Niebieska transformacja - Jak zachęcić konsumentów do wyboru ryb i owoców morza ze zrównoważonych źródeł? Jak odpowiadać na trendy wegetarianizmu i weganizmu?

Blue transformation - How to encourage consumers to choose sustainable seafood? How to respond to the trends of vegetarianism and veganism?

Richard Stobart
Warsaw, Poland – 7th September 2023

10 LAT
MSC
W POLSCE
2013 2023
MARINE STEWARDSHIP COUNCIL™

AGENDA

15 Minutes: Presentation and Questions:

"Blue transformation initiative and the role of MSC and its partners" (take information from WOD press release, Seafood Futures Forum and any updated information). Kasia to oversee this section

25 minutes: Presentation

Are consumers reconsidering their diets and how they shop for seafood and why?

15 minutes: Questions and Group discussion

5 minutes: Wrap up and check out

10 LAT MSC W POLSCE

1. Blue transformation initiative and the role of MSC and its partners

20 minutes

Richard Stobart
Warsaw, Poland – 7th September 2023

10 LAT
MSC
W POLSCE
2013 2023

So… what are Blue Foods?

Blue foods are those we get from water: fish, seafood and seaweed.

This means those we harvest from oceans, rivers and lakes as well as those that are farmed (aquaculture).

10 LAT MSC W POLSCE

United Nations

The Blue Transformation is a United Nations initiative to realise the potential of the oceans in supporting global food security.

10 LAT MSC W POLSCE

MARINE STEWARDSHIP COUNCIL

UNITE NATIONS BLUE FOODS INTITIATIVE

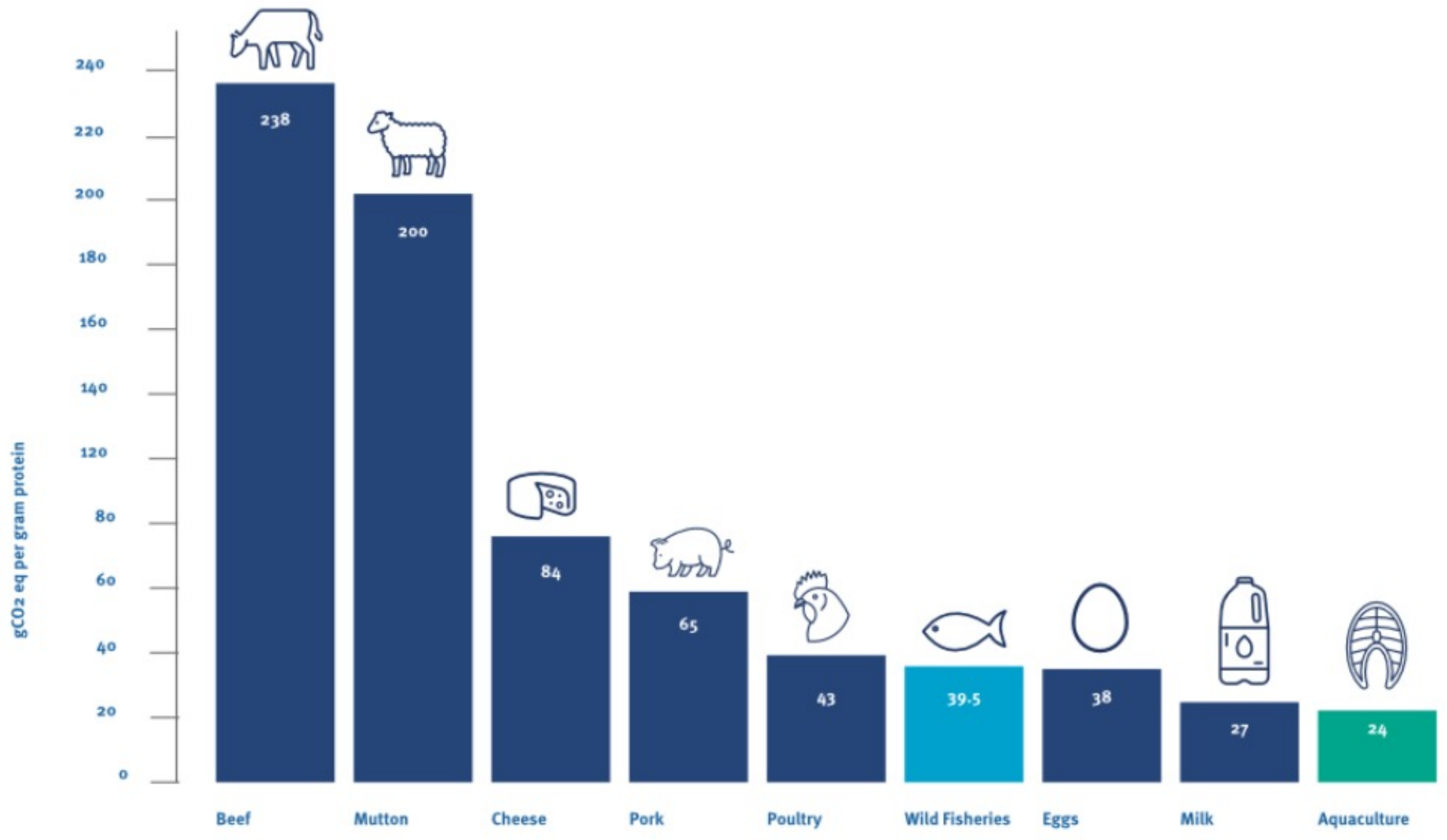
- The world's population will reach an estimated 10 billion by 2050, according to the United Nations
- Food from Oceans, Lakes and Rivers is seen as vital to Global Food Security:
- Blue foods play an essential role in UN Sustainable Development Goals

Access to safe and nutritious food for all	Boosting nature-positive and sustainable food production	Advancing equitable livelihoods and culture
2,800 Species of fish seafood caught or farmed - many rich in vitamins / micronutrients and low in fat	**3.3 billion** get 20% of their animal protein intake from fish	**800 million** derive livelihoods from blue foods

- The planet cannot be sustain the growth in Beef and meat consumption – but equally, there is no single food source that will solve the challenge

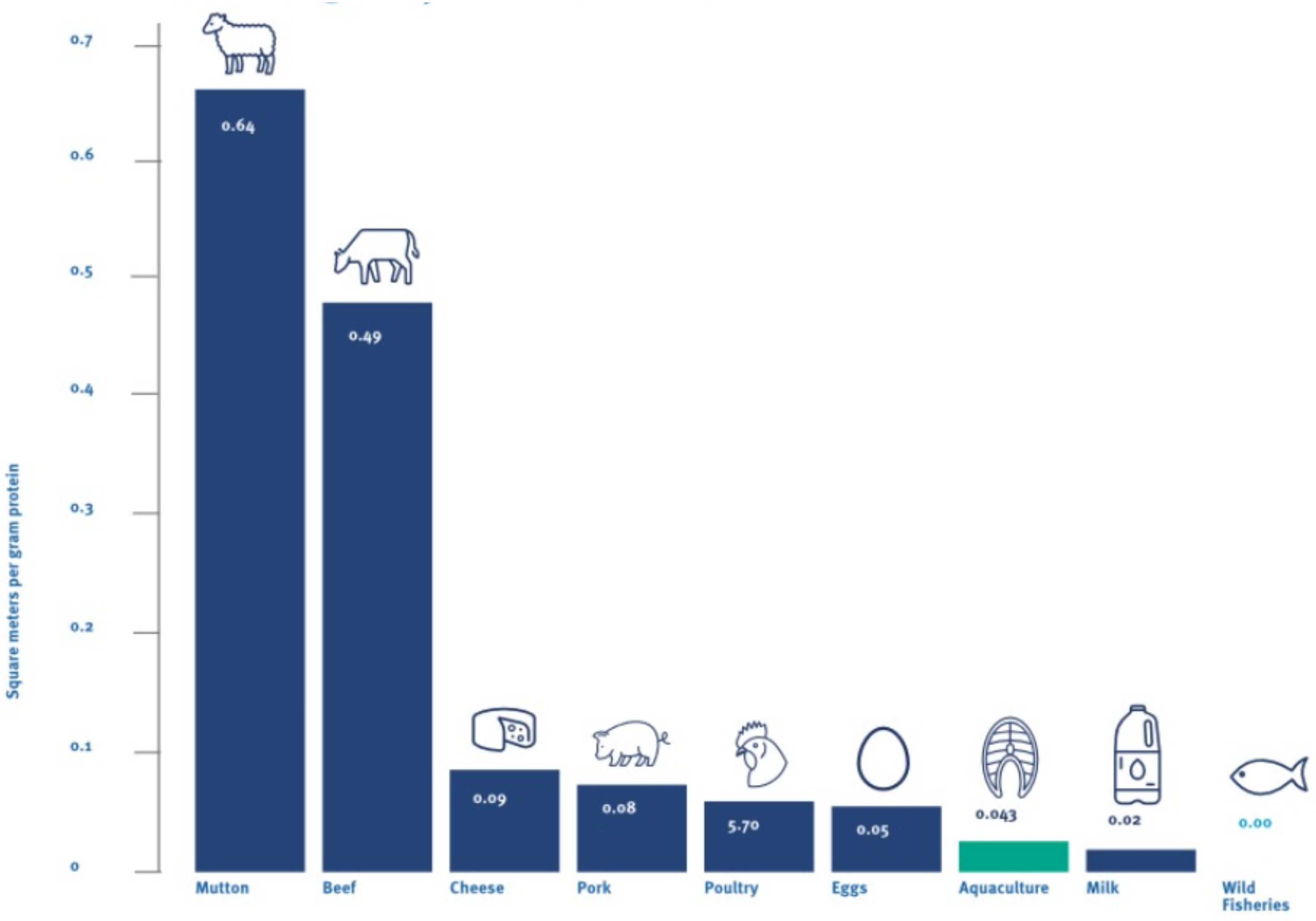
10 LAT MSC W POLSCE

CO2 Emissions from protein sources



10 LAT MSC W POLSCE

Land usage of protein sources



Questions?

So… what do Blue Foods mean to consumers…

10 LAT
MSC
W POLSCE

2. Are consumers reconsidering their diets and how they shop for seafood and why?

Richard Stobart
Head of Marketing (Global), MSC
25 minutes

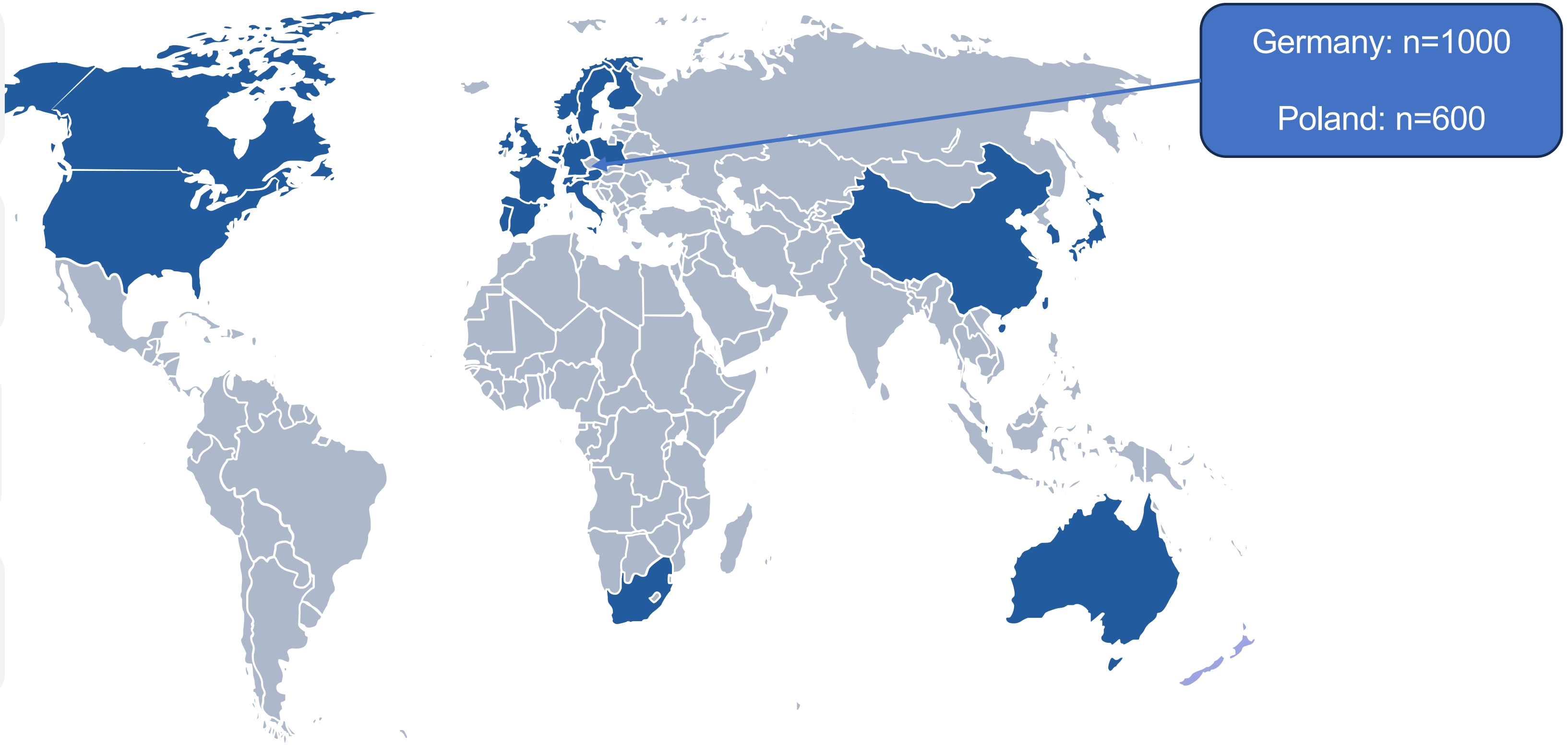
10 LAT
MSC
W POLSCE
2013 2023

Richard Stobart
Warsaw, Poland – 7th September 2023

Introduction to MSC Global 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.

