

MSC Consumer Insights 2018

Denmark

GlobeScan, May 2018

Contact Us

For more information, please contact:

Richard Stobart

Head of Marketing (Global Team)
richard.stobart@msc.org

Abbie Curtis

Associate Director
abbie.curtis@globescan.com

www.GlobeScan.com
evidence and ideas. applied.

The research questions and results reported herein are provided on a confidential basis to MSC. MSC is free to use the findings in whatever manner it chooses, including releasing them to the public or media.

GlobeScan Incorporated subscribes to the standards of the World Association of Opinion and Marketing Research Professionals (ESOMAR). ESOMAR sets minimum disclosure standards for studies that are released to the public or the media. The purpose is to maintain the integrity of market research by avoiding misleading interpretations. If you are considering the dissemination of the findings, please consult with us regarding the form and content of publication. ESOMAR standards require us to correct any misinterpretation.

Project: 3505



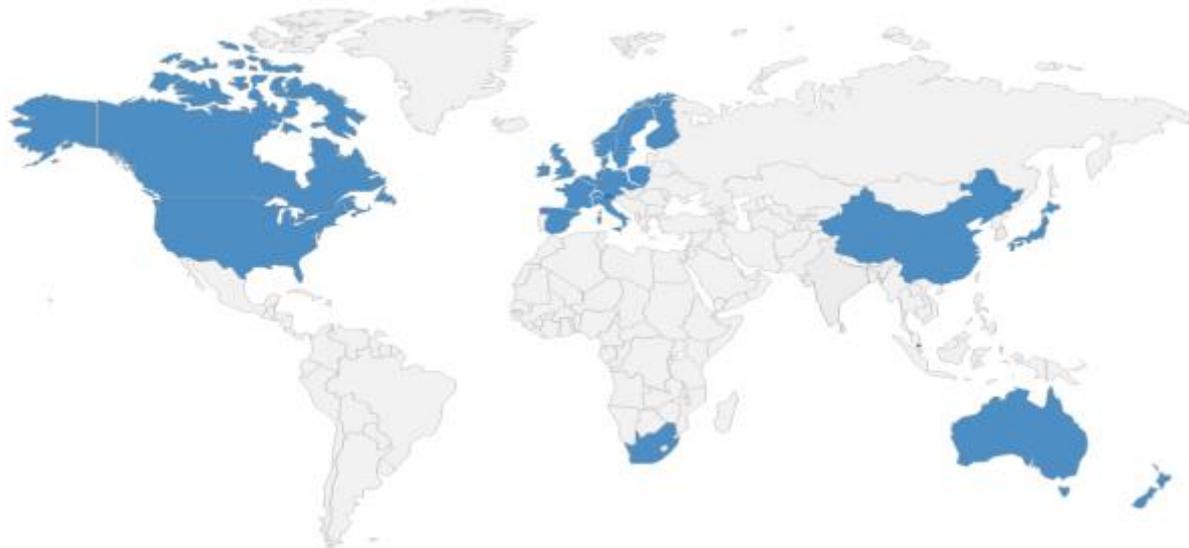
Introduction and Methodology

The Marine Stewardship Council has partnered with GlobeScan to conduct a global research study into consumer perceptions. This online quantitative study tracks a similar study in 2016.

This year's survey (2018) was conducted in a total of 22 markets: Australia, Austria, Belgium, Canada, China, Denmark, Finland, France, Germany, Italy, Japan, Netherlands, New Zealand, Norway, Poland, Singapore, South Africa, 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 $n=18,909$ seafood consumers (not including New Zealand which is reported separately); a minimum of 600 seafood consumers were surveyed in each country. Please find the relevant sample sizes in your market on the next page.

Fieldwork in Denmark was conducted between 13 February and 23 February 2018.



Understanding the Consumers in this Study

	Type of consumer	Description	Denmark sample size 2018	How do we know if changes since 2016 are significant?
	General public	A representative sample of consumers across the country (as far as possible using online surveys)	<i>n</i> =1,020	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	<i>n</i> =670	Differences of +/- 4 percentage points are statistically significant (approx.)
	MSC-aware consumers	Seafood consumers who recall having seen the MSC label “often” or “occasionally”	<i>n</i> =344	Differences of +/- 6 percentage points are statistically significant (approx.)
	Seafood lovers	Consumers who “really like” to eat seafood	<i>n</i> =386	<i>Not applicable; no tracking since 2016 (we didn't ask this question previously)</i>
	Coastal consumers	Seafood consumers who live on the coast or visit the coast every day	<i>n</i> =85	<i>Not applicable; no tracking since 2016 (we didn't ask this question previously)</i>

How Consumer Intelligence Supports MSC Theory of Change

Fisheries which meet MSC Standard are independently labelled

- To what extent do consumers understand and value MSC's independence?

More fisheries choose to improve their practices and volunteer to be assessed against the MSC Standard

- What is the shape and size of the demand for labelled sustainable seafood?

Market demand for MSC labelled seafood increases

- How can MSC enhance communications to further increase consumer trust and demand for sustainable seafood?

Retailers and restaurants choose MSC labelled seafood

- How large is the demand for sustainable seafood among customers of specific retailers?

Traceable supply chain assures consumers that only seafood from MSC labelled fishery is sold with MSC ecolabel

- How much trust do consumers have in the MSC ecolabel?
- Do they understand what the label stands for?

Consumers choose MSC labelled seafood

- How does sustainability fit within the factors driving fish purchase?
- How open are consumers to higher prices?

How the MSC works with fisheries, suppliers and retailers to encourage a more sustainable seafood market



Executive Summary

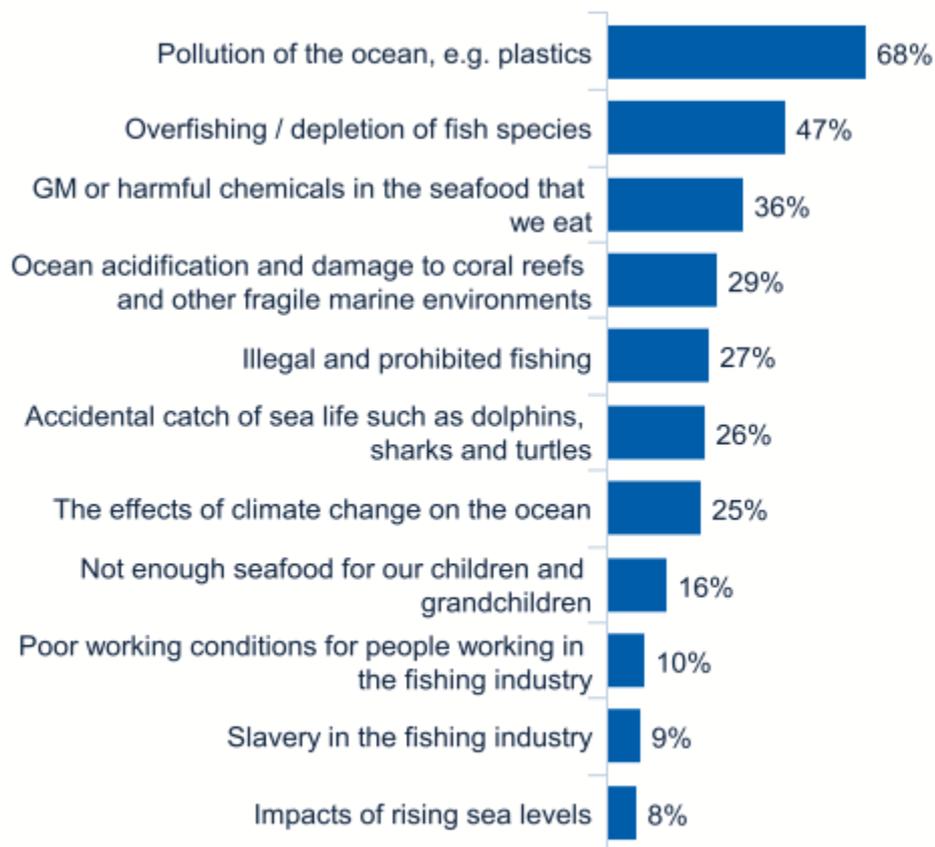
Ocean Sustainability Context



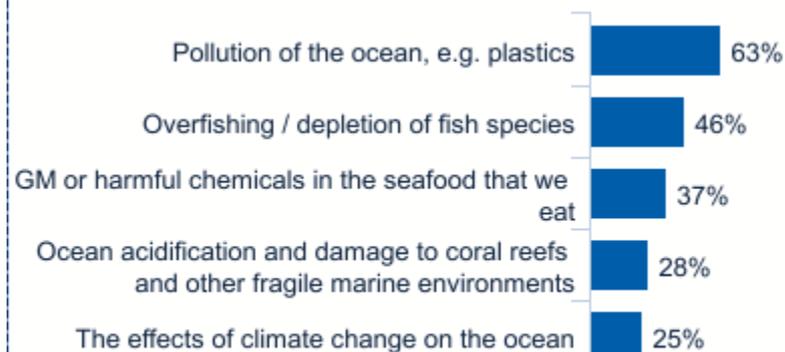
Most Concerning Threats to Oceans

Pollution of the oceans and overfishing of fish species are the most concerning threats to the world's oceans for Danish consumers

