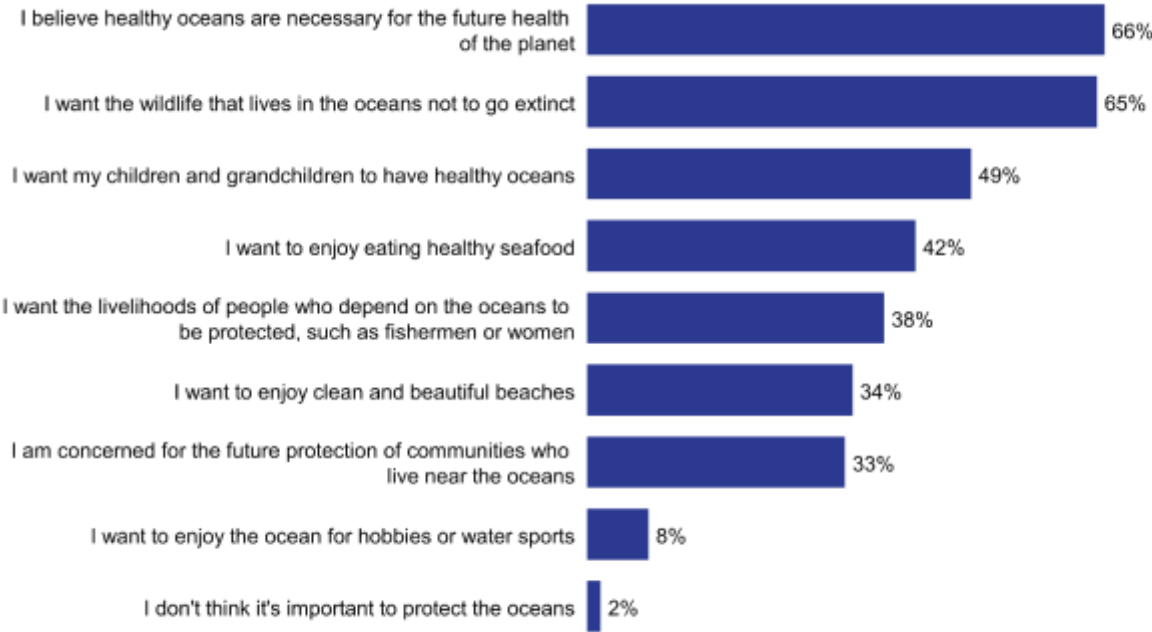
Q5.1: How well does each of the following statements describe your opinions? 7-pt scale: 1 = "Does not describe my opinion very well," 7 = "Describes my opinion very well"



Reasons to Protect the Oceans



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



Base: Seafood consumers, Germany

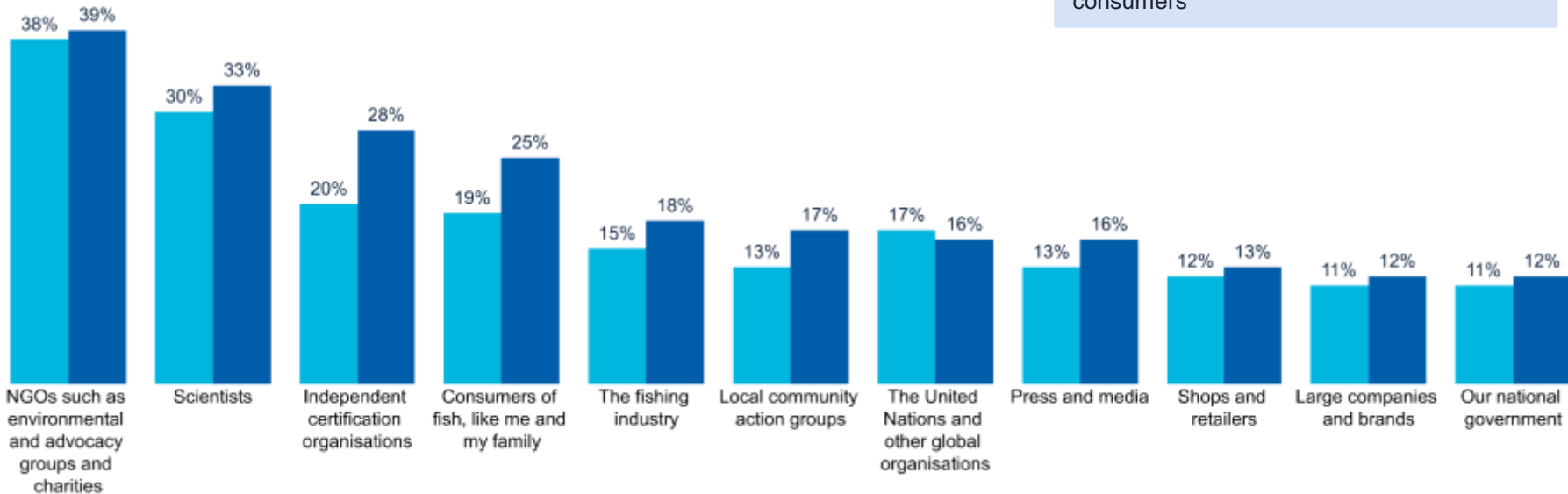
Q108 Why do you think it's important to protect the oceans?