General public	*n*=25,869
Seafood consumers	*n*=20,127
MSC-aware consumers	*n*=9,826
MSC Blues	*n*=5,399



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.

Healthy and Sustainable Living Survey

Participating Countries
2022

R22_particip_map

- Representative online samples of approximately 1,000 adults in each of 31 markets (500 each in Hong Kong, Kenya, Nigeria, and Singapore, and 850 in Egypt) (*n*=29,293)
- Samples representative of online population, weighted to reflect general population census data
- Online surveying in June and July 2022

Setting the Scene – the Changing Context since 2020

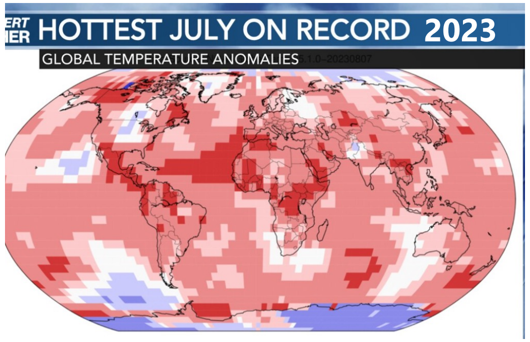
Russian forces invade Ukraine

Eurozone inflation hits record 10% as energy prices continue to soar

UK consumer confidence hits record low as cost of living bites

News Climate crisis

Forest fires rage across Europe as deadly heatwave reaches record temperatures



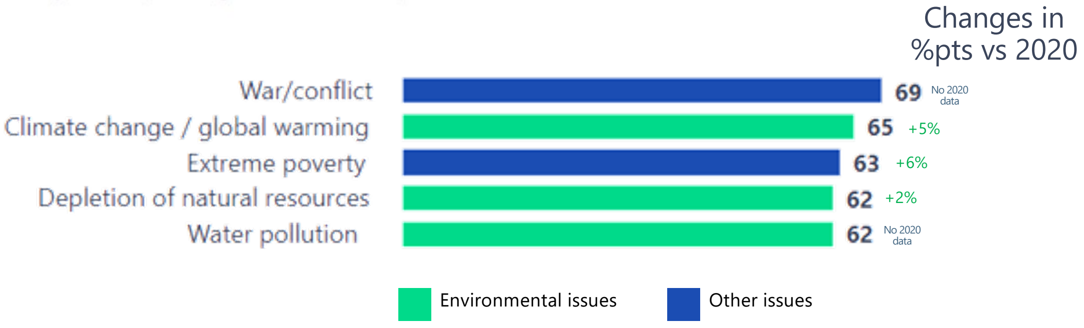
'The climate crisis is now': haunting video spotlights California wildfires

Pakistan's 'climate carnage beyond imagination', UN chief tells General Assembly

What has happened since our previous research in 2022?

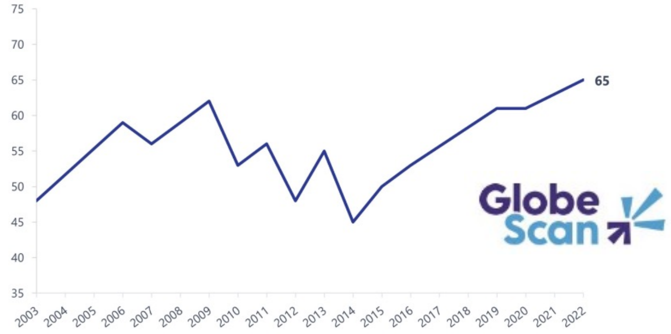
Healthy & Sustainable Living
A Global Consumer Insights Project

Perceived Seriousness of Global Problems
"Very Serious," Average of 31 Countries, 2022



The rise of climate change

Public Concern about Climate Change Reaches an All-time High
Perceived Seriousness of Climate Change, "Very Serious," Average of 17 Countries, 2003–2022



*Includes Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Italy, Kenya, Mexico, Nigeria, Russia, Spain, Turkey, UK, and USA.

GlobeScan x


Before we start!
Cost is becoming dominant
The world has not gone vegan (2-5%)!
10 LAT MSC W POLSCE
MARINE STEWARDSHIP COUNCIL

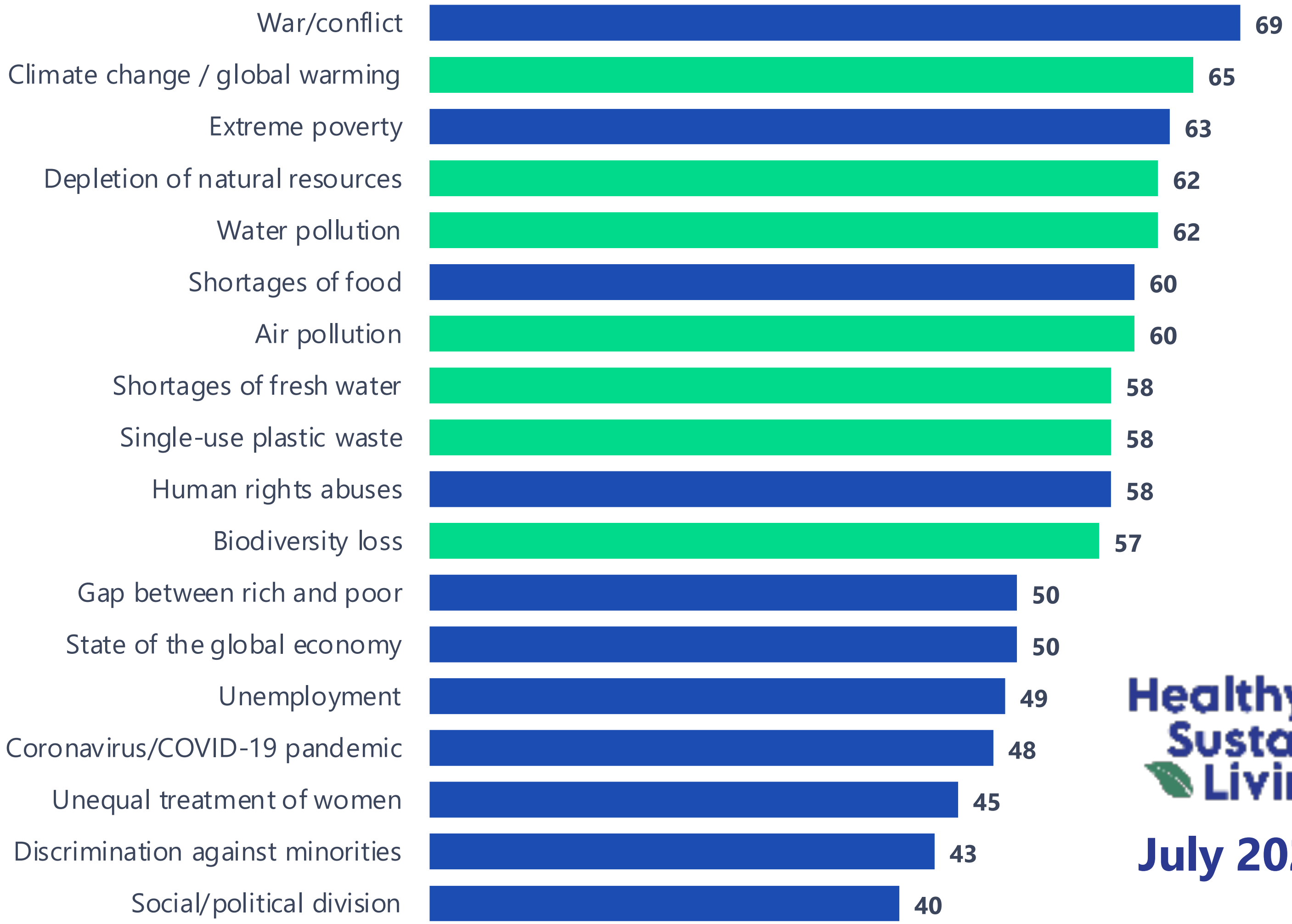
Theme 1: Eco-anxiety increases

Post-Covid, people more concerned about environmental issues – and generally we see they are more concerned about everything. Ocean issues high up on agenda in many countries.

Worries about war and conflict now dominate global concern, but concern about climate change follows closely behind

Perceived Seriousness of Global Problems

“Very Serious,” Average of 31 Markets
2022



Environmental issues

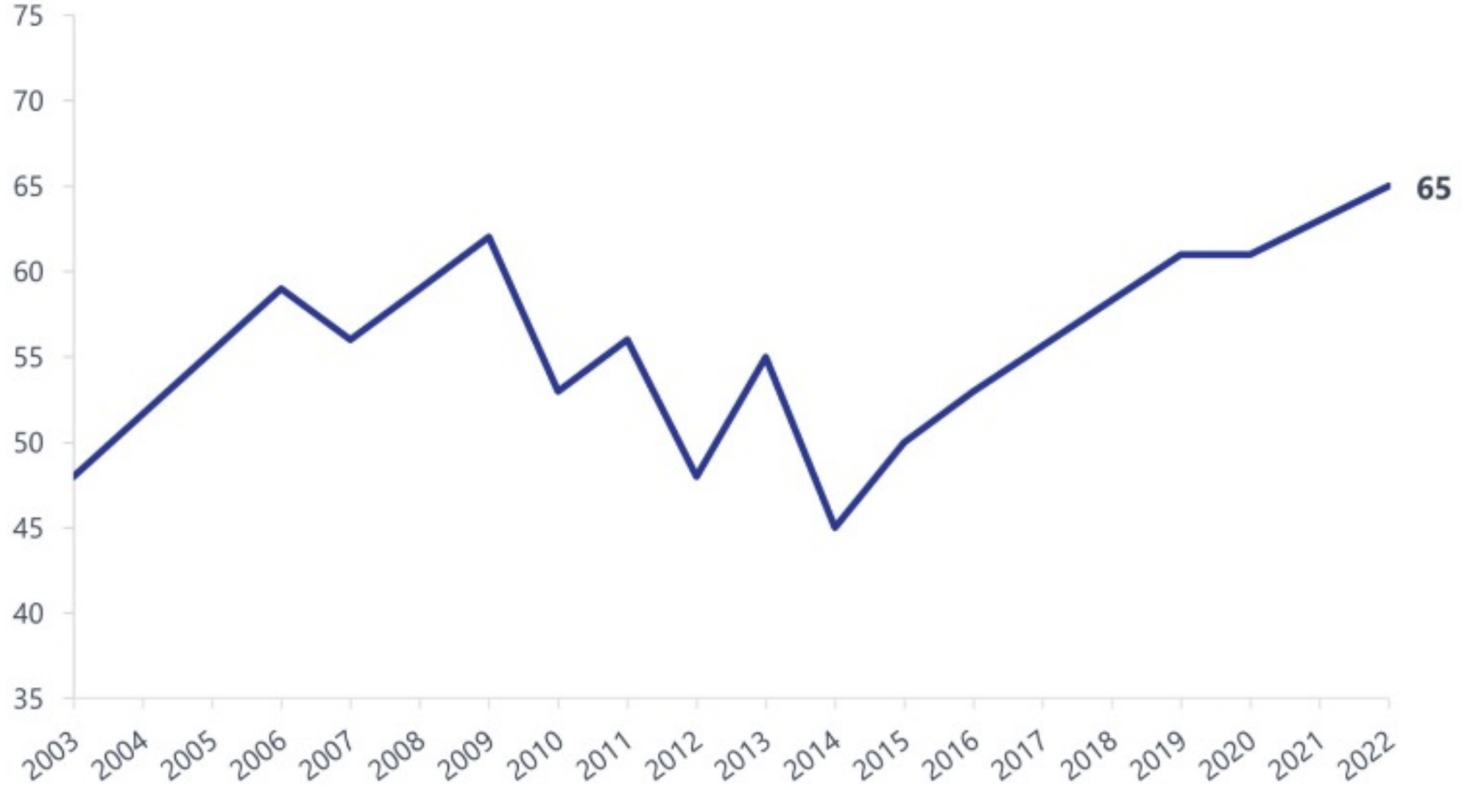
Healthy & Sustainable Living

July 2022 Global

T1. For each of the following possible global problems, please indicate if you see it as a very serious, somewhat serious, not very serious, or not at all serious problem.

