



MSC Consumer Insights 2020

Finland

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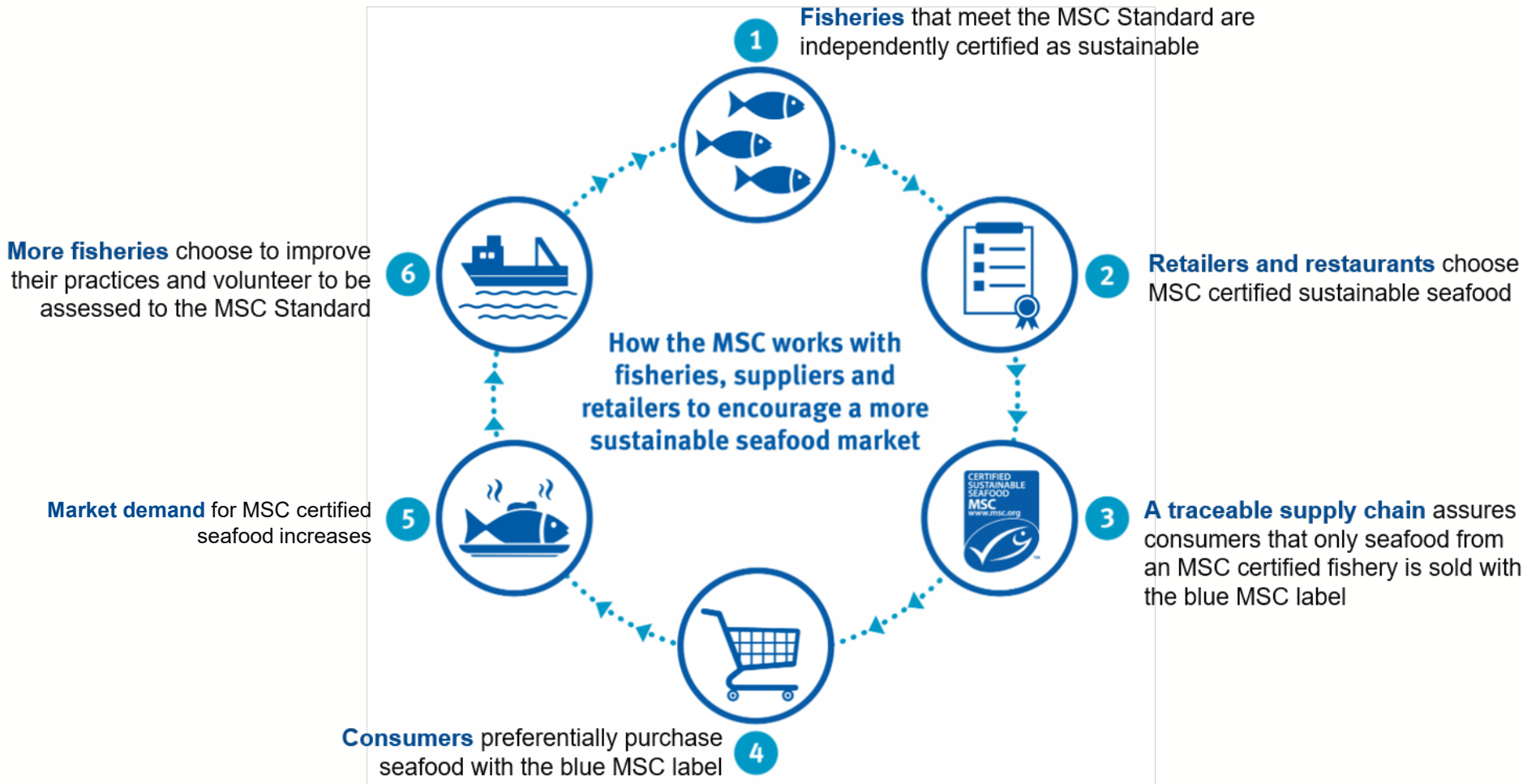
Project: 3690