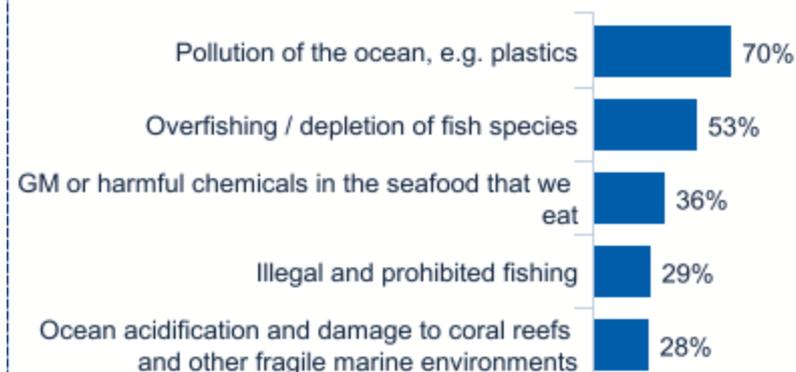
Issues (each respondent selected three issues)



Top issues for young consumers aged 18-34



Top issues for seafood lovers



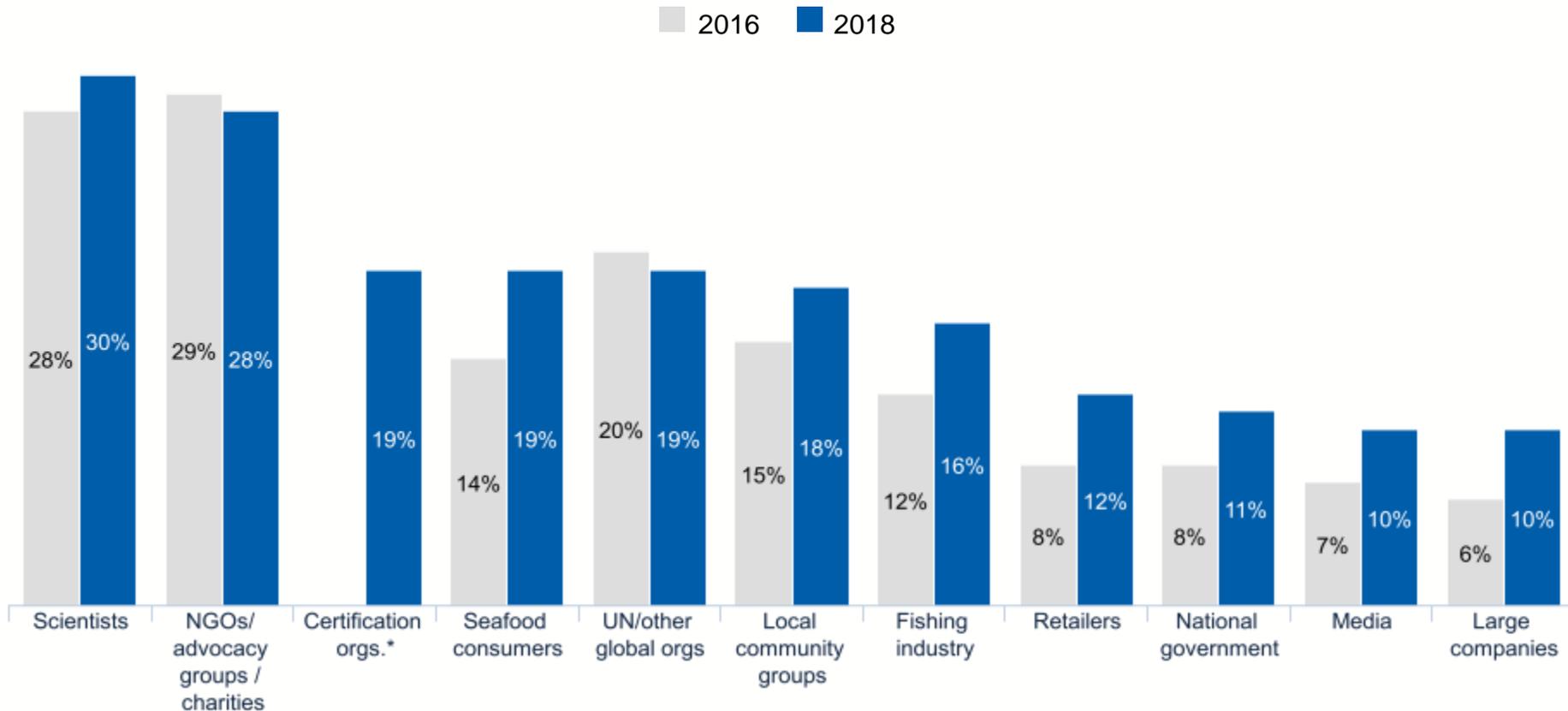
Base: Seafood consumers, Denmark

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?

Performance of Different Groups in Protecting Oceans

The majority of organisations are perceived as contributing more to protecting the environment than in 2016; even among the lower performing institutions, such as large companies, media and national government, there has been a rise of at least 3 percentage points

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



Base: Seafood consumers, Denmark

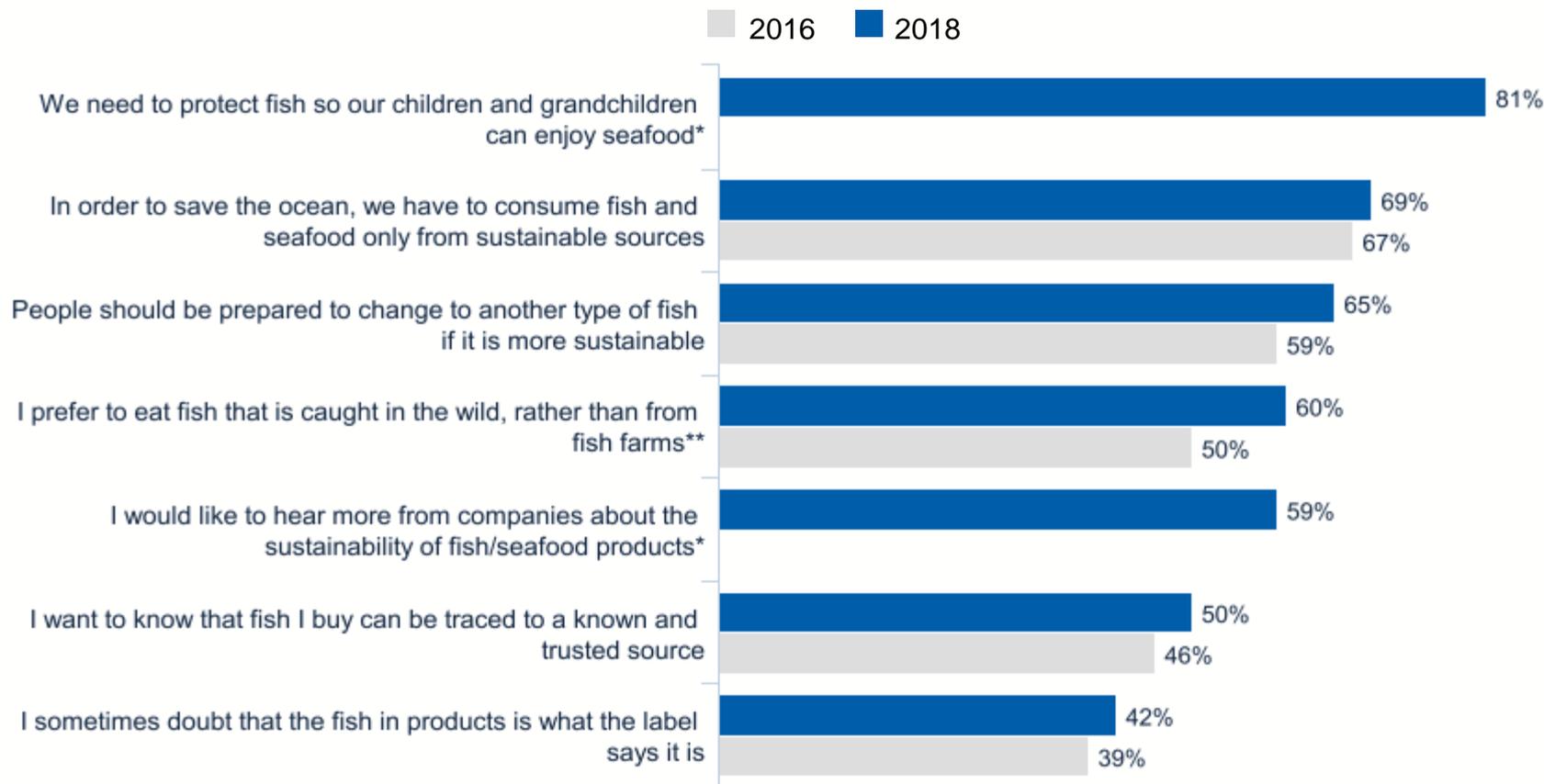
*No tracking data available

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

Perspectives on Ocean Sustainability and Fish

Eight in ten seafood consumers believe that we need to protect fish so future generations can enjoy seafood; seven in ten think that we should consume fish only from sustainable sources and a similar number agree that a change in the type of fish eaten could be justified for sustainability reasons.