Public Concern about Climate Change Reaches an All-time High

Perceived Seriousness of Climate Change, "Very Serious," Average of 17 Countries, 2003–2022



*Includes Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Italy, Kenya, Mexico, Nigeria, Russia, Spain, Turkey, UK, and USA.

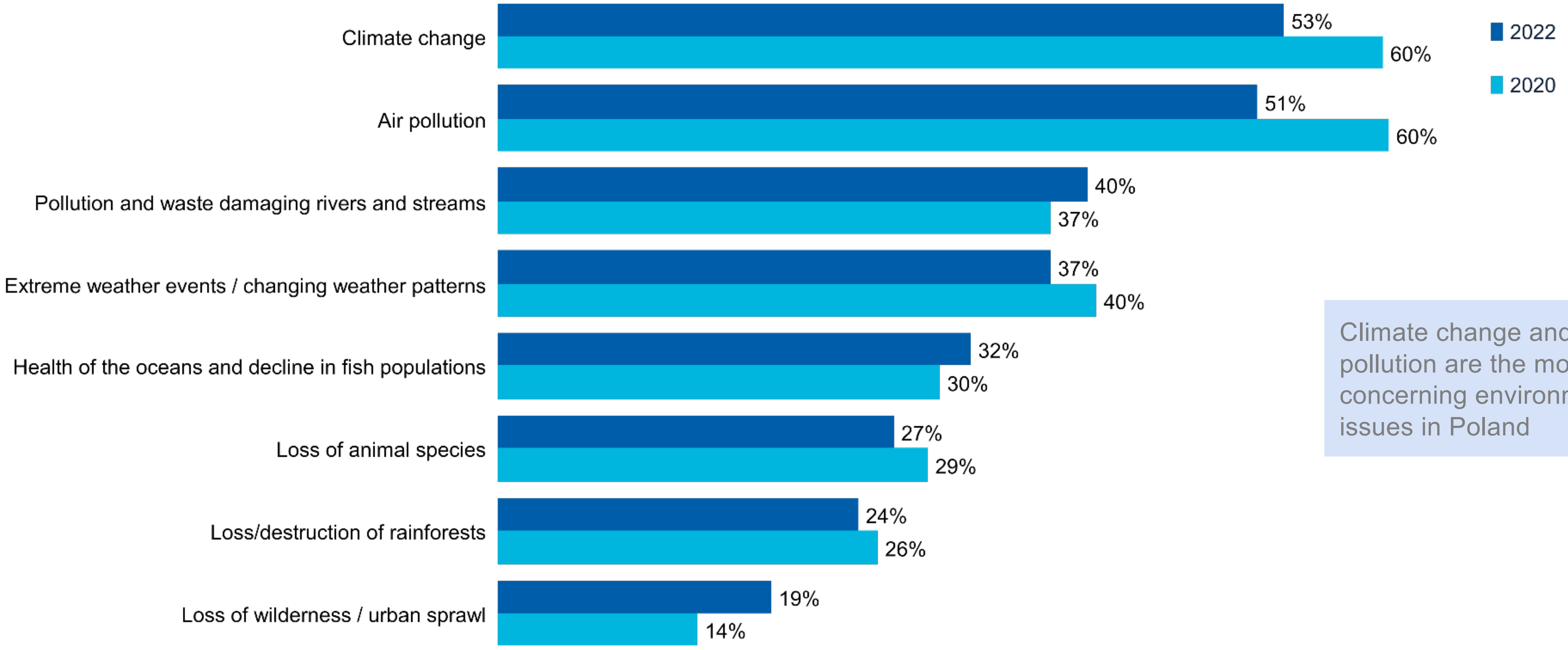
Healthy & Sustainable Living

July 2022 Global

GlobeScan

Most Concerning Broader Environmental Threats in Poland

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



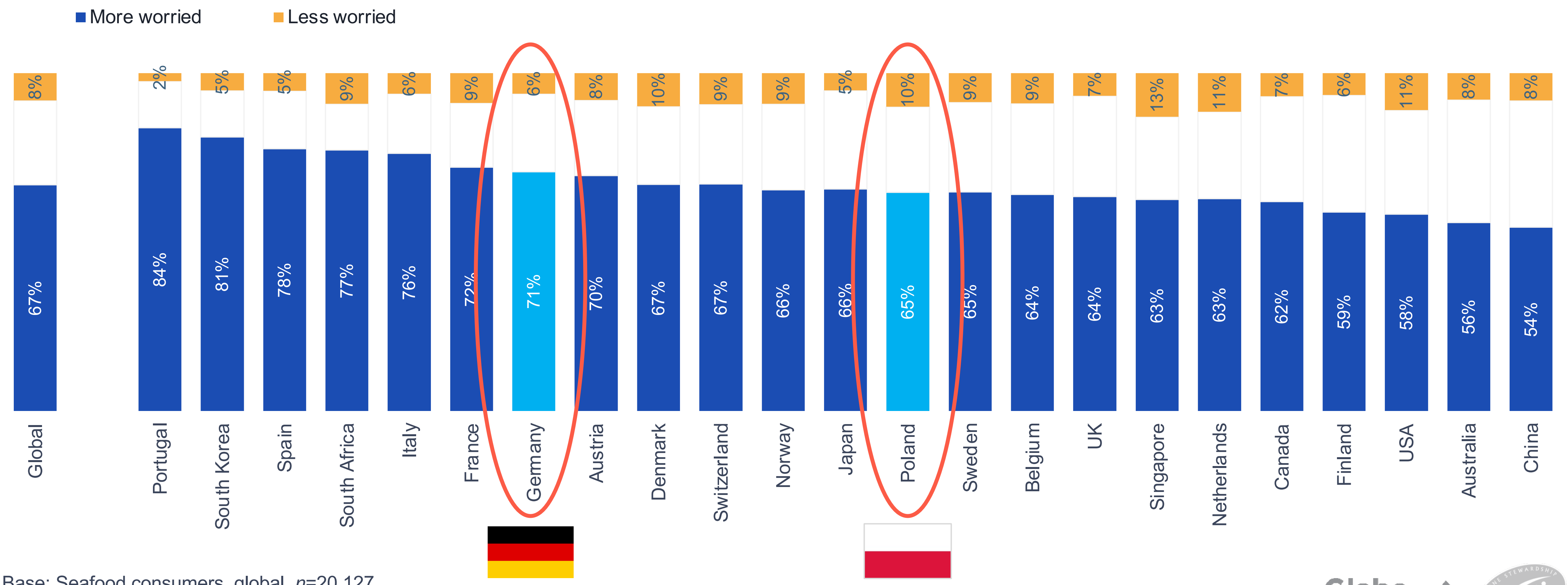
Climate change and air pollution are the most concerning environmental issues in Poland

Base: General public, Poland

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

Seafood consumers in all markets surveyed are much more likely to have become more worried, rather than less worried about the state of the oceans in the last two years

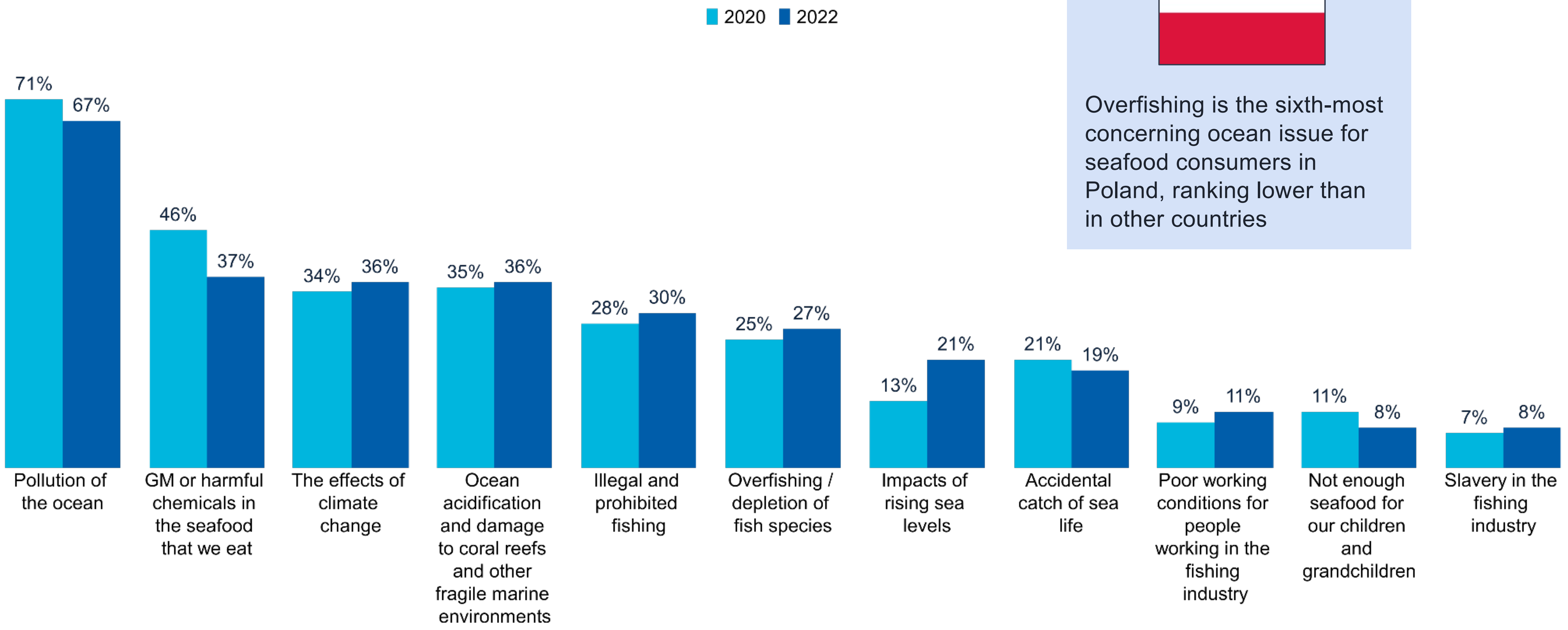
How feelings about the state of oceans have changed in last two years



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?

Most Concerning Threats to Oceans

Issues, (each respondent selected three issues)



Poland:

Overfishing is the sixth-most concerning ocean issue for seafood consumers in Poland, ranking lower than in other countries

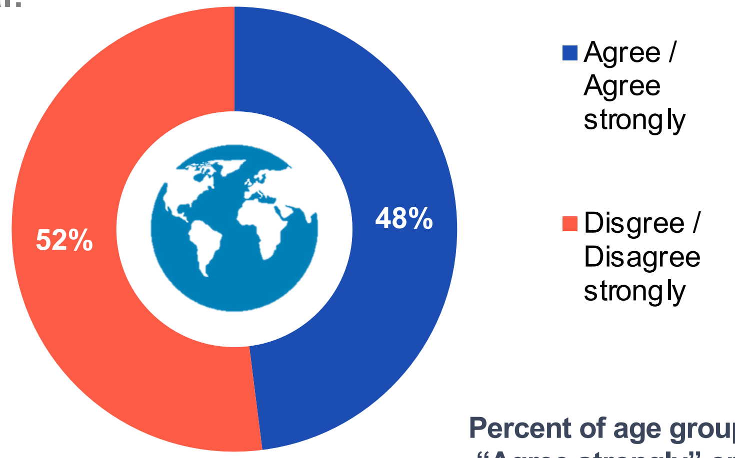
Base: Seafood consumers, Poland

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 are split almost 50:50 about the possibility of saving the oceans from irreparable damage; younger people are more optimistic, while those over 55 are least optimistic