Background and Approach

How Consumer Intelligence Supports the MSC Theory of Change





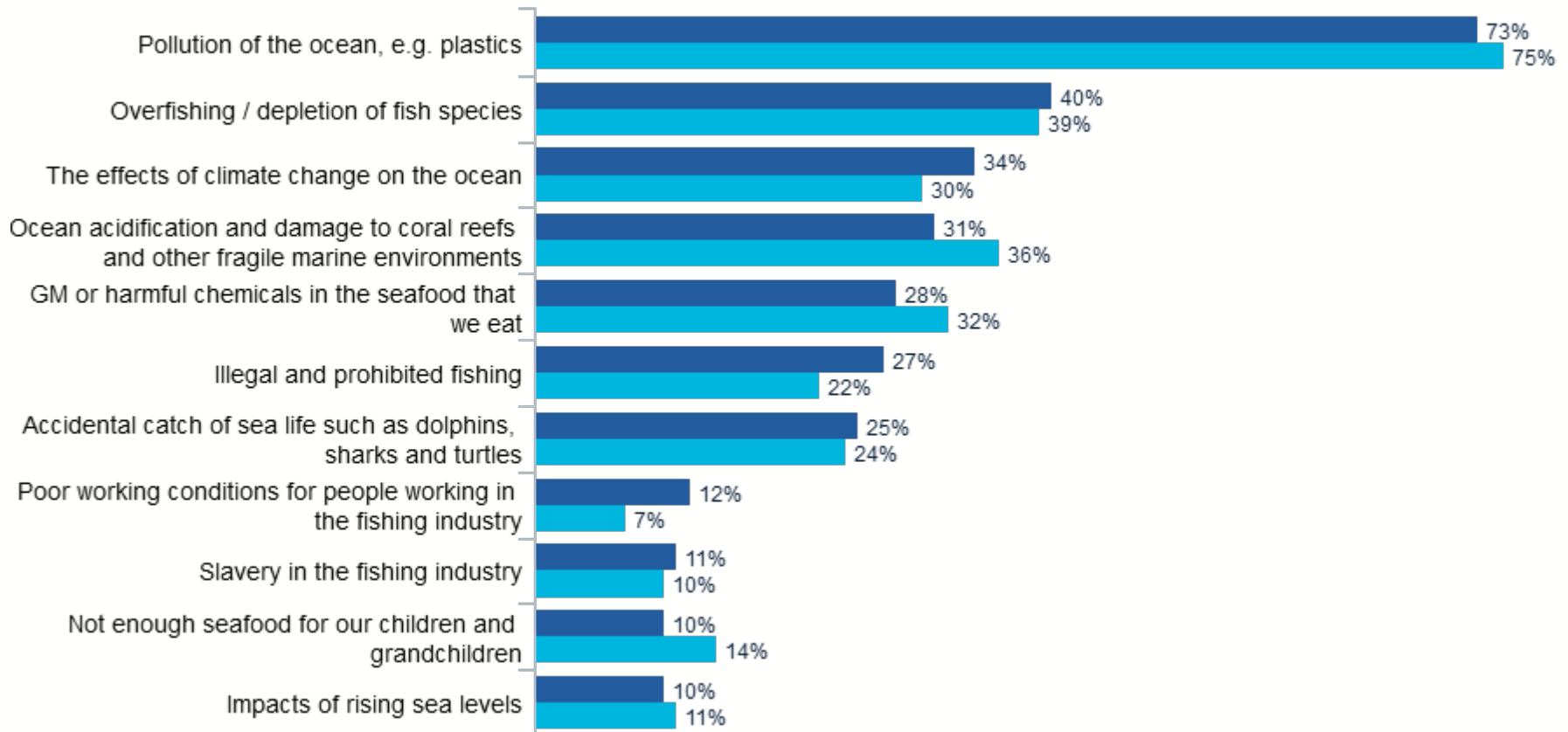
Attitudes to Ocean Sustainability

Most Concerning Threats to Oceans

Pollution of the ocean remains by far the most concerning ocean issue to seafood consumers. Four in ten consider overfishing / decline of species as one of their top 3 ocean issues. There has been a significant increase in concern regarding poor working conditions, illegal fishing, and climate change since 2018.