Performance of Different Groups in Protecting Oceans

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

2020 2022



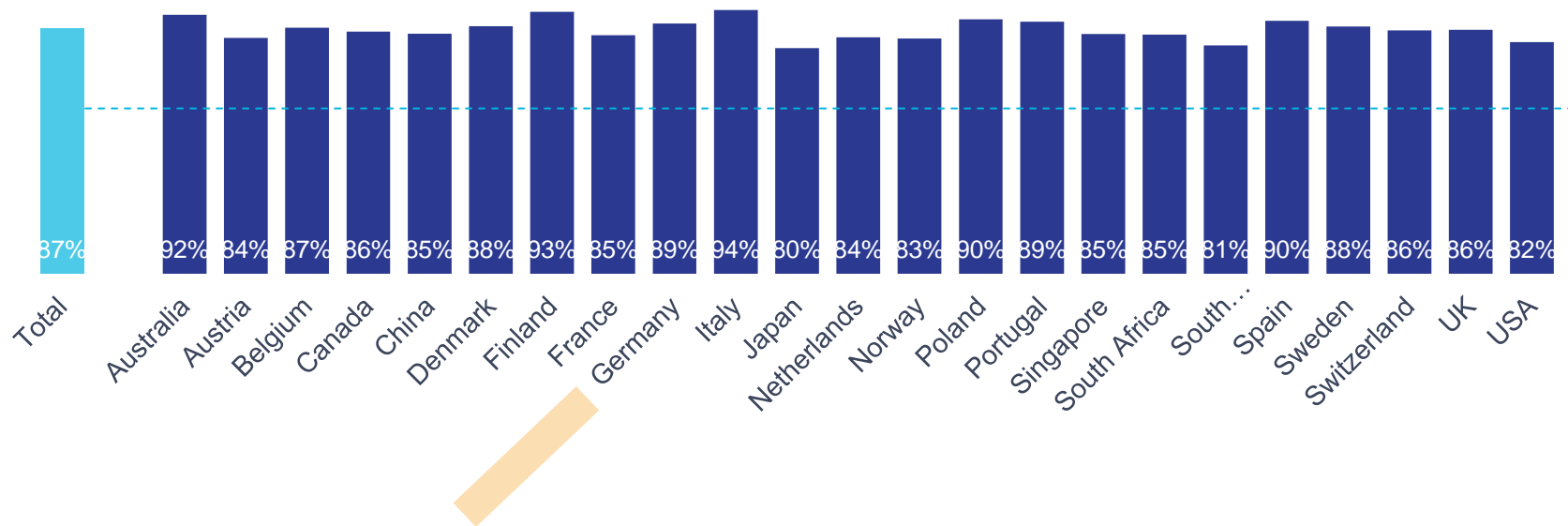
Perceptions have improved of several different actors in protecting the oceans including independent certifications and fish consumers

Base: Seafood consumers, Germany

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

Climatarians who believe in order to save the oceans we have to consume fish and seafood only from a sustainable source

7 point scale: Agree (5+6+7)



Base: Climatarians, global, n=3,274

Q5.1_1. How well does each of the following statements describe your opinions? – In order to save the ocean, we have to consume fish and seafood only from sustainable sources

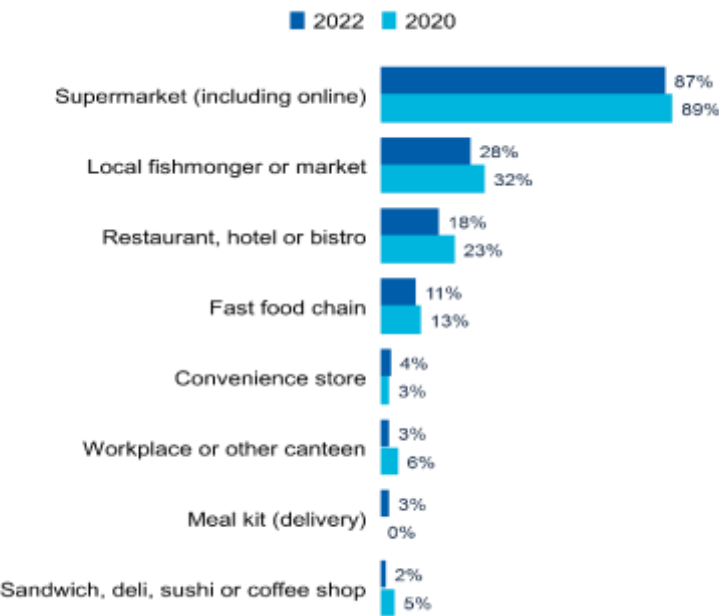


Love of Seafood

Fish/Seafood Purchase, by Outlet and Supermarket

Seafood purchases, multiselect

Fish/seafood purchase, by type of outlet



Online grocery shopping



15%

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



10%

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, Germany

Q2.4: Which supermarket do you/your family usually buy fish and seafood products from?

Base for Q2.4: Consumers purchasing fish in supermarkets, Germany

Q103: How, if at all, has your grocery shopping changed in the last two years?

