
GlobeScan 2024

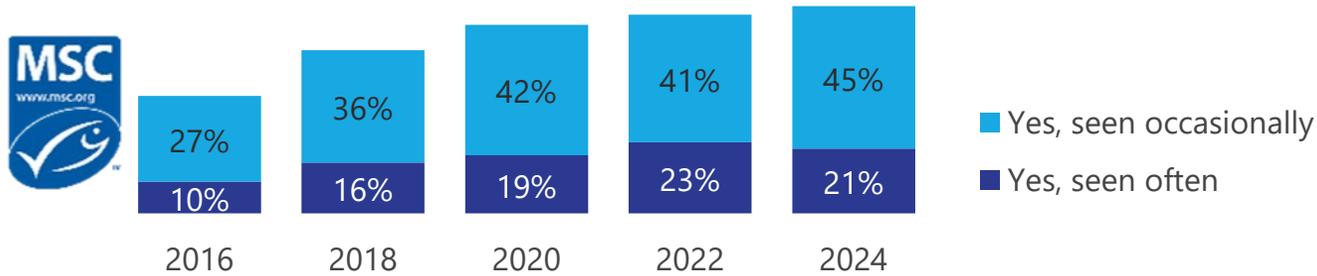
Kuluttajatutkimus

Suomi, toukokuu 2024



MSC Dashboard – Finland

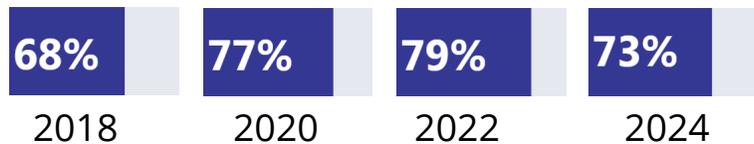
MSC Awareness General Public



Unprompted Understanding Seafood Consumers, Have at least some understanding, mentioning **sustainability and/or certification**



Trust in MSC MSC-aware Consumers



Changes in eating habits General Public

Eating more seafood

11%



Eating less seafood

26%

Love of Seafood and the Oceans

82%

Recently purchased seafood
Base: General Public

20%

Believe that in 20 years' time we will have saved the oceans from irreparable damage from humans.
Base: Seafood consumers

79%

Believe we need to switch to only sustainable sources
Base: Seafood consumers

91%

Concerned about the state of the world's oceans
Base: Seafood consumers



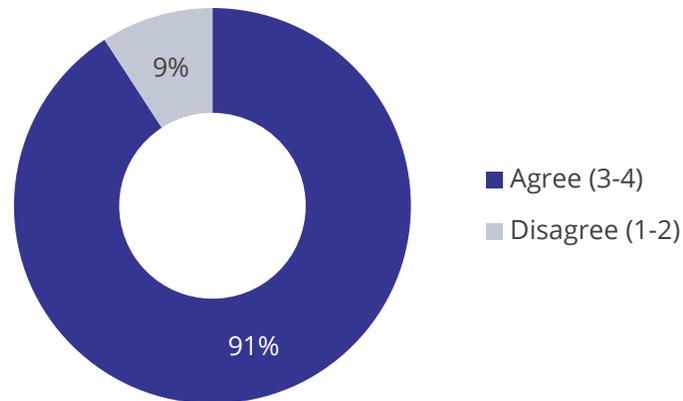
Top six motivators of seafood purchase (of 19 factors tested):



Concern about the state of the oceans remains high, and pessimism has increased about our ability to save the oceans from irreparable damage and the future availability of seafood

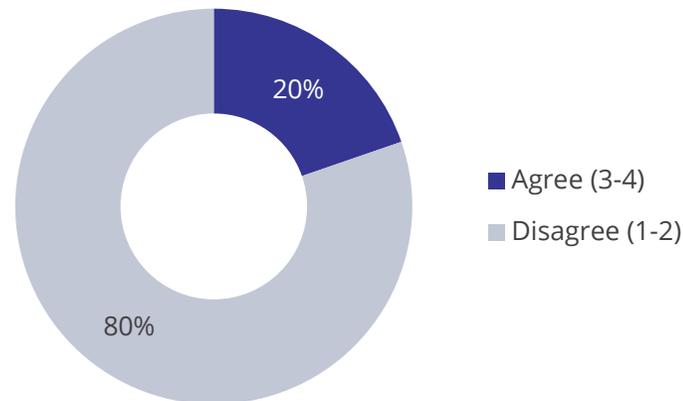
Worry and level of optimism/pessimism about the oceans, 4-point scale, 2022–2024

I feel worried about the state of the world's oceans



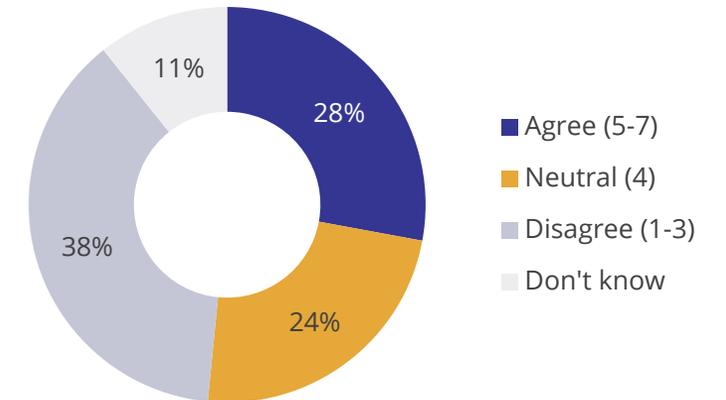
2022 "Agree": 90%

I believe in 20 years' time we will have saved the ocean from irreparable damage*



2022 "Agree": 35%

I don't think my favourite fish or seafood will be available to eat 20 years from now



2022 "Agree": 22%

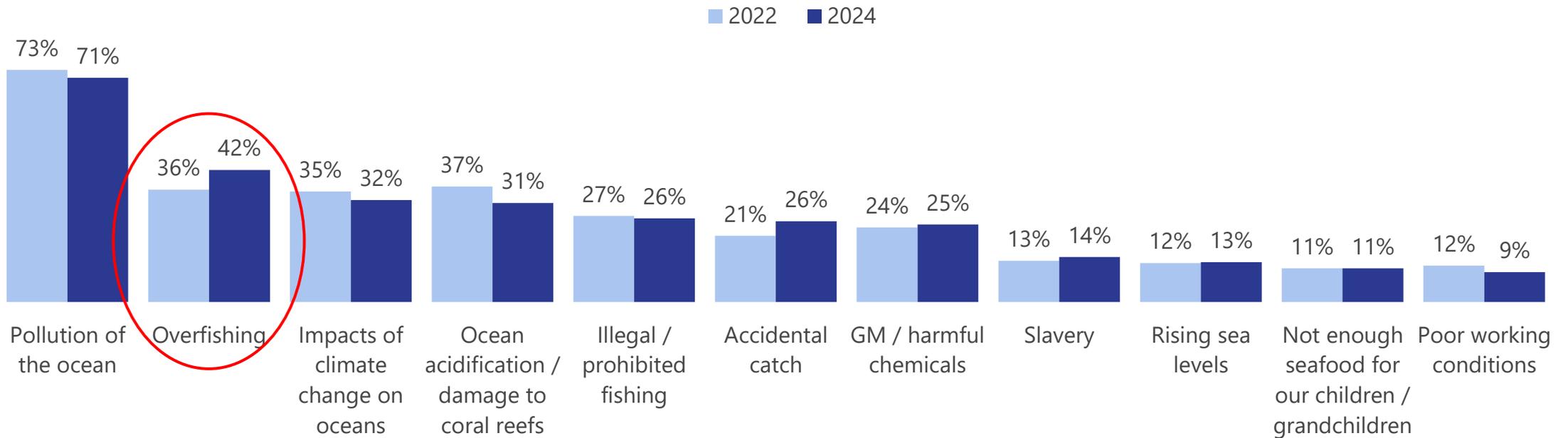
Base: Country Filter and 2024 - Seafood consumers: n=603

Q105: To what extent do you agree or disagree with the following statements? *Due to modifications to the questionnaire, this question was relocated to the beginning rather than its original placement closer to the end, potentially impacting tracking results

Q5: How well does each of the following statements describe your opinion?