Issues (each respondent selected three issues)

■ 2020 ■ 2018



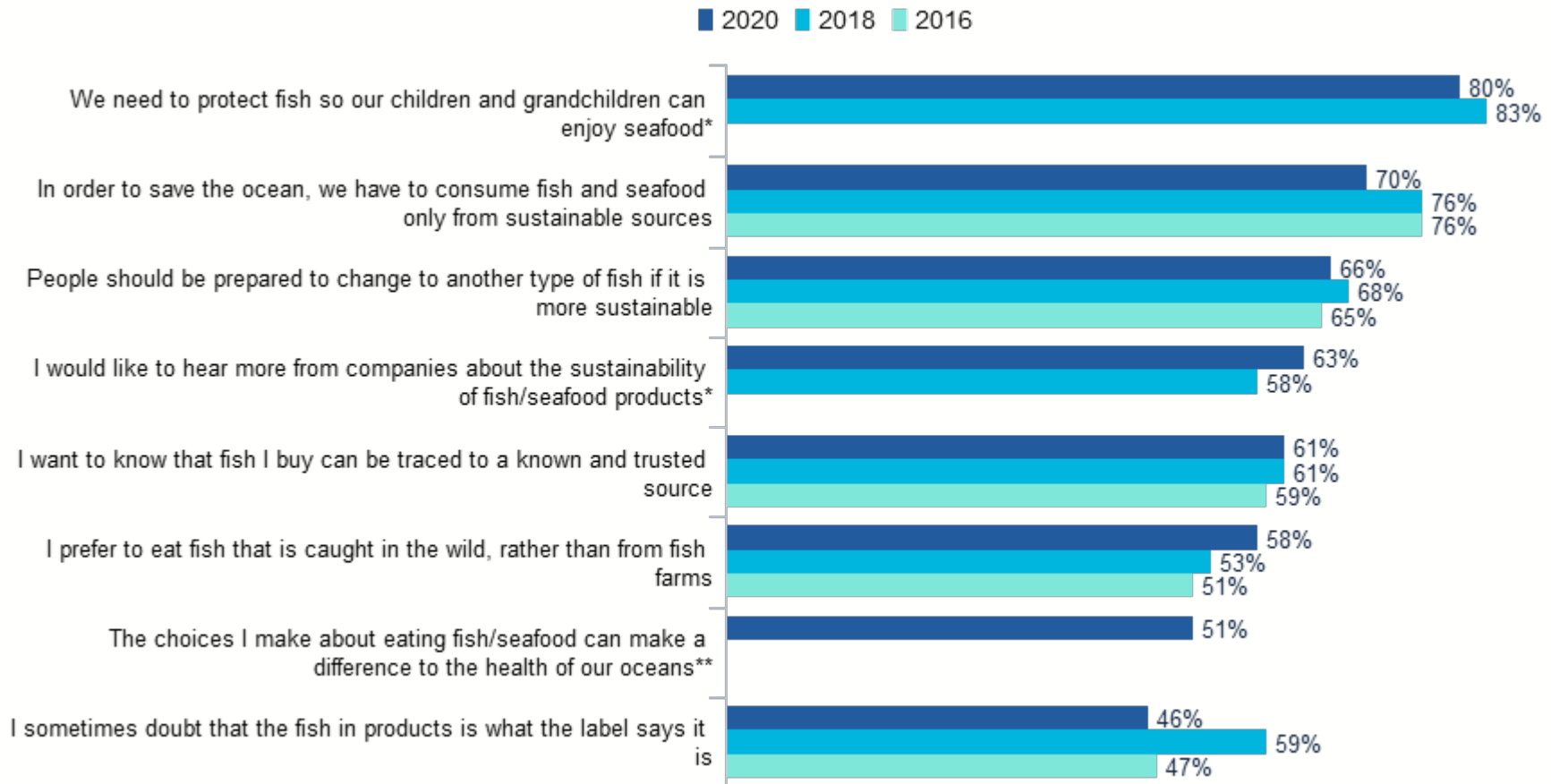
Base: Seafood consumers, Finland

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?

Perspectives on Ocean Sustainability and Fish

Since 2018, there has been a significant increase in those wanting to hear from companies about product sustainability and a significant decrease in agreement that people should consume fish only from sustainable sources. The number of those who doubt that fish in products is what the label says has significantly decreased since 2018, back to 2016 levels.