Base for Q103: Seafood consumers, Germany

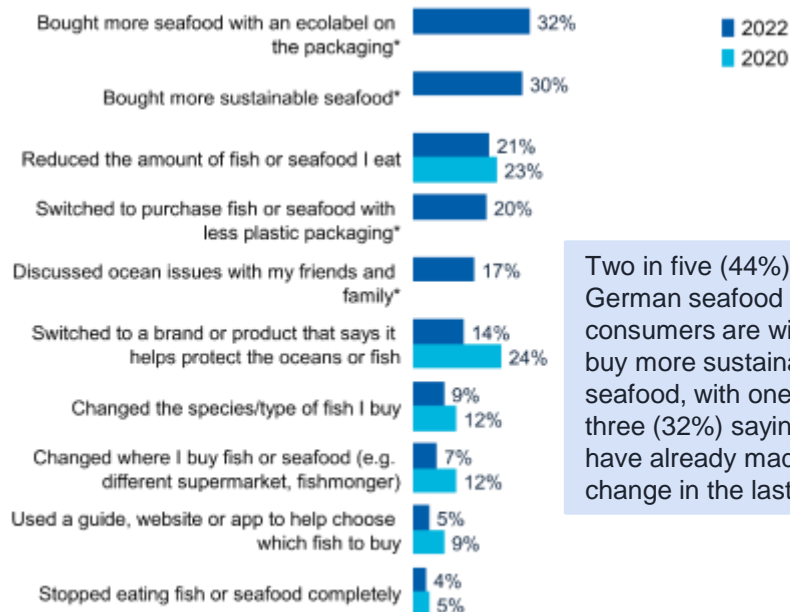


Consumer Action and Diet

Current and Future Consumer Actions to Protect Seafood

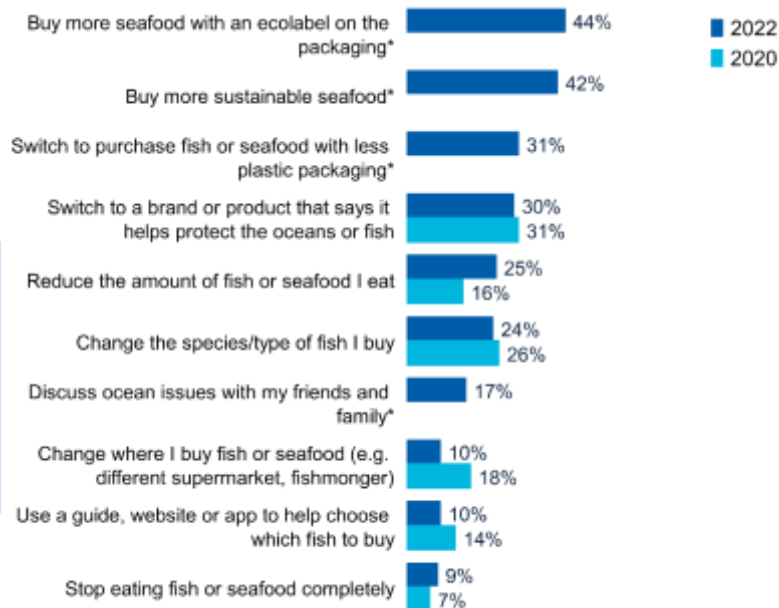
Actions consumers have taken and would be willing to take to protect the fish and seafood in our oceans, multiselect

Action taken



Two in five (44%) German seafood consumers are willing to buy more sustainable seafood, with one in three (32%) saying they have already made this change in the last year

