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# MSC Consumer Insights 2018

Finland results

*GlobeScan, June 2018*



# Contact Us

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evidence and ideas. applied.

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**Project: 3505**

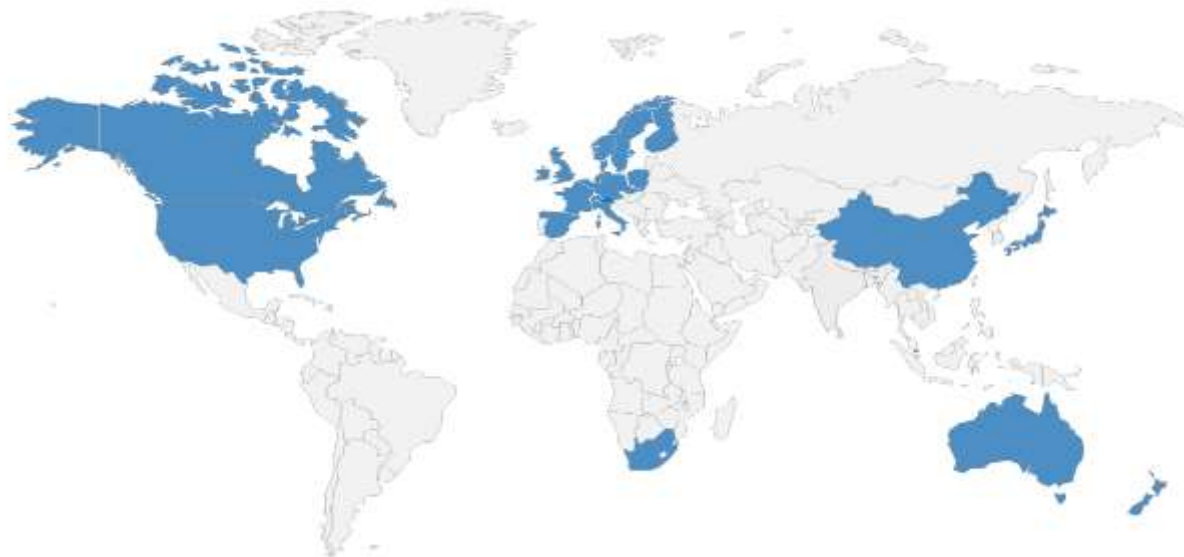


# Introduction and Methodology

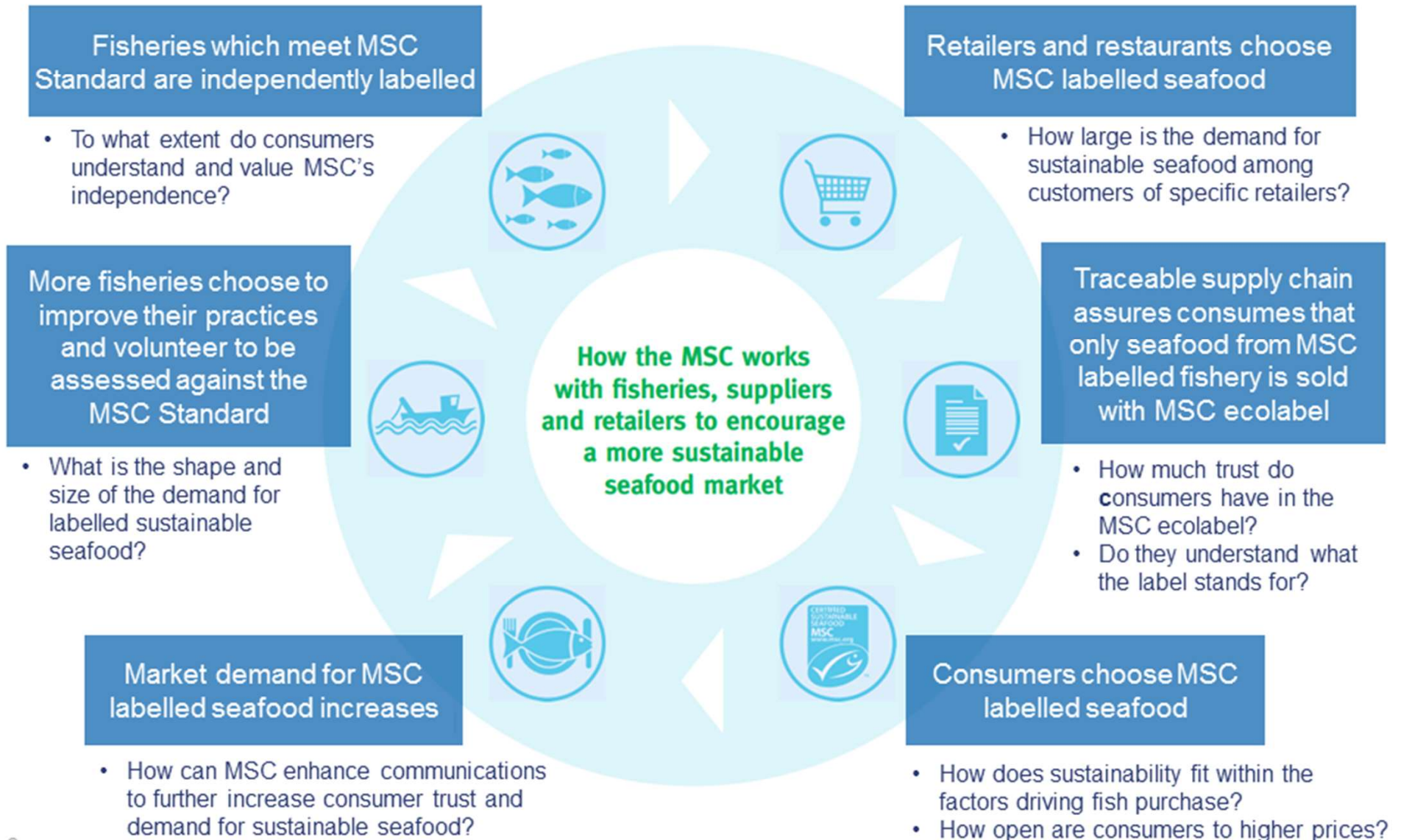
The Marine Stewardship Council has partnered with GlobeScan to conduct a global research study into consumer perceptions. This online quantitative study tracks a similar study in 2016.

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.



# How Consumer Intelligence Supports MSC Theory of Change



# Understanding the Consumers in this Study

	Type of consumer	Description	Finland sample size 2018	How do we know if changes since 2016 are significant?
	<b>General public</b>	A representative sample of consumers across the country (as far as possible using online surveys)	<i>n</i> =919	Differences of +/- 3 percentage points are statistically significant (approx.)
	<b>Seafood consumers</b>	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> =649	Differences of +/- 4 percentage points are statistically significant (approx.)
	<b>MSC-aware consumers</b>	Seafood consumers who recall having seen the MSC label “often” or “occasionally”	<i>n</i> =392	Differences of +/- 5 percentage points are statistically significant (approx.)
	<b>Seafood lovers</b>	Consumers who “really like” to eat seafood	<i>n</i> =325	<i>Not applicable; no tracking since 2016 (we didn't ask this question previously)</i>
	<b>Coastal consumers</b>	Seafood consumers who live on the coast or visit the coast every day	<i>Not applicable – sample too small</i>	<i>Not applicable</i>



# Executive Summary



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# MSC Finland Country Dashboard

## Love of seafood and the oceans



**83%**

Regularly purchase seafood

Base: General public, Finland



**36%**

Love to eat seafood

Base: General public, Finland



**76%**

Believe we need to switch to only sustainable sources

Base: Seafood consumers, Finland

Top six motivators of seafood purchase (of 21 factors tested):

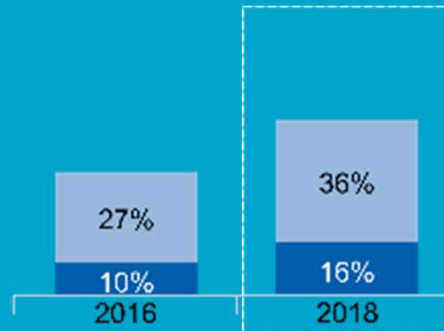
- 1 Safe to eat
- 2 Taste
- 3 Fresh
- 4 Good for my health / my family
- 5 Price
- 6 Easy to cook

