

MSC Global Stakeholder Engagement Survey

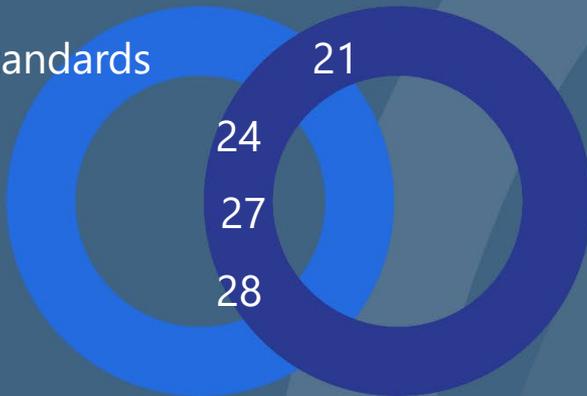
Highlights Report for
Stakeholders

May 2022



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Thank You

Thank you for taking part in the MSC's Global Stakeholder Engagement Survey.

We are delighted that so many of you took the time to contribute your insights and experience to this survey. There were over one thousand participants, and this response is a testament to the value you attach to the work of the MSC as well as your desire to see us continue to evolve.

Our vision of healthy and productive oceans with seafood supplies safeguarded for this and future generations is a common cause which unites us all. Your collective engagement over the last 25 years has helped to encourage over 500 fisheries to engage with our program and seek certification. Currently 19% of the world's wild marine catch is engaged with the MSC, which would not have been possible without the commitment of so many partners, all of whom have high - and occasionally conflicting – expectations of our program.

In this short report, you will see our stakeholders believe there are many strengths in the MSC's program. But you have been clear too that there are areas that we should continue to develop. For example, you want us to reduce the complexity in our program, improve accessibility for small-scale fisheries as well as expand our advocacy efforts on behalf of the sustainable seafood movement.

Your contributions will help to inform the MSC's new strategy which will lay out our road map to 2030. I look forward to sharing this with you later this year and continuing our work together to achieve the goal of ending overfishing.

Rupert Howes

Chief Executive, Marine Stewardship Council

Introduction

- The MSC Global Stakeholder Engagement survey is intended to capture the views of fisheries, scientific institutions, seafood businesses and NGOs and other groups across the world which regularly engage with the MSC. This short report covers key findings including:
- **Key performance indicators**, including trust in the MSC and effectiveness of achieving our mission and vision. These results help to inform about areas of **strength** and improvement with different stakeholder groups in different regions.
- **The opportunity and role of the MSC:** These findings help the MSC understand whether it is currently fulfilling stakeholder expectations of its current role, as well as indicating some future directions for the organisation.
- **Barriers to fulfilling the MSC's role:** these outcomes cover the external barriers to fulfilling the MSC's role as well the tensions that arise from the MSC's multi-stakeholder environment.
- **Urgency of issues and feedback on the MSC's standards:** This provides some context on our stakeholders' perceived urgency of major sustainability issues and how stakeholders views the MSC Fisheries and Chain of Custody Standards
- **MSC engagement:** these findings help the MSC understand if there are gaps in its engagement efforts and where improvement is needed.
- The survey was carried out by the independent research agency, GlobeScan in late 2021. The outcomes will help inform areas for monitoring, improvement as well as inform the organisation's next strategic plan.



Methodology and participants

Survey Methodology

- GlobeScan, a third-party research and advisory consultancy, was commissioned by the MSC to independently manage the MSC's stakeholder survey. The survey was designed collaboratively and GlobeScan was responsible for programming and hosting, and data collection and analysis.
- The stakeholder survey was offered online and took approximately 15 minutes to complete. Data was collected from November 4th to December 10th 2021.
- Engagement with stakeholders was coordinated centrally by the MSC's global team, with country level teams supporting direct engagement efforts with their stakeholders. Participation in the survey was completely voluntary and no respondents were excluded from taking the survey unless the respondent self-declared that they lacked familiarity with the MSC. No quotas were applied.

Note to Readers

- Figures in the charts and tables in this report are expressed in percentages, unless otherwise indicated.
- Total percentages may not add to 100 because of rounding.
- The data presented in this report has been weighted at a regional level to reflect a more balanced composition of MSC's stakeholders and to minimise over- and under-representation of some regions. The sample is weighted to represent $n=150$ in North America, Northern Europe, Southern Europe, and Asia, and $n=75$ in Latin America, Middle East and Africa (MEA), Russia, and Oceania.