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



Base: Seafood consumers, Denmark

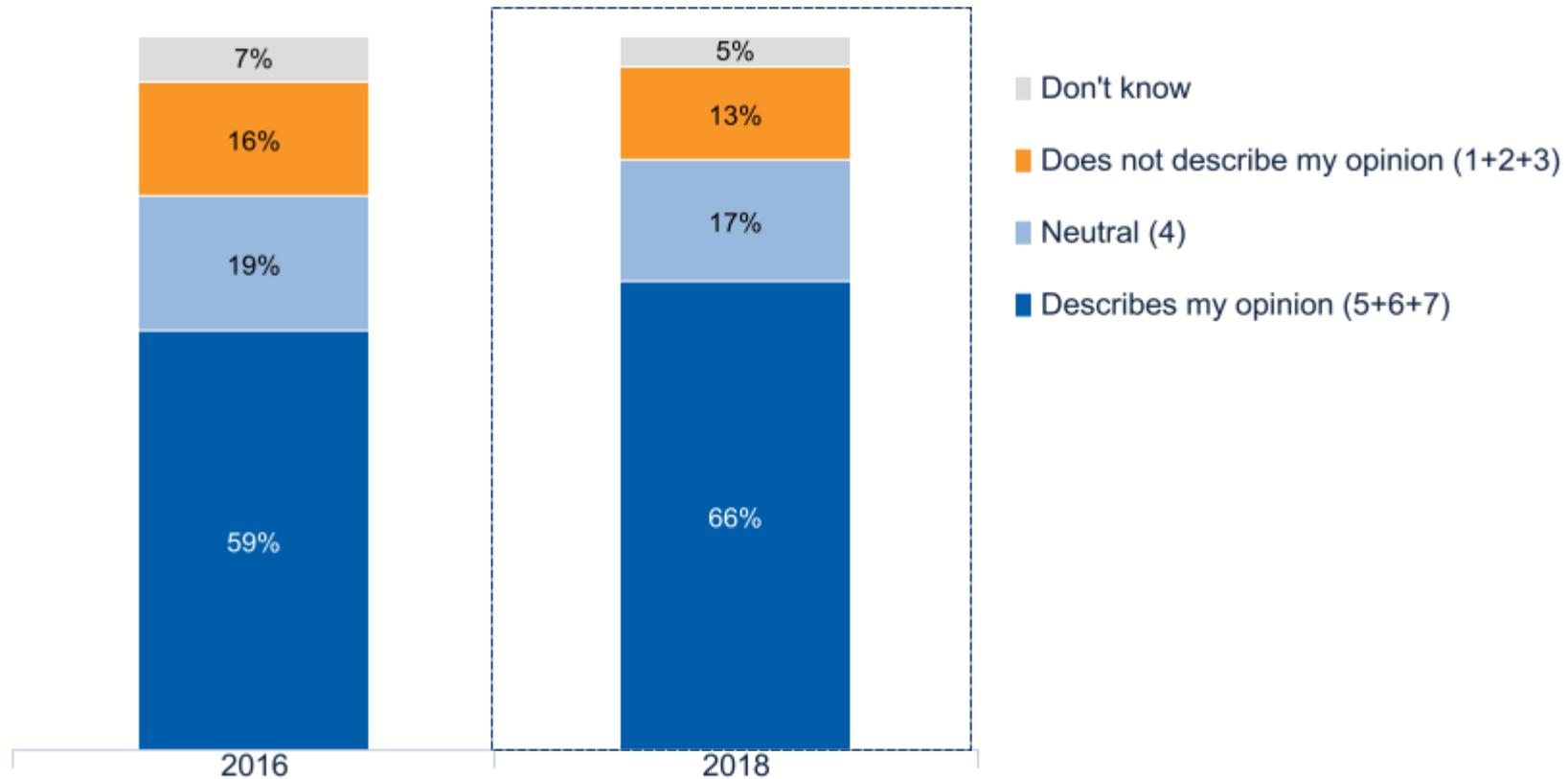
Q5.1: How well does each of the following statements describe your opinions? 7-pt scale: 1 = "Does not describe my opinion very well", 7 = "Describes my opinion very well"

*No tracking data available; **wording has slightly changed from last wave

Demand for Independent Certification

Two thirds of seafood consumers agree that supermarkets' and brand' claims about sustainability should be verified by an independent organisation – this has increased by 7 percentage points since 2016

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



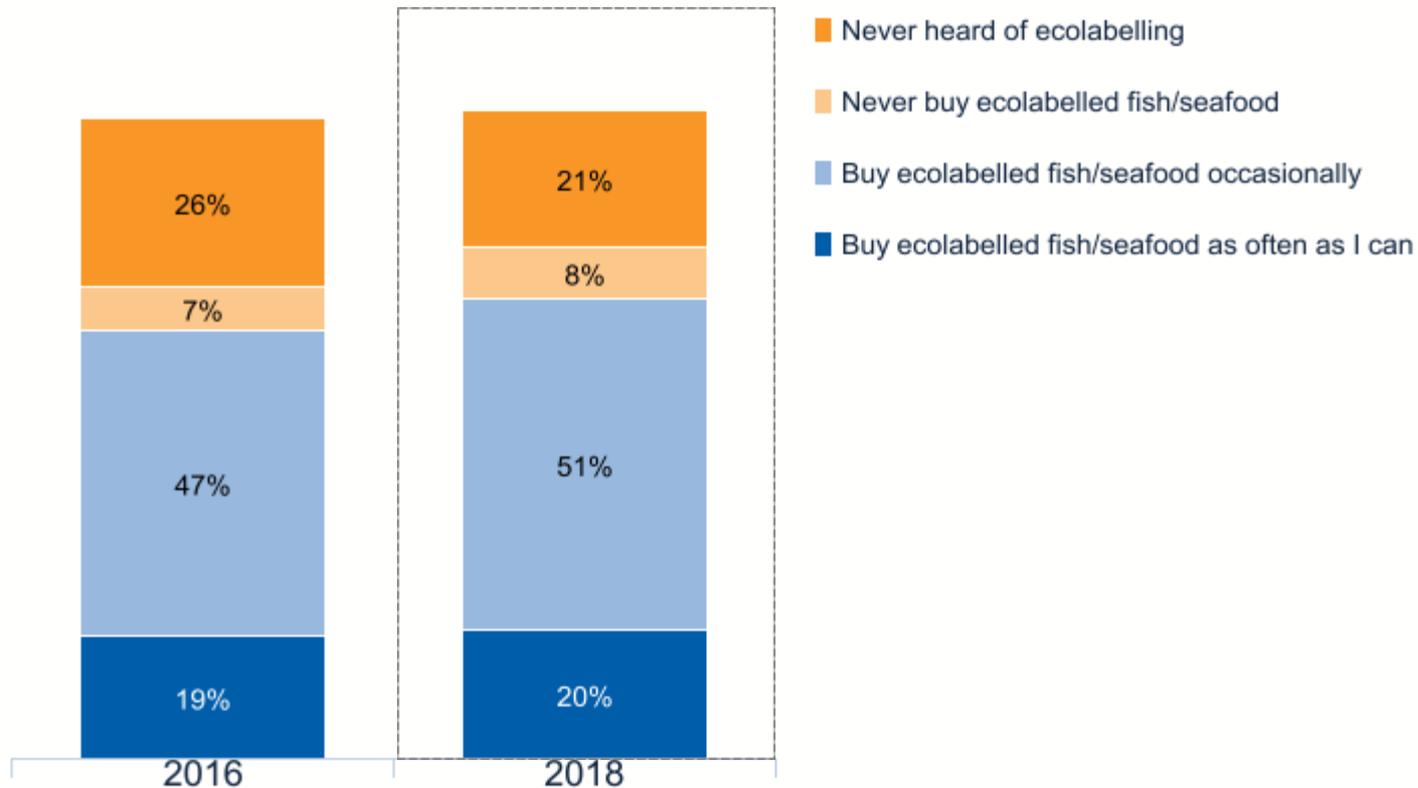
Base: Seafood consumers, Denmark

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”

Purchase of Ecolabelled Fish

The percentage of people purchasing ecolabelled fish at least occasionally has increased slightly, reflecting increased awareness and demand for ecolabelling