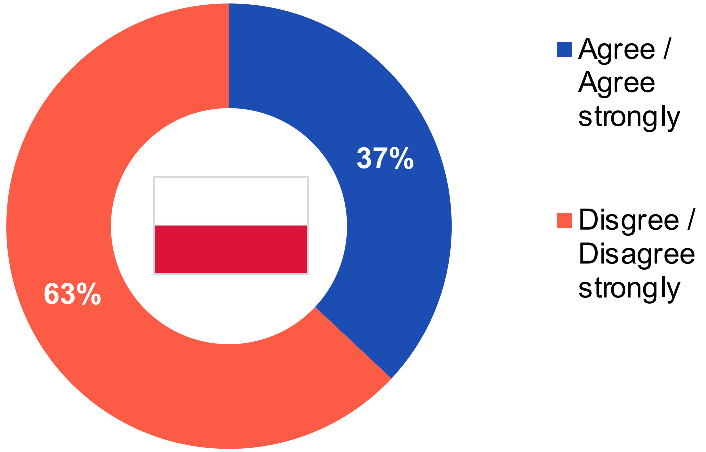
I believe in 20 years' time we will have saved the oceans from irreparable damage from humans

Global:



Percent of age groups saying "Agree strongly" or "Agree"

Poland:



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

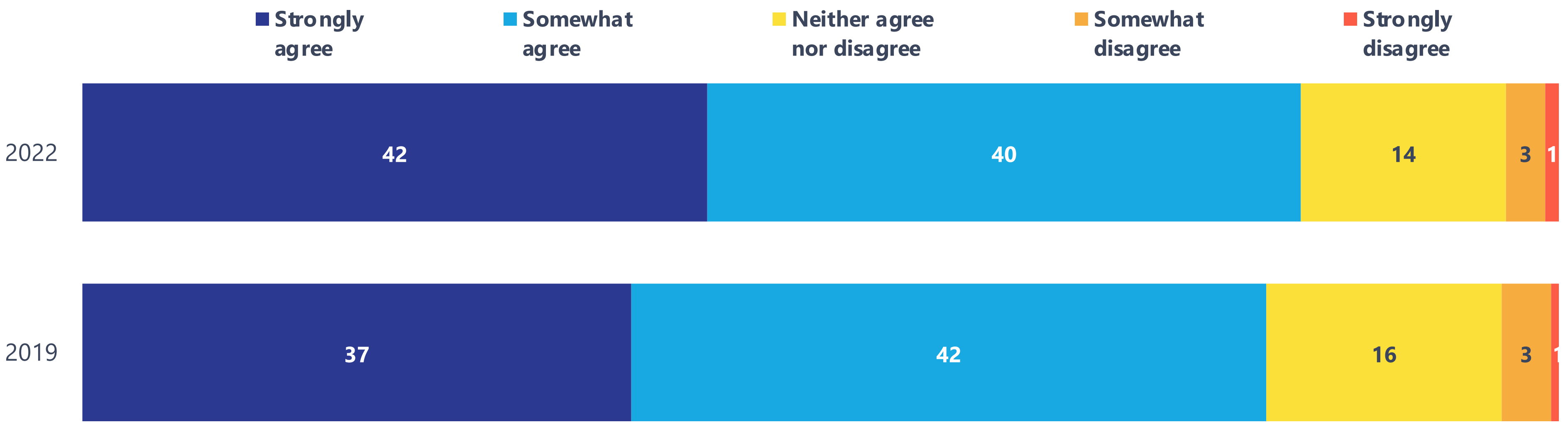
Theme 2: A shift to healthier diets

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

Compared to before the pandemic, people are now more likely to say they are trying to improve their own health and well-being

Trying to Improve Own Health and Wellbeing

Average of 23 Markets,* 2019–2022

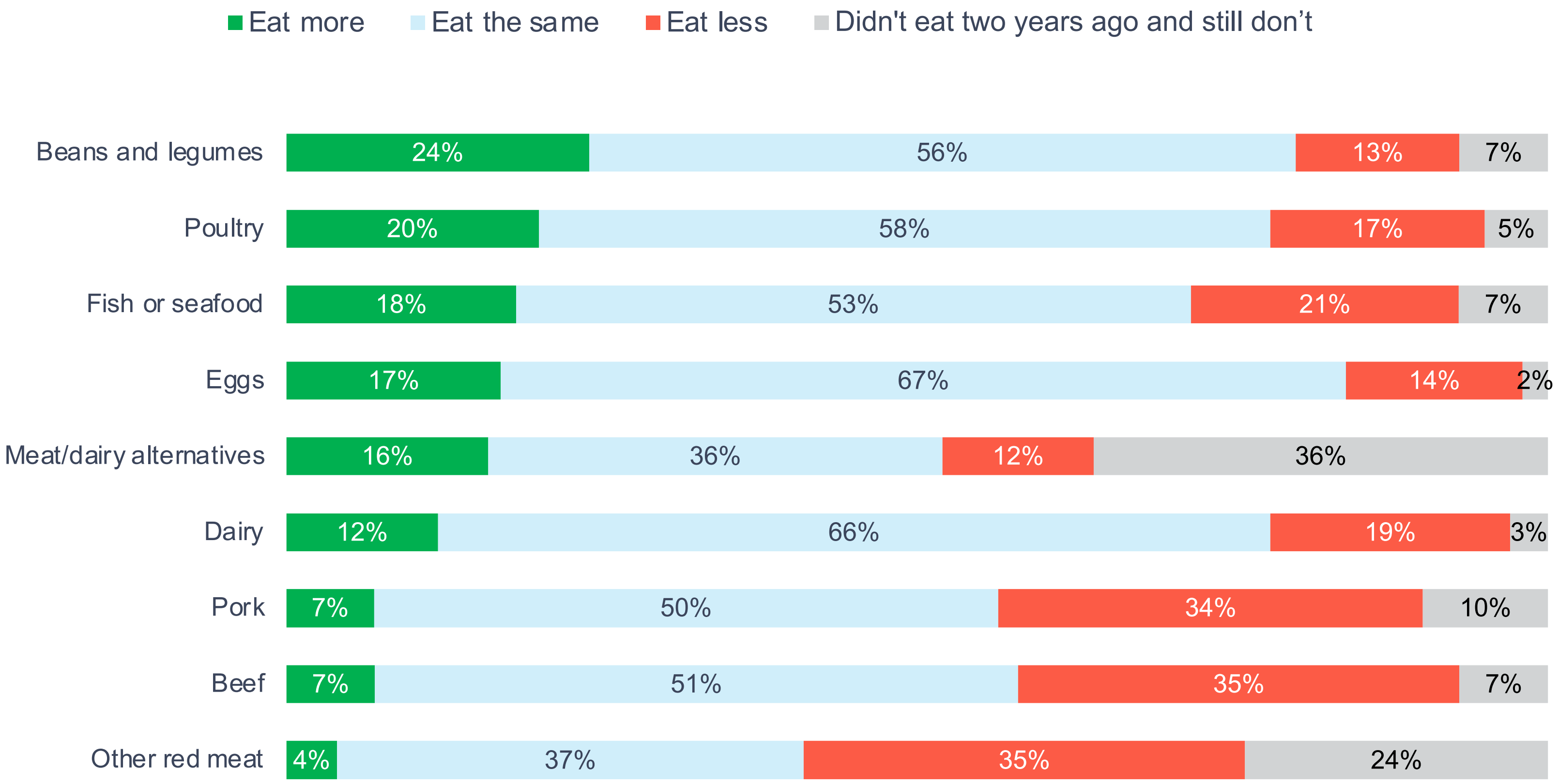


*For consistent tracking, this chart includes Argentina, Australia, Brazil, Canada, China, France, Germany, Hong Kong, India, Italy, Indonesia, Japan, Kenya, Mexico, Nigeria, Saudi Arabia, South Africa, South Korea, Spain, Sweden, Turkey, UK, and USA.

Q6. Please indicate whether you strongly agree, somewhat agree, neither agree nor disagree, somewhat disagree, or strongly disagree with each of the following statements. – I am trying to improve my own health and well-being.

Beans and legumes have seen the largest increase in consumption, while pork, beef, and other red meat have seen the largest decreases: for Fish and Seafood, populations are split

Changes in food consumption compared to two years ago



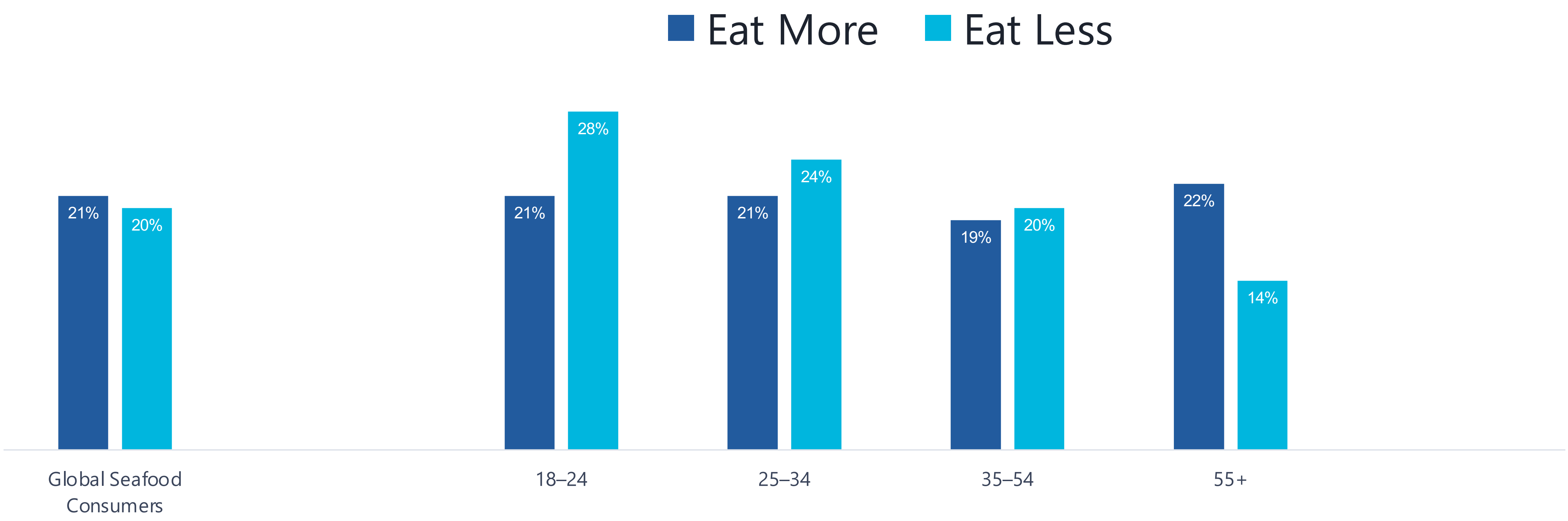
Eating less fish/seafood is higher among 18–24s (29%) and lower among 55+ (17%)

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

Base: General population, global, *n*=25,869
Q101: Do you eat more or less of the following foods than you did two years ago?

Younger consumers are eating less seafood, whereas older consumers are eating more seafood

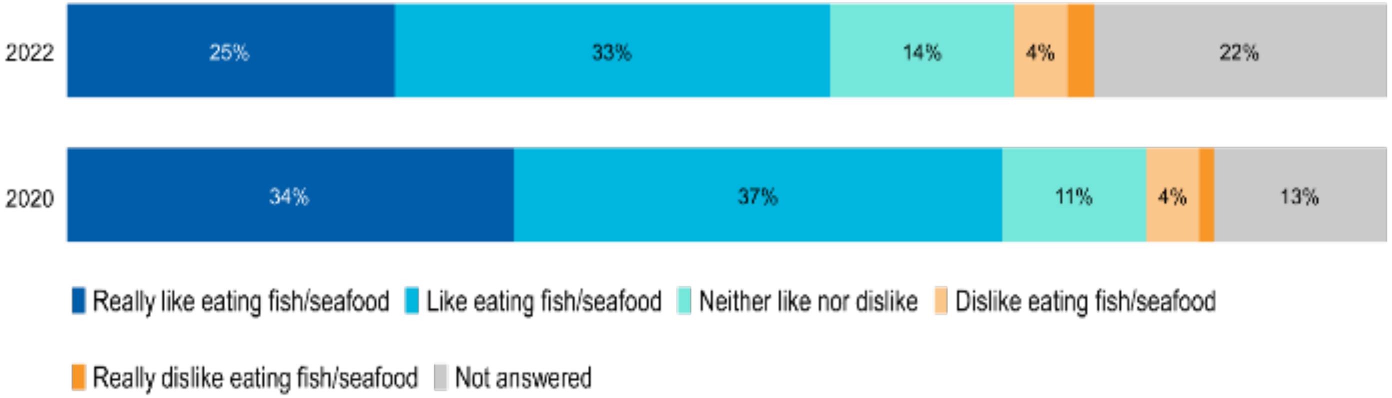
Changes in food consumption compared to two years ago



Base: Seafood Consumers, global, *n*=20,127; frozen seafood consumers, *n*=10,679
Q101: Do you eat more or less of the following foods than you did two years ago?