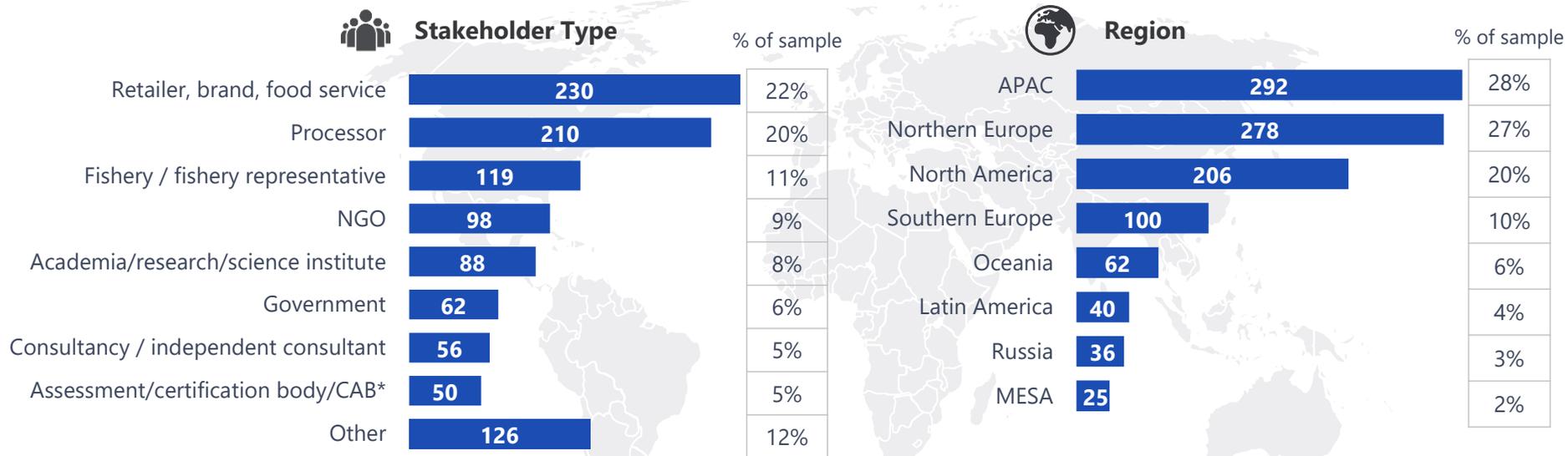
The survey was offered in:

- English
- Bahasa Indonesian
- Simplified Chinese
- French
- German
- Italian
- Japanese
- Korean
- Polish
- Russian
- Spanish

Participant Profile

Number of respondents by stakeholder type and region (counts)

Total responses, $n=1039$



Other mentions include: zoos and aquariums, individuals interested in marine issues, traders (import/export), brokers, wholesalers, etc.

*Assessment and certification body, and Conformity Assessment Bodies (CAB).



Key Performance Indicators

The MSC systems and governance instils much trust. We have seen evidence to support the program having impact. Despite all best efforts, there are some issues that may be difficult to tackle e.g. where intergovernmental agreement is not reached. Also dependent on the number and scale of fisheries that enter to program.

- CAB, Oceania

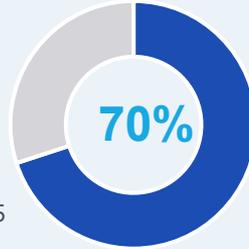
I think MSC is doing a lot for our ocean and I have a lot of trust in the program. However, a lot of our seafood today is from countries that may not have the financial means to pursue certification.

- Processor, North America

Summary of Key Performance Indicators (KPIs)*

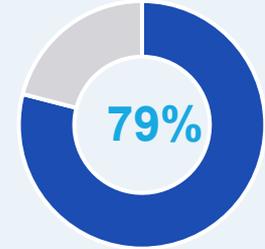
Overall, the MSC performs well across key performance areas. Metrics were chosen to give a holistic view of the MSC's reputation among stakeholders.