Frequency of purchase of ecolabelled fish



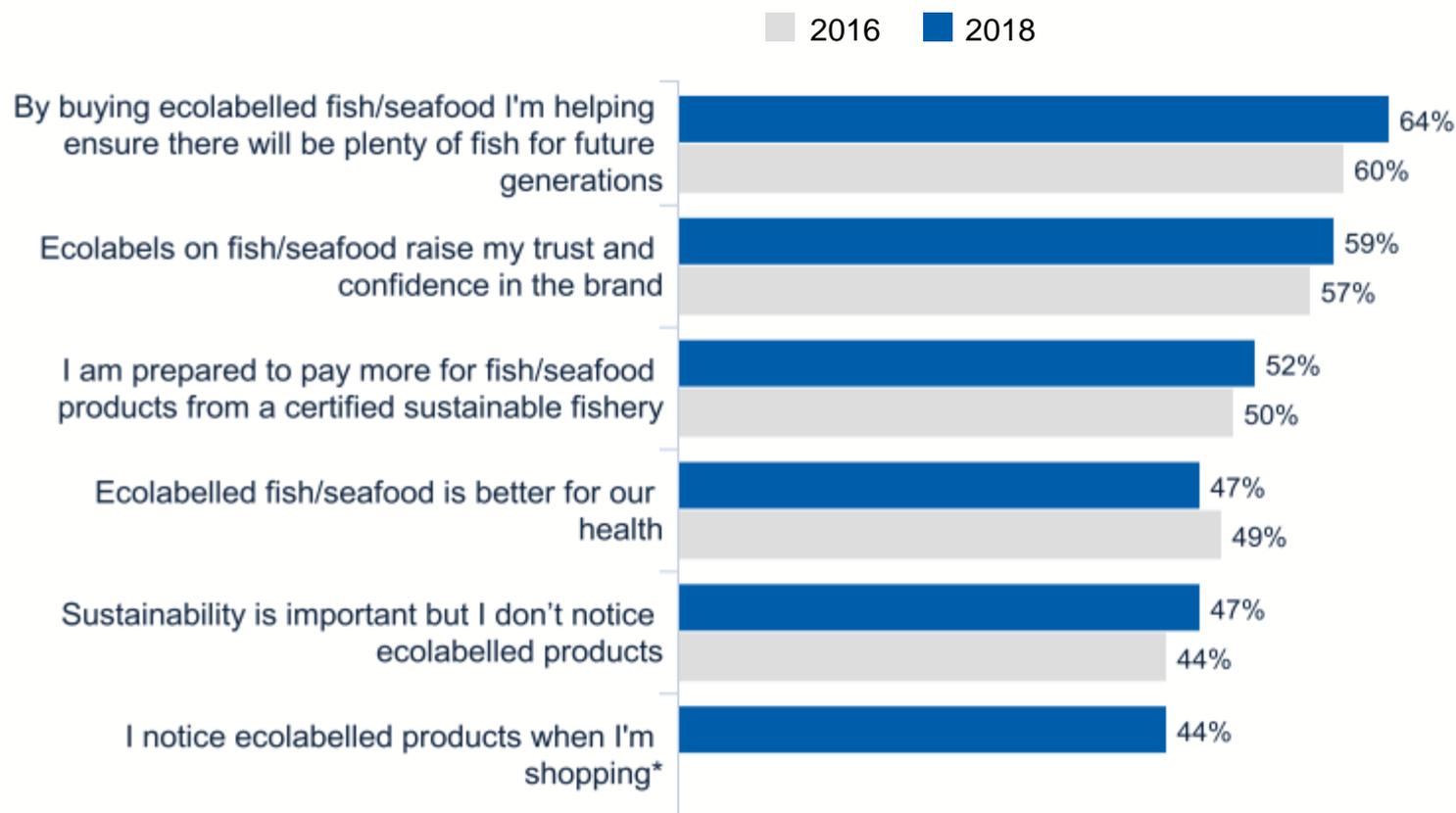
Base: Seafood consumers, Denmark,

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

Attitudes Towards Ecolabels

Just under two thirds of consumers believe that by buying ecolabelled fish they are helping to ensure that there is an abundance of fish for future generations, and nearly two fifths agree that ecolabels raise their trust and confidence in the brand

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



Base: Seafood consumers, Denmark

Q8.1: 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"

*No tracking data available

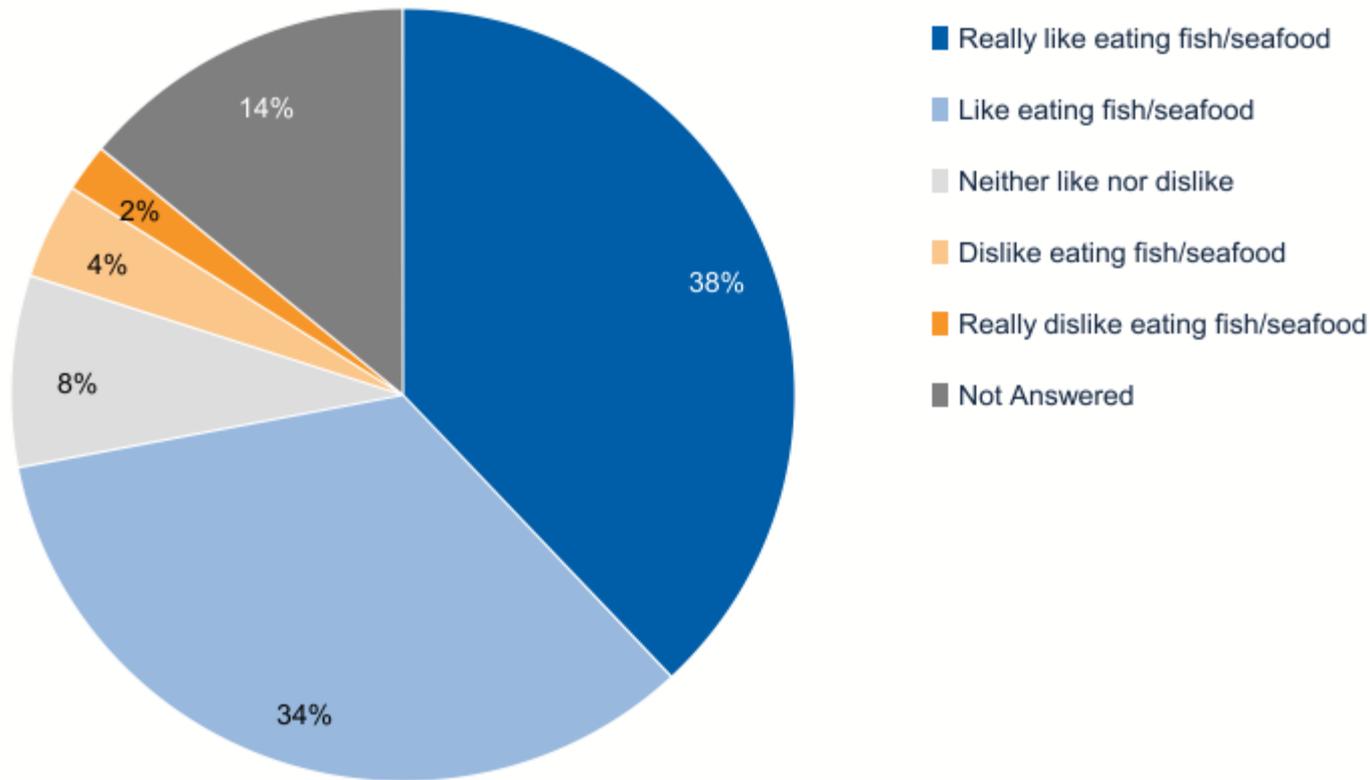
A photograph of two men, likely fishermen, sitting at a table in a restaurant. The man on the left is wearing a blue jacket and yellow and blue overalls, smiling as he eats. The man on the right is wearing a red jacket and red overalls, also smiling and eating. They are both eating plates of seafood, possibly fish and chips. In the background, there is a window with several framed black and white photographs of fishing boats. A semi-transparent white box with the text "Love of Seafood" is overlaid on the image.

Love of Seafood

Consumer Love for Fish and Seafood

More than seven in ten enjoy eating fish and seafood and more than half of these are seafood lovers