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 2016 data available; **New statement in 2020

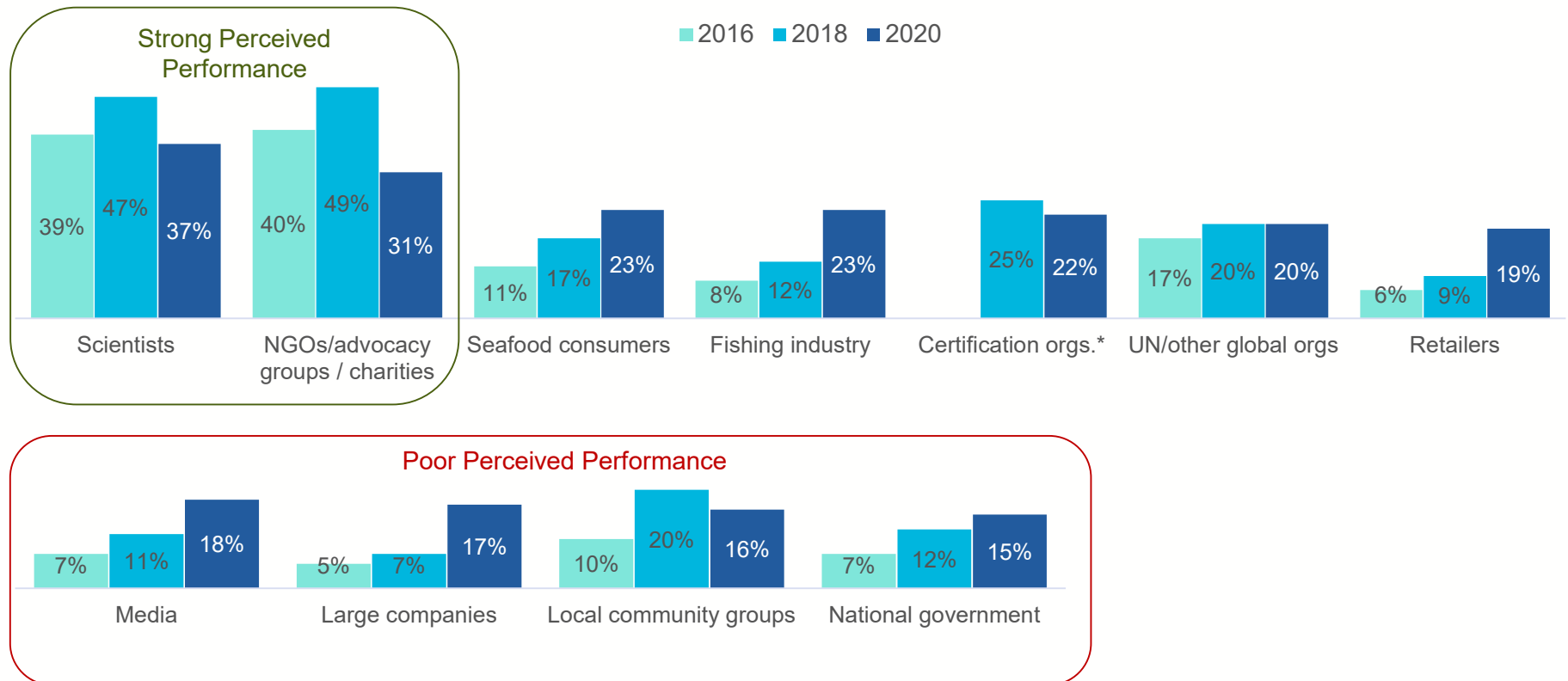


Expectations of Other Actors

Performance of Different Groups in Protecting Oceans

Scientists and NGOs remain the actors perceived to be contributing most to protecting oceans, although there has been a significant decline in views of both since 2018. Just over a fifth of seafood consumers see independent certifications to be performing very well. Perceived performance of seafood consumers, the fishing industry, retailers, media, and large companies have increased significantly since 2018.