Base: Seafood consumers, Finland

## MSC awareness and understanding

Awareness of MSC label

■ Seen often ■ Seen occasionally



Base: General public, Finland

Unprompted understanding

**35%** associate MSC with ocean sustainability  
**11%** mention certification

Base: Seafood consumers, Finland

Trust in MSC

2016

**70%**



2018

**68%**



Base: MSC-aware consumers, Finland

## Optimal messaging and label wording

Most motivating messages

Ensures seafood availability for future generations

Helps stop the destruction of life in oceans

Helps protect our oceans

Base: Seafood consumers, Finland

Most compelling label wording

Vastuullisesti pyydetty  
 Vastuullinen  
 Sertifioitu  
 msc.org



Base: Seafood consumers, Finland





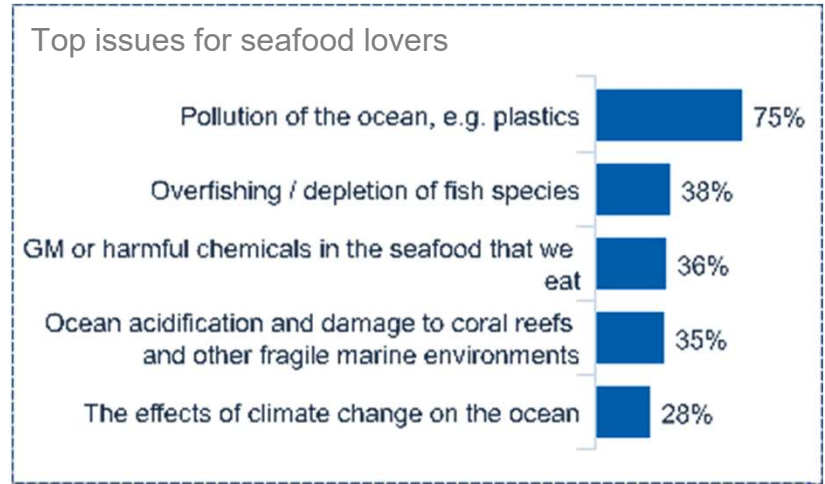
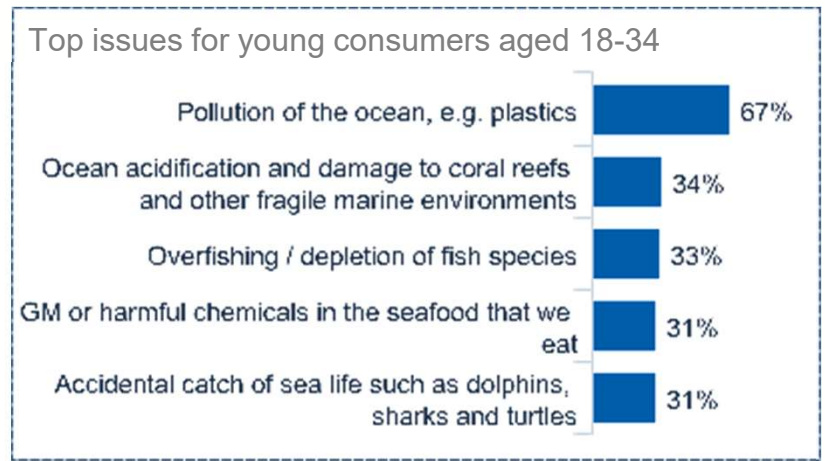
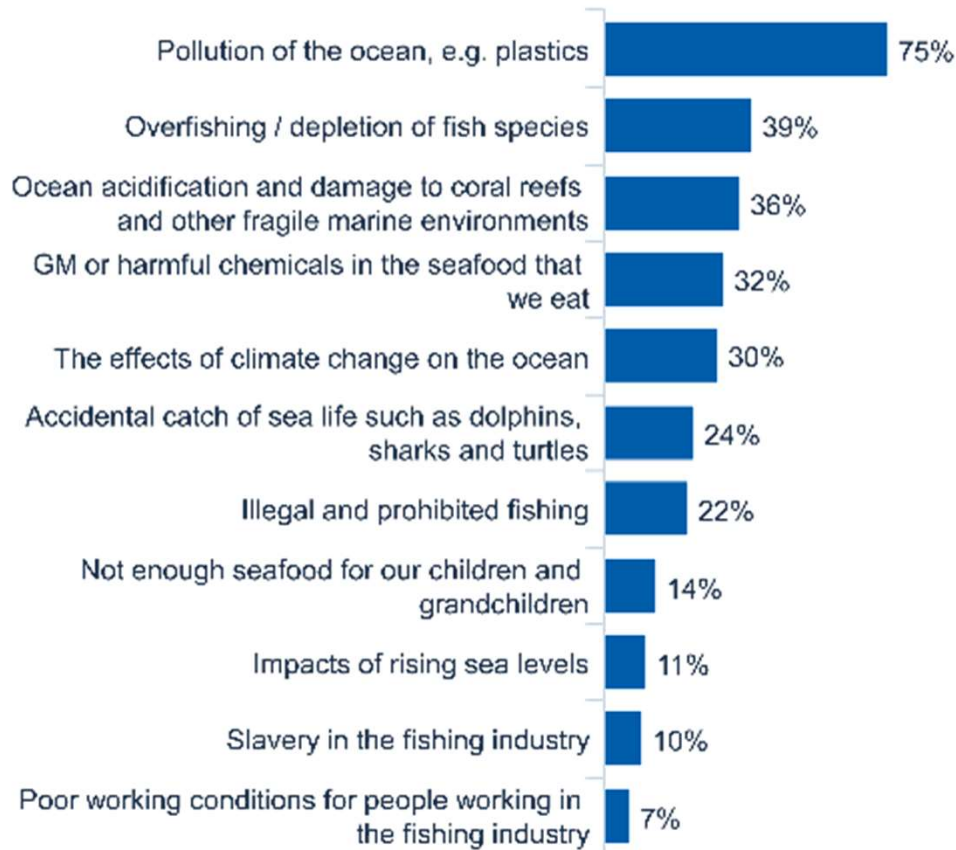
# Ocean Sustainability Context





# Most Concerning Threats to Oceans

Issues (each respondent selected three issues)