Trust in the MSC to contribute to ending overfishing



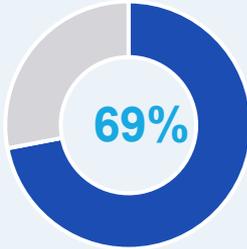
Mean: 5.05 out of 7

Likelihood to speak favourably about the MSC



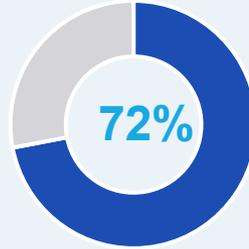
Mean: 5.51 out of 7

Effectiveness to achieve the MSC's vision



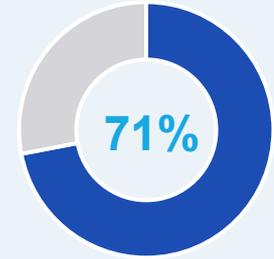
Mean: 4.94 out of 7

Effectiveness to achieve the MSC's mission



Mean: 5.08 out of 7

Satisfaction with level of engagement /communications

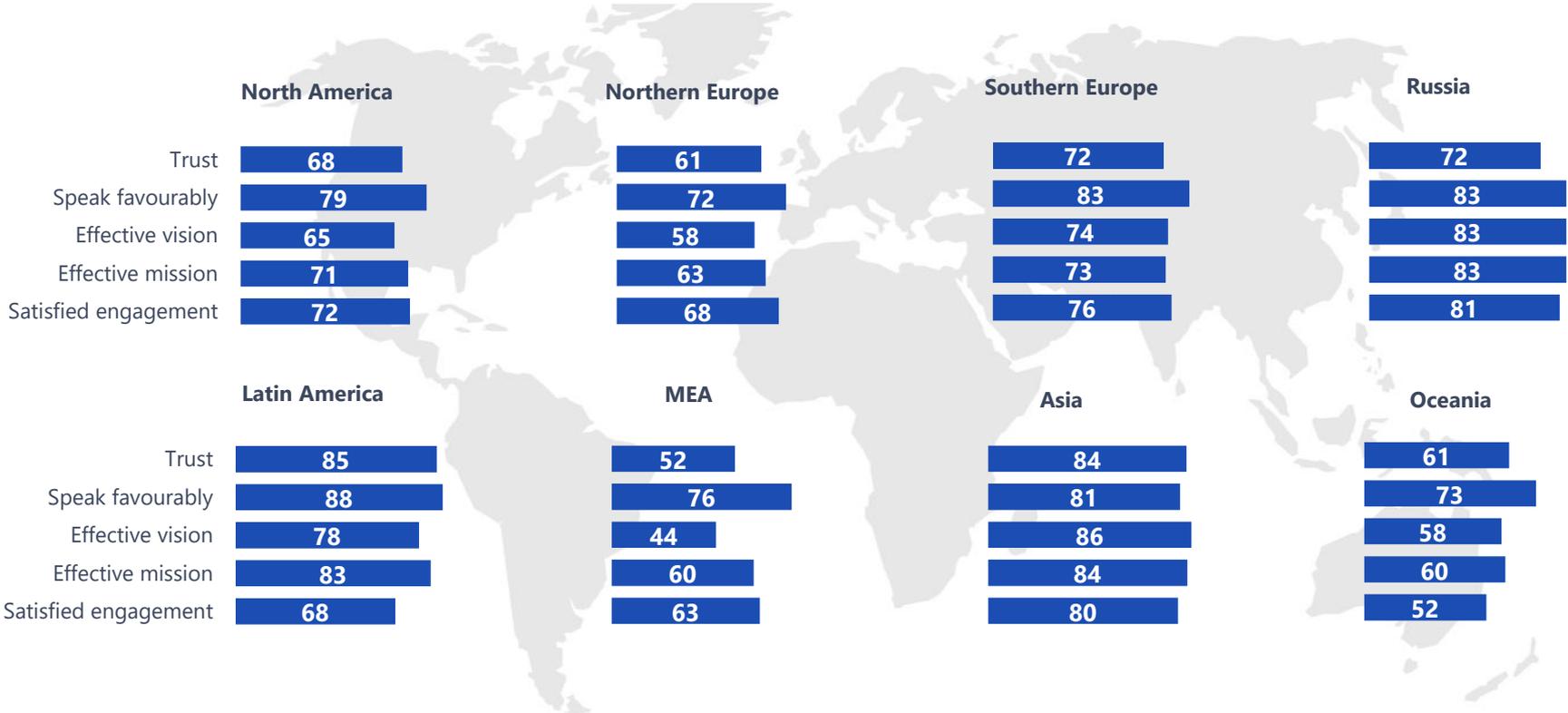


Mean: 5.31 out of 7

*Dashboard metrics are based on top 3 ratings (5+6+7) on a 7-point scale.

Snapshot of Regions*

Global	Trust: 70%	Favourable: 79%	Vision: 69%	Mission: 72%	Satisfied: 71%
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*Score based on top 3 (5+6+7) on a 7-point scale

Summary of Regions

North America

- Views are typically aligned with the global average across most areas including trust, favorability, and perceived effectiveness towards achieving the MSC's mission and vision.
- Climate change, biodiversity and overfishing are seen as the three most urgent ocean issues according to North American stakeholders.

Northern Europe

- Scores on trust and core KPIs are lower compared to the global average, while concerns about the urgency of ocean issues (overfishing, biodiversity, climate change) are higher.
- Stakeholders see a particularly strong advocacy role for the MSC, including campaigning on ocean issues to governments and generally communicating on overfishing.

Southern Europe

- Social issues such as slavery in the fishing industry and working conditions are seen as more urgent issues in Southern Europe
- Scores for the MSC are higher than average on favourability, effectiveness at vision, and satisfaction of engagement.
- As in Northern Europe, stakeholders would like to see more advocacy on ocean issues.