Willingness to take action

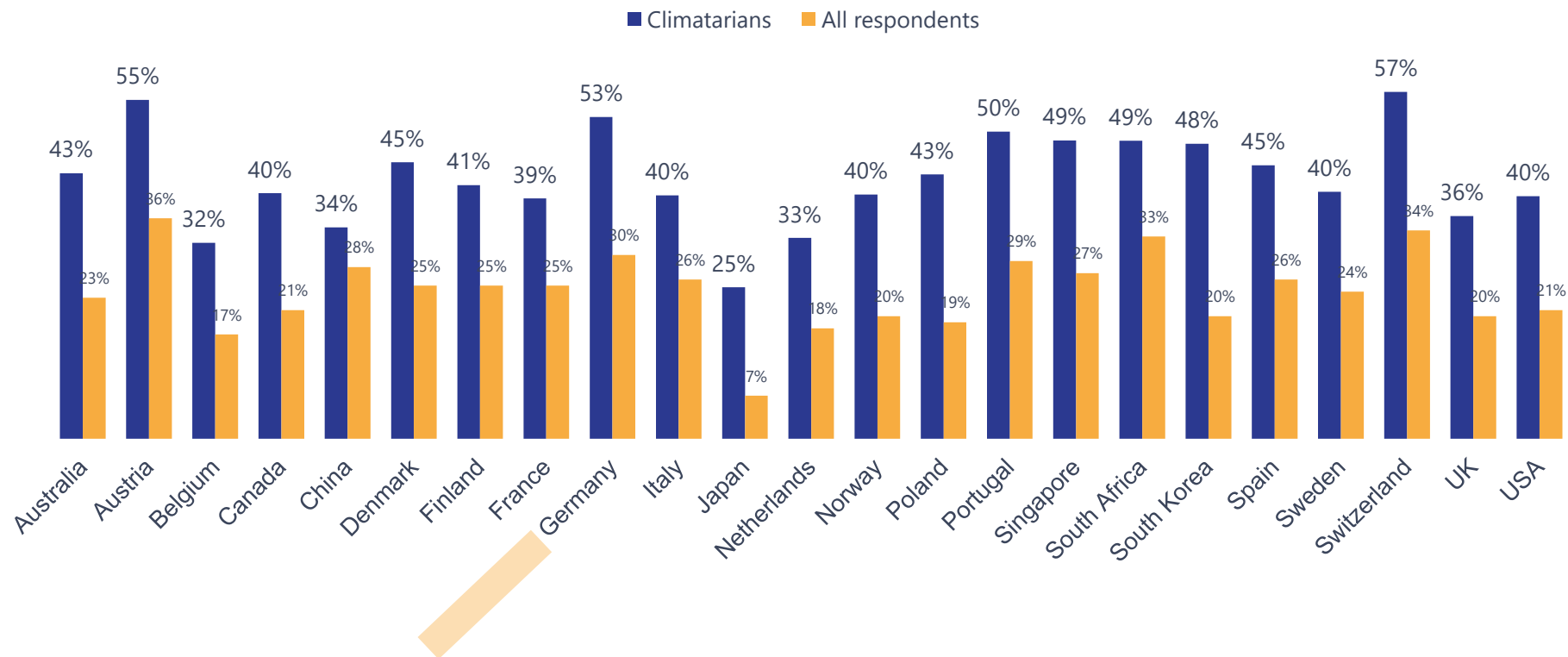


Base: Seafood consumers, Germany

*Statements with no 2020 data were added in 2022

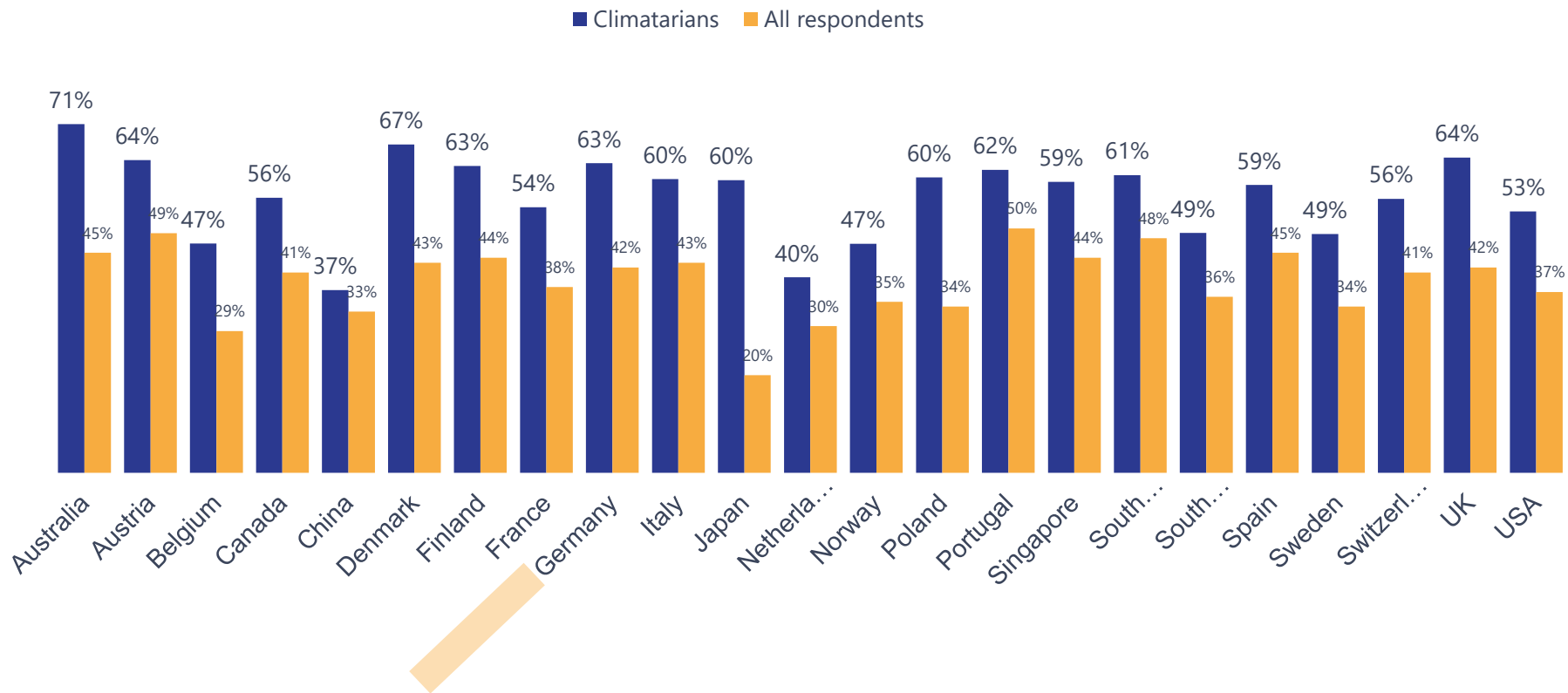
Q11.4a: Which, if any, if the following actions have you taken in the last year to help protect the fish and seafood in our oceans?

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?



Base: Climatarians, global, n=3,274. All respondents, 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?



Base: Climatarians, global, n=3,274. All respondents, global, n= 20,127

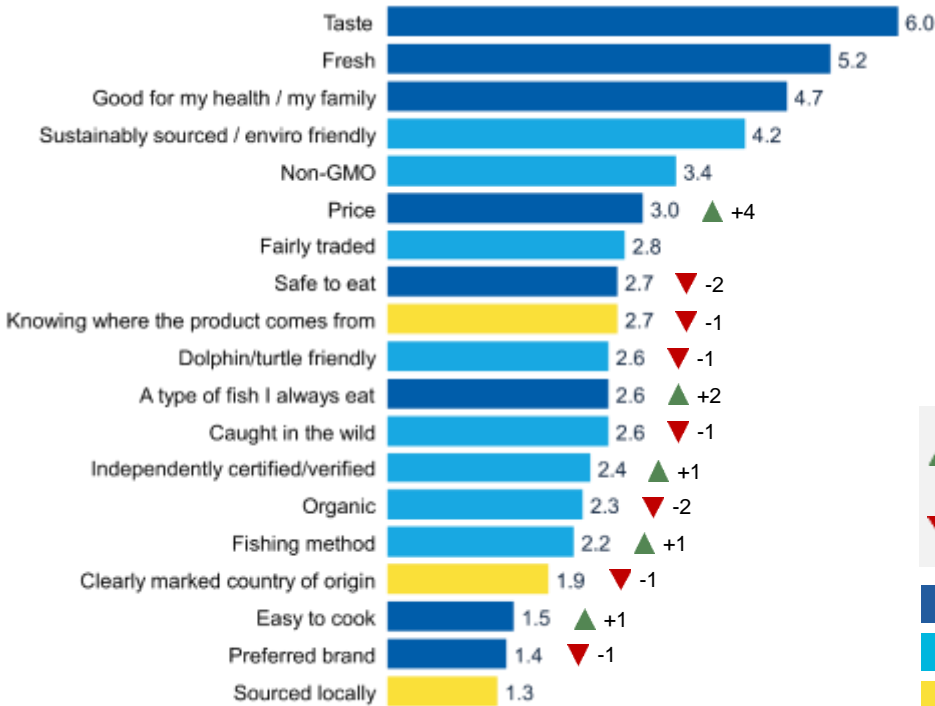
Q11.4b And which other actions would you also be willing to take in the future to protect the fish and seafood in our oceans?.



Motivators of Purchase and Ecolabels

Motivators when Purchasing Fish and Seafood

Relative importance scores



The top motivators of seafood purchase in Germany focus on quality (taste and freshness) and health and have remained steady compared to 2020. Sustainably sourced/environmentally friendly is the fourth most important factor – higher than in many other markets – although independent certification remains a lower motivator of seafood purchase, while price has risen in importance in Germany this year