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



Base: Seafood consumers, Finland

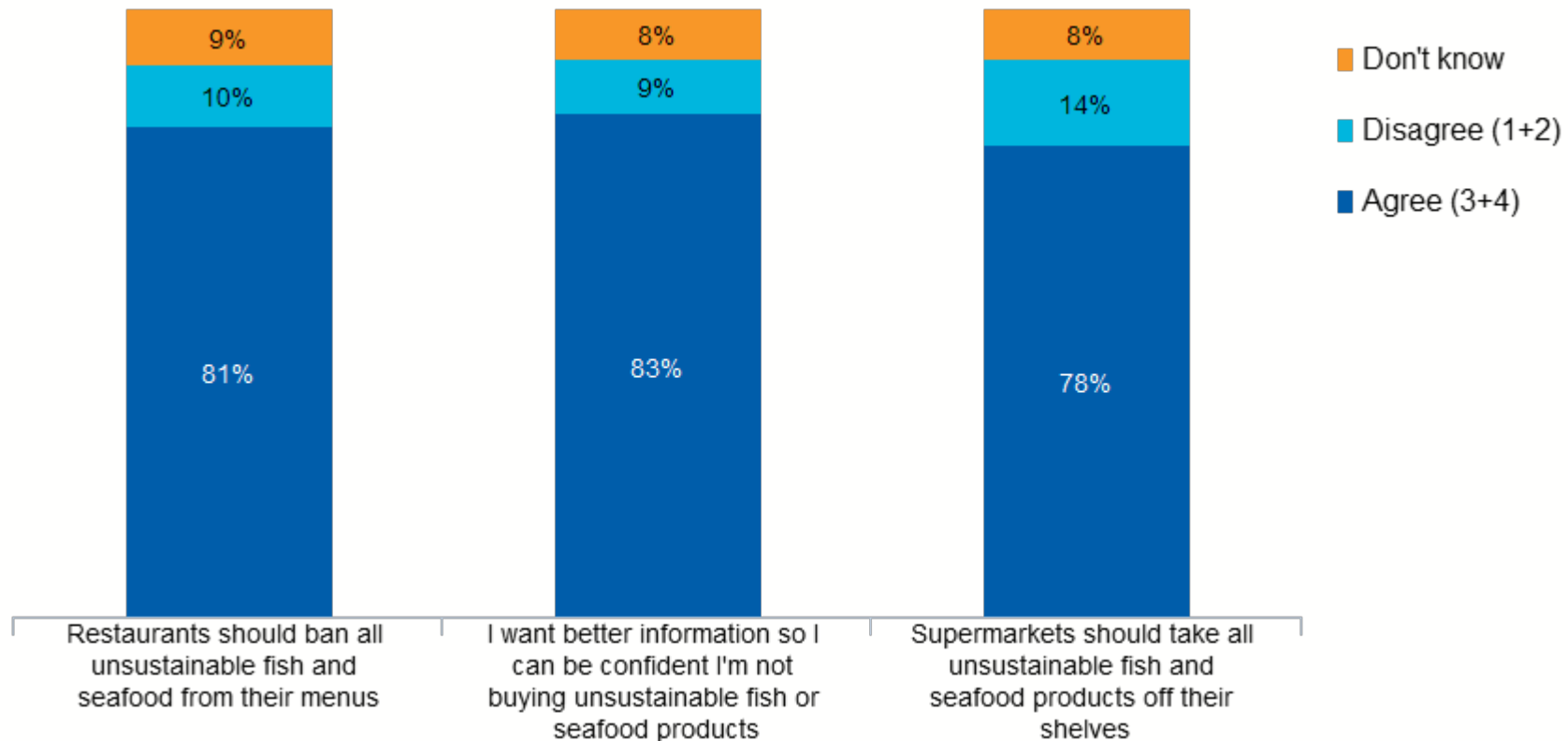
Q3.1: How well do you think the following institutions are contributing to protecting the ocean environment?

*No 2016 data available

Action on Unsustainable Fish and Seafood

Over eight in ten say they want better information so they can be confident they are not buying unsustainable fish or seafood products, and that restaurants should remove unsustainable fish and seafood from menus. There is also strong support for supermarkets to remove unsustainable fish from their shelves.

Consumer beliefs on actions regarding unsustainable fish



Base: Seafood consumers, Finland

Q11.3: The following question relates to how you feel about unsustainable fish and seafood products. These products contain fish or seafood from areas where their numbers are under threat or are captured in ways that may damage the environment. Please indicate below how much you agree or disagree with the following statements.