Russia

- Higher than average scores across most KPIs, particularly on satisfaction with the MSC's engagement.
- Building consumer awareness and understanding of the MSC is seen as a communications priority.
- Pollution of the ocean (e.g. plastic pollution) is considered the most urgent issue according to Russian stakeholders.

Latin America

- Very high trust but less familiarity with the MSC than in other markets, reflected in below-average satisfaction with engagement.
- Supporting small-scale fisheries in developing/ developed economies along with social standards are areas that Latin American respondents would like to see from the MSC's programs.

MEA

- Trust in the MSC and its effectiveness in achieving its vision are the lowest of the regions despite high familiarity (though the sample size is very low in MEA).
- Supporting small-scale fisheries in developing economies is a desired area of focus for the MSC programs.

Oceania

- Core KPI ratings slightly below global average despite key concerns of overfishing, availability of seafood and impact of climate change.
- Priority for more communication from brands and retailers using the MSC ecolabel.
- MSC is seen as an independent certification body with a role to help businesses meet their sourcing policies.

Asia

- The MSC's brand is less visible and recognised in Asia but despite this there are high ratings on trust and other KPIs, indicating strong support for the MSC.
- Increasing the MSC's presence (in market such as China and Japan) is considered crucial.
- Food safety is an area of interest for the MSC's programs.

Snapshot of Stakeholders*

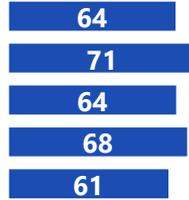
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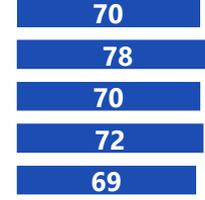
Retail/Brand



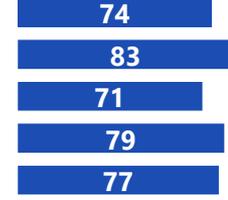
Fishery



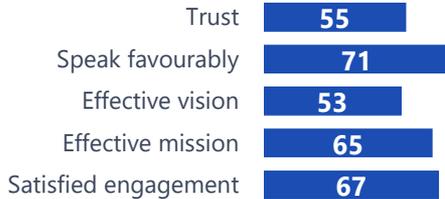
Processor



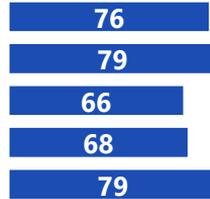
Consultant



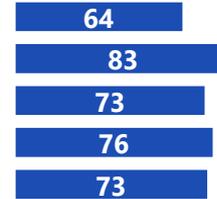
NGO



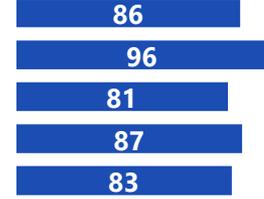
Academia



Government



CAB



*Score based on top 3 (5+6+7) on a 7-point scale

Summary of Stakeholders

Retail/brands



- Significantly higher ratings on all core KPIs, demonstrating strength of the MSC's programs for this group.
- Helping to meet customer expectations/sustainability goals and ensuring balanced responses are very important.
- Raising consumer awareness and advocacy are key roles of the MSC.

Fisheries



- While outcomes are broadly positive, there is room for improvement, especially on satisfaction
- Cost of certification is a top barrier to more engagement.
- Showing how the MSC helps to protect livelihoods a focus area for building trust.
- Important to highlight fisheries on the sustainability journey and program benefits.

Processors



- Scores on core KPIs are aligned with global average, though some processors can be quite negative in verbatim comments.
- Focus areas to drive trust include how the MSC helps to protect livelihoods, has balanced viewpoints, and prepares fisheries for climate change.
- Food fraud is a program area of interest.

Consultants



- Above-average ratings on all KPIs; very high familiarity with the MSC.
- Strengths to leverage include independence of the certification process and how the MSC partners with stakeholders.

NGOs



- Despite some criticism, NGOs want to engage with the MSC because of mutual goals to improve fisheries and ocean issues; 79% say there are no challenges to working with the MSC.
- Low ratings of trust and effectiveness of achieving vision.
- Focus areas to drive trust include helping to achieve sustainability goals, ensuring species/ecosystem health, and preparing fisheries for climate change.

Academia



- Above-average trust and satisfaction ratings but below average on the MSC's effectiveness of achieving its mission.
- Focus areas to build trust include climate, food security, livelihoods, species/ecosystem health, and balanced response to views.
- Emphasis needed on communicating scientific research at the MSC and helping fisheries to communicate on sustainability.

Government



- Below-average trust but above average on favourability and the MSC's effectiveness on mission/vision.
- Focus areas to build trust include safeguarding food security, protecting livelihoods, and ensuring species/ecosystem health.
- Strength to leverage is the independent certification process.
- Governments are supportive of the MSC's advocacy role.