Consumer Love for Fish and Seafood

Personal Love of Seafood
General Public, Germany



Changes in eating habits
General Public, Germany

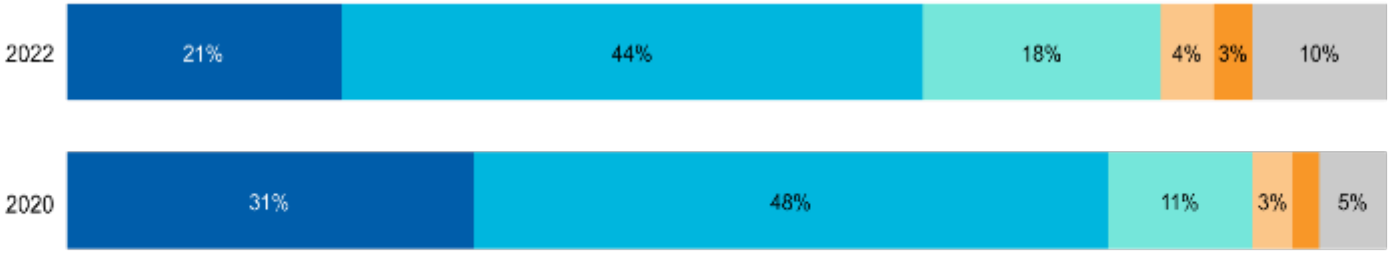
Eating more seafood

12%

Eating less seafood

23%

Personal Love of Seafood
General Public, Poland



Changes in eating habits
General Public, Poland

Eating more seafood

16%

Eating less seafood

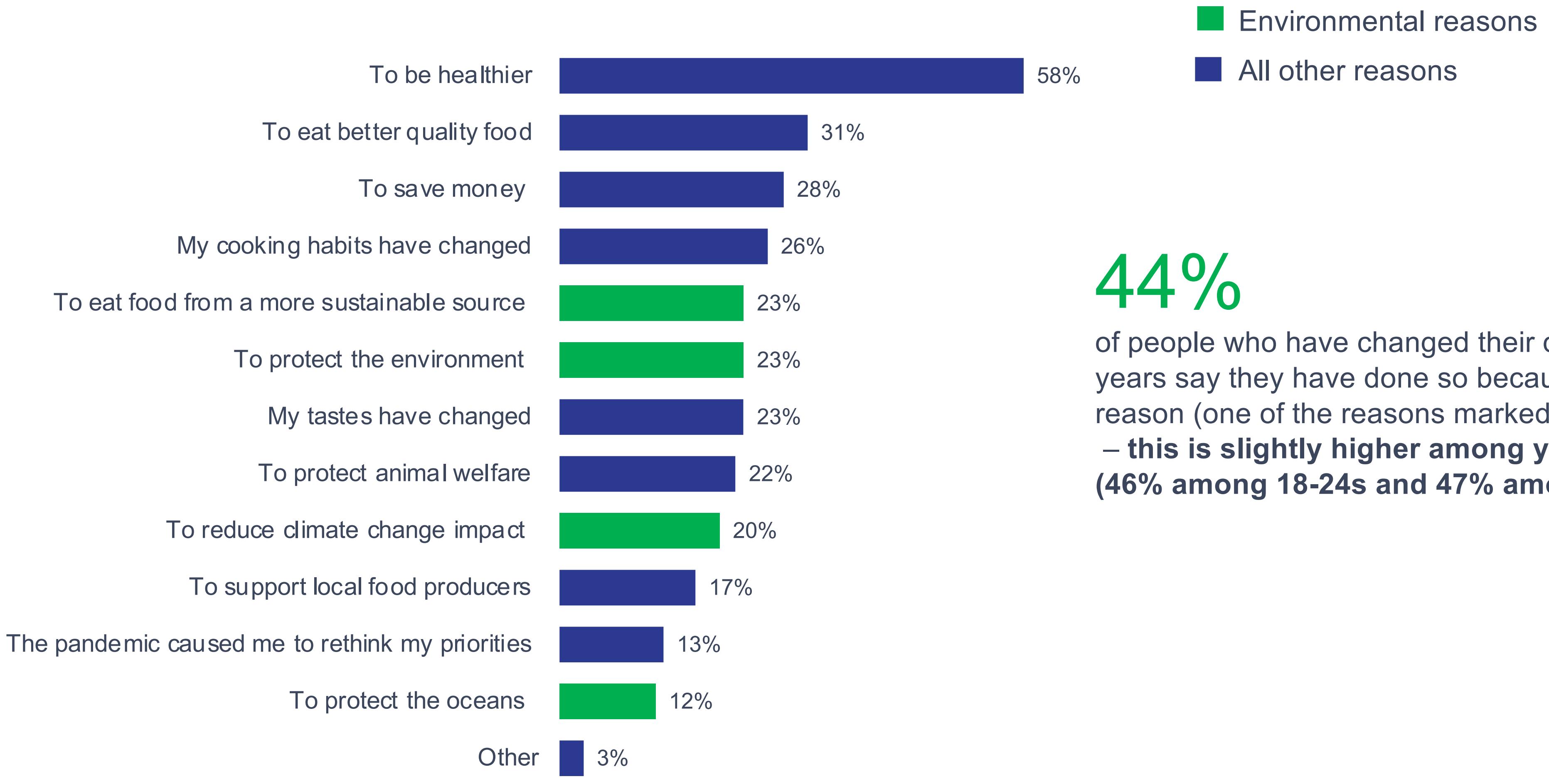
23%

Base: General public, Germany

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”*

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

Reasons for changing diet compared to two years ago



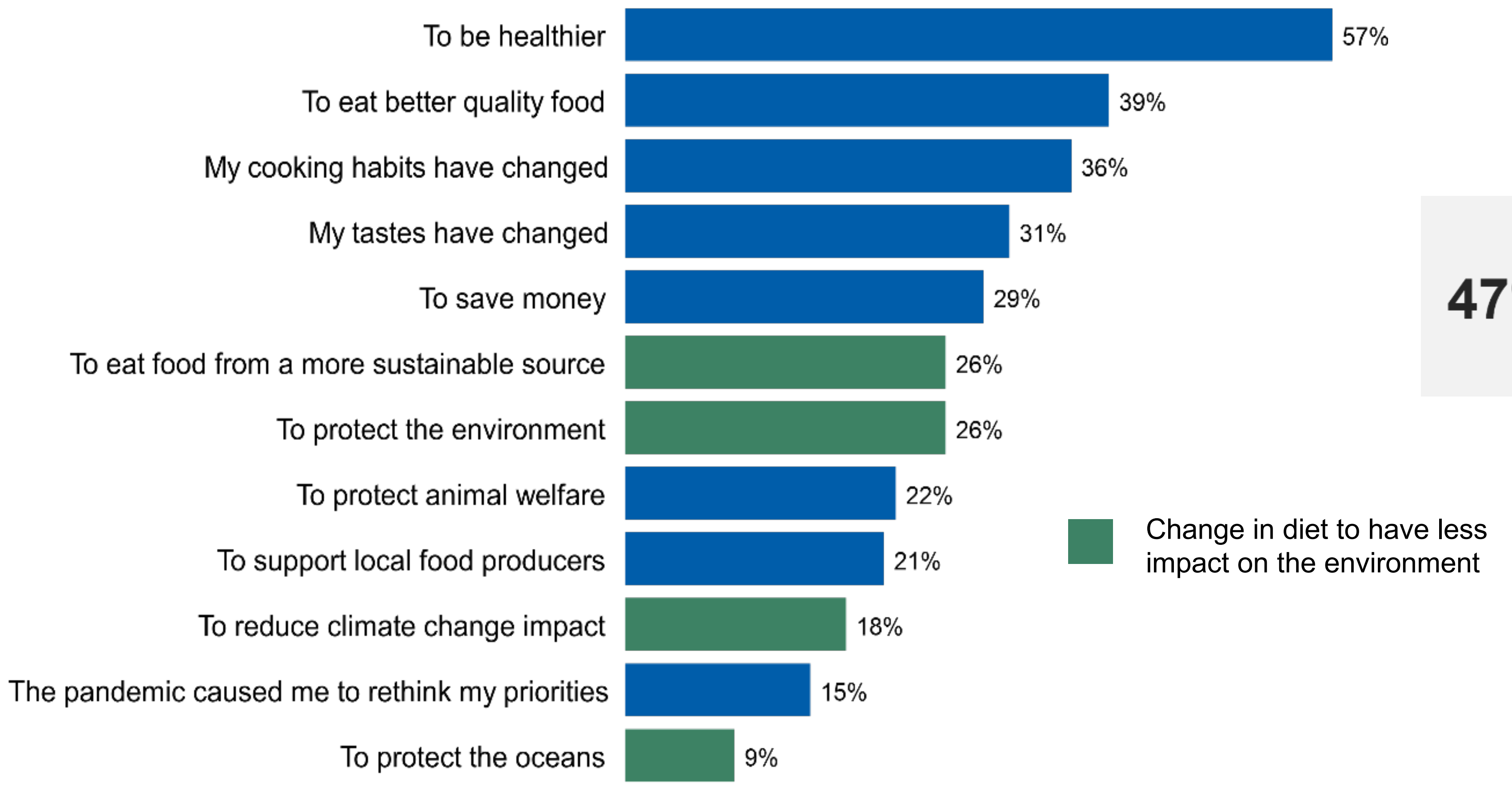
44%

of people who have changed their diet in the last two years say they have done so because of an environmental reason (one of the reasons marked in green on the chart) – **this is slightly higher among younger age groups (46% among 18-24s and 47% among 25-34s)**

Base: Those who eat more or less of any of the listed foods, global, *n*=20,431
Q102: What are the reasons for changing your diet?

Reasons for Diet Changes (Poland)

Reasons for changes in diet, multiselect



47% of Polish people in total have changed their diet to have less impact on the environment (marked in green on the chart)

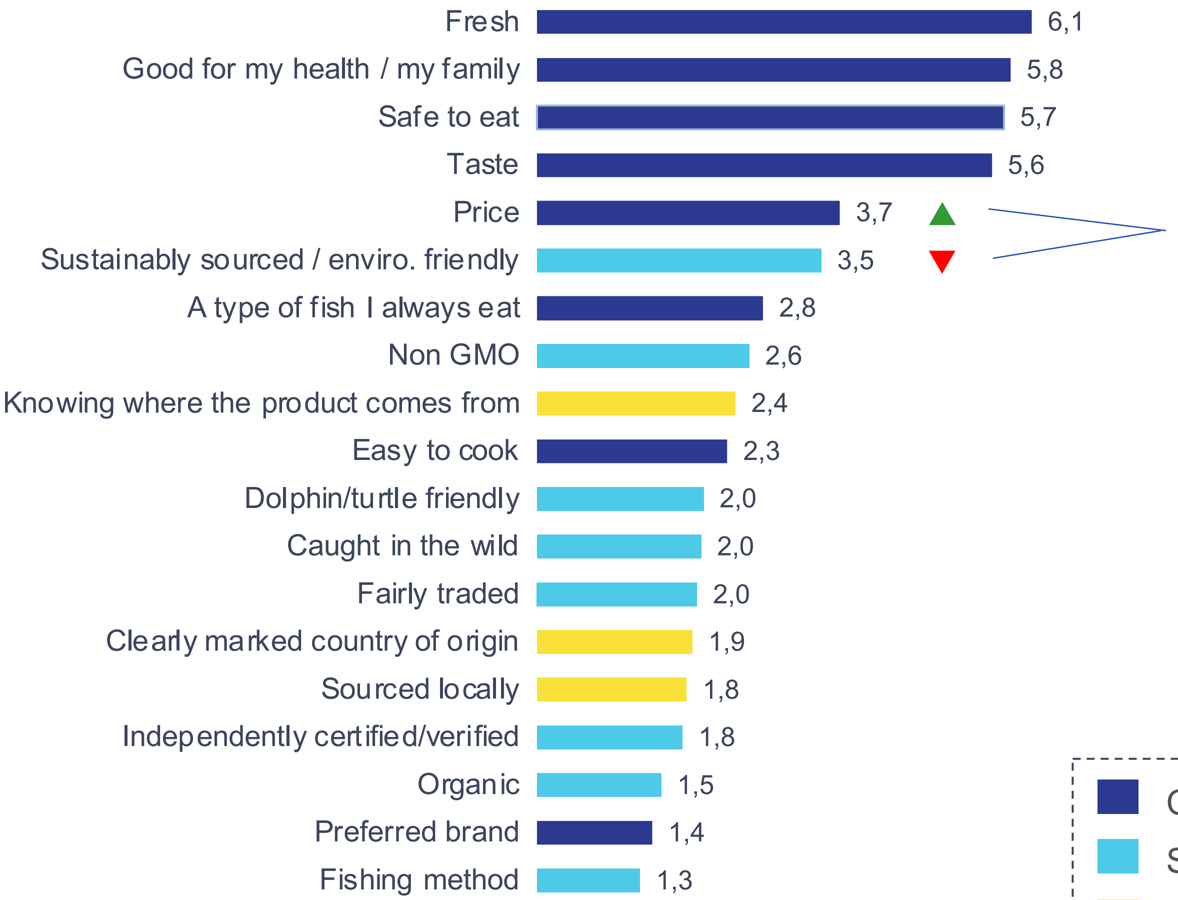
Base: All general public who say they have changed their diet in the last two years

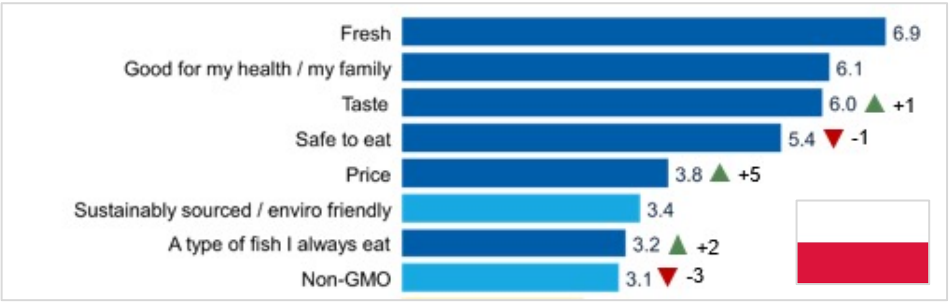
Q102 What are the reasons for changing your diet? Please select all that apply.