Concern about fishing practices, specifically overfishing and accidental catch, has intensified since 2022

Issues (each respondent selected three issues), 2022–2024

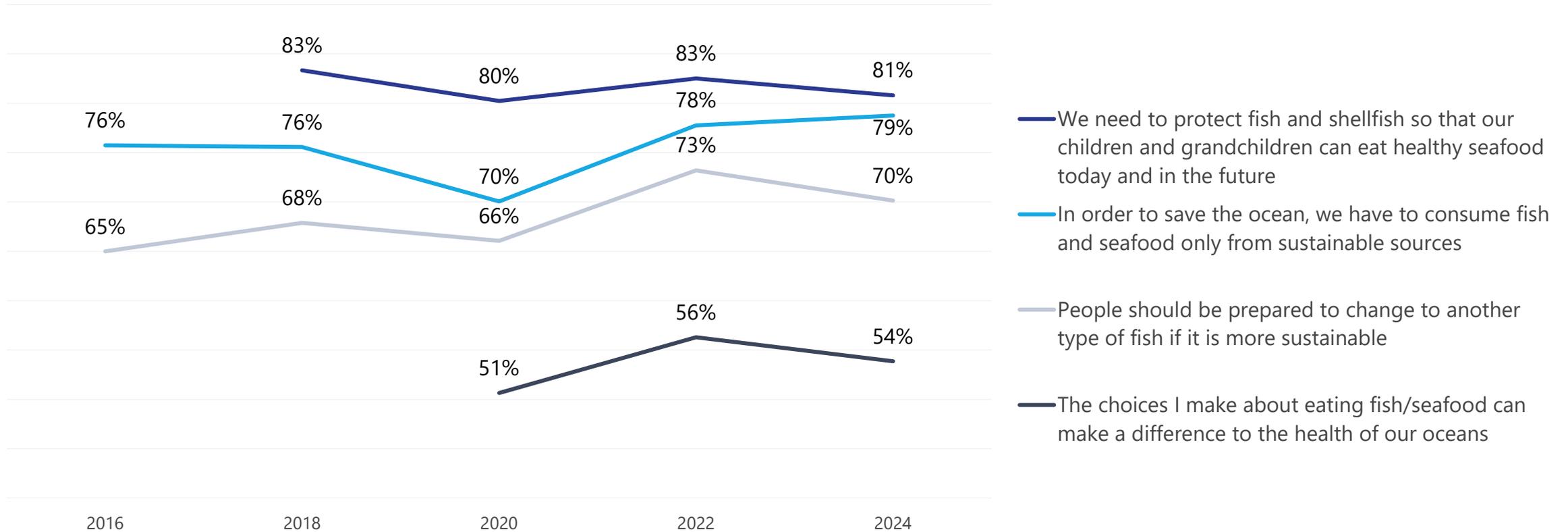


Base: Country Filter, 2024 and Status is Completes - Seafood consumers: n=603

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?

Individual empowerment has declined, with perceptions of the impact of consumer actions down across the board; the exception is agreement that to save the ocean we have to consume seafood only from sustainable sources, which has remained steady

Opinions on ocean sustainability, 2016–2024

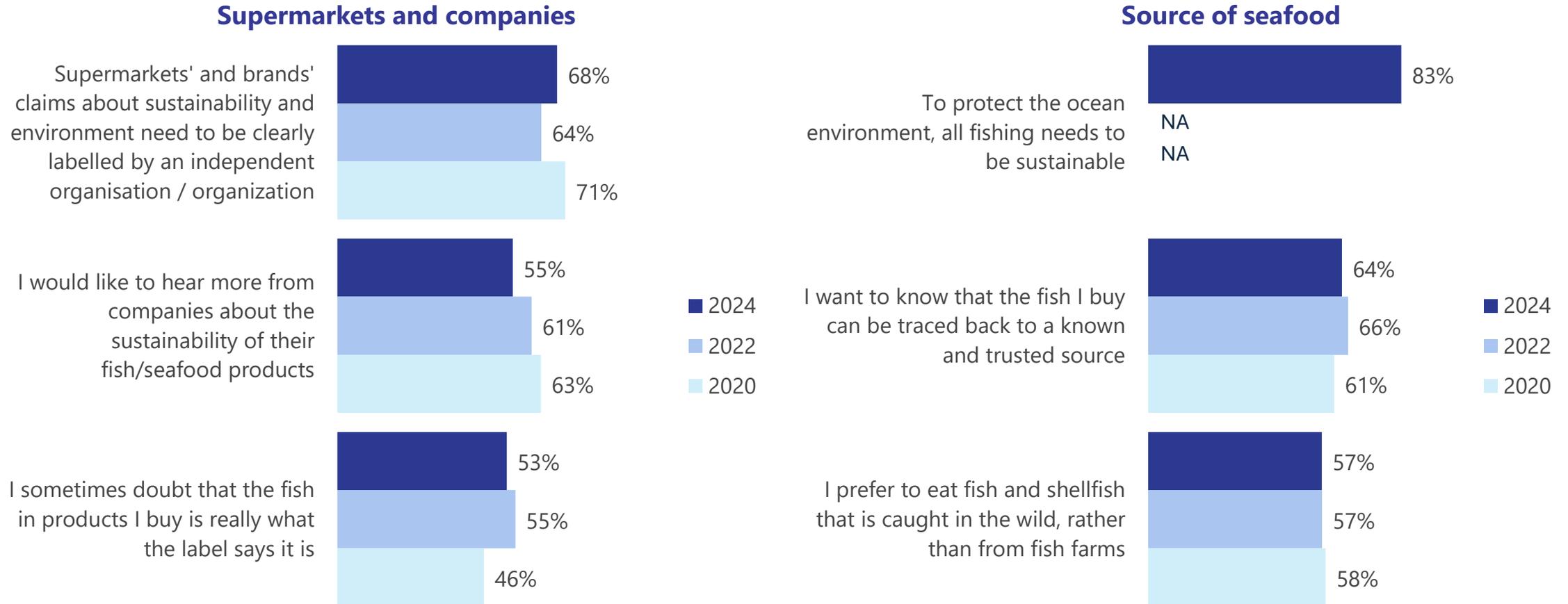


Base: Country Filter and 2024 - Seafood consumers: n=603

Q5.1: How well does each of the following statements describe your opinions?

Demand for independent labelling has increased, while demand for hearing from companies about sustainability and for information on traceability has declined slightly

Attitudes toward ocean sustainability issues, "describes opinion well," top three (5+6+7 on a 7-point scale), 2020–2024