▲ Ranked higher in 2022 compared to 2020

▼ Ranked lower in 2022 compared to 2020

■ Conventional purchase motivators

■ Sustainability-focused

■ Traceability-focused

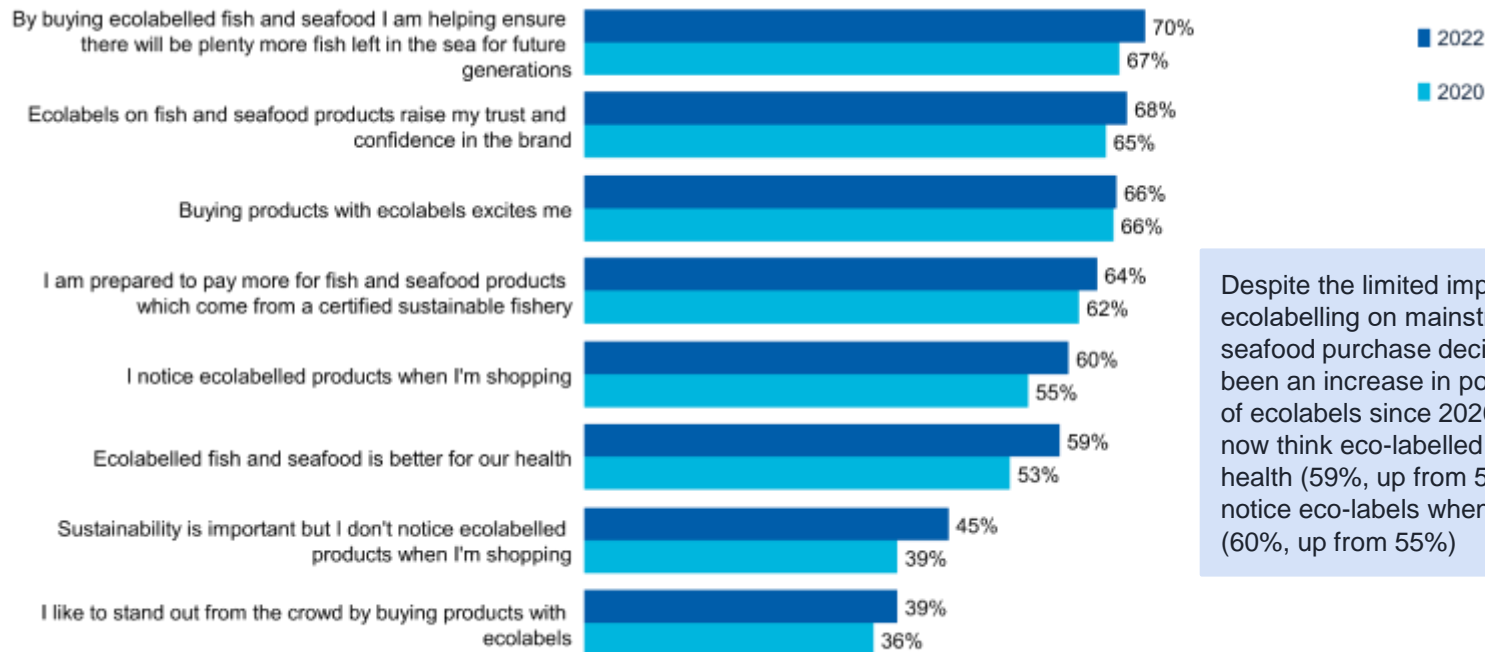
Base: Seafood consumers, Germany

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)



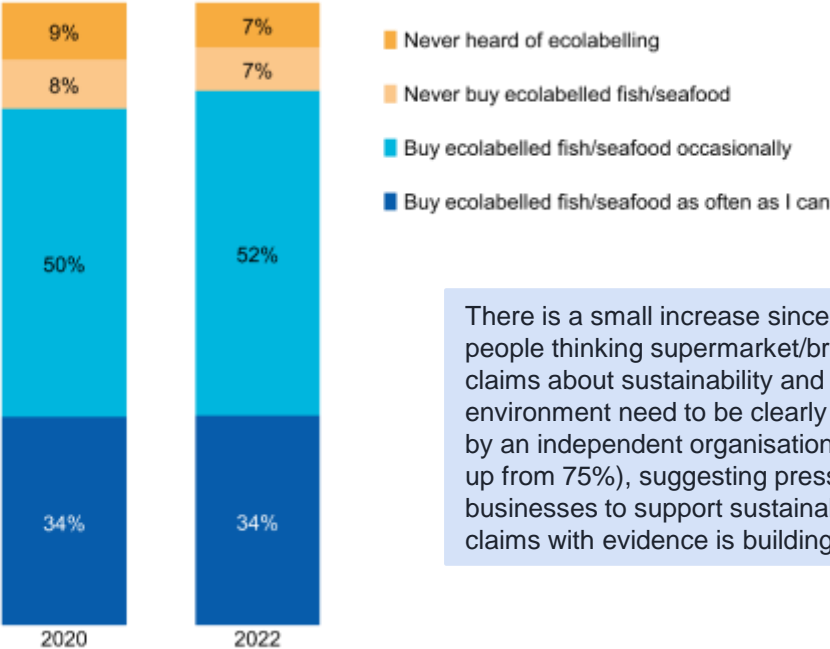
Despite the limited impact of ecolabelling on mainstream consumers' seafood purchase decisions, there has been an increase in positive perceptions of ecolabels since 2020. More people now think eco-labelled fish is better for health (59%, up from 53%) and say they notice eco-labels when shopping (60%, up from 55%)

Base: Seafood consumers, Germany

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"

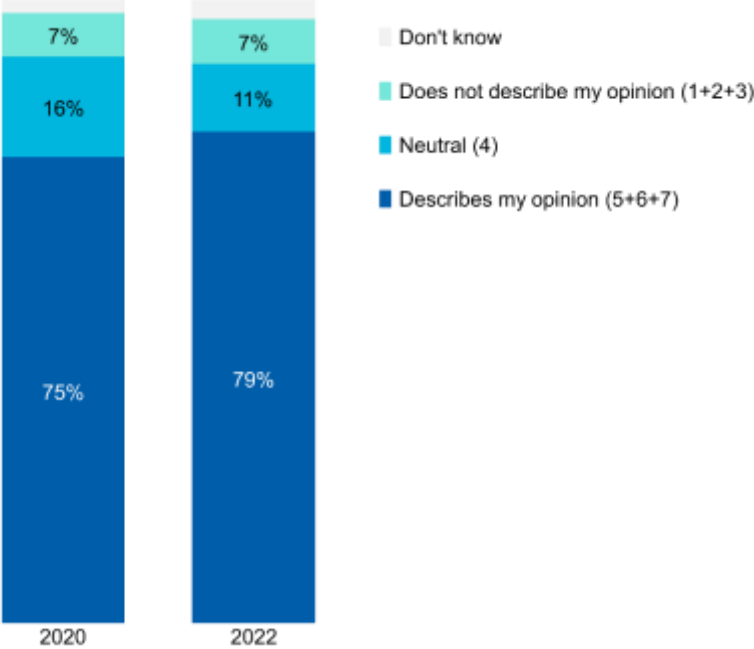
Demand for Labelling & Recalled Purchase of Ecolabllled Fish