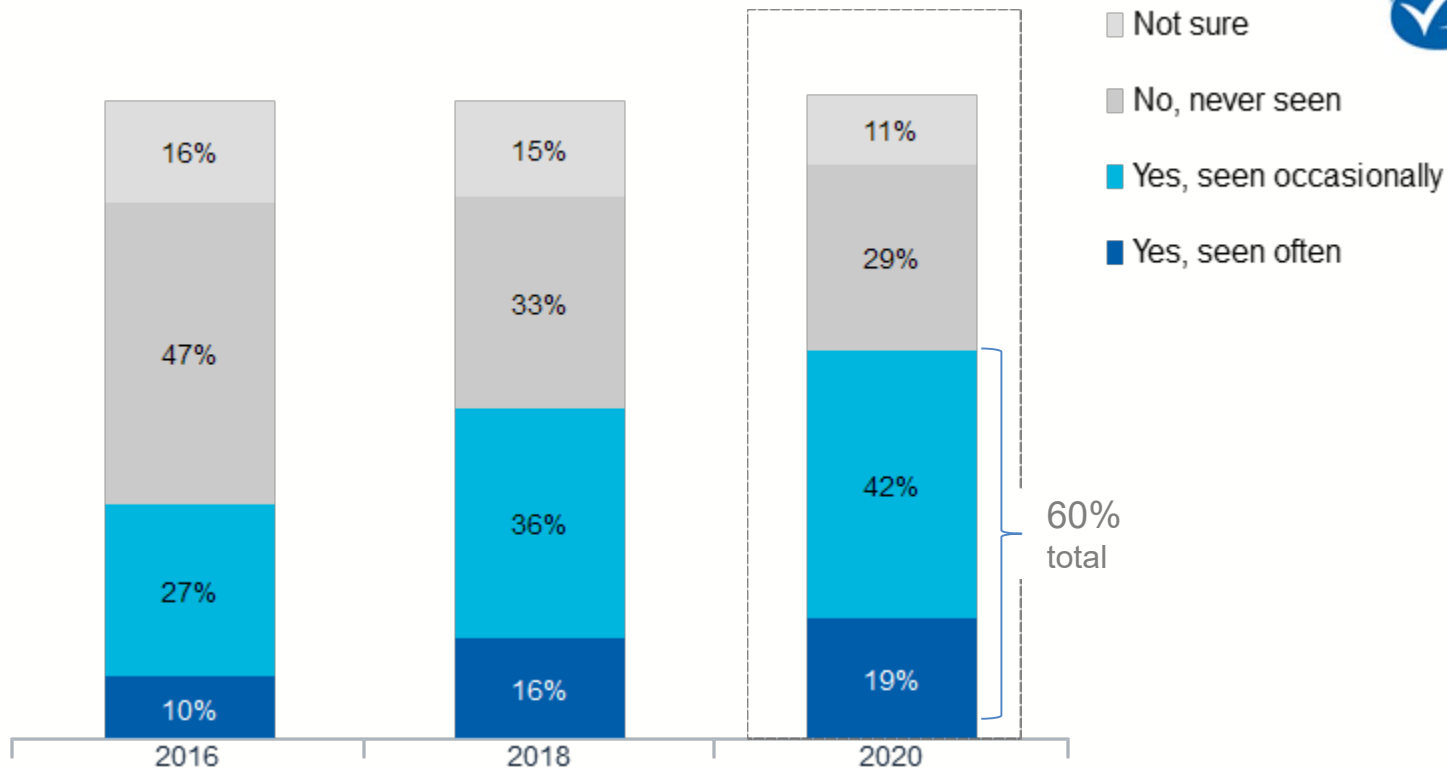


MSC Awareness and Understanding

Awareness of the MSC Label

There has been a significant increase of 8 percentage points since 2018 and 23 percentage points since 2016 . Awareness of the MSC label remains high compared to the global average.