CAB



- Most familiarity and likely to speak favourably of the MSC, above average on most core KPIs except trust.
- Strengths to leverage include independence of certification and communications about the MSC's mission/vision, while an area of focus is having a balanced response to viewpoints.



Opportunities & Role of the MSC

The MSC should be a vocal leader in defining what sustainable seafood is, how to measure a healthy ocean, and what seafood consumers can do to contribute toward a healthy ocean.

– Retailer/brand, North America

I think MSC should definitely continue to refine its certification methodology and ensure that as many fisheries as possible are fishing in the most sustainable way.

– NGO, North America

MSC should integrate social/labor criteria as pre-requisites to obtain certification. MSC should adopt a holistic point of view about "sustainability" (no longer "only" environmental).

– Processor, Southern Europe



Six in ten would describe the MSC's role as a certificate and eco-label organisation but stakeholders highlight many roles the MSC could play beyond this role in the future

Understanding of the MSC's role today

Total mentions, multiple selection, global, %



Retailers/brands (69%) and processors (59%) are more likely to think of the MSC as a marine conservation organisation.

Role of the MSC in the future of sustainable seafood

Unprompted, top eight themes mentioned based on analysis of $n=400$ randomised responses, global

- Assessing/protecting fisheries/holding them accountable
- Helping stakeholders to be more sustainable and meet their own sustainability goals
- Strengthening the MSC's current standards/processes
- Being a trusted leader in supporting sustainability
- Defining/setting standards for sustainability
- Raising awareness about seafood sustainability
- Expanding programs to be more accessible to fisheries
- Advocating for sustainability

Stakeholders would like to see the MSC take more of a role as a leading voice on ocean issues, collaborating, advocating and growing impact

Three main areas emerged as roles that stakeholders say the MSC can play in the future of sustainable seafood

Summary of unprompted, open responses

Leading authority in sustainable fishing/seafood

The MSC has the potential to strengthen its leadership in sustainable fisheries/seafood:

- Uphold, strengthen, and define strict standards for sustainable fisheries
- Provide more support to help organisations adopt best practices and achieve their sustainability goals
- Make programs more accessible and transparent

Strengthen advocacy and awareness of sustainable seafood

The MSC has a role to:

- Raise consumer awareness about sustainable seafood
- Advocate and lobby for stronger fishing policies and standards for governments and industry
- Work with a broader range of stakeholders
- Promote the benefits of the MSC's program and sustainable fishing

Growing scale, reach, and scope of the MSC and its programs

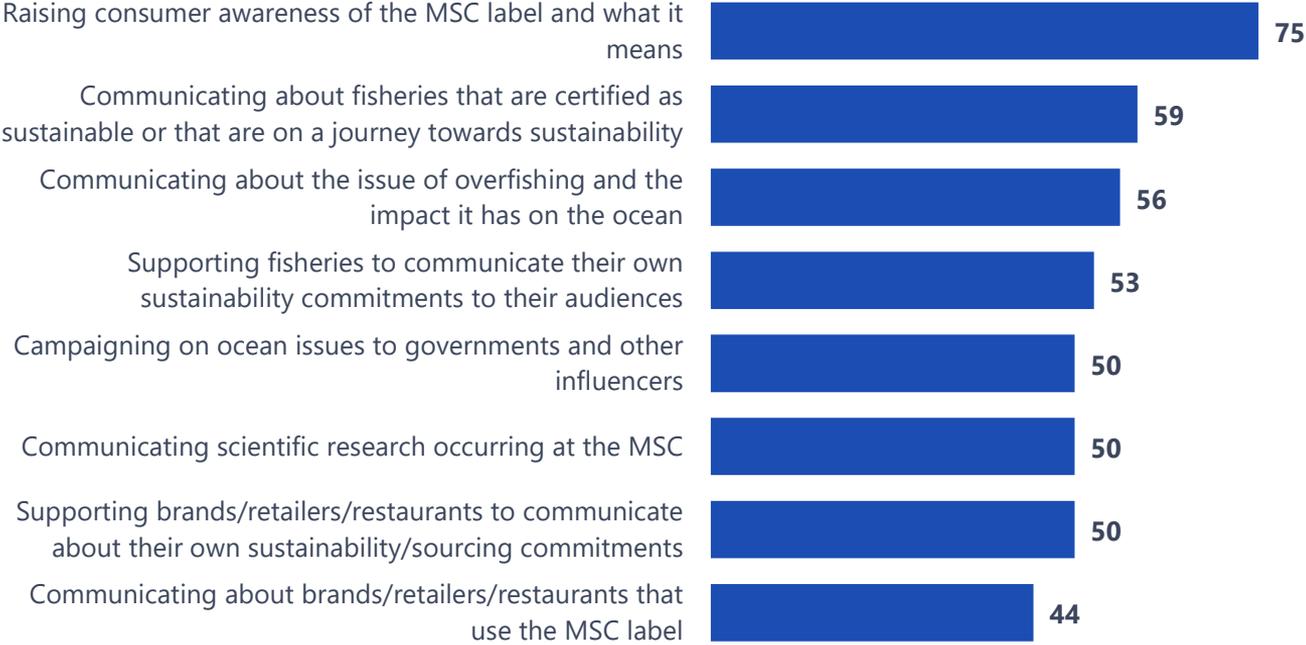
Stakeholders see the opportunity for the MSC to grow:

- Increase the MSC's presence in more markets
- Expand programs to reach more fisheries of all sizes
- Develop a broader spectrum of programs, beyond certification, to protect more marine species, address climate change, as well as other socioeconomic and human rights issues.

Raising consumer awareness and understanding is a key activity for the MSC to prioritise, according to three quarters of stakeholders

Communication activities the MSC should prioritise

Total mentions, multiple selection, global, %



The GlobeScan/ MSC Global Consumer Insights survey 2022 shows steadily increasing consumer awareness of the MSC label, rising to 48% amongst consumers generally. 78% of MSC-aware seafood consumers say they trust the label.





Barriers to Achieving the MSC's Mission

It's largely up to governments and other decision-makers to reduce and prevent overfishing. MSC is essentially one mechanism for applying pressure to these decision-makers, and only for the subset of fisheries that are certified or working toward certification.

- **NGO, North America**

The MSC covers a rather significant proportion of global fisheries; the requirements in our view strikes a balance between the high level needed for it to be taken seriously by customers, consumers and governments, while still being within reasonable reach of the fishing industry, plus the MSC label has an actual value, meaning.

- **Retailer/brand, Northern Europe**



The biggest perceived barriers facing the MSC include lack of political will to tackle overfishing, consumer demand for sustainable seafood and conflicting ideas on future role of the MSC

Three main over-arching themes are mentioned as perceived challenges facing the MSC as the organisation tries to achieve its mission

Summary of unprompted, open responses

Lack of political will to end overfishing

This is especially noted in some Asian and developing markets. Lack of strong sustainable fishing regulations (along with the will to address other issues like climate change) and the continuation of illegal fishing undermines what the MSC is trying to achieve.

Recognised tension between rigorous, scientific, strict standards, and encouraging wide participation

Industry stakeholders want less complexity, costs, and fewer barriers to participation. Other stakeholders like those in civil society want stricter criteria that apply to more species. There is a sense among some stakeholders that some fisheries may not be adhering to the MSC's processes as stringently as they should, and that the MSC has limited resources to monitor for non-compliance.

Perceived lack of consumer demand for sustainable seafood

Some stakeholders believe that consumers are not aware of the MSC /MSC label or do not care about seafood sustainability, and/or are unwilling to pay more for certified seafood in their markets. Consumer action is needed in order to drive demand for sustainable seafood and encourage participation in the MSC's programs.

Stakeholders have high expectations of the MSC, often making competing requests; given this challenging tension, it's important that the MSC maintains trust with stakeholders with transparency and communication around decision-making

Summary of themes within open-ended stakeholder responses

Strengthen your standard, especially on the evidence requirements side, and you have unarguable proof of your efficacy. Accept that some fisheries may not make the cut but bolster your public image and outreach on the basis that you oversee the strongest independently verified standard. You'll achieve more vocal and sustained support from the NGO community.

– NGO, Europe

In their open comments, some stakeholders have competing requests of the MSC and there is tension between being rigorous, scientific and strict standards, and encouraging wider participation in the MSC's programs

- | | | |
|--|-----------|--|
| <ul style="list-style-type: none">• Stricter standards/processes• More enforcement/accountability• More rigor/scientific focus | vs | <ul style="list-style-type: none">• More accessible• Less costly• Fewer barriers to participate• More widely available products |
|--|-----------|--|

Don't make the standard too hard, stay focused on what it means to fish sustainably. A fishery should not fail to achieve that label based on some new "hobby-horse" about data sampling stringency
– Consultant, Europe

Many industry stakeholders such as retailers, brands, processors, fisheries and consultants would like to see less complexity, lower costs, and fewer barriers to participation, to expand the impact and scale of the MSC program. Civil society stakeholders including NGOs and some academics tend to request stricter criteria that apply to more species. There is a sense among some stakeholders that some fisheries may not be adhering to the MSC's processes as stringently as they should, and that the MSC has limited resources to monitor for non-compliance.





Urgency of Issues & Feedback on the MSC Standards

The MSC provides the most comprehensive and inclusive standard to enable the stopping of overfishing IF the fisheries are willing to implement.