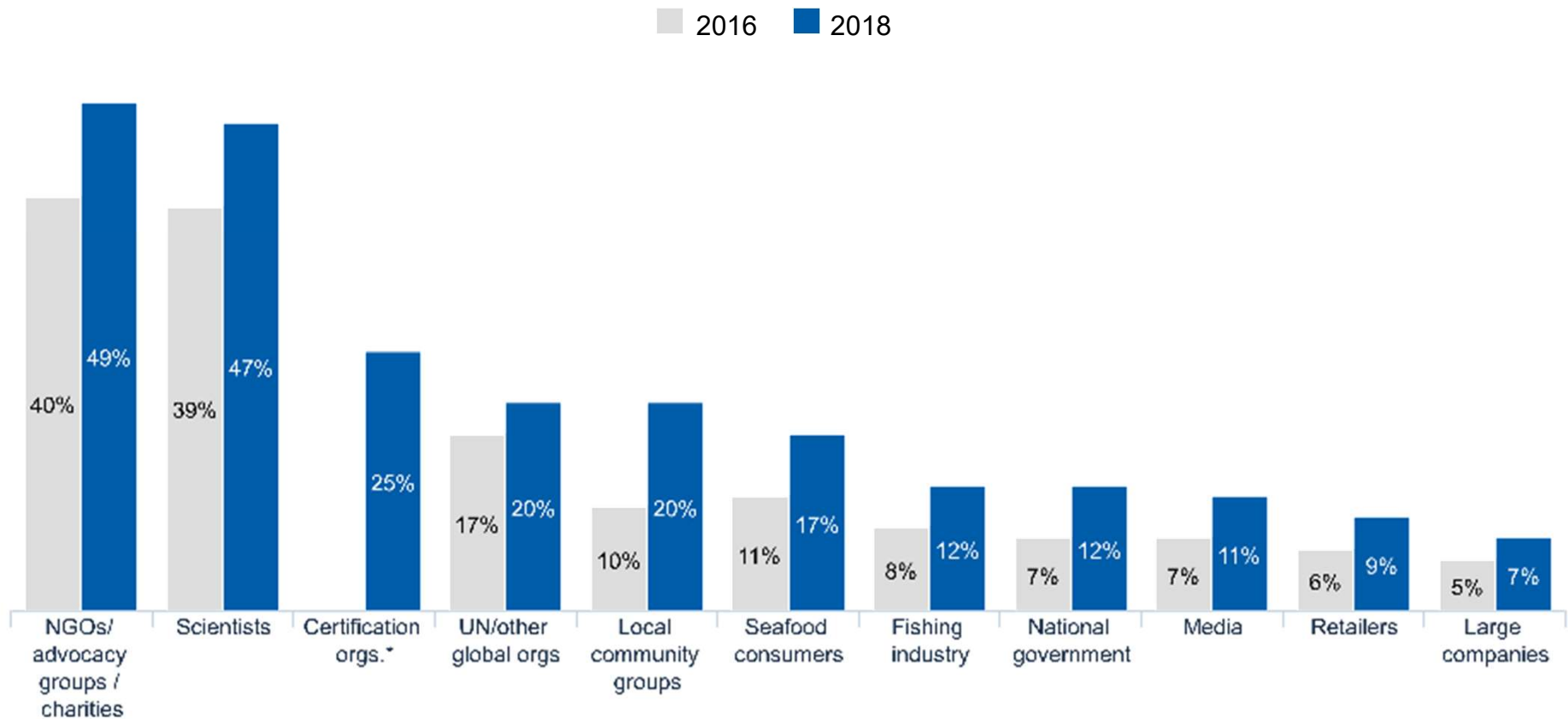
Base: Seafood consumers, Finland

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

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



Base: Seafood consumers, Finland

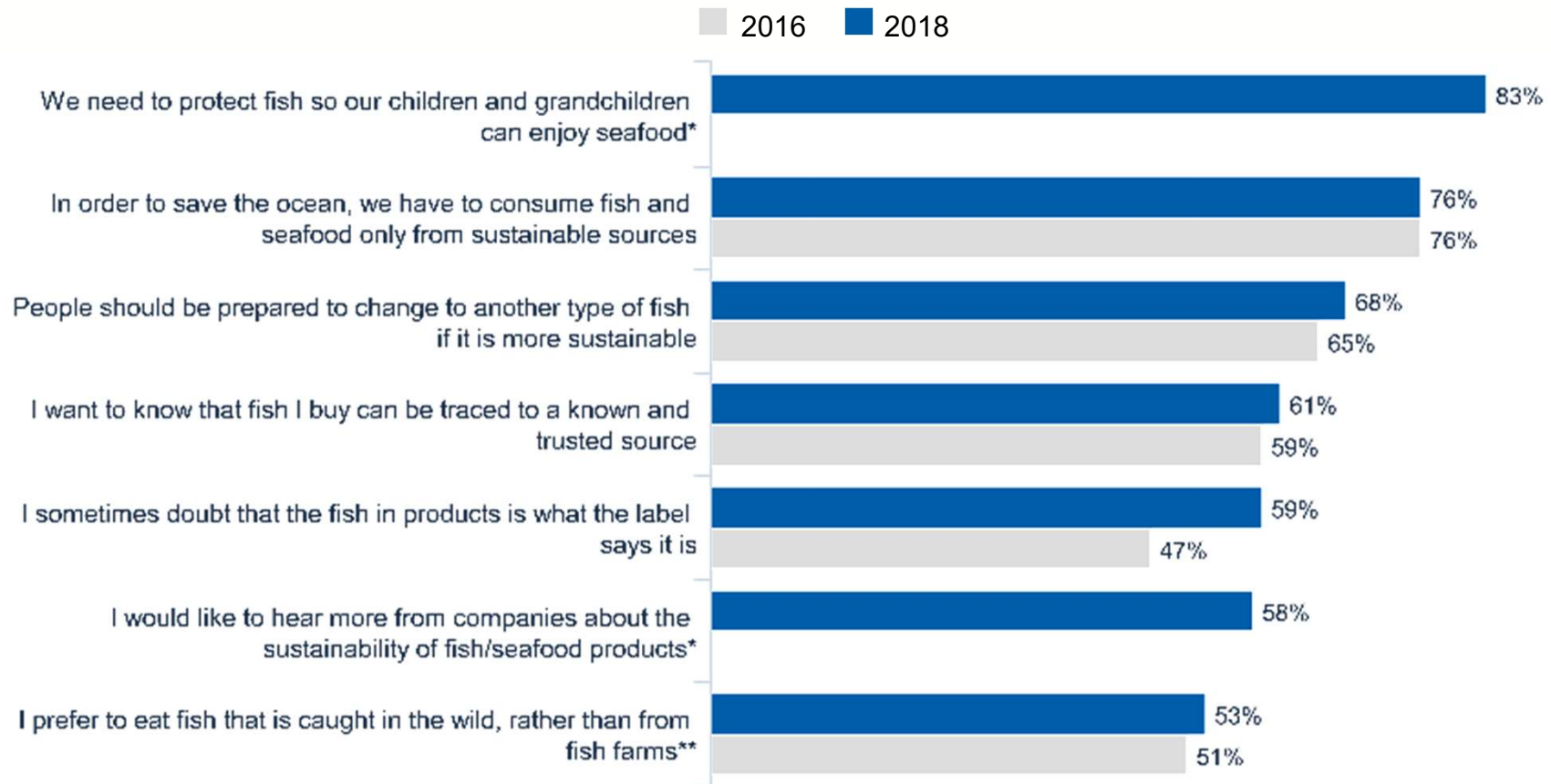
\*No tracking data available

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



# Perspectives on Ocean Sustainability and Fish

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



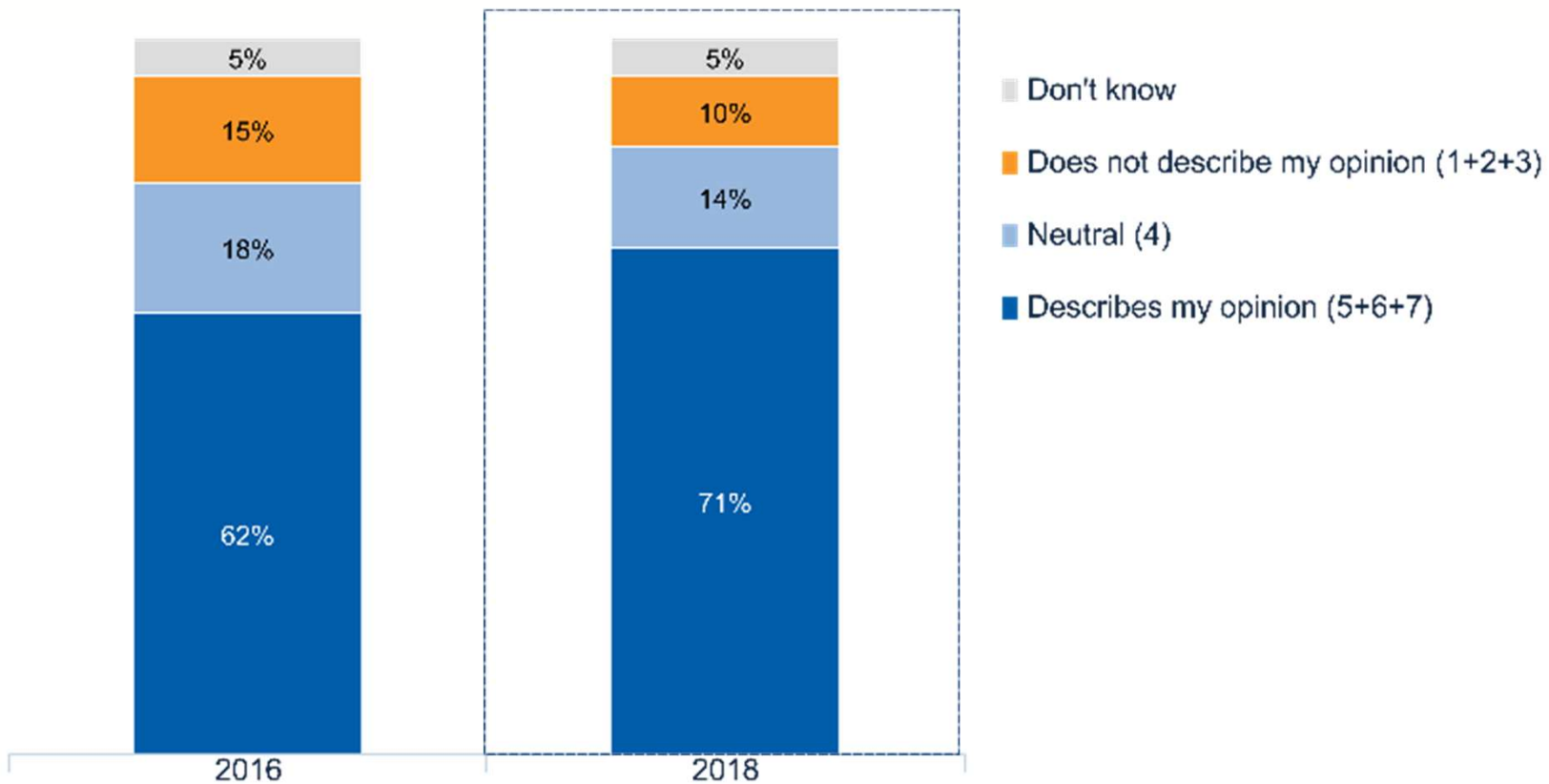
Base: Seafood consumers, Finland

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

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

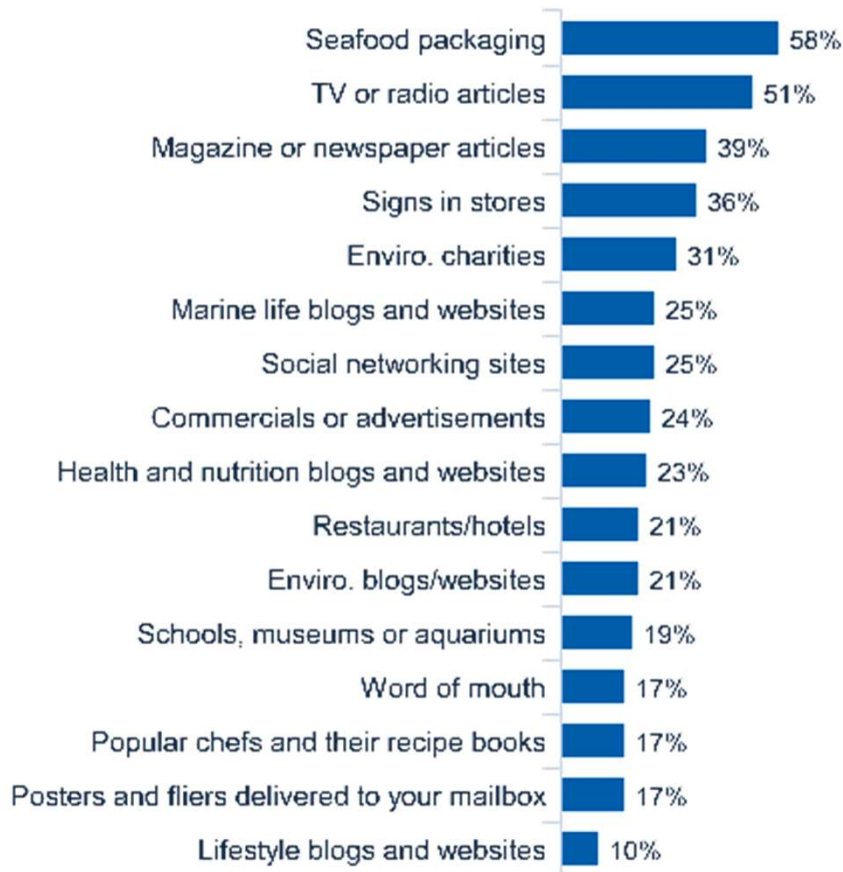


Base: Seafood consumers, Finland

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”

# How Consumers Learn about Sustainable Seafood

Percentage choosing each channel