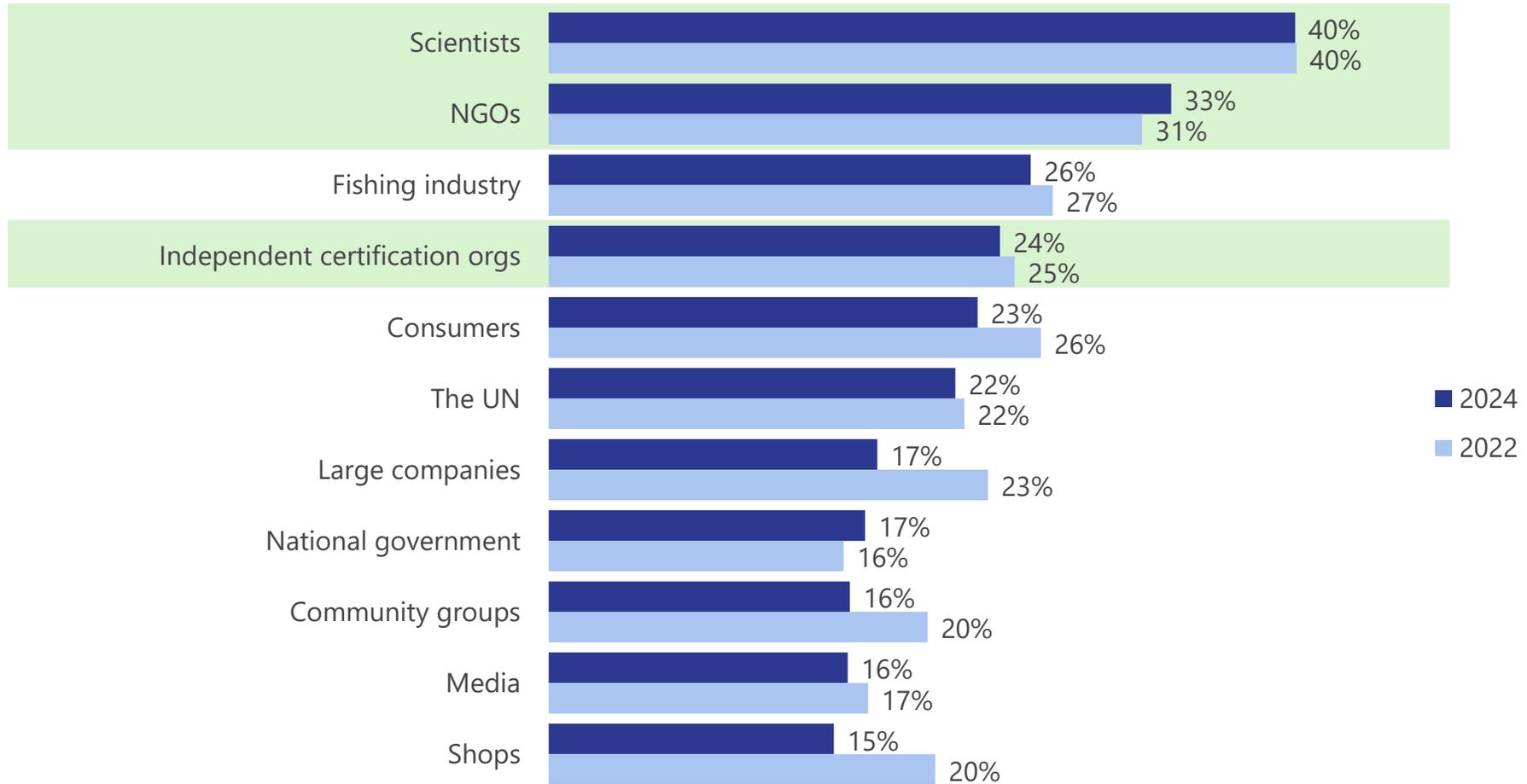


Base: Country Filter and 2024 - Seafood consumers: n=603

Q5.1: How well does each of the following statements describe your opinions?

Scientists and NGOs continue to be seen as leading on ocean protection, followed by the fishing industry, and then independent certifications

Contributing "very well" to protecting oceans, top two (6+7 on a 7-point scale), 2022–2024



Base: Country Filter and 2024 - Seafood consumers: n=603

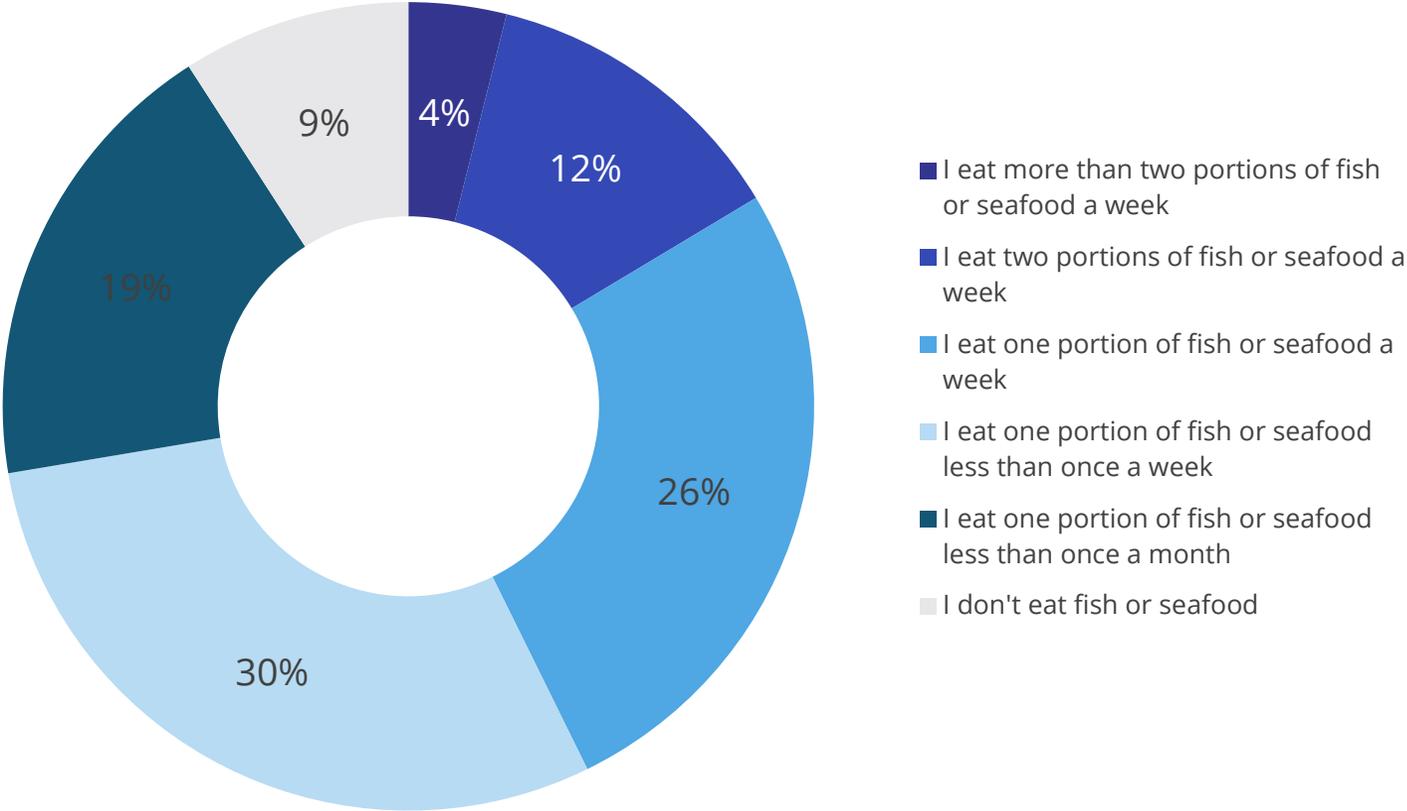
Q3.1: How well do you think the following institutions are contributing to protecting the ocean environment?