– Retail/brand, Europe

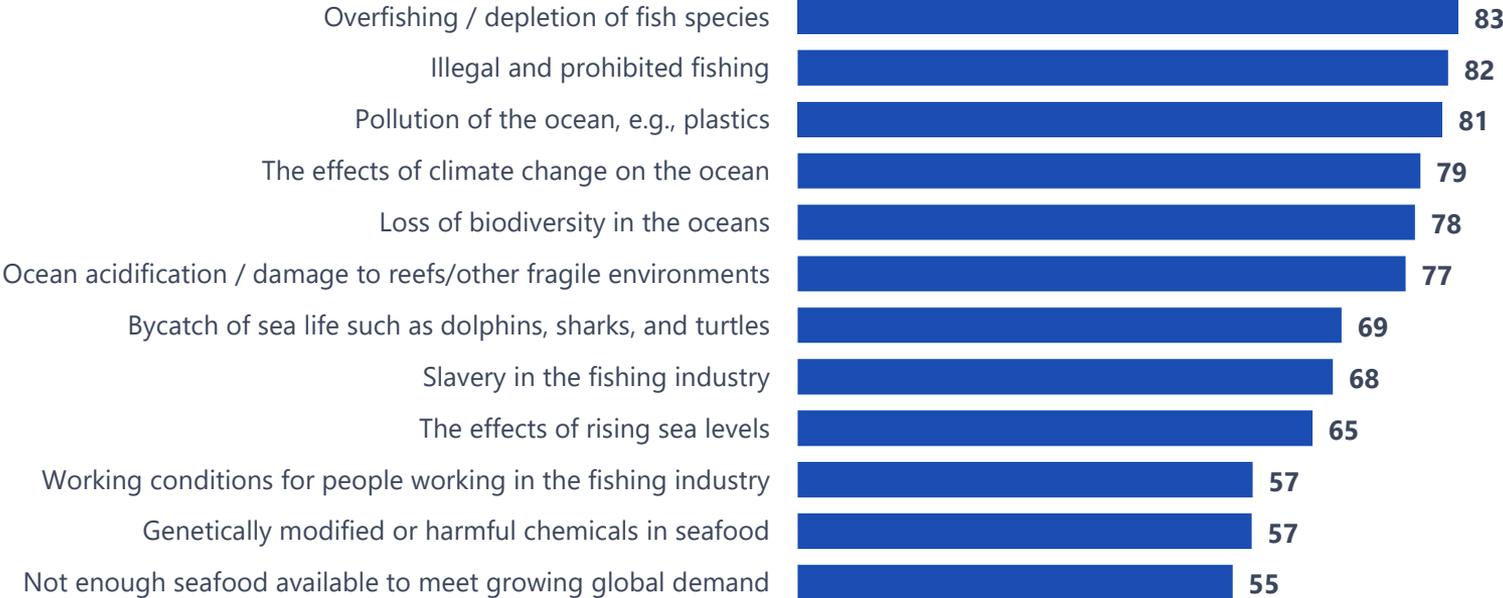
Currently, the standard does not set the bar high enough and allows for too many exceptions and conditions.

– NGO, MEA

Overfishing is seen as the most urgent ocean issue, but a myriad of interconnected issues are considered to be very urgent by stakeholders

Urgency of ocean issues

“Extremely urgent” + “very urgent,” global, %



Most issues facing our ocean, including overfishing, climate, pollution and ecosystem protection, have increased in urgency in recent years - given the lack of progress achieved so far.
- NGO, Oceania

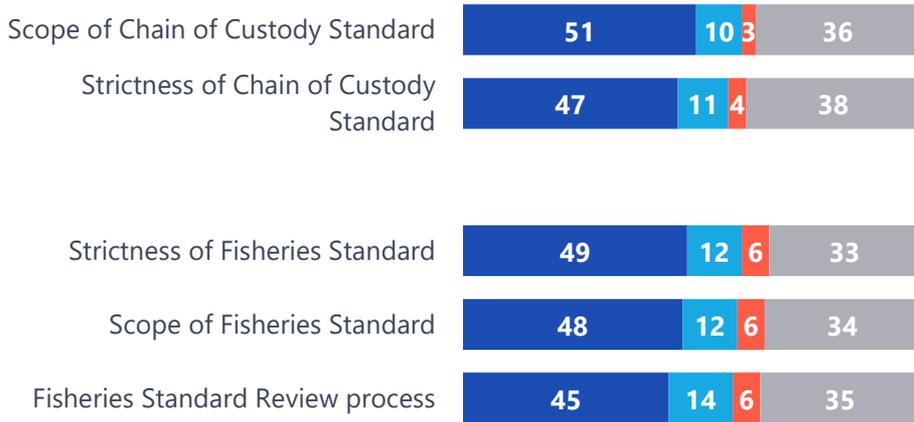


Around half of stakeholders are satisfied with the MSC's Standards; few are unsatisfied, but many lack information; some comment on the need to reduce cost and complexity

Satisfaction with the MSC's standards and process

Global, %

■ Satisfied ■ Neither satisfied nor unsatisfied ■ Unsatisfied ■ Not enough info



Suggestions from stakeholders on ways to improve both the MSC Fisheries Standard Review process and Chain of Custody Standard:

- Find ways to reduce cost and complexity
- Increase timeframe for the audit process
- Broaden scope of the standards and audit process (e.g., workers' rights, food safety, fish species, fishing methods)
- Provide more support and training about the processes
- Third-party data verification



Additional program areas

When asked if there are any additional areas they would like to see in the MSC program, stakeholders' the most frequent response was reduction in fishing gear waste (ghost gear).