Personal enjoyment of eating fish/seafood



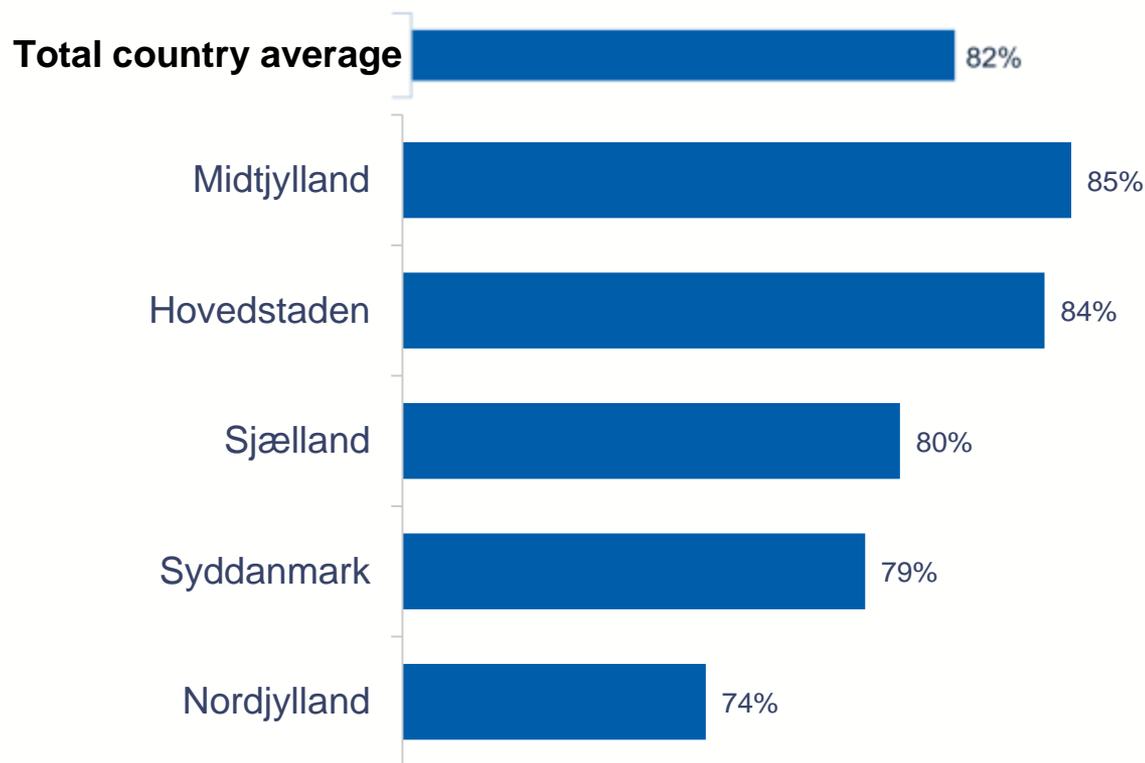
Base: General public, Denmark

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"

Purchase of Seafood, by Region

Over four-fifths of the Danish public have purchased fish or seafood in the past two months; seafood purchase rates are highest in Midtjylland, Hovedstaden and Sjælland

Fish/seafood purchase, by region



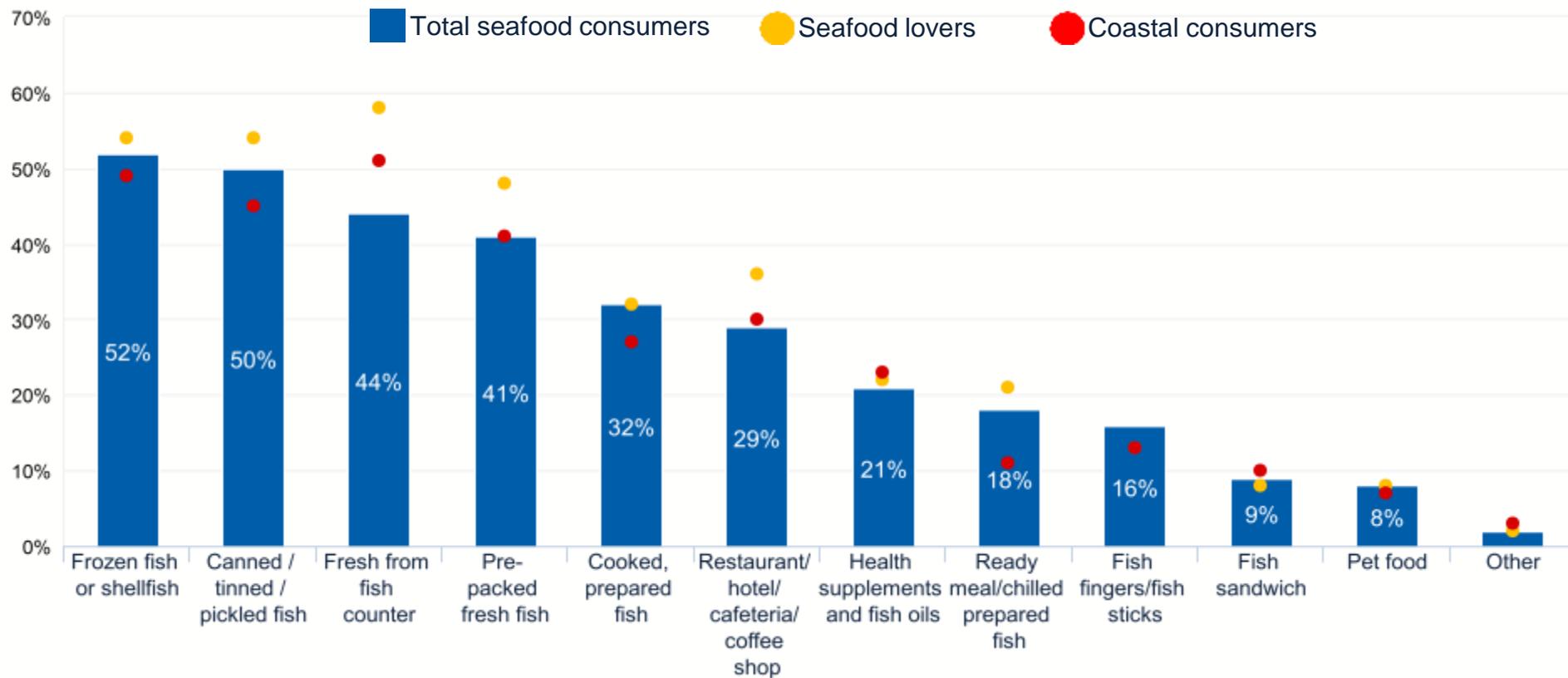
Base: General public, Denmark

Q2.1: Have you or anybody in your household bought fish or seafood products in the past 2 months? (this includes frozen, fresh, or canned, sandwiches, salads, sushi etc.)

Types of Fish/Seafood Purchased, by Consumer Type

Frozen fish is the most popular type of fish for seafood consumers generally; amongst seafood lovers and coastal consumers, fresh fish from the fish counter is preferred

Types of fish/seafood purchased frequently, by consumer type



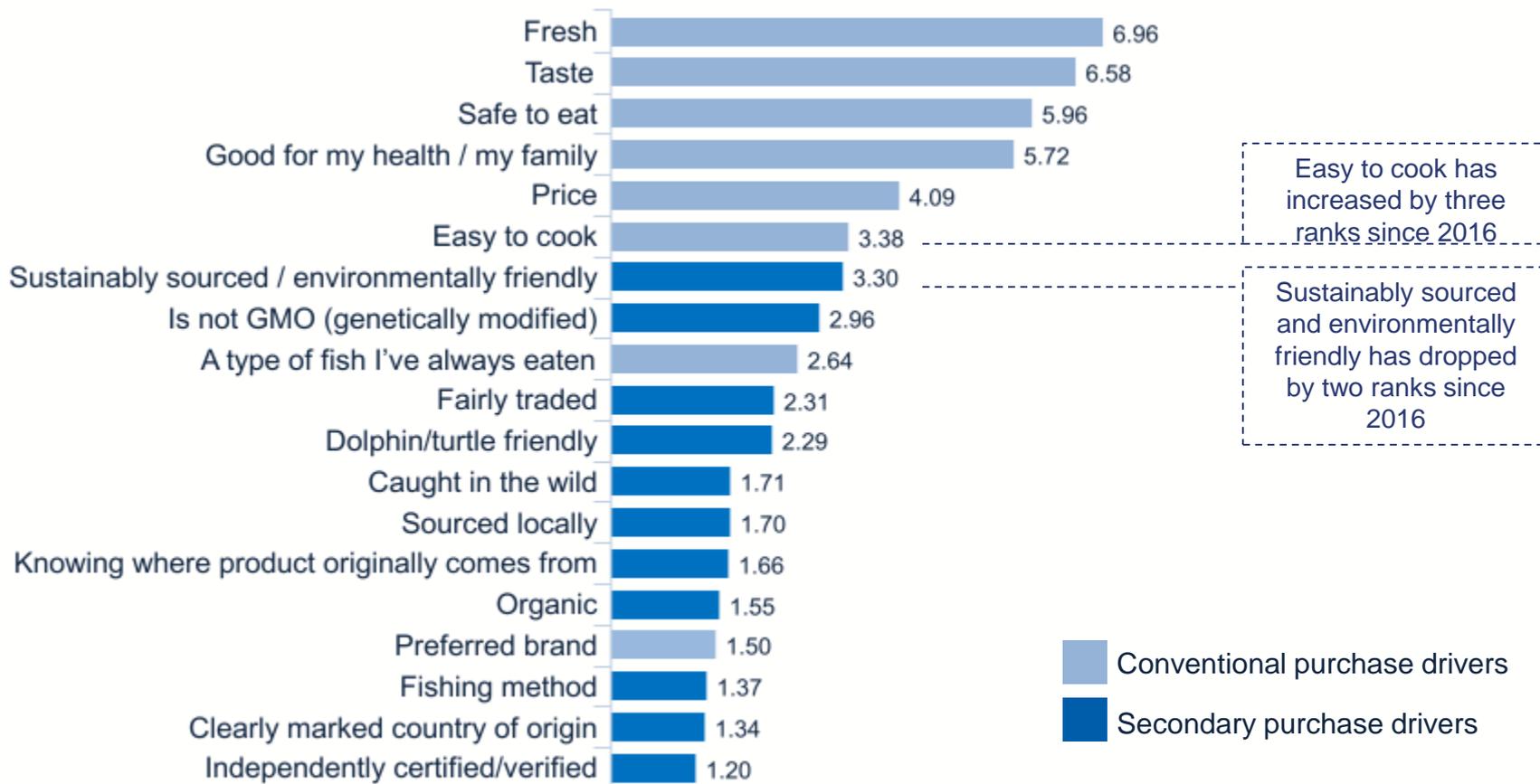
Base: Seafood consumers, Denmark

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

Motivators when Purchasing Fish and Seafood

Conventional purchase drivers dominate as motivators when purchasing fish and seafood; although sustainably sourced and environmentally friendly is the top secondary purchase driver, it has dropped by two ranks since 2016

Relative importance scores



Base: Seafood consumers, Denmark

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?