Top channels for young consumers aged 18-34



Top channels for seafood lovers



Base: Seafood consumers, Finland

Q13.1: How would you like to find out more about sustainable fish and seafood?

A photograph of two fishermen sitting at a table in a restaurant, eating a meal of fish and chips. The man on the left is wearing a blue jacket and yellow overalls, smiling as he eats. The man on the right is wearing a red jacket and red overalls, also smiling and eating. In the background, a window displays 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.

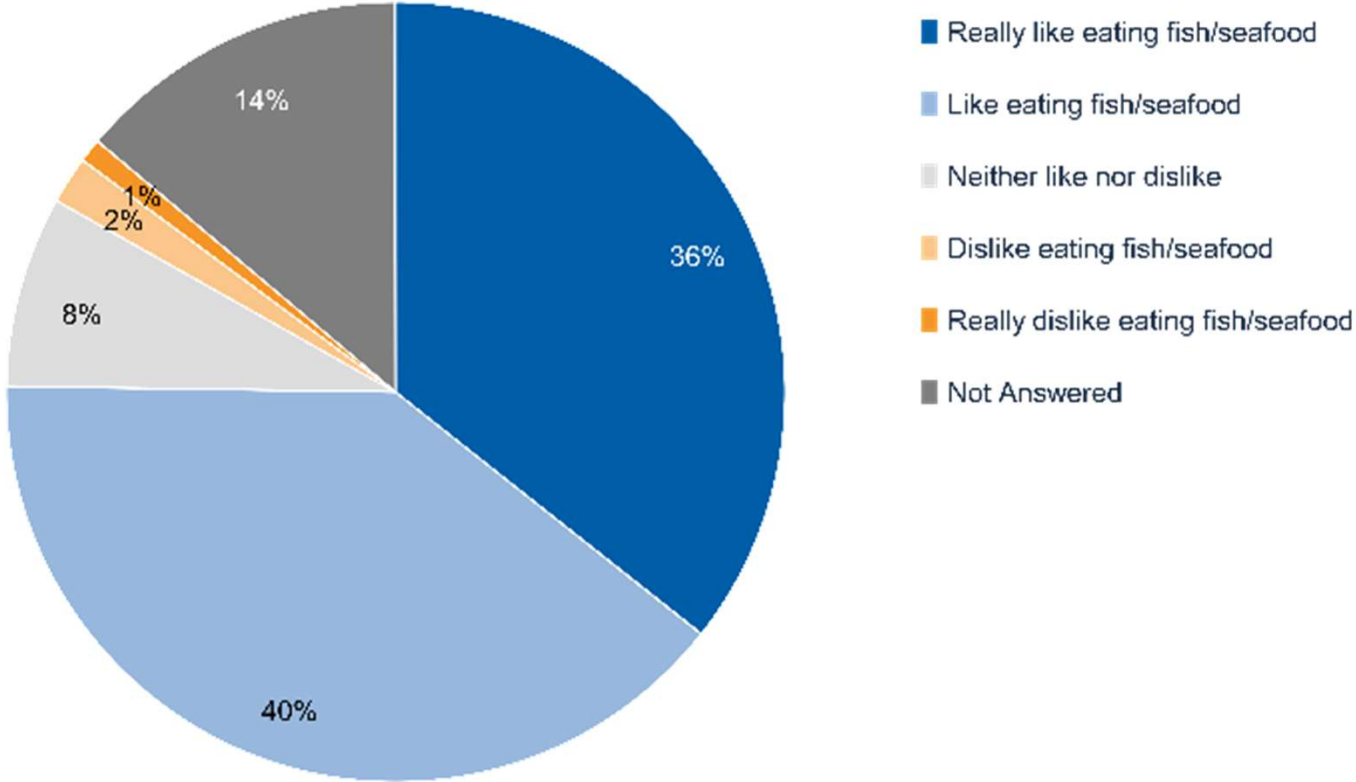
## Love of Seafood



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# Consumer Love for Fish and Seafood

Personal enjoyment of eating fish/seafood

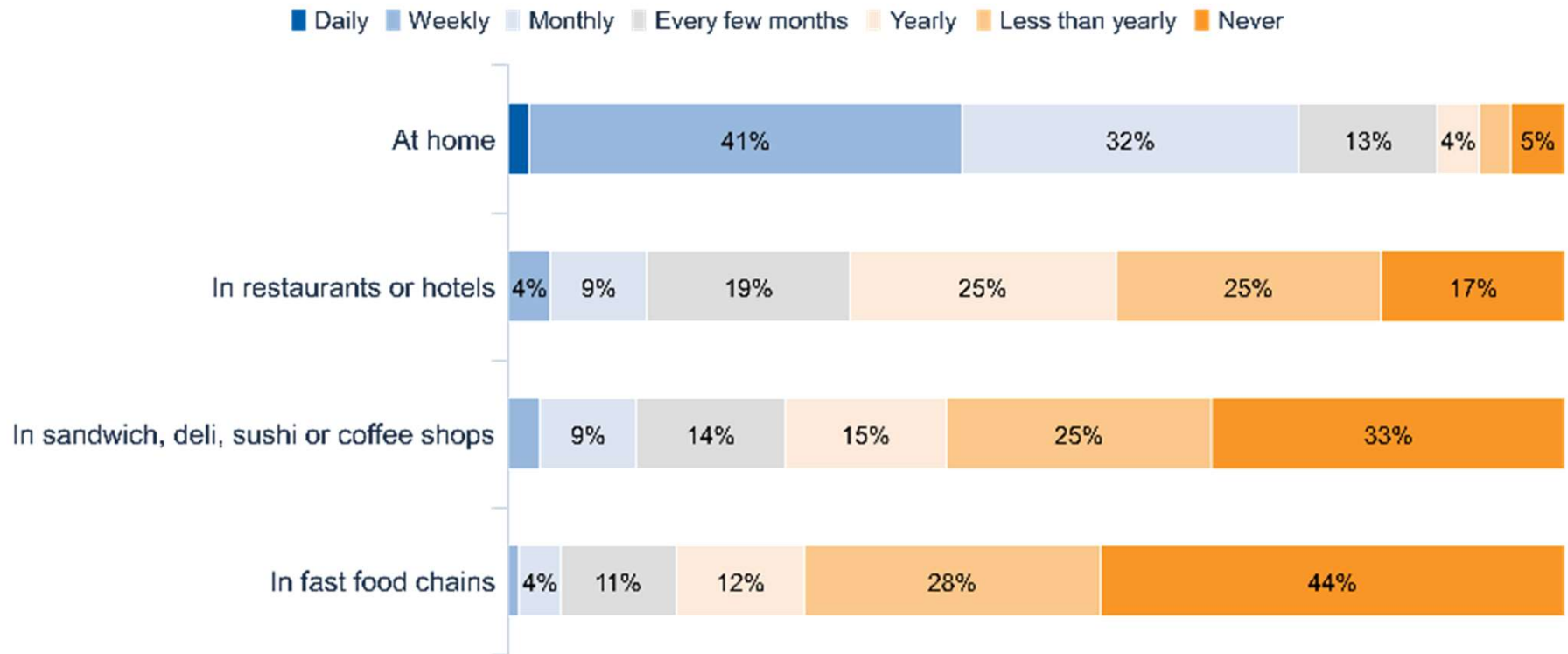


Base: General public, Finland

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"