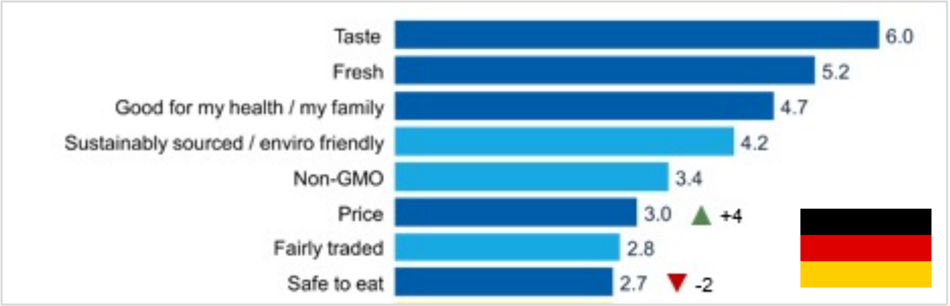
The top drivers of purchase remain freshness, health benefits, safety, and taste; sustainable sourcing and environmental friendliness still ranks above price in 11 countries including Germany

Motivators: max diff analysis, Importance score, globally

Sustainably sourced ranks above price in: Austria, China, Denmark, France, Germany, Italy, South Africa, Spain, Sweden, Switzerland, UK







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

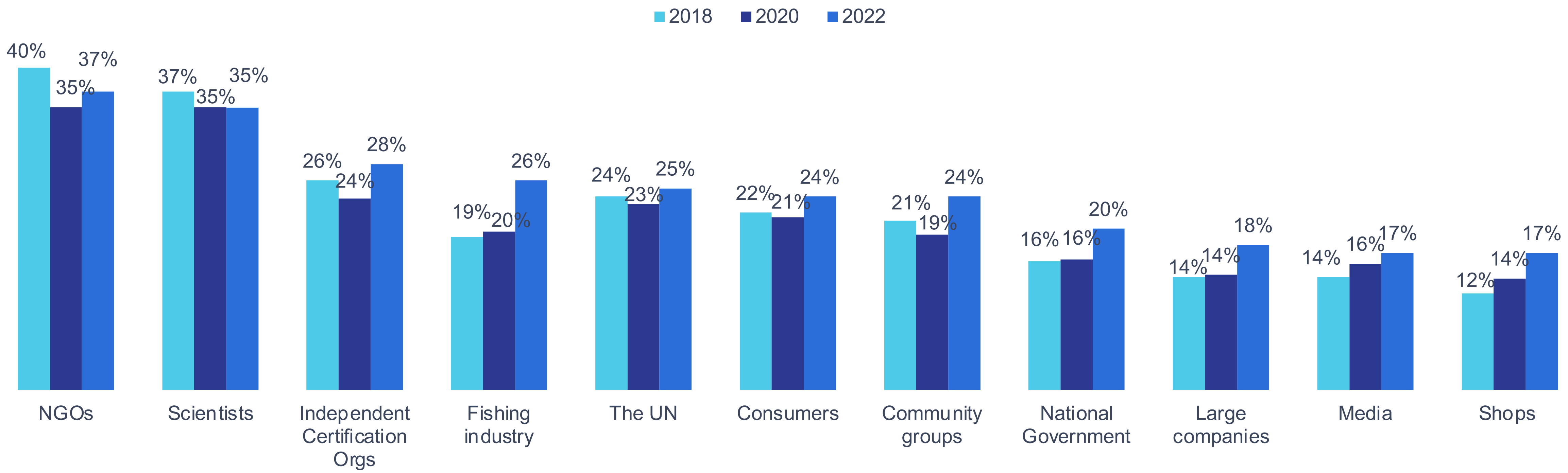
Base: Seafood consumers, global *n*=20,127
Q4.2: Thinking about your recent purchase of [fish type], which of the following five considerations was the most important and which was the least important?

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 they also increasingly see themselves as consumers having a role, believe that they can make a difference and are prepared to make changes. They notice ecolabels slightly more than 2 years ago

Actors perceived to contribute to protecting the Ocean: an increase in the perceived positive impact of independent certification organisations

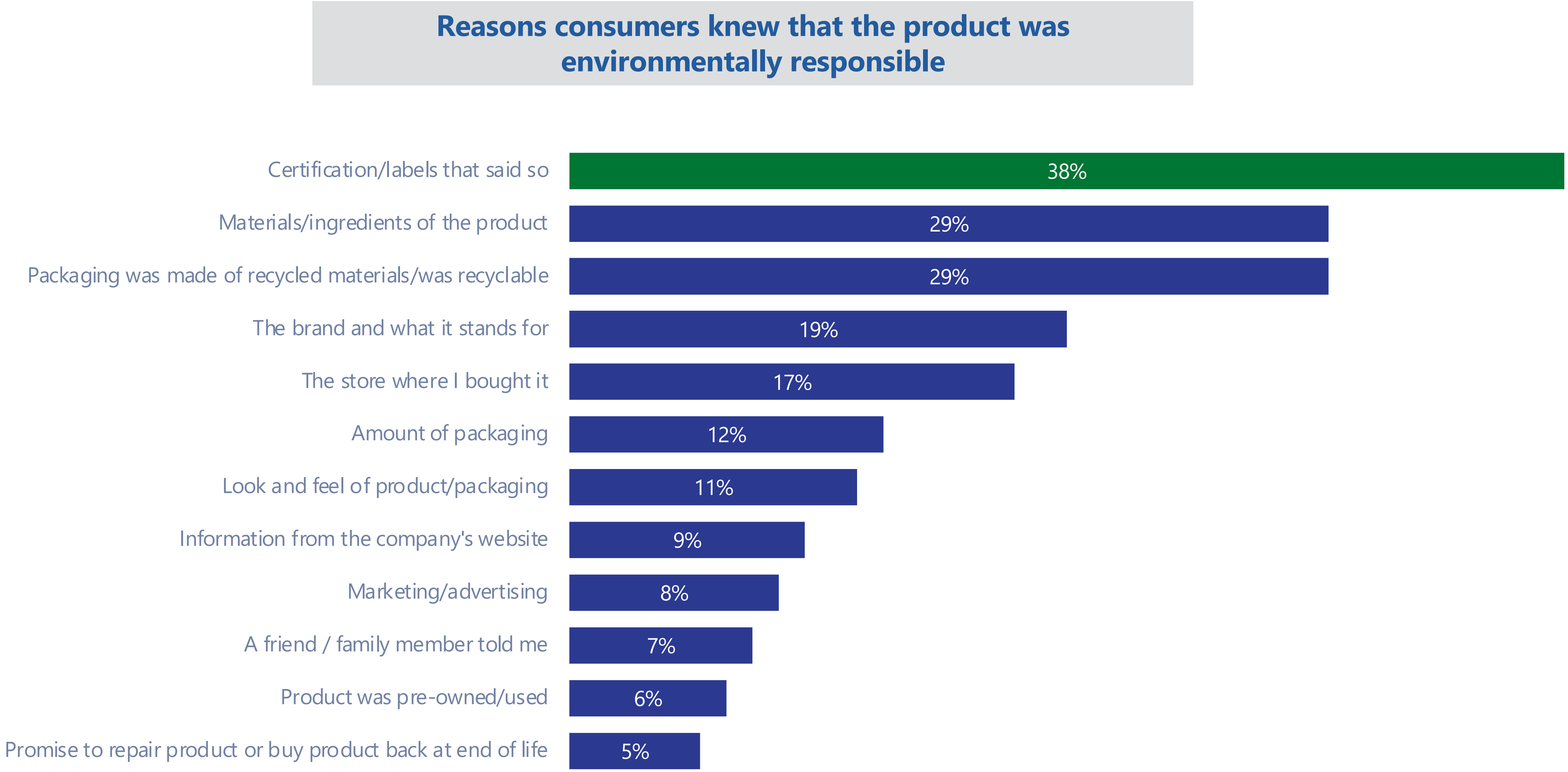
The pattern is similar in Germany and Poland – except that the United Nations is high (4th) in Poland and Consumers are high (4th) in Germany



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

Q3.1: How well do you think the following groups or institutions are contributing to protecting the world's ocean environment?

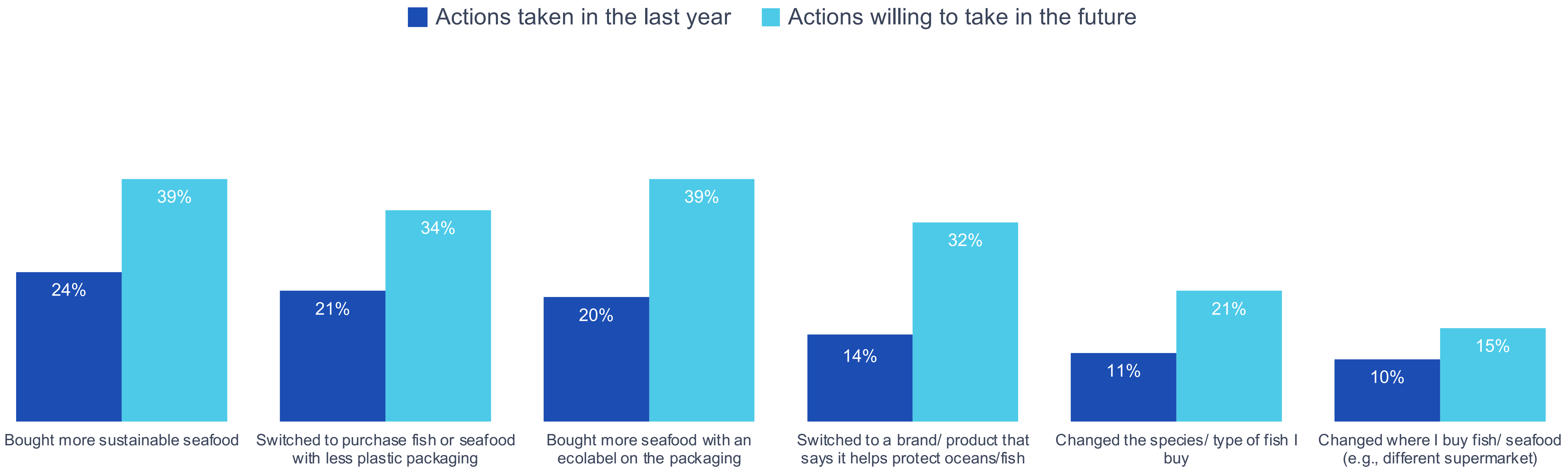
Certifications are a major reason that Europeans consider a product to be environmentally responsible



Base: Europe
Q46. How did you know that the product was environmentally responsible?