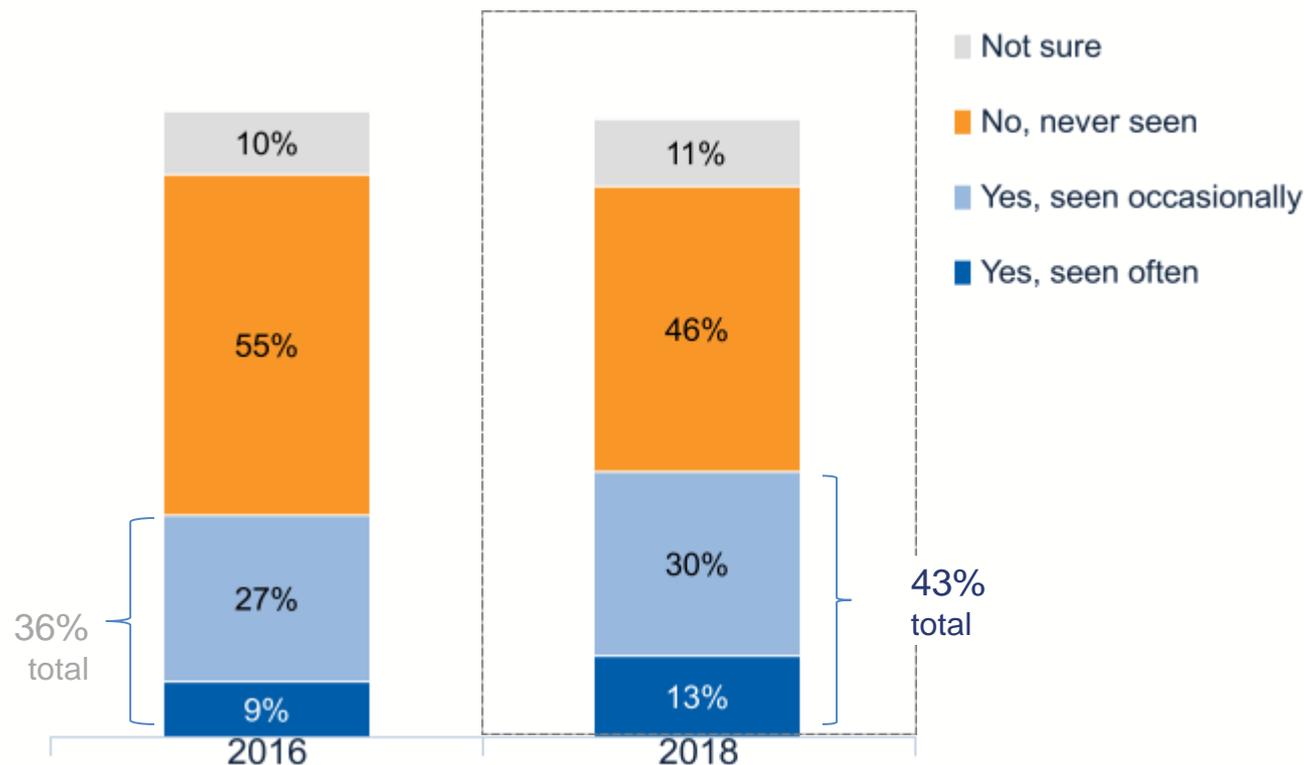
MSC Awareness and Understanding



Awareness of the MSC Label

Awareness of the MSC label has increased since 2016 with over two fifths of Danish consumers recalling seeing the label either often or occasionally, while the percentage of people who have never seen the label has decreased by almost 10 points