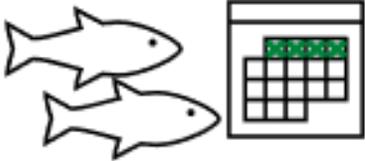
Love of Seafood

Just 16% of Finns eat the WHO recommended amount of seafood a week

Frequency of seafood consumption, 2024



16%
eat two or more portions
of seafood a week

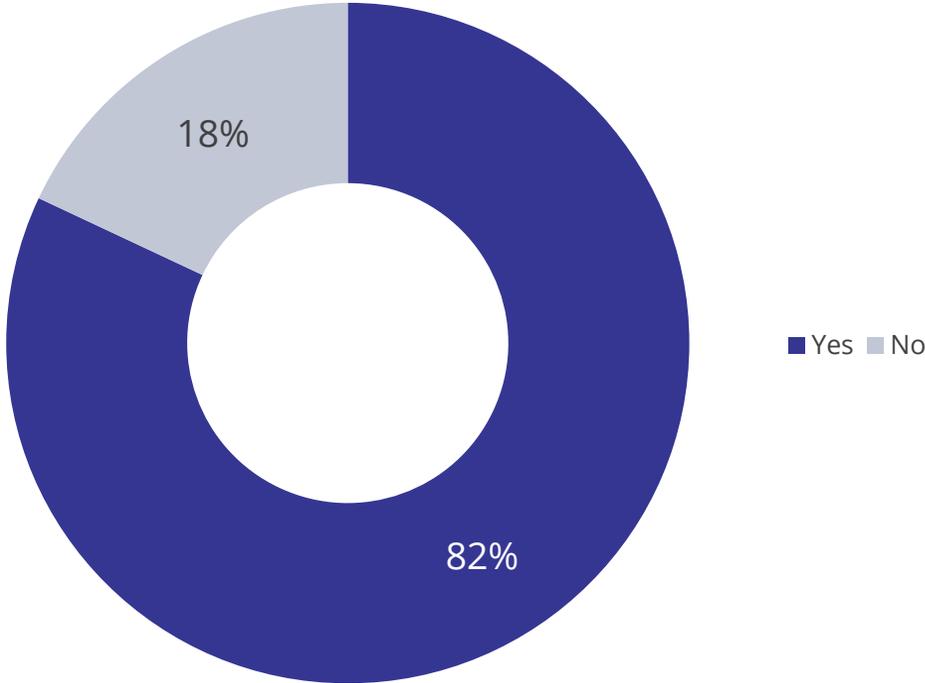


Base: Country Filter and 2024 - General public: n=775

Q2.5: How often do you eat a portion of fish? A portion of fish or seafood could be a piece of fish in a main meal, a prawn/shrimp sandwich, tinned tuna salad, or some fish sushi.

Claimed purchase of seafood in the past two months has remained steady

Claimed purchase of fish/seafood in past two months, 2022–2024



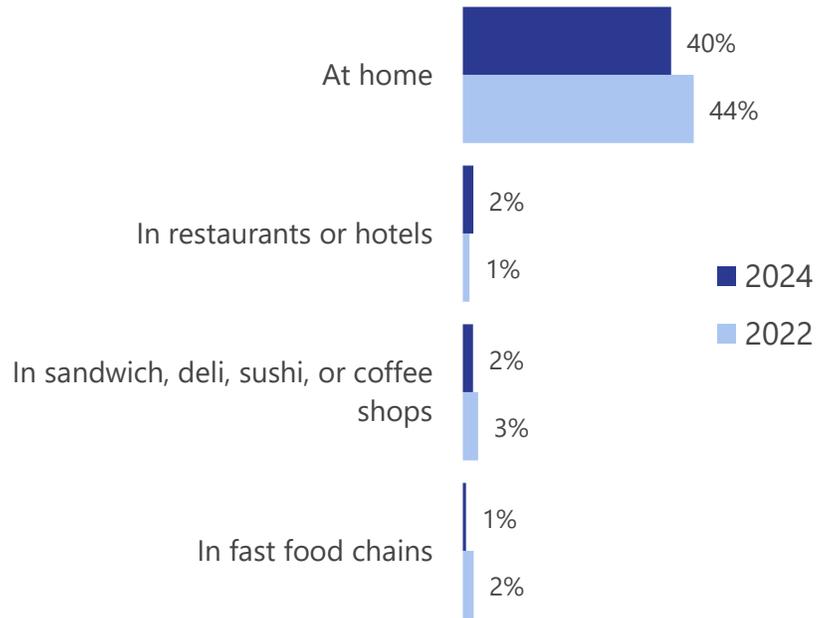
2022 "Yes": 81%

Base: Country Filter and 2024 - General public: n=775;

Q2.1: Have you or anybody in your household purchased fish or seafood products in the past two months?

People continue to most frequently eat seafood at home; purchase of tinned seafood has increased since 2022, while purchase of most other product types has stayed the same or declined slightly

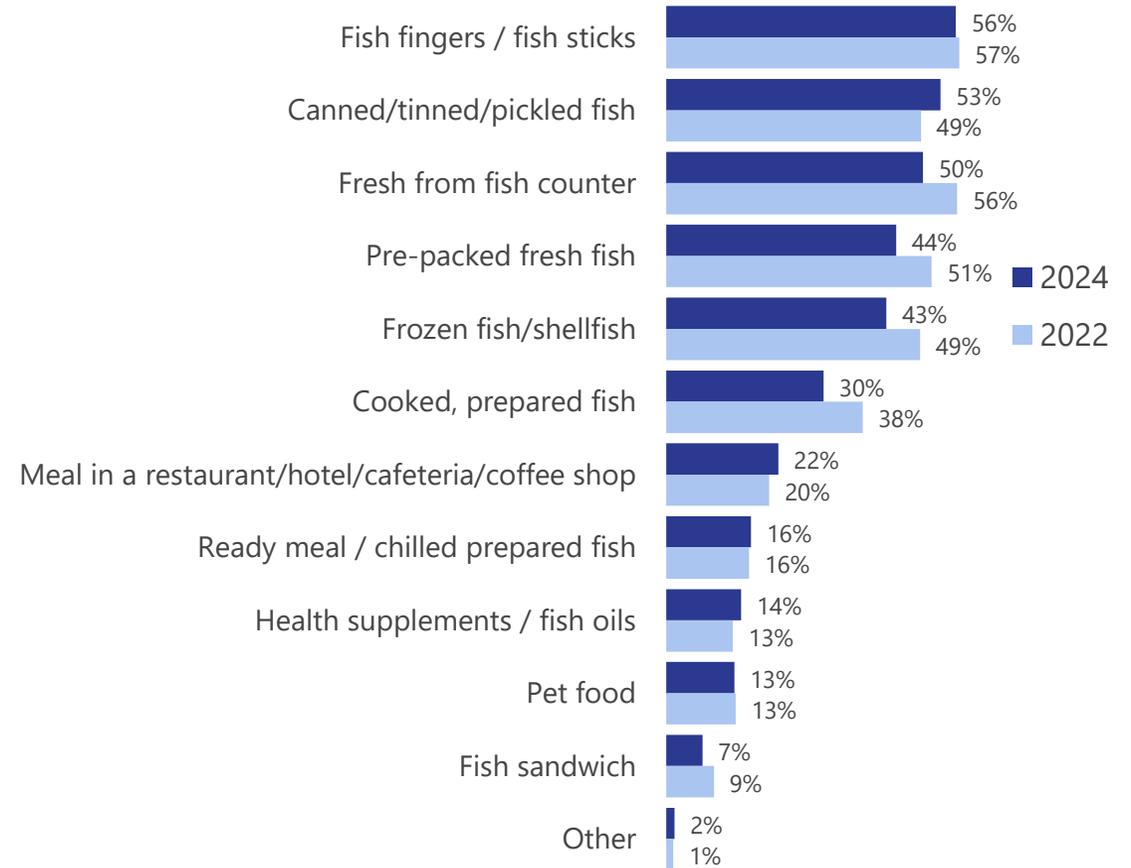
Frequency of fish/seafood consumption, very often (at least weekly), by location, 2022–2024