Frequency of purchase of ecolabelled fish



There is a small increase since 2020 in people thinking supermarket/brand claims about sustainability and the environment need to be clearly labelled by an independent organisation (79%, up from 75%), suggesting pressure on businesses to support sustainability claims with evidence is building

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



Base: Seafood consumers, Germany

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"

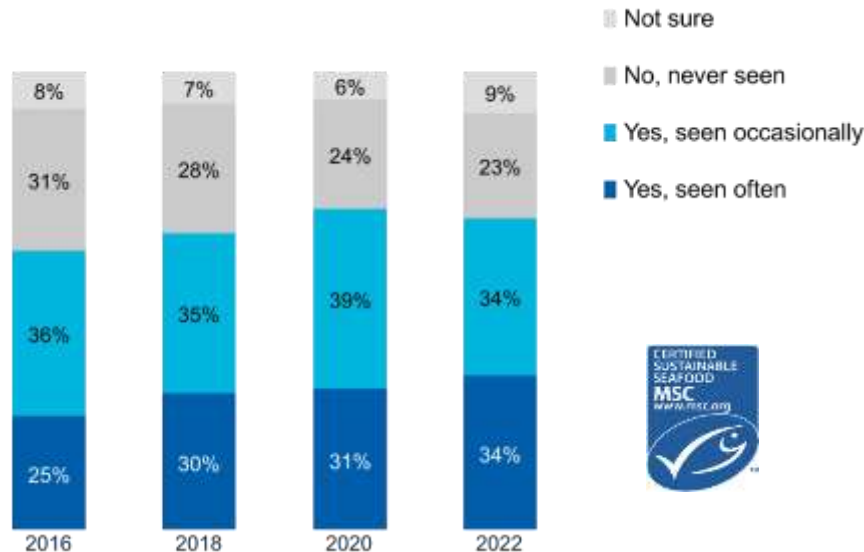




MSC Awareness, Trust, and Understanding

Awareness of the MSC Label by Consumer Type

Frequency of seeing the MSC label

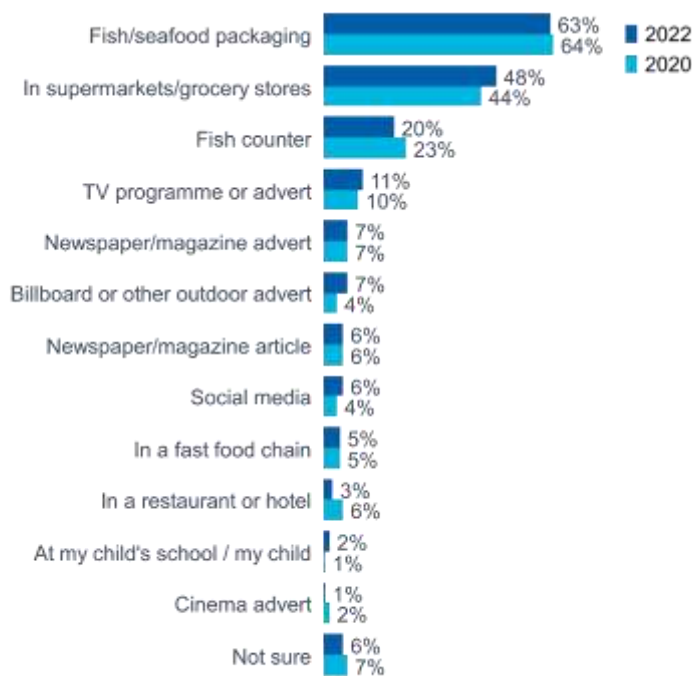


Awareness of the MSC label has remained similar to 2020 – overall awareness (seen “often” and “occasionally”) has dropped very slightly from 70% to 68% this year but the proportion of people who recall seeing the label “often” has risen from 31% to 34%. Fish and seafood packaging and supermarkets/grocery stores are the most recalled places to see the MSC label

Base: General public, Germany

Q1.1: Have you ever seen the following logos?

Locations where consumers recall seeing the MSC label



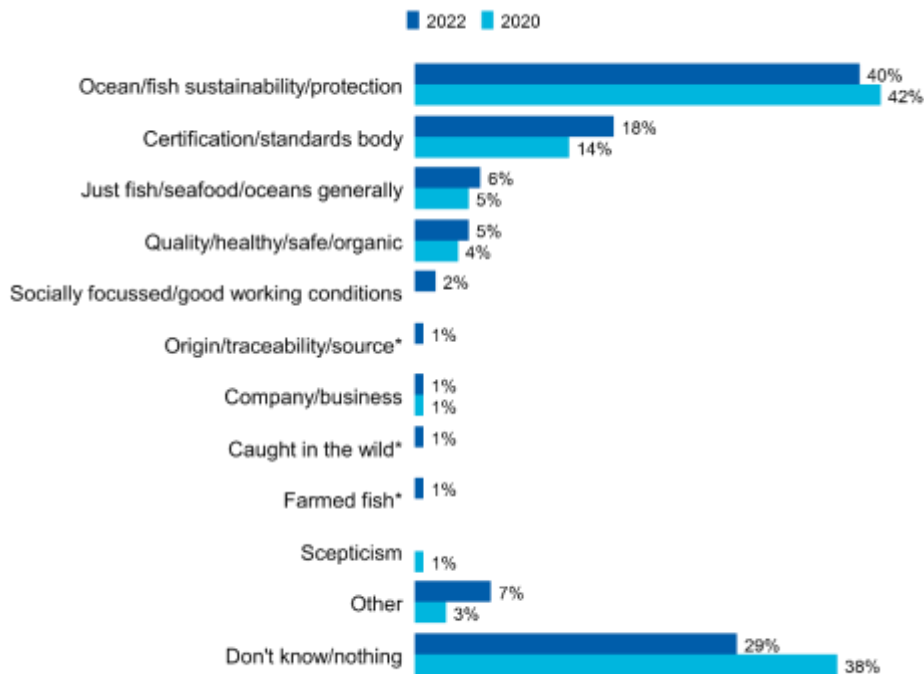
Base: MSC aware, Germany

Q9.4: Earlier, you mentioned that you remember seeing this label. Where have you seen it?