Q16. The following questions are about the MSC's Fisheries Standard Review process and the Chain of Custody Standard. If you have knowledge of or any interaction of this part of the MSC's work, how satisfied are you with the following....?

Q18. In the future are there any additional areas that you would like to see within the MSC program?

Q17. Please explain the reasons for your answers regarding the Fisheries Standard Review process and the Chain of Custody Standard.





MSC engagement

We appreciate the efforts that MSC China team make. We wish to continuously work with you on this to find out how could we effectively promote sustainable value for consumers.

– **Government, Asia**

The comms team does a great job with their outreach campaigns. I've also seen some cool videos featuring MSC staff in a StarKist video on LinkedIn. I saw a lot of social media ads on Instagram during October.

– **Processor, North America**

I have regular contact with the local MSC team regarding opportunities, current assessments, plans for upcoming SSW etc. Our engagement is impactful, relevant and friendly. We would like more commercial engagement between MSC and the supply chain in [our region] to support the enormous investment in MSC.

– **CAB, Oceania**

The majority of stakeholders who often interact with the MSC teams locally and globally are satisfied with MSC's engagement and communication

Satisfaction with engagement with the MSC

Global, %



35% of stakeholders engage with their local MSC team while 15% of stakeholders often (or very often) engage with the MSC global team

“ MSC staff are knowledgeable, friendly and engaging. If they don't have an answer to a question, they work to find it.
 – Processor, North America

Base: Global, n=1,025; Often engages local team, n=346, Often engages global team, n=126
 Q26. How satisfied are you with the level of engagement and communication from the MSC in the last twelve months?
 Please use a scale where 1 is very dissatisfied and 7 is very satisfied



Summary of key findings

Summary of key findings

- Overall, the MSC performs well across key performance indicators across stakeholder groups, but more work has to be done with some groups, including improving the satisfaction of fisheries and the trust of NGOs.
- The MSC is seen to perform strongly in core functional areas, (strict standards, rigour, well managed fisheries) and should work on continuous improvement.
- There is a need to provide more training and information around the MSC's standards.
- The main external challenges to the MSC achieving its mission, are lack of political will and lack of consumer demand
- Raising consumer awareness of sustainable seafood should be the main focus of the MSC's communications.
- Industry representatives want the MSC programs to involve less complexity and cost and fewer barriers to entry
- Civil society representatives including scientists would like to see stricter criteria applied to more fisheries. More efforts needed to monitor non-compliance.
- There is a desire to see the MSC grow to make greater impact, including working more on social issues and helping other organisations achieve sustainability goals.
- There is overall high satisfaction with engagement and communications from the MSC, and there are limited barriers to engagement.



Staying informed

Stay informed about the MSC

- **Support the development of our Standards**
 - Provide feedback and technical input on policy proposals through our consultations
 - [Sign up to our policy development mailing list](#) to receive updates
- **[Engage with fishery assessments](#)**
 - Provide input throughout the assessment process
 - All assessments are publicly reported on and accessible via [Track a Fishery](#)
- **[Join our newsletter mailing lists](#)**
 - Be kept informed of our events and the latest news
- **Follow us on social media**



Stakeholder engagement and the MSC Fisheries Standard Review

Nearly 200 stakeholders participated in public consultation workshops, and we received over 600 responses to surveys between 2020 and 2022.

Our consultations included:

- **12** surveys – including a 60-day public review of the proposed revisions to our Standard.
- **9** online workshops
- Our online engagement events were attended by around **1300** participants between 2020 and 2022



The Marine Stewardship Council is an international non-profit organisation. We recognise and reward efforts to protect oceans and safeguard seafood supplies for the future.

We want future generations to be able to enjoy seafood and oceans full of life, forever.

Our vision is of the world's oceans teeming with life, and seafood supplies safeguarded for this and future generations.

Our mission is to use our ecolabel and fishery certification program to contribute to the health of the world's oceans by recognising and rewarding sustainable fishing practices, influencing the choices people make when buying seafood and working with our partners to transform the seafood market to a sustainable basis.

www.msc.org

For more information, please contact Nikki Wood,
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GlobeScan is an independent, international insights and advisory consultancy.

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 UN Global Compact.

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