Buying more sustainable seafood is the most common action taken by seafood consumers, with almost four in ten 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

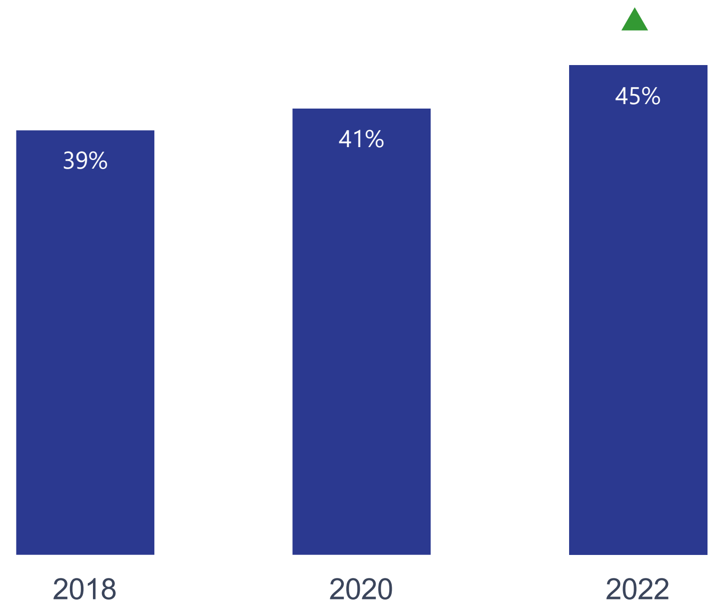


Base: Seafood consumers, global, *n*=20,127
Q11.4a: Which, if any, of the following actions have you taken in the last year to help protect the fish and seafood in our oceans?
Q11.4b: And which other actions would you also be willing to take in the future to protect the fish and seafood in our oceans?

Seafood consumers increasingly say they notice ecolabelled products when shopping, with increases seen across all age groups

Awareness of ecolabels, “describes opinion well,” top three (5+6+7 on 7-pt scale)

I notice ecolabelled products when I’m shopping



Age 18–24
46% say they notice ecolabelled products

Age 25–34
51% say they notice ecolabelled products

Age 35–54
47% say they notice ecolabelled products

Age 55+
40% say they notice ecolabelled products

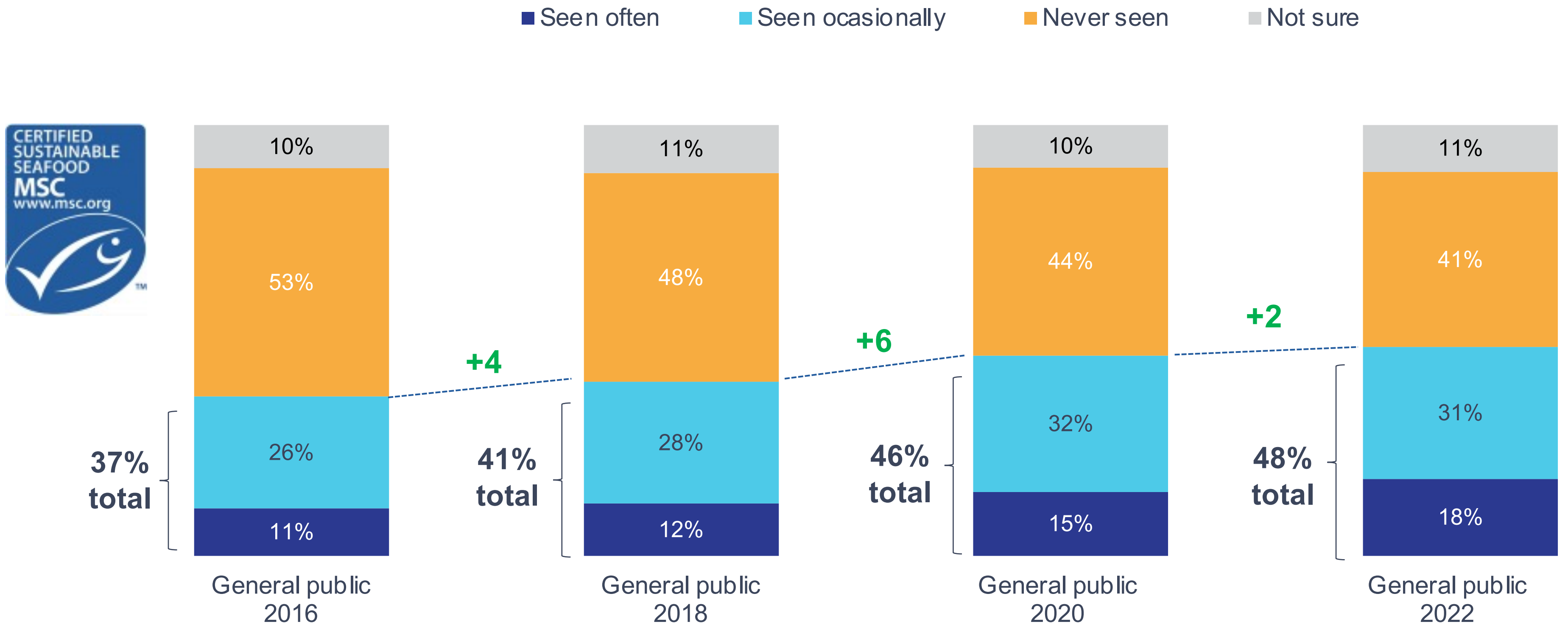
MSC Blues
83% say they notice ecolabelled products (up 2 points)

Europe Fish/Seafood Consumers
50% say they noticed ecolabelled products

Base: Seafood consumers, global, *n*=20,127
Q8.1: How well does each of the following statements describe your opinions about ecolabels?

Global recognition of the MSC label continues to grow; the proportion claiming to have seen the label "often" has grown from 11% in 2016 to 18% in 2022

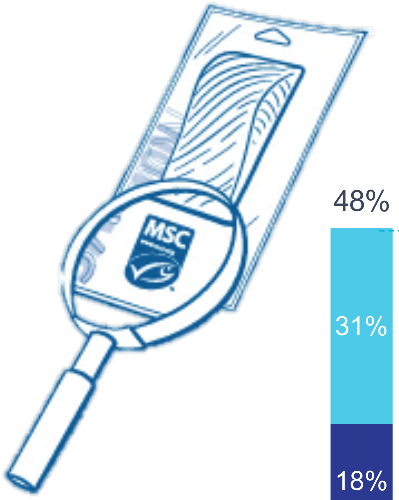
Awareness of the MSC label

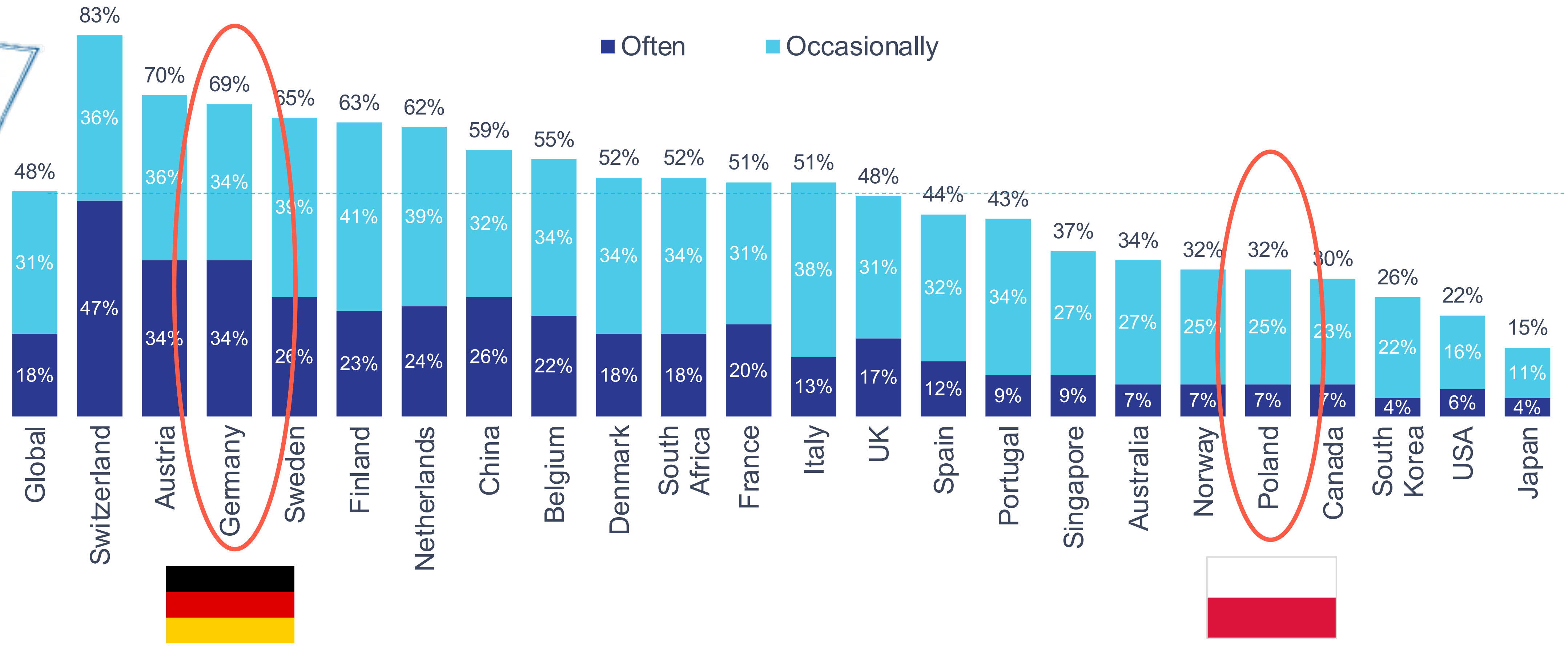


Base: General population, global, *n*=25,869
Q1.1: Have you ever seen the following logos?

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

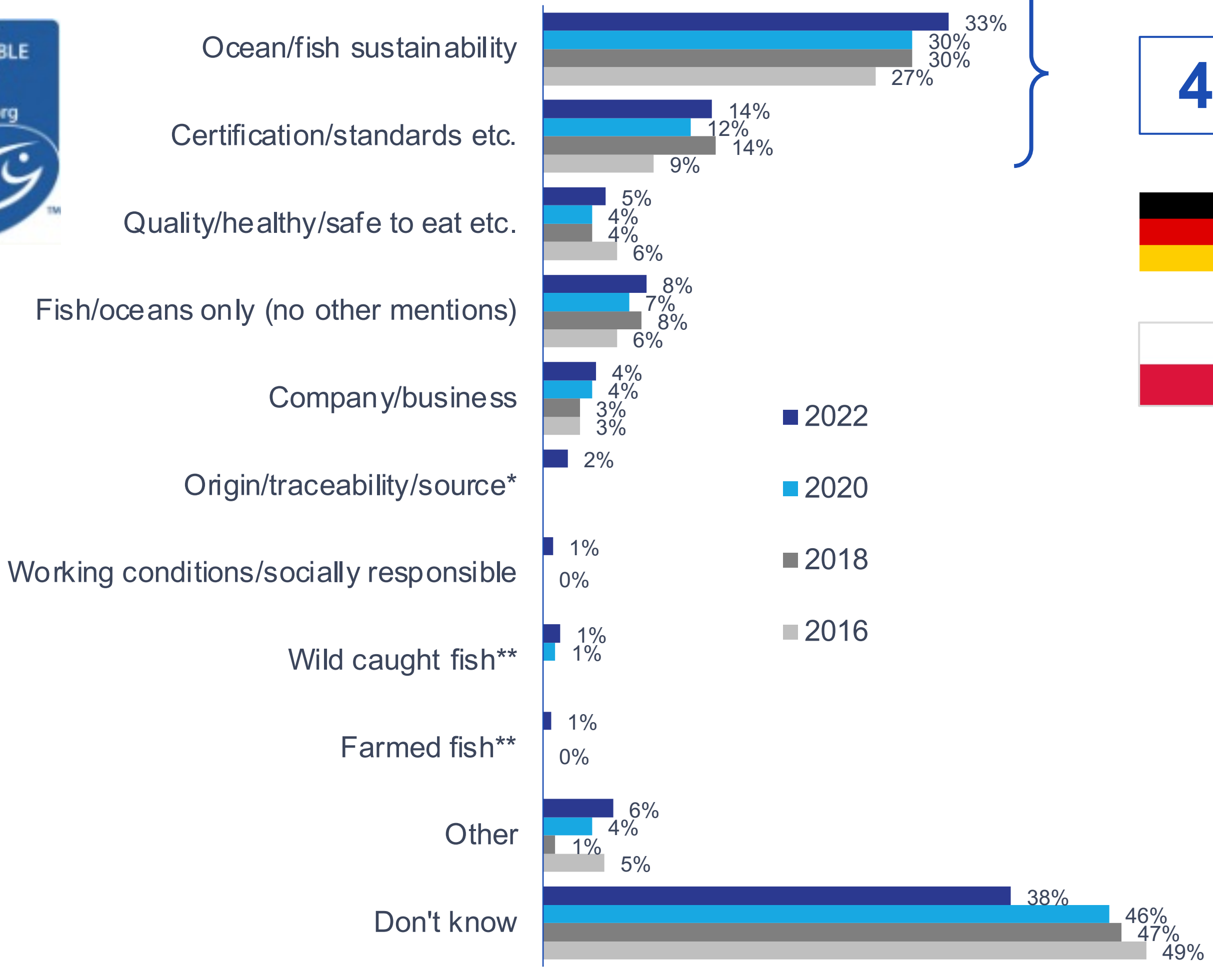




Base: General population, global, *n*=25,869
Q1.1: Have you ever seen the following logos?