# Frequency of Fish/Seafood Consumption

Frequency of fish/seafood consumption, by location



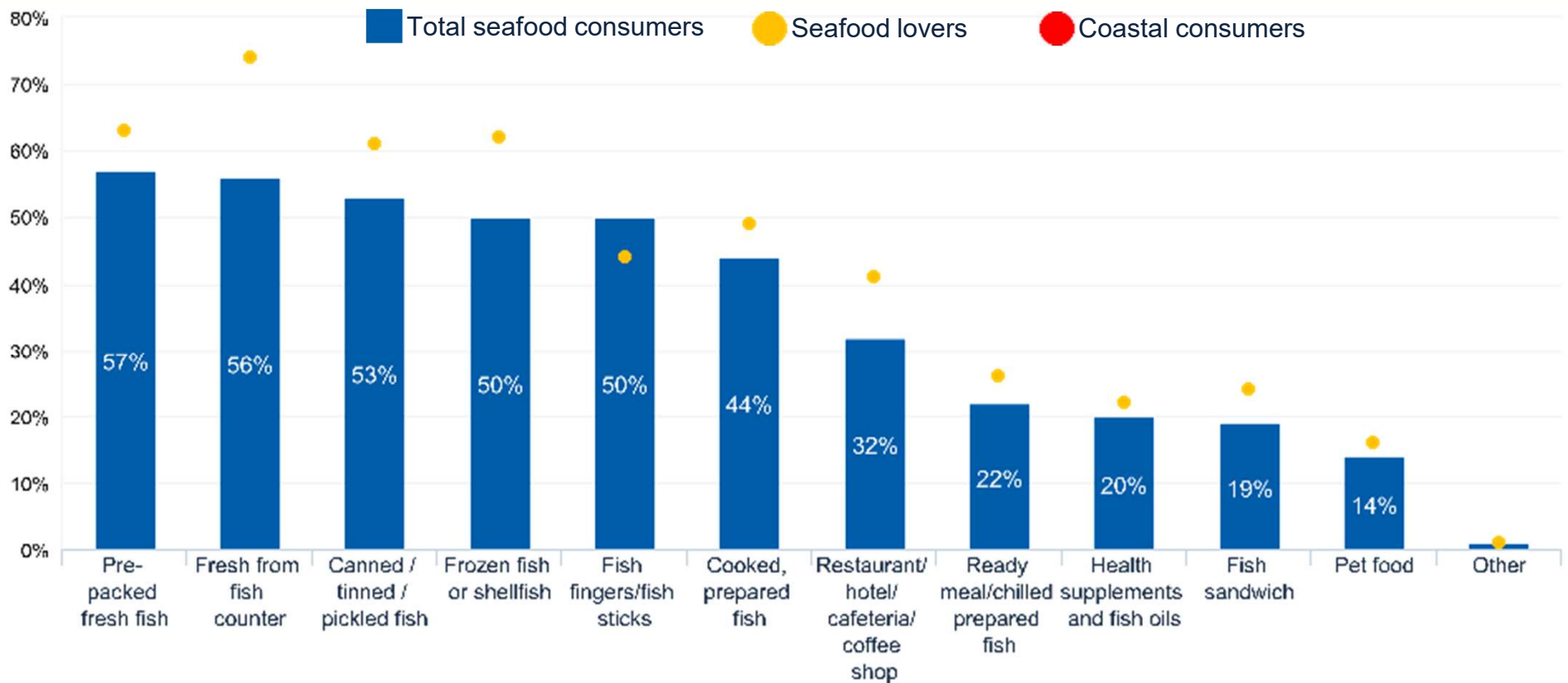
Base: General public, Finland

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



# Types of Fish/Seafood Purchased, by Consumer Type

Types of fish/seafood purchased frequently, by consumer type



Base: Seafood consumers, Finland

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

# Motivators when Purchasing Fish and Seafood

Relative importance scores



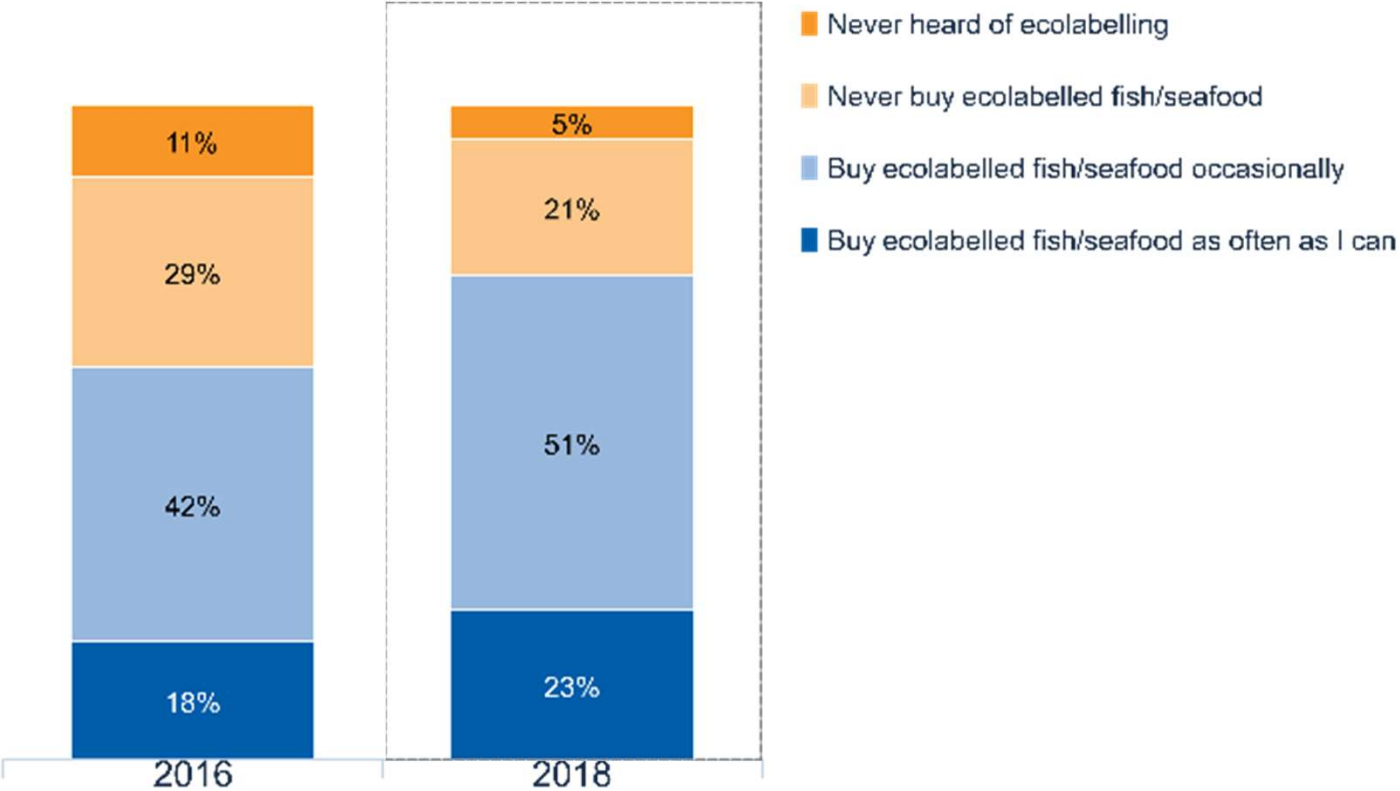
Base: Seafood consumers, Finland

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?