Base: Country Filter and 2024 - General public: n=775

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

Types of fish/seafood purchased frequently, 2022–2024



Base: Country Filter and 2024 - Seafood consumers: n=603

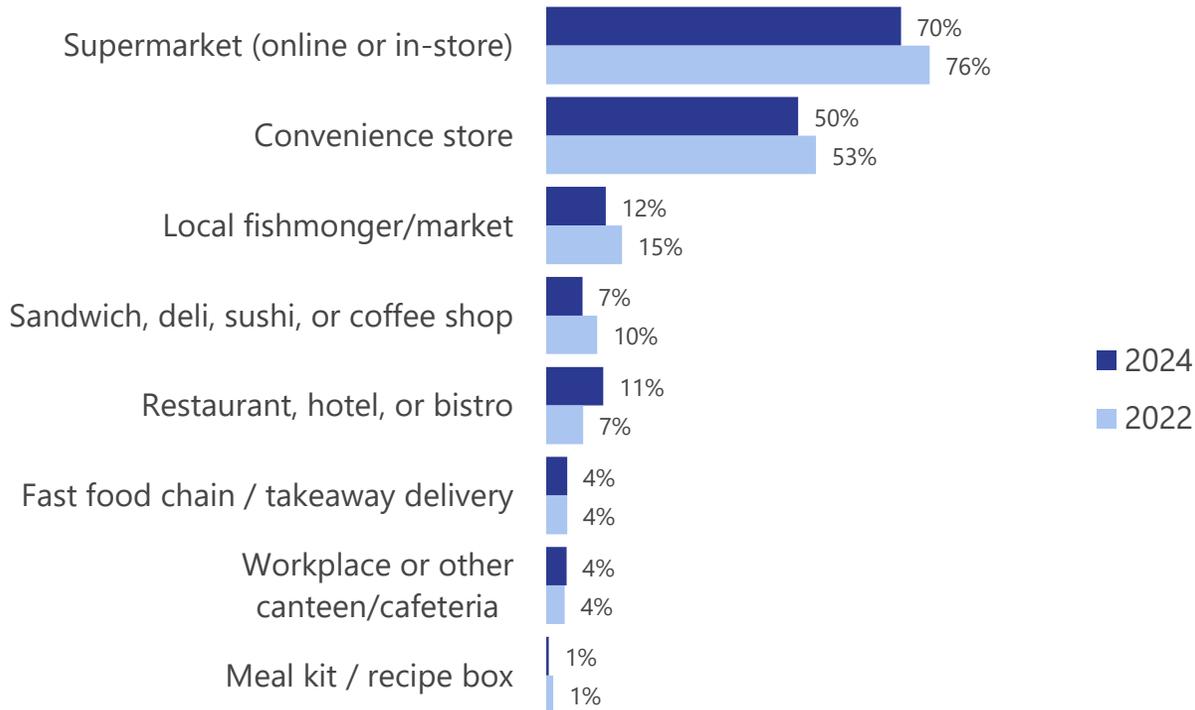
Q4.1: Which types of fish or seafood do you purchase frequently?



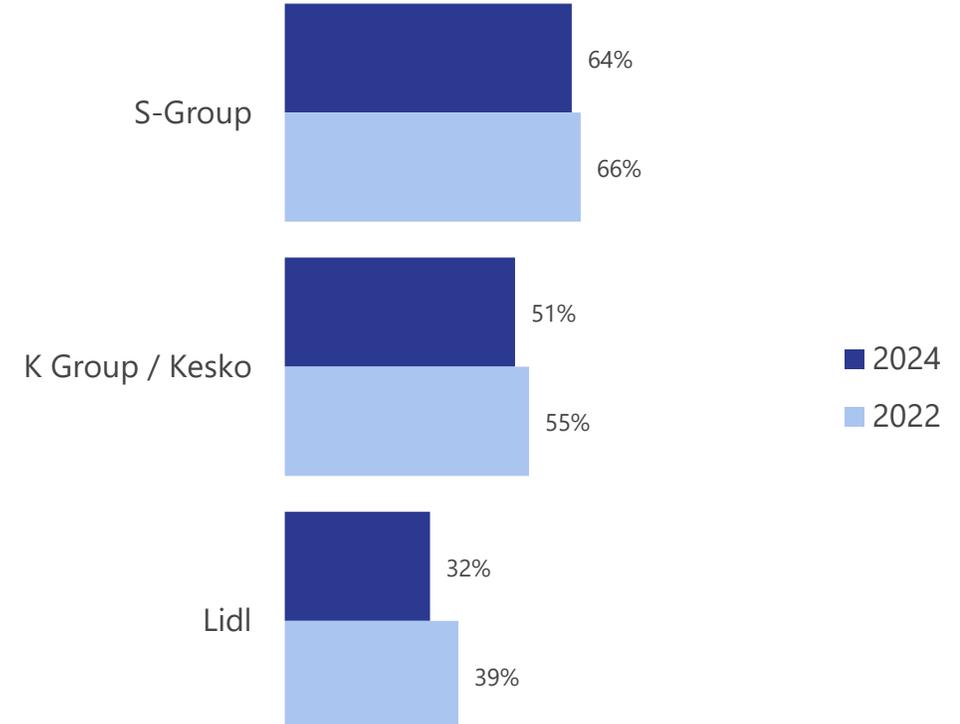
Supermarkets remain the most common location for buying seafood, despite a drop in supermarket purchases since 2022, with purchase also declining at convenience stores, local fishmongers, and delis; S-Group remains the most popular supermarket for seafood purchase

Seafood purchases, multi-select, 2022–2024

Fish/seafood purchase by type of outlet



Fish/seafood purchase in each supermarket



Base: Country Filter, 2024 and Status is Completes - Seafood consumers: n=579

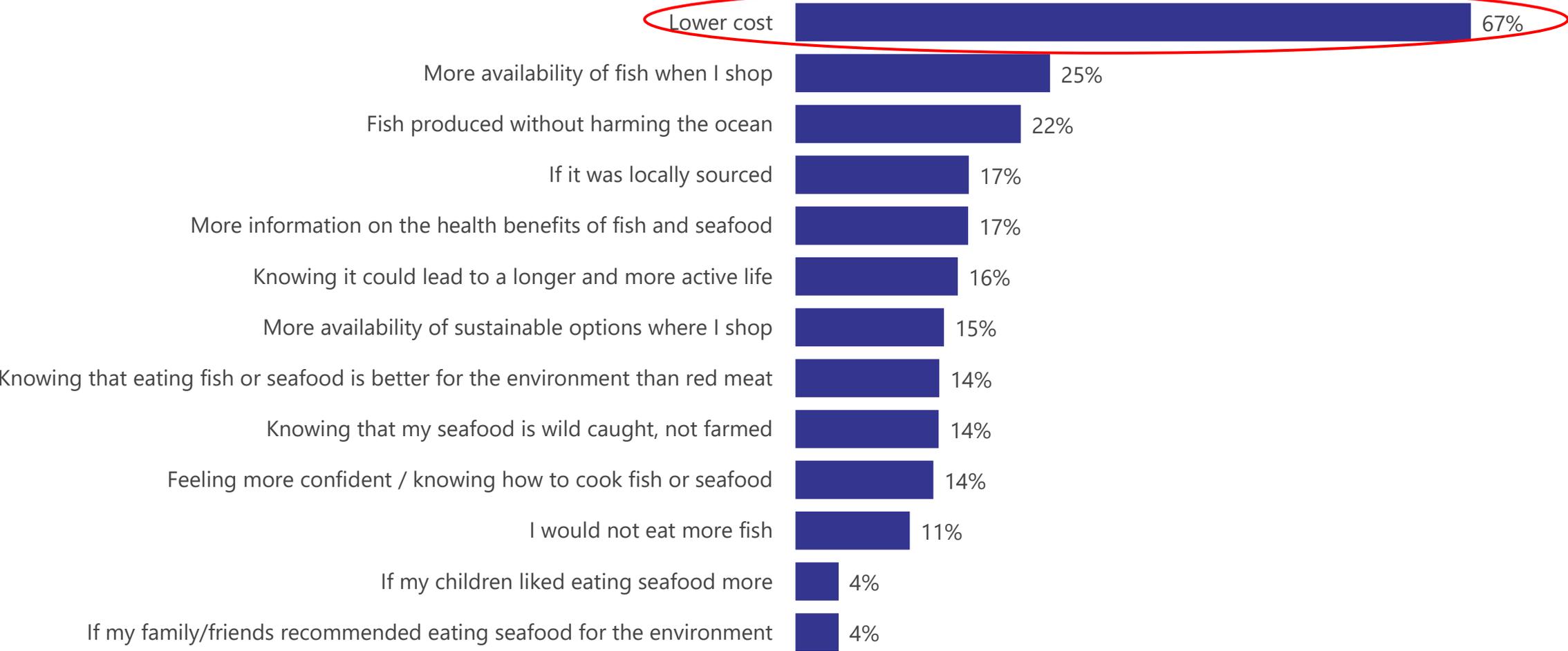
Q2.3: Where do you / your family usually buy fish and seafood products from?