Understanding of the MSC Label

Unprompted associations with MSC label



51%

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

This compares to **50%** in 2020

Half (51%) of consumers have at least some understanding of the MSC label, spontaneously associating it with either ocean sustainability or certification – similar to previous years in Germany and higher than global averages

Base: Seafood consumers, Germany

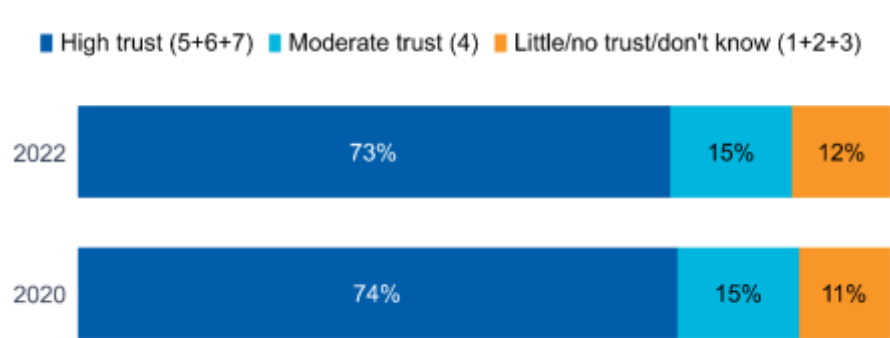
Q6.1: What does this logo mean or represent?

*Origin/traceability/source was not recorded in previous years as it wasn't a significant theme; farmed fish or wild fish were not recorded in 2016 or 2018

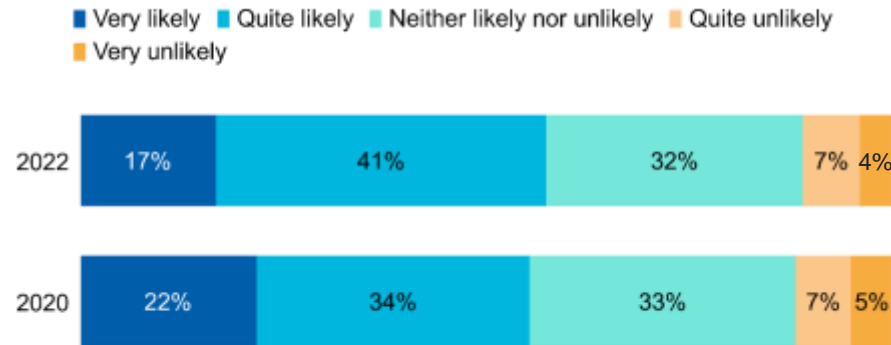


Trust in the MSC Label and Recommendation of MSC

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



Likelihood of recommending MSC-certified products, likelihood scale



Trust in MSC is high amongst MSC-aware seafood consumers at 73%, again similar to previous years. Likelihood to recommend amongst MSC-aware consumers has remained steady over the last two years with 58% of German consumers likely to recommend MSC-certified products

Base: MSC aware, Germany

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"

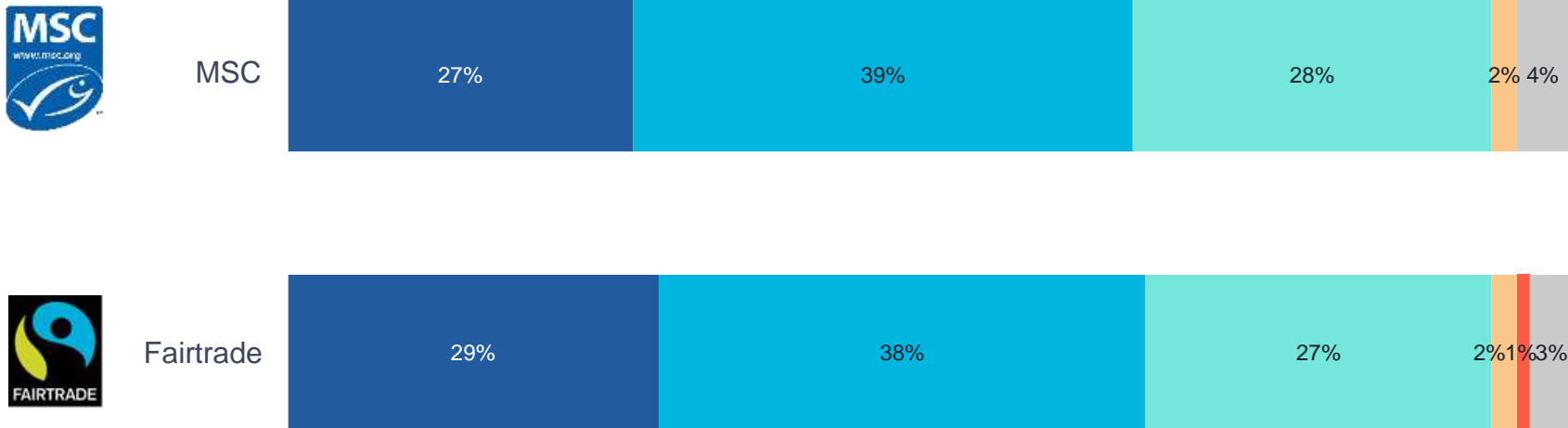
Q12.2: How likely are you to recommend MSC-certified products to the people you know?