# Purchase of Ecolabelled Fish

Frequency of purchase of ecolabelled fish

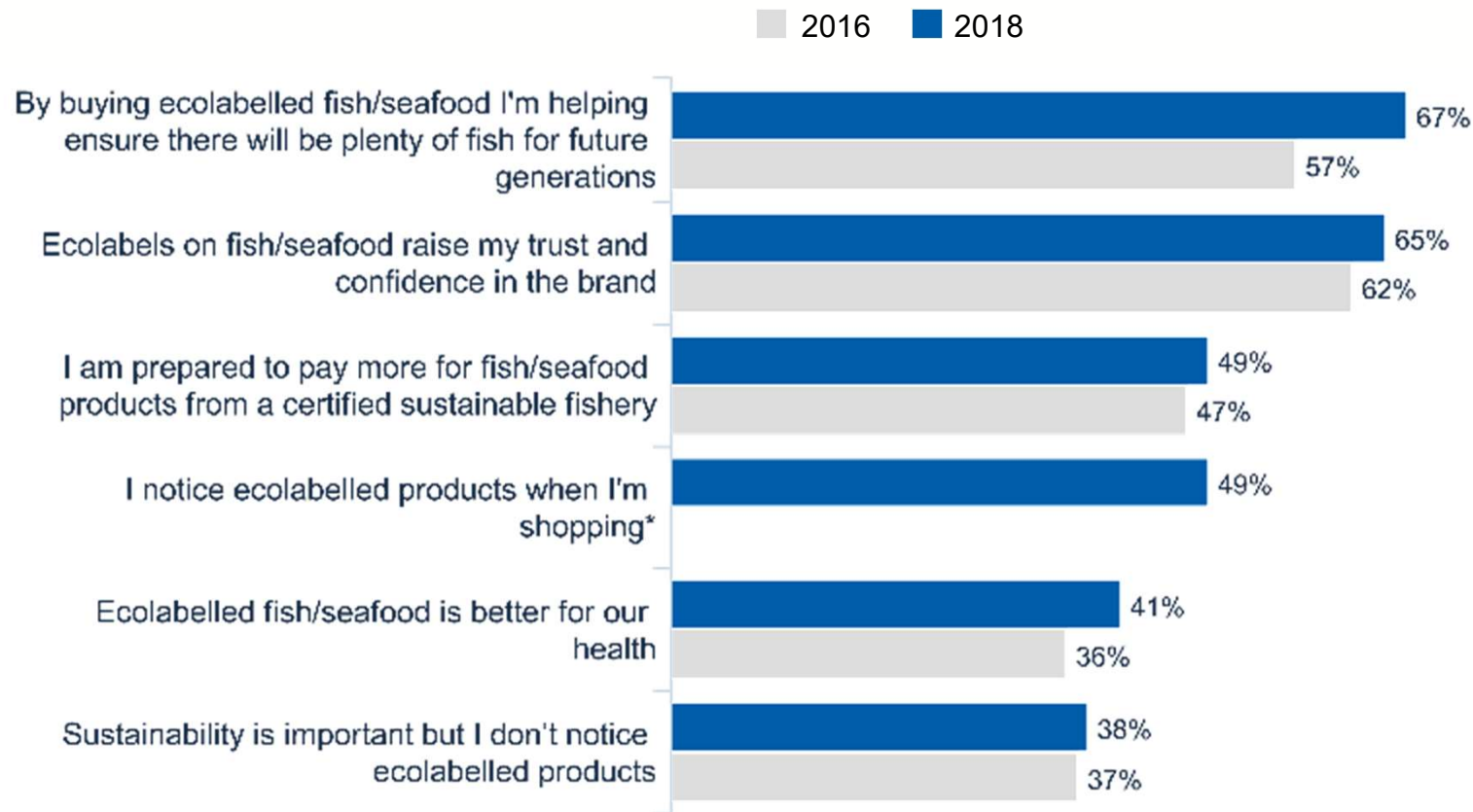


Base: Seafood consumers, Finland,

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

# Attitudes Towards Ecolabels

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



Base: Seafood consumers, Finland

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

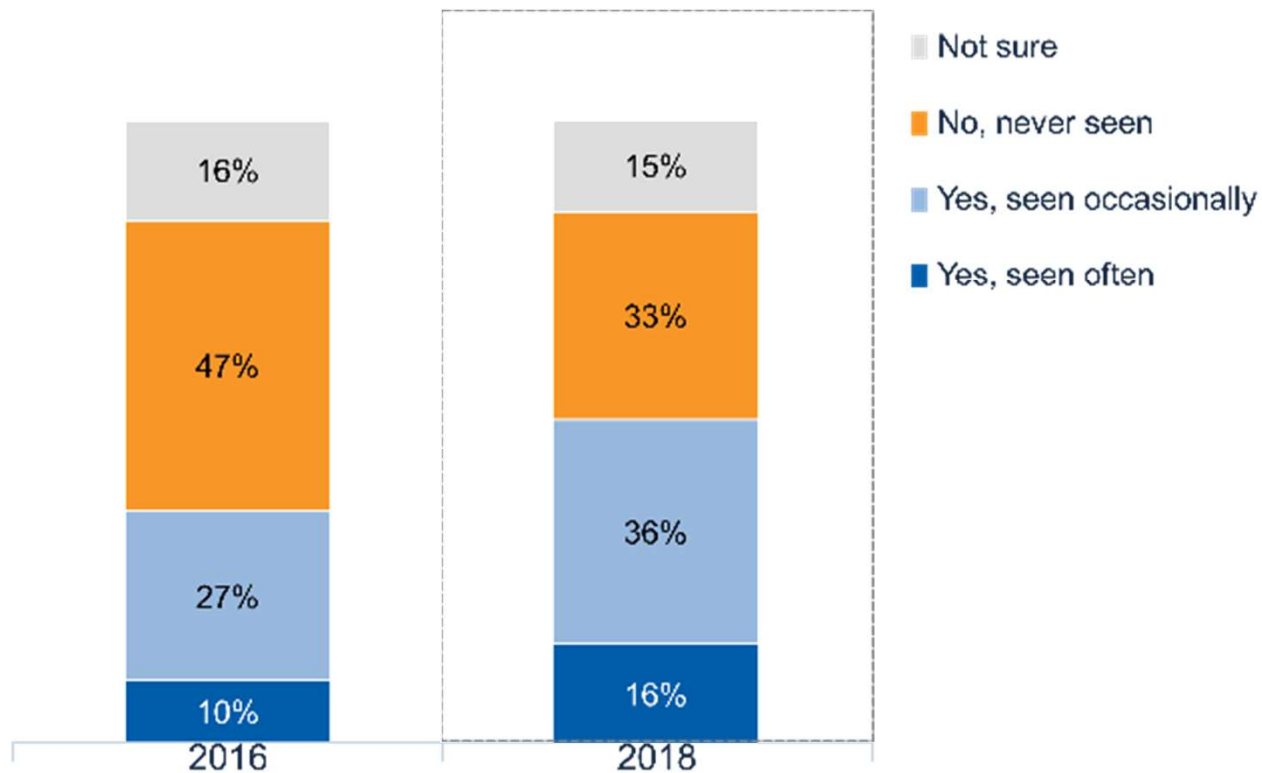
A woman with blonde hair is looking at a menu in a restaurant. The menu has the MSC logo on it. The background is a blurred restaurant interior with other people and lights.