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

Base: Country Filter, 2024 and Status is Completes - Consumers purchasing fish in supermarkets: n=408

Lower prices are by far the top way to encourage more seafood consumption

Ways to encourage people to eat more fish/seafood per week, seafood consumers, 2024



Base: Country Filter and 2024 - Seafood consumers: 603

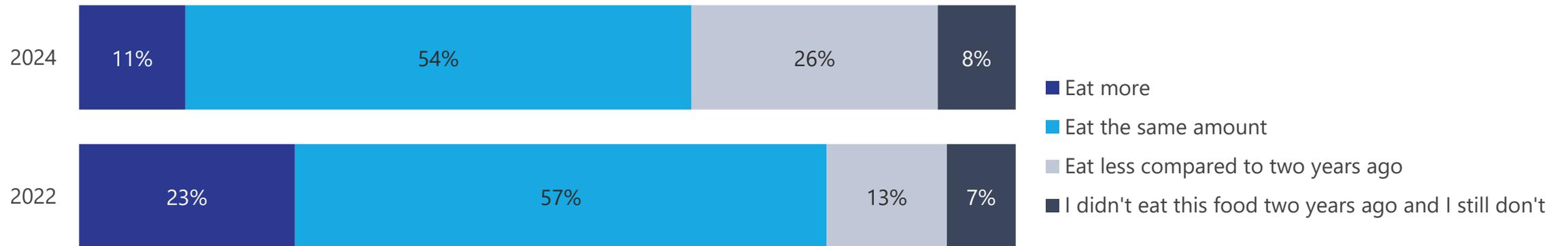
Q111: Which of the following reasons would encourage you to eat more fish/seafood per week?



Consumer Action and Diet

Finns are increasingly likely to state that they eat less rather than more fish compared to two years ago

Seafood consumption diet changes, general public, 2022–2024

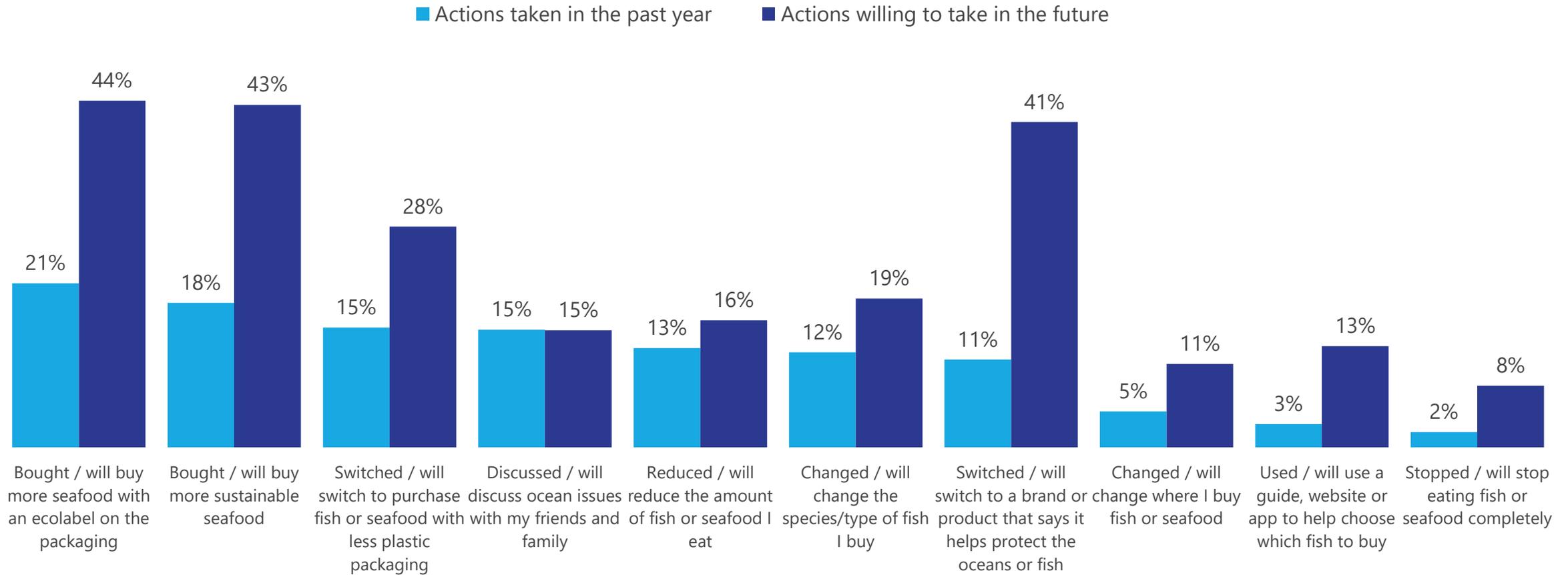


Base: Country Filter and 2024 - General public: n=775

Q101: Do you eat more or less of the following foods than you did two years ago? *Scale changed in 2024 to a 5-point scale from a 4-point scale, new point on scale: "I didn't eat this food two years ago and I still don't"

Seafood consumers want to do their bit to protect fish and seafood – the most common actions are buying more sustainable or ecolabelled seafood, switching to products with less plastic packaging, and discussing ocean issues

Actions consumers have taken and would be willing to take to protect the fish and seafood in our oceans, multi-select, 2024



Base: Country Filter and 2024 - Seafood consumers: n=603

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?



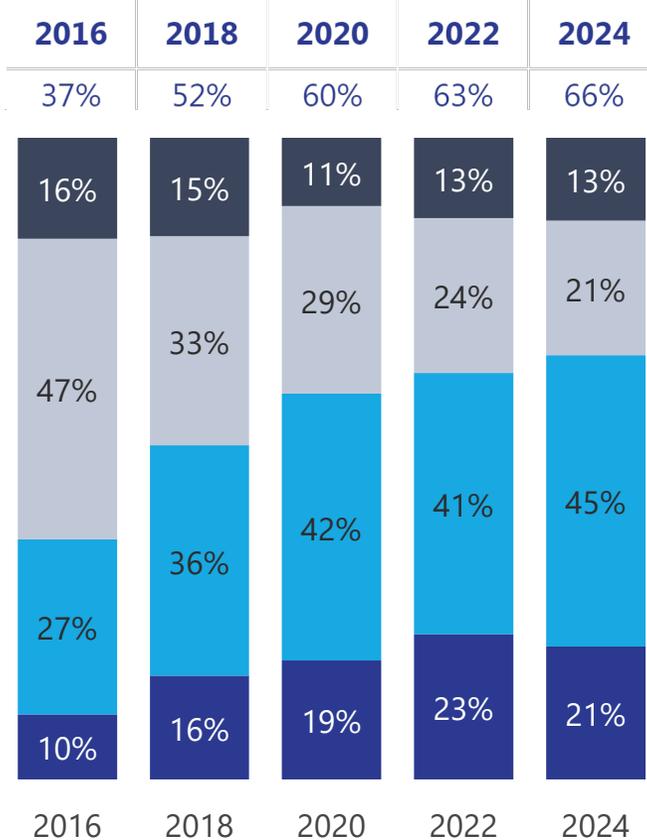
MSC Awareness, Trust, and Understanding

Awareness of the MSC label has been increasing steadily since 2016, the most recalled locations for seeing the label are product packaging and in-store