Impact of Label on Likelihood to Purchase

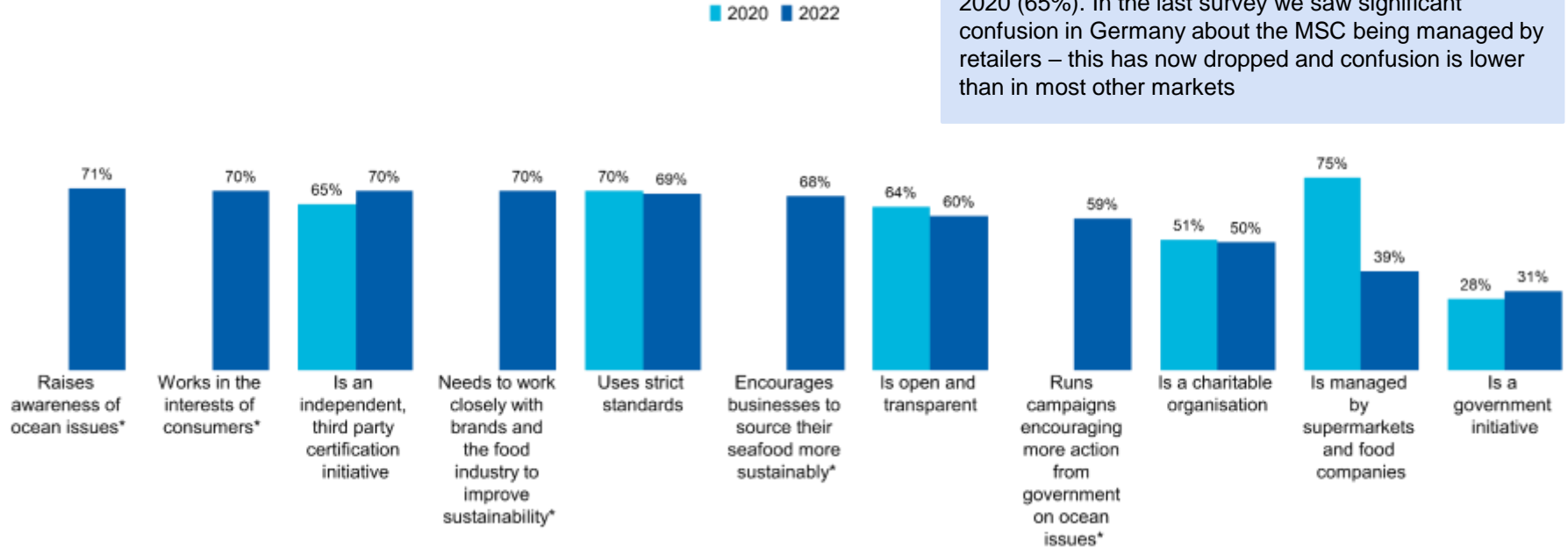
Impact labels have on likelihood to purchase, 5 pt scale

■ Much more likely to purchase ■ Slightly more likely to purchase ■ No impact on my purchase
■ Slightly less likely to purchase ■ Much less likely to purchase ■ Don't know



Perceptions of the Role of MSC

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



Seven in ten (70%) correctly identify the MSC label as an independent, third-party initiative, an increase since 2020 (65%). In the last survey we saw significant confusion in Germany about the MSC being managed by retailers – this has now dropped and confusion is lower than in most other markets

Base: MSC aware, Germany

*Statements with no 2020 data were added in 2022

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"





The MSC Blues

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.



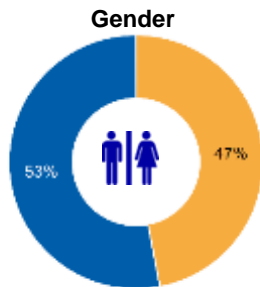
Introducing the MSC Blues: Germany

36%

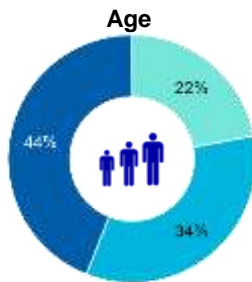
of seafood consumers in Germany are MSC Blues

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.

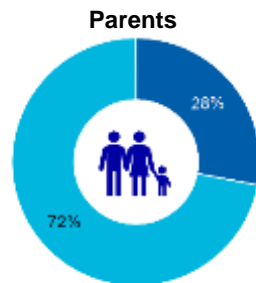
Demographics



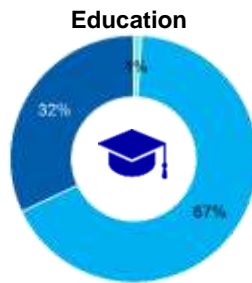
Male Female



18-34 35-54 55+



Parents Non-Parents



Low Medium High

Hobbies, top five



Preferred channels (at least weekly use)



Introducing the MSC Blues: Germany (continued)

MSC KPIs

MSC awareness

■ Yes, seen often ■ Yes, seen occasionally ■ No, never seen ■ Not sure

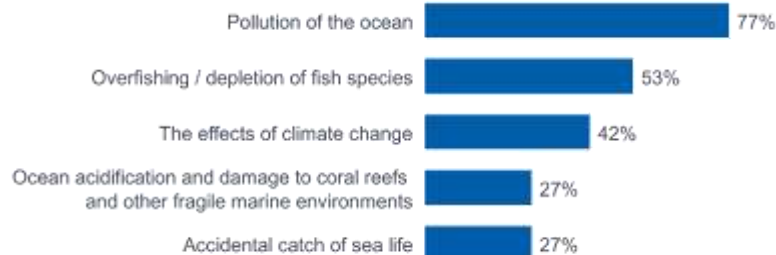


MSC trust

■ High trust (5+6+7) ■ Moderate trust (4) ■ Little/no trust/don't know (1+2+3)



Most concerning ocean issues, top five

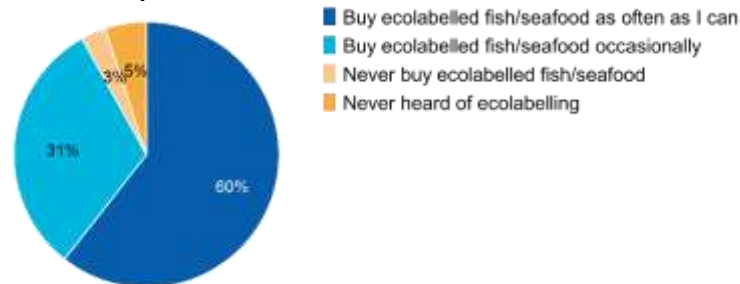


Labelling and purchasing

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





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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.

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