Frequency of seeing the MSC label



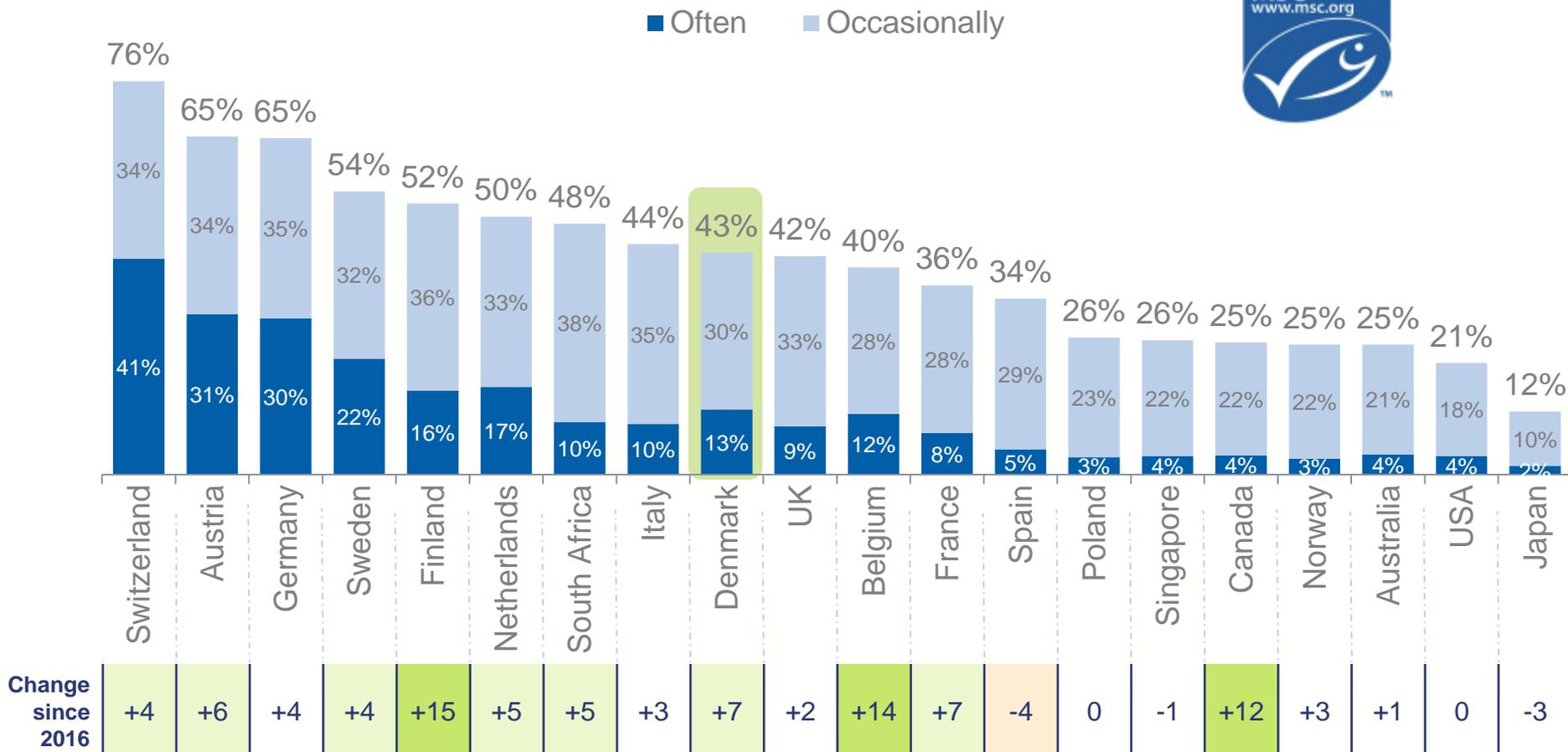
Base: General public, Denmark

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

Global Awareness of the MSC Label

Denmark ranks just above average, globally for consumer awareness

Awareness of the MSC label (seen often + seen occasionally), by country

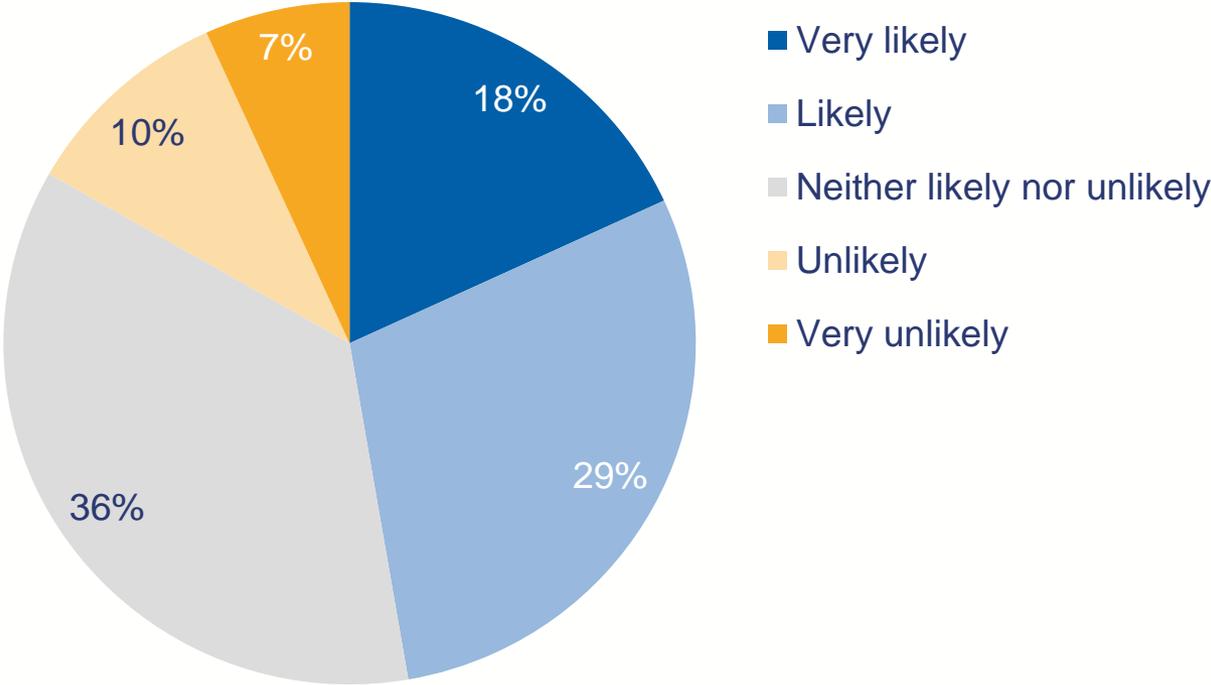


Base: General public, by country; Q1.1: Have you ever seen the following logos?

Recommendation of MSC

Almost half of MSC-aware consumers in Denmark are likely to recommend MSC-certified products to the people they know

Likelihood of recommending MSC-certified products



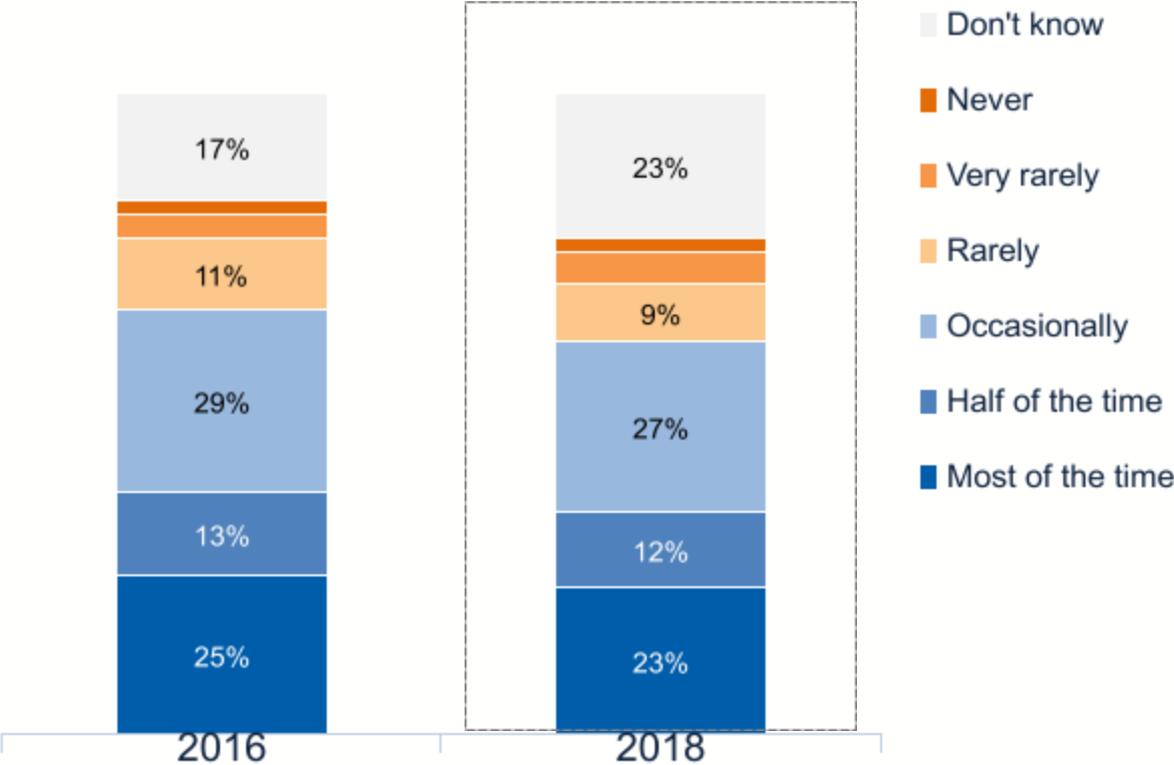
Base: MSC aware, Denmark

Q12.2: How likely are you to recommend MSC certified products to the people you know? 5-pt scale; 1 = "Very unlikely", 5 = "Very likely"
PLEASE NOTE: this question cannot be tracked back to 2016 results, because of questionnaire changes this year

Purchase of MSC-certified Fish

There has been a slight decrease in stated purchase of MSC-certified fish since 2016, with around six in ten now saying they buy it at least occasionally

Frequency of purchase of MSC-certified fish



Base: MSC aware, Denmark

Q9.3: How often do you purchase fish or seafood with this logo on it?

Perceptions of the MSC

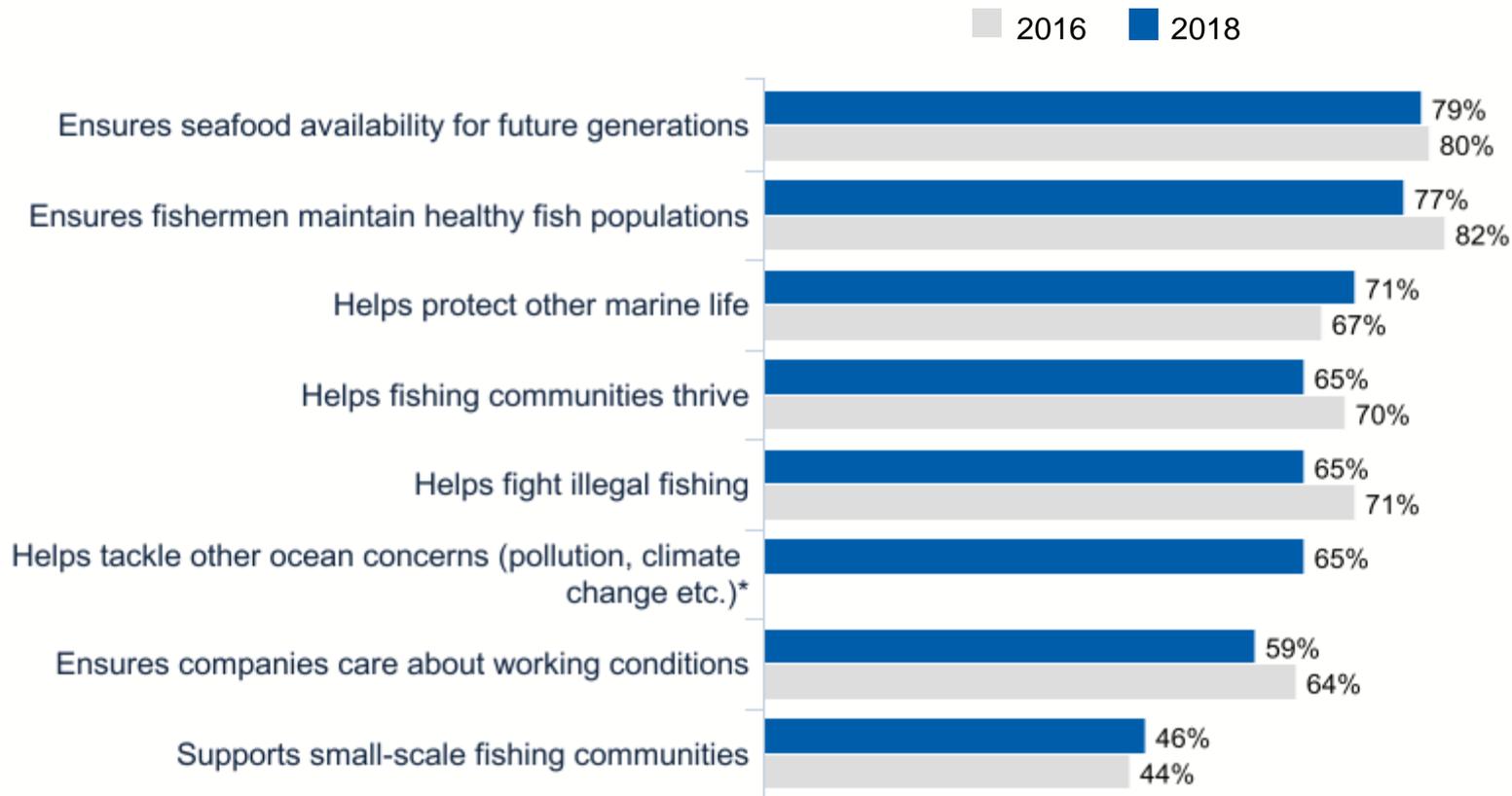


GLOBESCAN

Perceptions of MSC: Sustainability Impact

MSC-aware consumers perceive MSC as ensuring seafood is available for future generations, and that fishermen maintain healthy fish populations