Frequency of seeing the MSC label, 2016–2024



Seen occasionally + often*



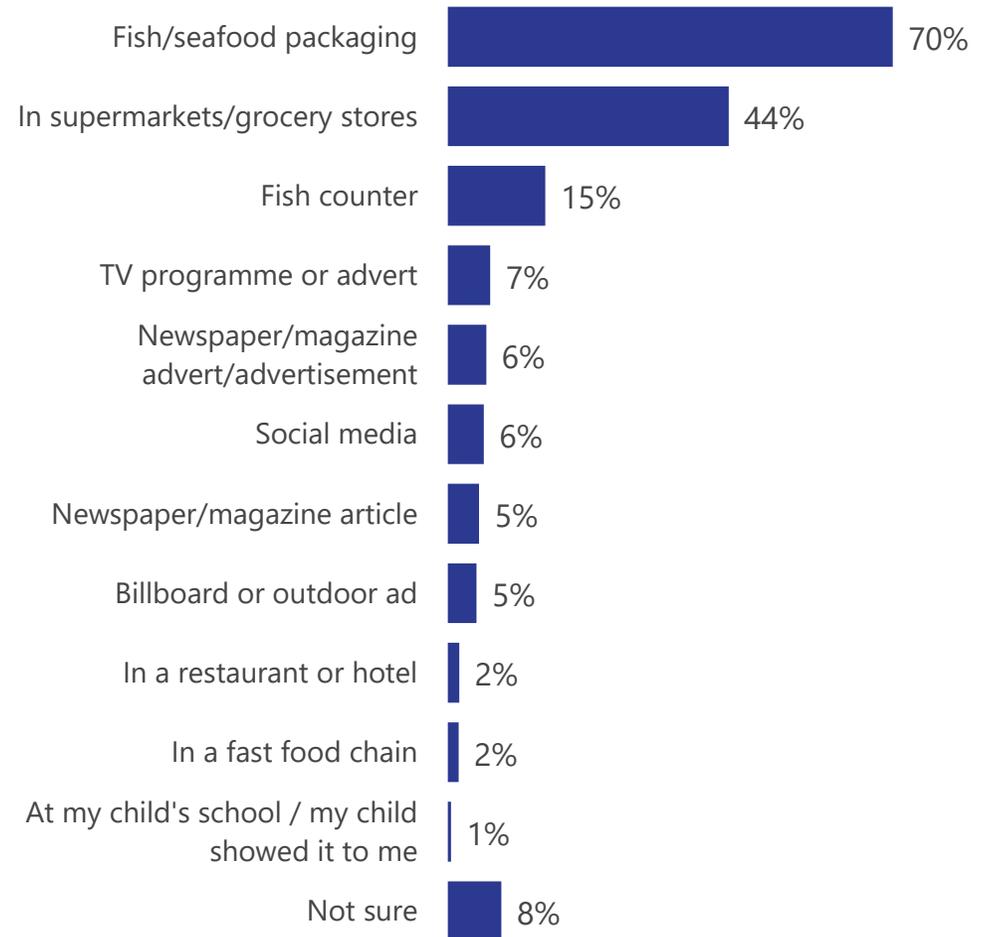
- Not sure
- No, never seen
- Yes, seen occasionally
- Yes, seen often

*may not be a total of the seen occasionally + often due to rounding

Base: Country Filter and 2024 - General public: n=775

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

Locations where consumers recall seeing the MSC label, 2024



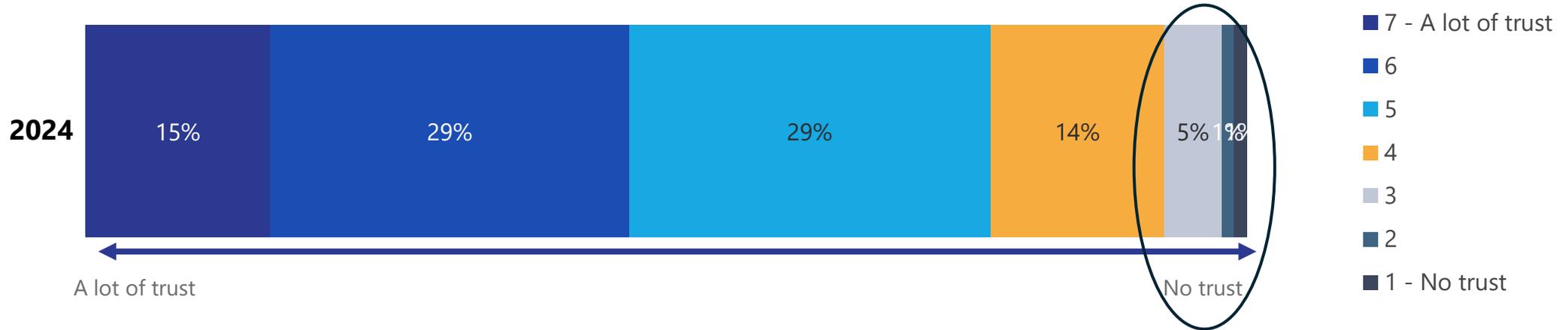
Base: Country Filter, 2024 and MSC-aware: n=426

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



Trust in MSC among those who recall seeing the label remains high, though it has declined since 2022 and is below 2020 levels

Trust in the MSC label among MSC-aware consumers, 7-point scale, 2018–2024



Trust MSC (5+6+7), MSC-aware consumers, 2018–2024

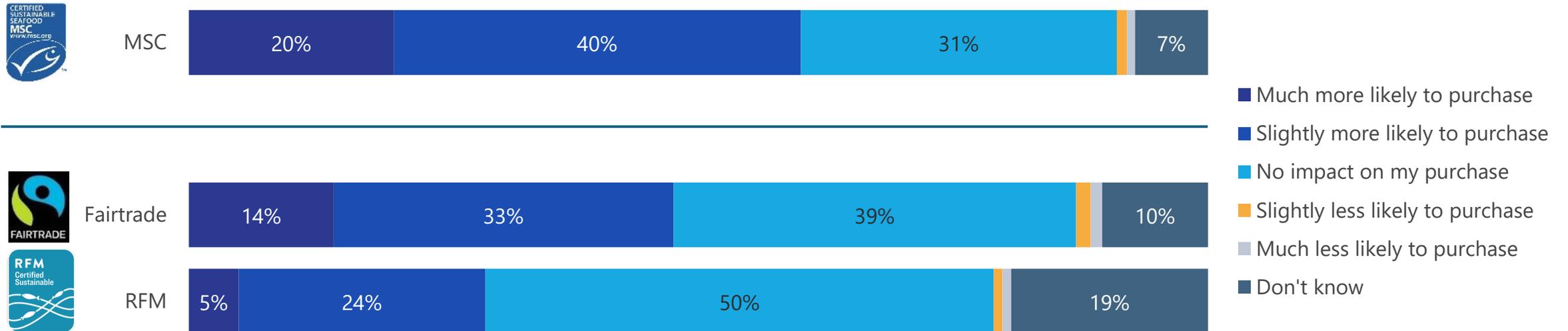


Base: Country Filter, 2024 and MSC-aware: n=426

Q9.2: How much trust do you have in the claims of the following organisations?