# MSC Awareness and Understanding



# Awareness of the MSC Label

Frequency of seeing the MSC label

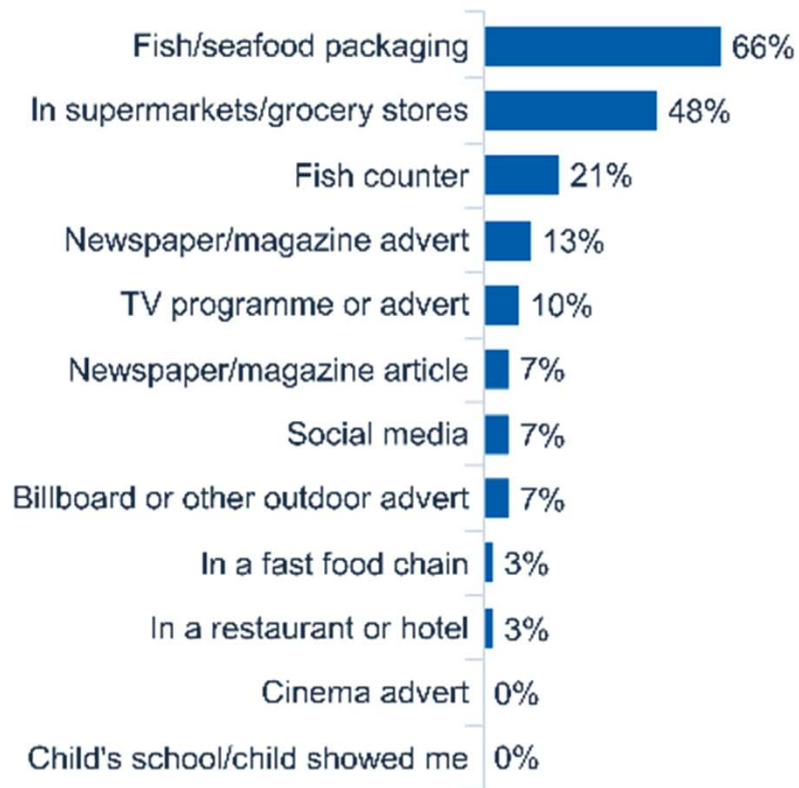


Base: General public, Finland

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

# Locations Where Consumers Recall Seeing MSC Label

## Locations



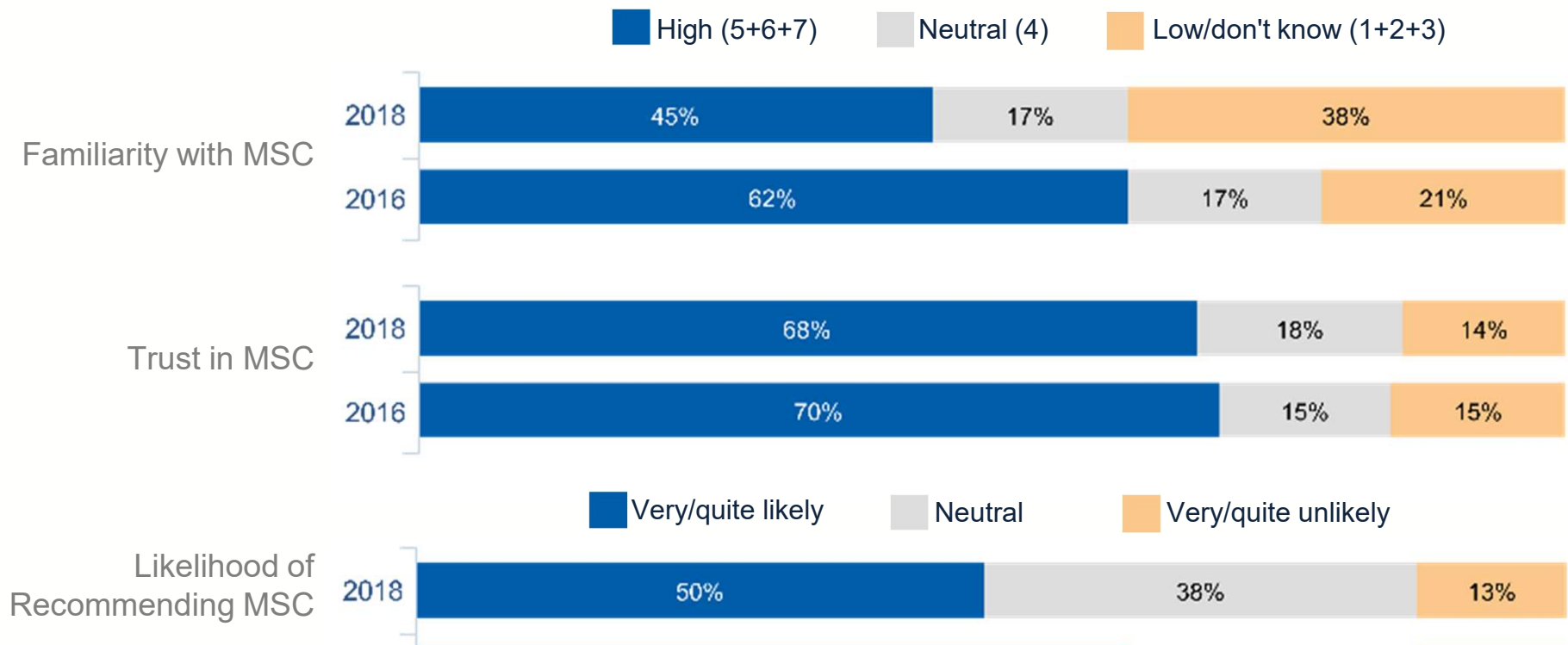
Base: MSC aware, Finland

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

Q9.5: Do you recall seeing this label in any of the following places?

# Familiarity, Trust and Likelihood of Recommendation

KPIs on familiarity, trust and advocacy of MSC label



Base: MSC aware, Finland

Q9.1: How familiar are you with the following ecolabelling initiatives/organisations? 7-pt scale: 1 = "Not at all familiar", 7 = "Extremely familiar"

Q9.2: How much trust do you have in the claims of the following organisations? 7-pt scale: 1 = "No trust", 7 = "A lot of trust"

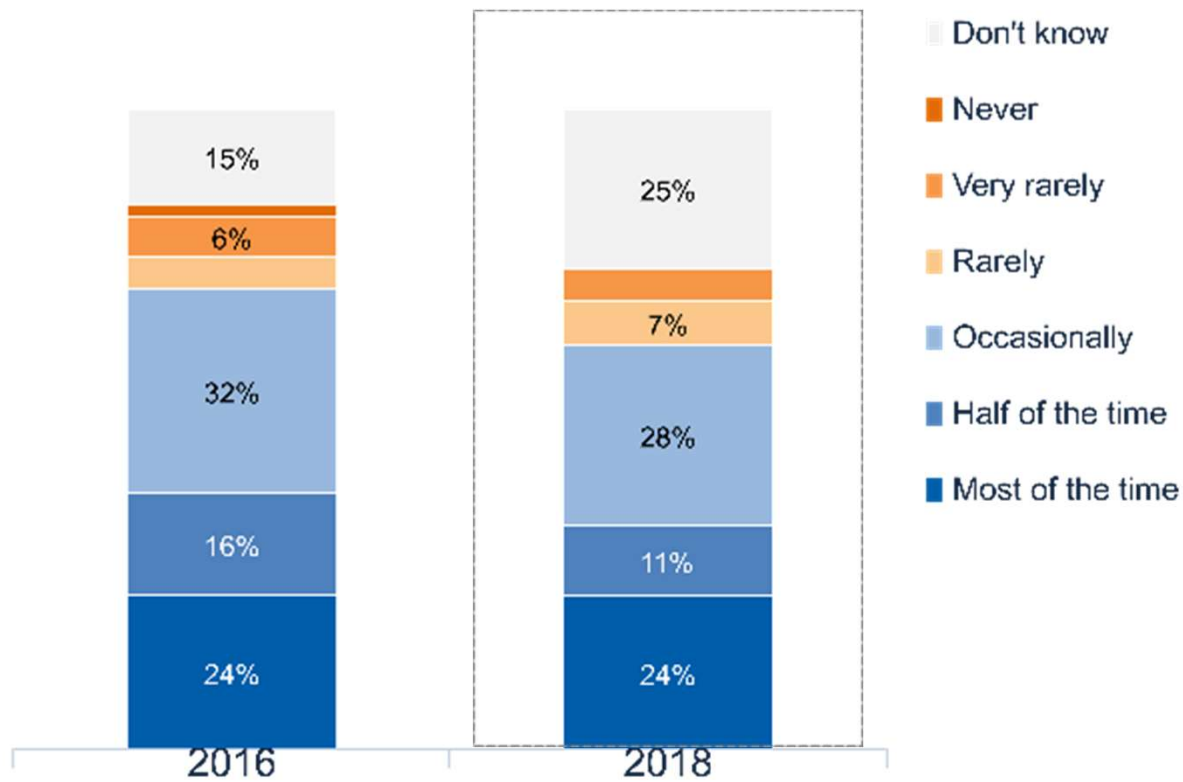
Q12.2: How likely are you to recommend MSC certified products to the people you know? 5-pt scale; 1 = "Very unlikely", 5 = "Very likely"