There is increasing understanding of the MSC label with our target audience more likely to associate the label correctly with sustainability and certification

Unprompted understanding of the MSC label



40%*

51%

32%

MSC receptives	56%
18–24	40%
25–34	43%
35–54	42%
55+	37%

Base: Seafood consumers, global, *n*=20,127
Q6: What does this logo mean or represent?

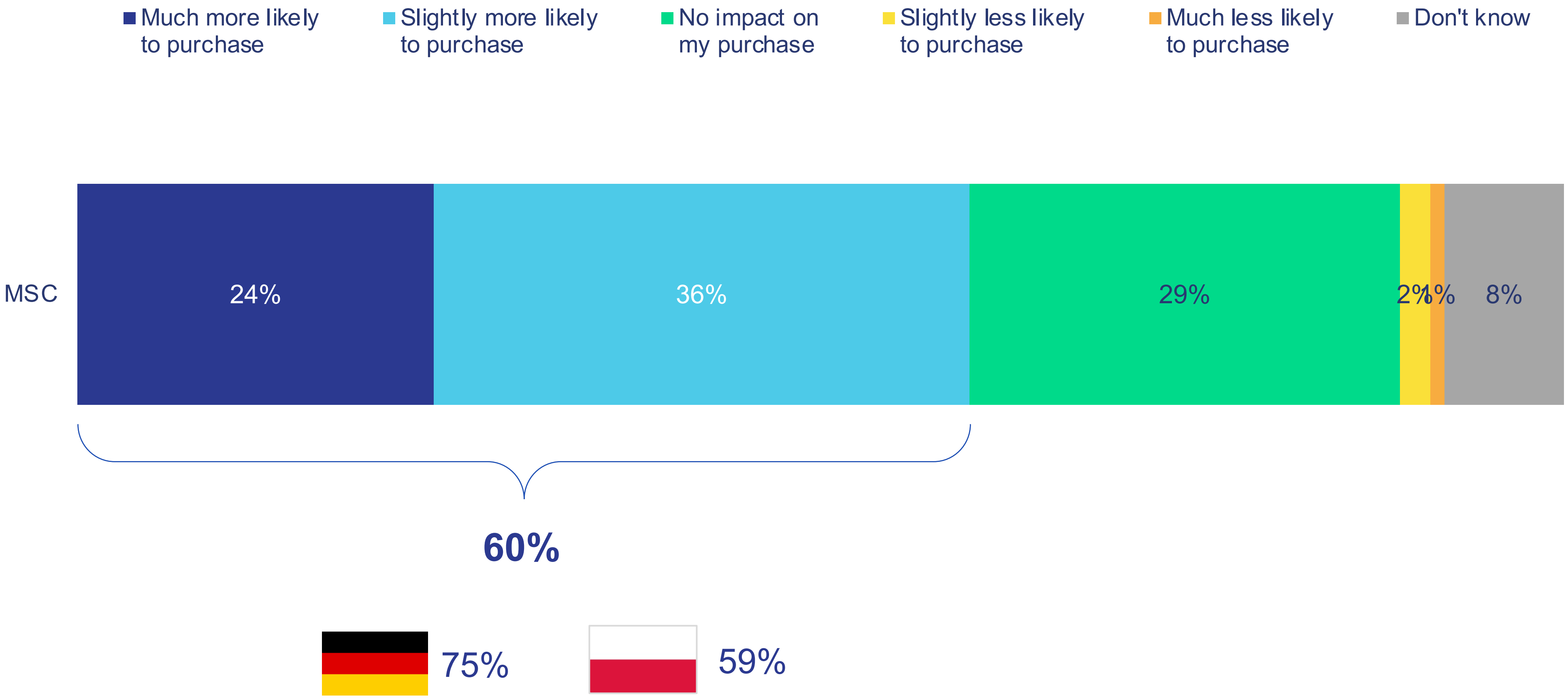
Trust remains high across all markets that the MSC operates in

Trust in the MSC label (5+6+7 on 7-pt scale), by country

Base: MSC-aware seafood consumers, per country, *n*=9,826
Q9.2: How much trust do you have in the claims of the following initiatives/organisations?

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



Base: Seafood consumers, global *n*=20,127
Q104: What impact would the following labels have on your likelihood to purchase a product?

Consumer Segmentation (2018) – global averages hide more colourful country insights!

Consumer segments overview

Sustainability Advocates

- Sustainability is the strongest motivator of fish purchase
- Higher than average awareness of the MSC label, relatively high levels of trust and purchase of the label
- Very likely to recommend MSC label
- Above average awareness and trust in ecolabels generally

Responsible Receptives

- Taste, freshness, health and safety are strong motivators of fish purchase, but sustainability is close behind as a moderately strong motivator
- Moderate MSC awareness, moderate/high levels of reported purchase of MSC
- Moderate awareness and trust in ecolabels generally

Health Seekers

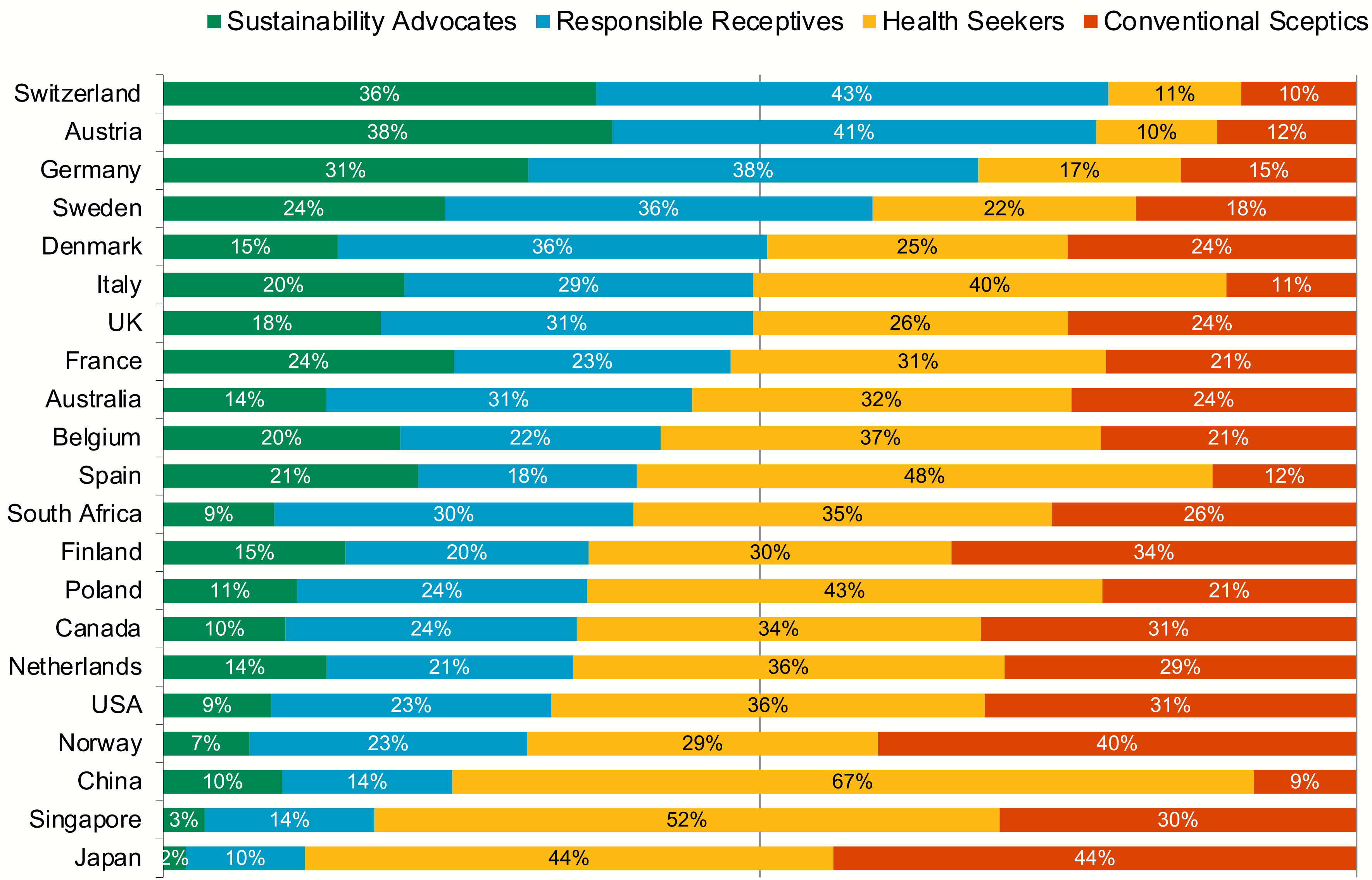
- Health benefits, safety and freshness are by far the strongest motivators of fish purchase
- Sustainability is a moderately strong motivator
- Lower than average awareness and trust in MSC
- Lower than average awareness and trust in ecolabels generally

Conventional Sceptics

- Primary purchase drivers such as price, health, taste, safe, freshness are the strongest motivators
- Sustainability is a very weak motivator of seafood purchase
- Low awareness of MSC; below average trust and purchase
- Lower than average awareness and trust in ecolabels generally

GLOBESCAN

Consumer segments by country reveal stark differences



Headline Findings

- Consumers globally are worried about the oceans and the planet
- People feel more empowered to affect change on the oceans through their seafood choices
- However dietary shifts are significant and the role of seafood in a more sustainable diet going forward appears unclear to some
- Perceptions of ecolabels and of the wider fishing industry have both improved (despite *Seaspiracy* in 2021). MSC recognition is increasing and trust is high
- Price becomes dominant: Consumers continue to subconsciously weigh up health, quality and sustainability against price when making seafood purchase decisions

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Lead the future.

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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

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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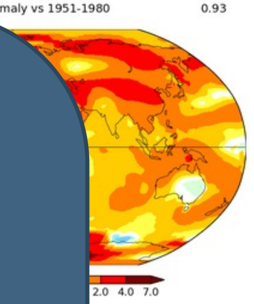
Setting the Scene – the Changing Context since 2022

Russian forces invade Ukraine

Forest fires: Nine member states now have new burned area records

UK consumer co



Colder early win worsen cost of li forecasters

neral Assembly

Perceived Seriousnes Global Problems
"Very Serious," Average of

Wa
Climate change / global
Extreme
Depletion of natural re
Water pollu

Environmental issues
Other issues

35
2003 2004 2005 2006 2007 2008 2009 2010 2011 2012 2013 2014 2015 2016 2017 2018 2019 2020 2021 2022

*Includes Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Italy, Kenya, Mexico, Nigeria, Russia, Spain, Turkey, UK, and USA.

Trends for 2023 and 2024???...

Cost of living even more dominant

Increased concern on health & UPFs (focus on "real food")

Rationalisation of plant-based products

Food security?

GlobeScan x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NOW £1.48
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STREAKY
BACON
REDUCED
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NOW £1.72
TASTY VEGAN
HEALTHIER SNACKING
Wall's
Since 1786
REDUCED
was £1.45
NOW £1.00
PLANT BASED
SUITABLE FOR VEGANS
KEEP REFRIGERATED BELOW 5°C
£2.60
Tesco British
Chicken Breast
Mini Flts 400G
£9.38 per kg
£3.75
T. Chicken Brst
Fillets
300G (C)
£9.17 per kg

15 Minutes to discuss…

Organise yourselves into groups of 3 or 4 people…

Question 1:

What do you think the top 3 changes in concerns for Polish consumers are since we ran this survey in February 2022

Question 2:

Blue foods for consumers are both heathy and good for the planet – other than price, what is the effective message to promote seafood and fish in the next 2 years?

Question 3:

What will be your 3 trend projections for Seafood over the next 2 years?

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THEMES DISCUSSED IN THE WORKSHOP

Question 1: Consumer concerns

- Price of seafood will limit consumers
- Younger consumers have less motivation for seafood
- Seafood sales are level, despite a lot of advertising and promotion
- Education is required on link with health and healthy planet

THEMES DISCUSSED IN THE WORKSHOP

Question 2: Messages for marketing seafood

- Price – cheaper seafood option
- Canned seafood – education on health and price
- Habit is important
- Healthy and good for the planet
- Effortless production (no pesticides or articificial input)
- Wild / natural food
- Benefits comparison to red meat
- Highlighting our ocean as the "lungs of the world"

THEMES DISCUSSED IN THE WORKSHOP

Question 3: Potential trends

- Price limits purchase of seafood (– more chicken)
- Young people will need to know how to prepare fish more
- Young people will need more education (older generations know about species and how to buy)
- More sales of cheaper options for seafood
- Sales of seafood will remain the same despite efforts

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