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



Base: MSC aware, Denmark

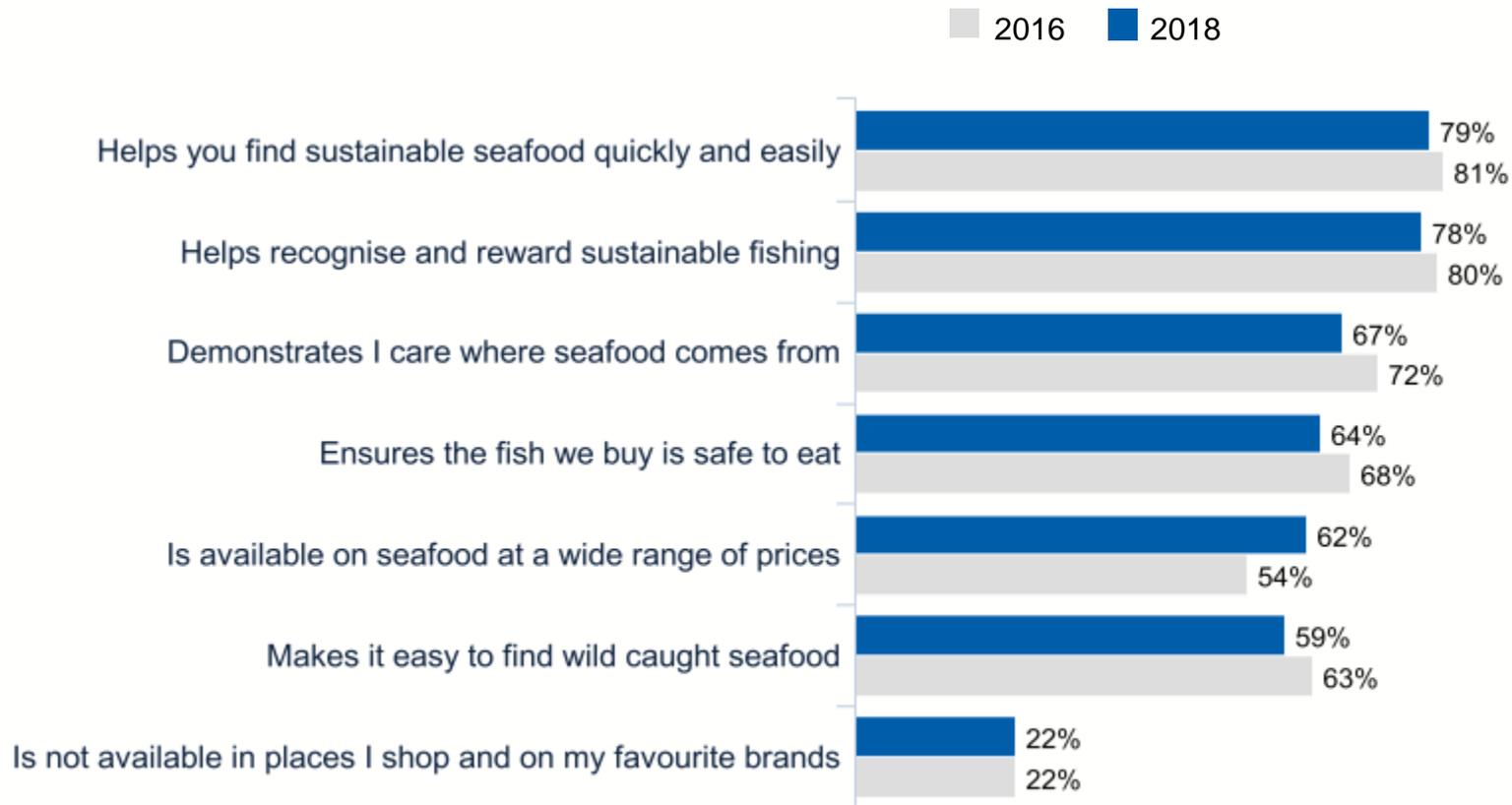
Q11.1: How well do you think the following statements describe the Marine Stewardship Council (MSC) and the ecolabel?
7-pt scale: 1 = "Does not describe MSC at all", 7 = "Describes MSC completely"

*No tracking data available

Perceptions of MSC: Consumer Benefits

Eight in ten believe that the MSC label allows them to find sustainable seafood quickly and easily, and a similar proportion think that it helps recognise and reward sustainable fishing

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



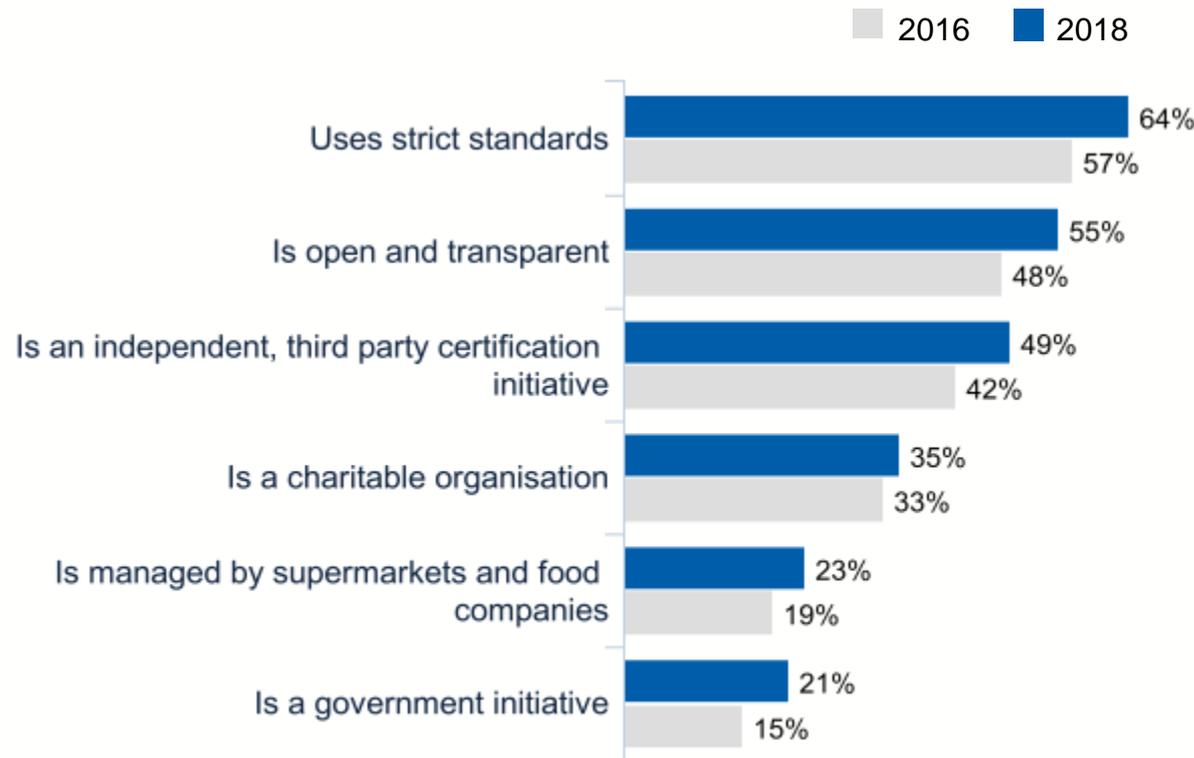
Base: MSC aware, Denmark

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"

Perceptions of MSC: Organisation

Almost two thirds of MSC-aware consumers believe that the MSC uses strict assessment standards – an increase of 7 points since 2016. Over half also perceive the MSC as an organisation that is open and transparent

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



Base: MSC aware, Denmark

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"



GlobeScan is an insights and strategy consultancy, focused on helping our clients build long-term trusting relationships with their stakeholders. Offering a suite of specialist research and advisory services, we partner with business, NGOs and governmental organizations to meet strategic objectives across reputation, sustainability and purpose.

Established in 1987, GlobeScan has offices in Cape Town, Hong Kong, London, Paris, San Francisco, São Paulo and Toronto, and is a signatory to the UN Global Compact and a Certified B Corporation.

www.globescan.com