# Purchase of MSC-certified Fish

Frequency of purchase of MSC-certified fish



Base: MSC aware, Finland

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

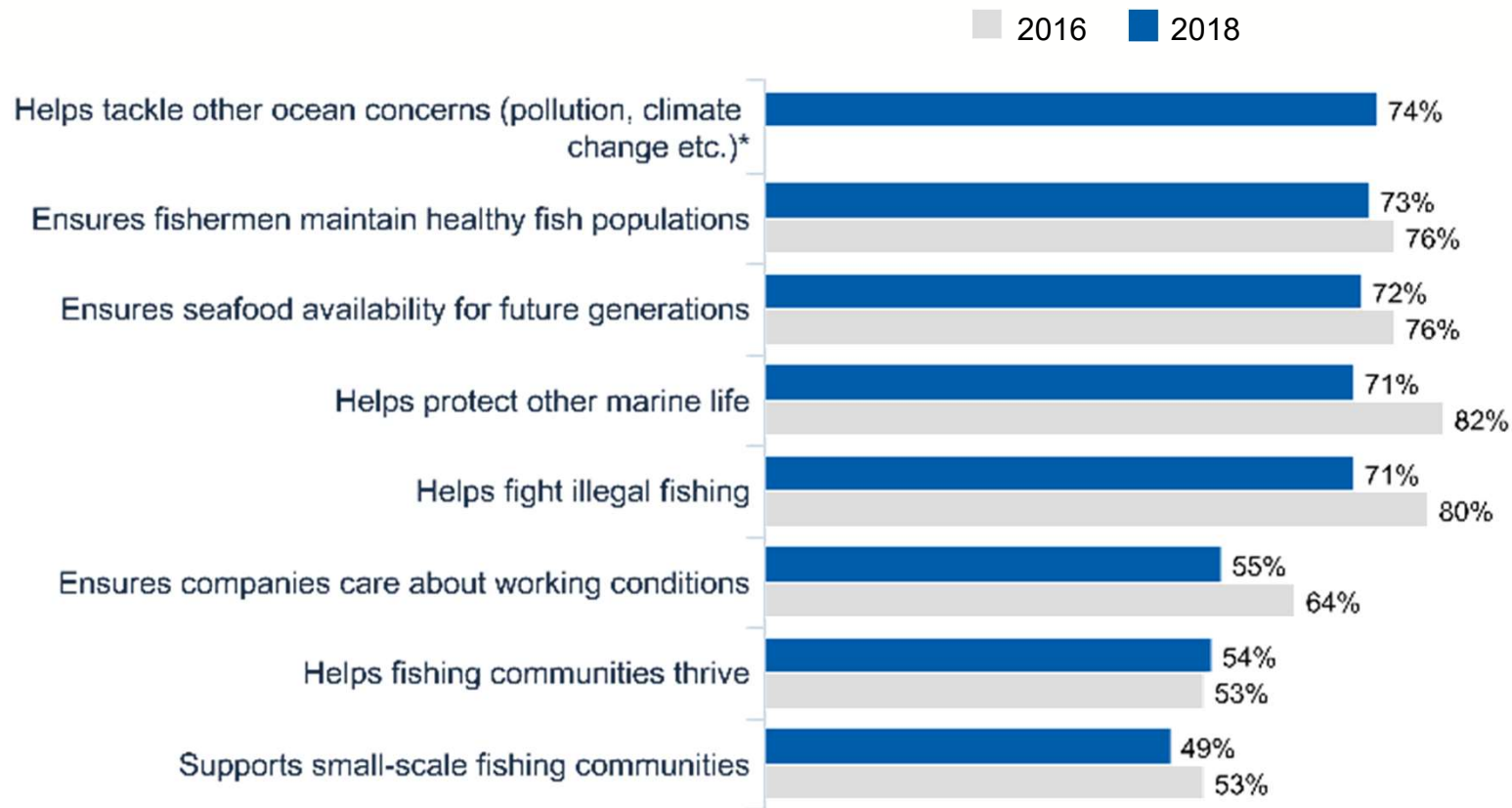
# MSC Messaging



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# Perceptions of MSC: Sustainability Impact

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



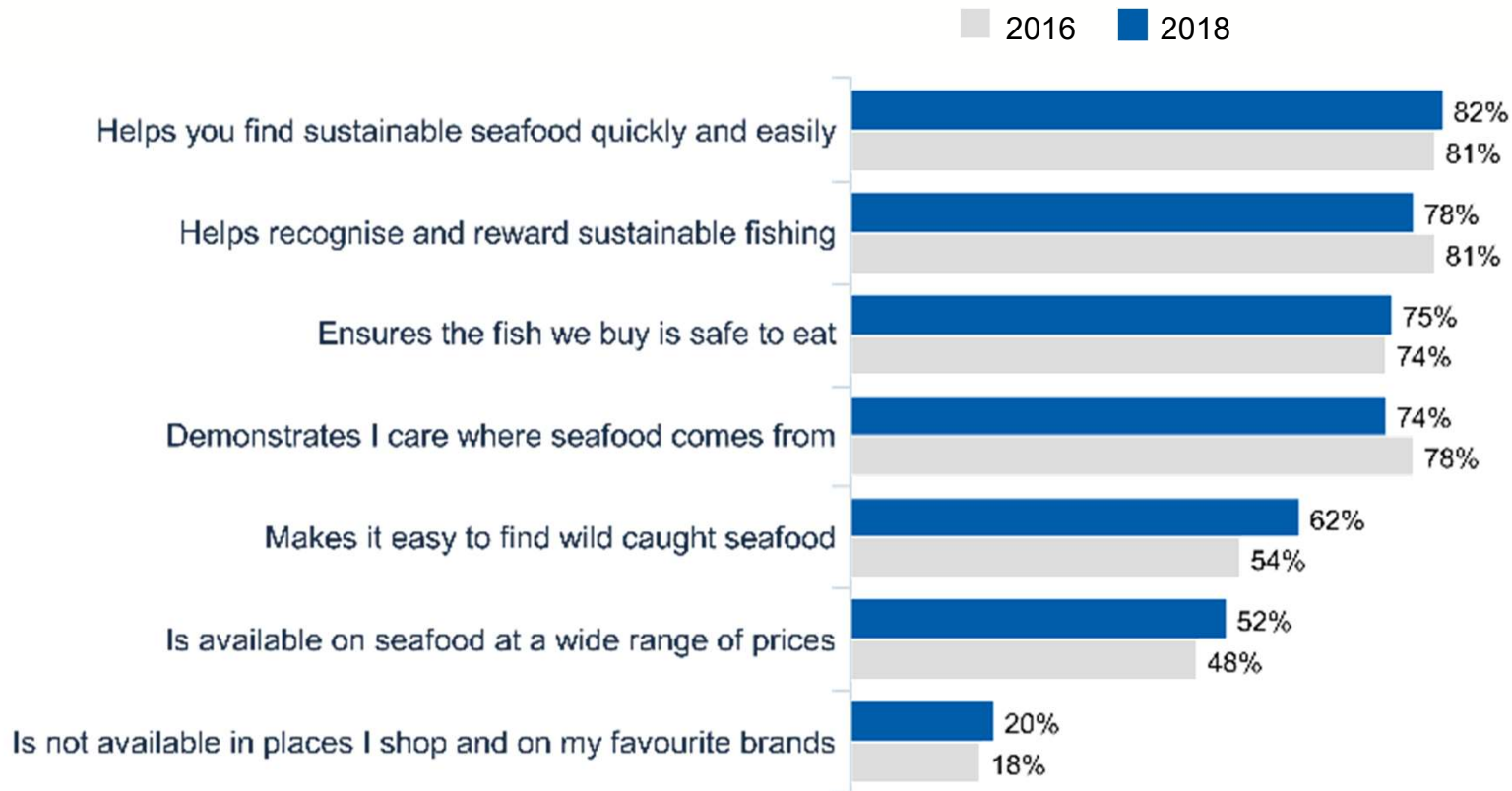
Base: MSC aware, Finland

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

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

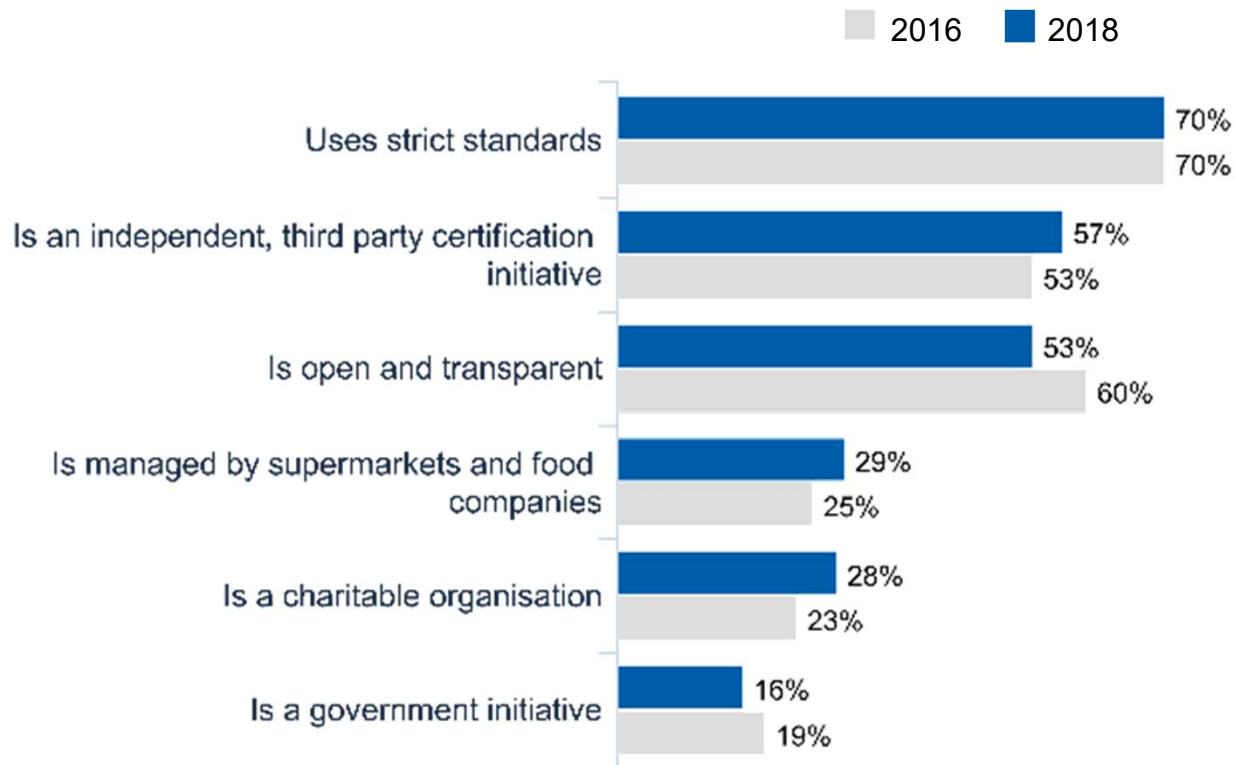


Base: MSC aware, Finland

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

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



Base: MSC aware, Finland

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"



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