Three in five seafood consumers say seeing the MSC label would make them more likely to purchase a product, more than the proportion of those who say the same for Fairtrade

Impact labels have on likelihood to purchase, 5-point scale, 2024

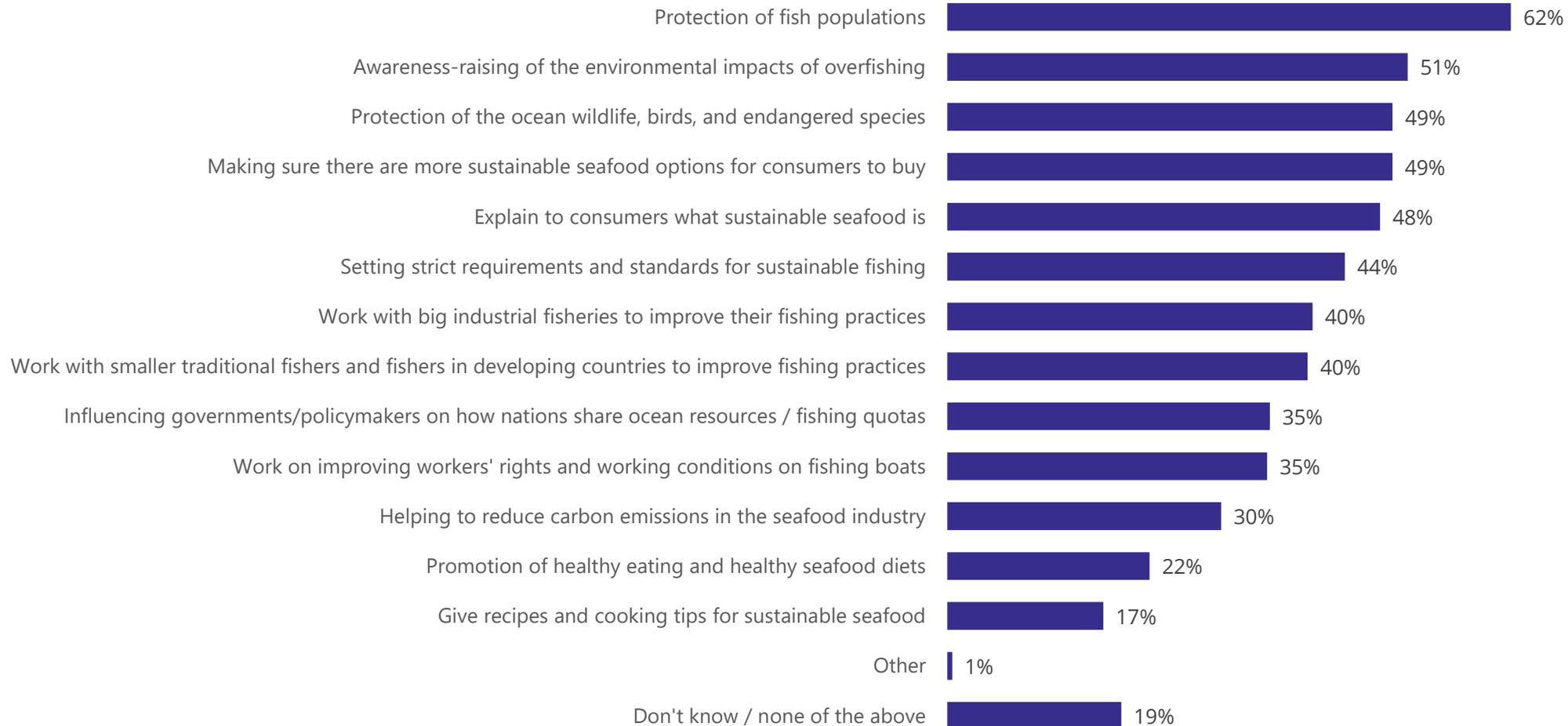


Base: Country Filter and 2024 - Seafood consumers: 603

Q104: What impact would the following labels have on your likelihood to purchase a product?

MSC is expected to play a role in protecting fish populations and ocean wildlife, awareness raising and consumer education, and ensuring the availability of sustainable options for consumers

Areas Where MSC should play a role, multi-select, 2024



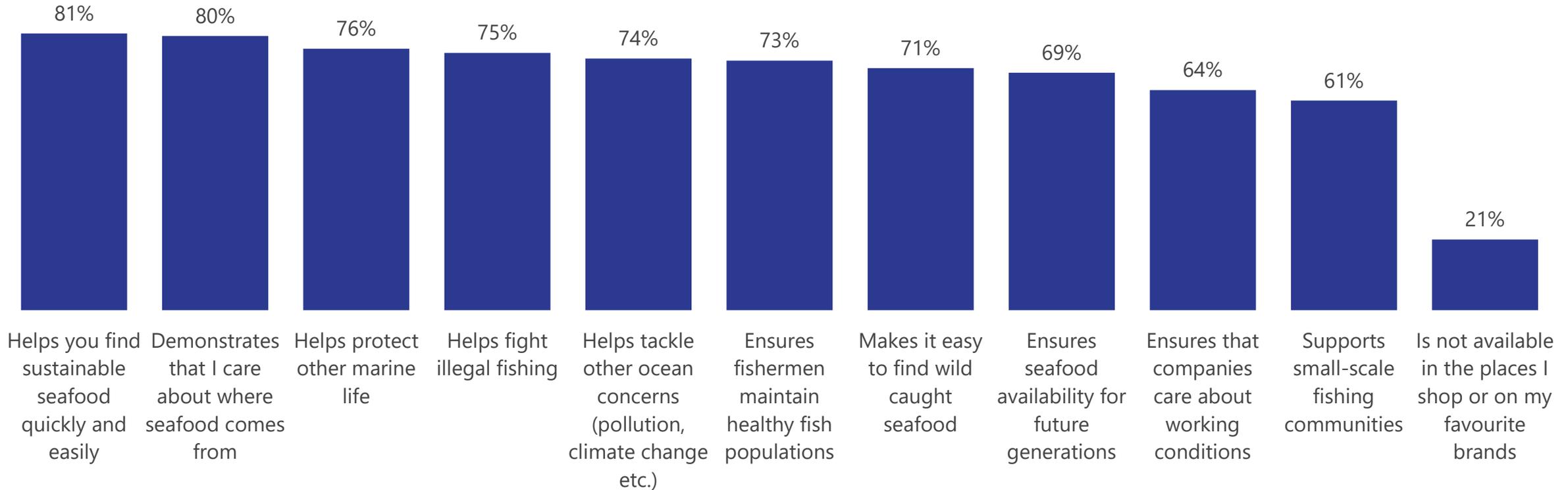
Base: Country Filter and 2024 - Seafood consumers: 603

Q109: Which of the following areas do you think MSC should play a role in?



MSC-aware Finns perceive MSC helpful in identifying sustainable seafood and demonstrating they care about where seafood comes from; strong majorities also associate MSC with protecting marine life, fighting illegal fishing and tackling ocean concerns

Describes MSC well, top three (5+6+7 on a 7-point scale, excluding don't now), 2024



Base: Country Filter, 2024 and MSC-aware: n=426

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





Targeting Consumers: The MSC Blues Segment and Channels

Introducing the MSC Blues:

22%
of seafood consumers 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.



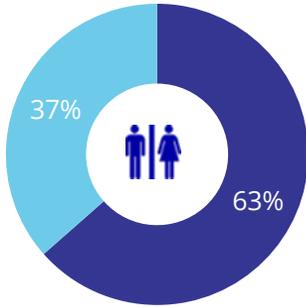
Awareness

76%

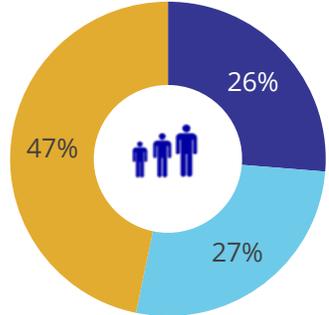
Trust MSC (5+6+7 on a 7-point scale)

91%

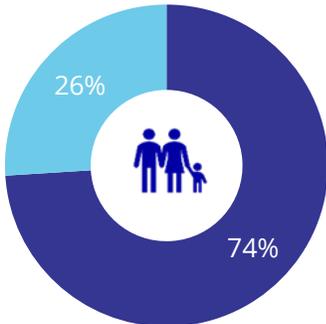
Demographics



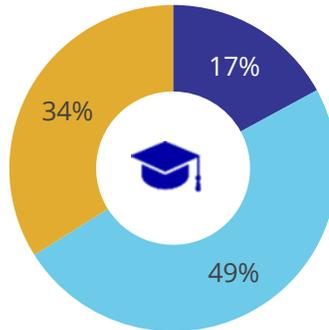
■ Female
■ Male



■ 18-34
■ 35-54
■ 55+



■ Non Parent
■ Parent



■ Low education
■ Medium education
■ High education

Interests, top five



Preferred channels (at least weekly use)