Frequency of seeing the MSC label



Base: General public, Finland

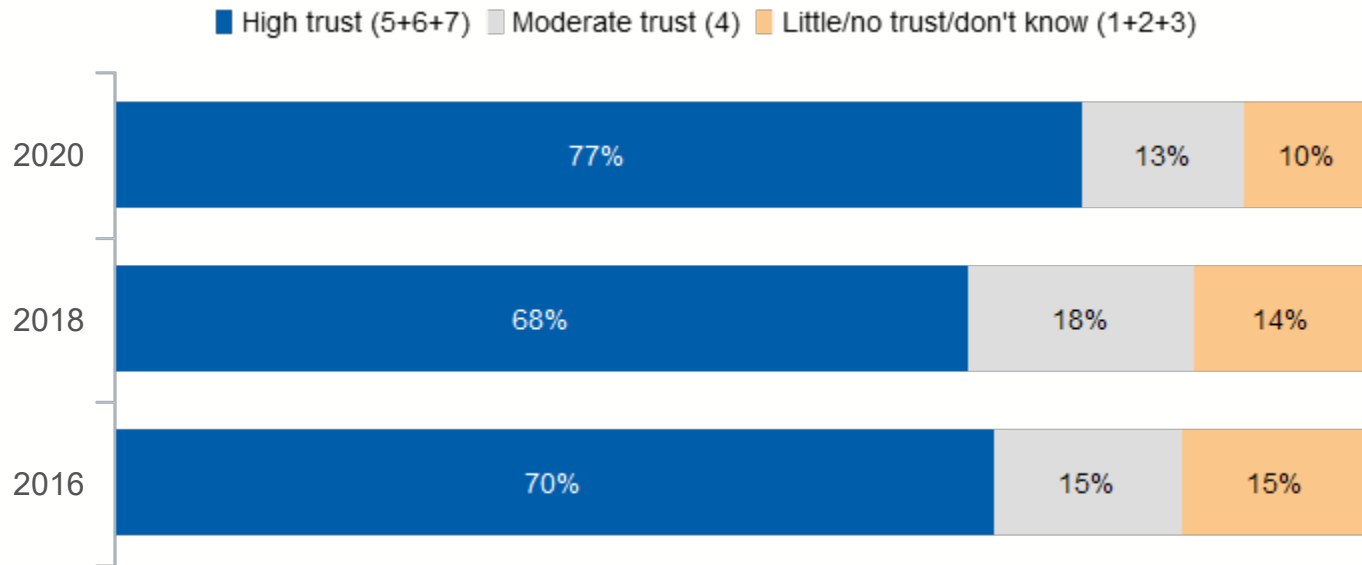
Q1.1: Have you ever seen the following logos?

Trust in the MSC Label

Trust in the MSC label is high among MSC-aware consumers and has increased significantly since 2018 (+9 percentage points). While Finland scores high on awareness, the trust score is around average among those aware (the global average is 76%).

KPIs on trust in the MSC label

Trust in MSC

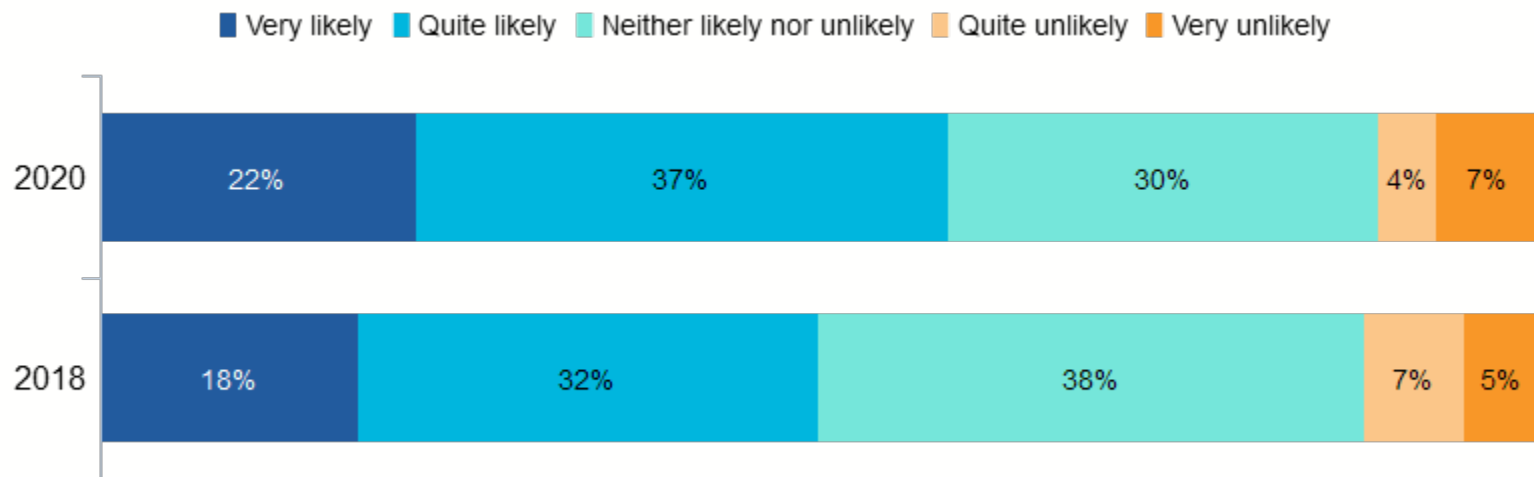


Base: MSC aware, Finland

Recommendation of MSC

Nearly six in ten MSC-aware consumers would recommend MSC-certified products to people they know. There has been a significant increase in likelihood to recommend (+9 percentage points) since 2018.

Likelihood of recommending MSC-certified products

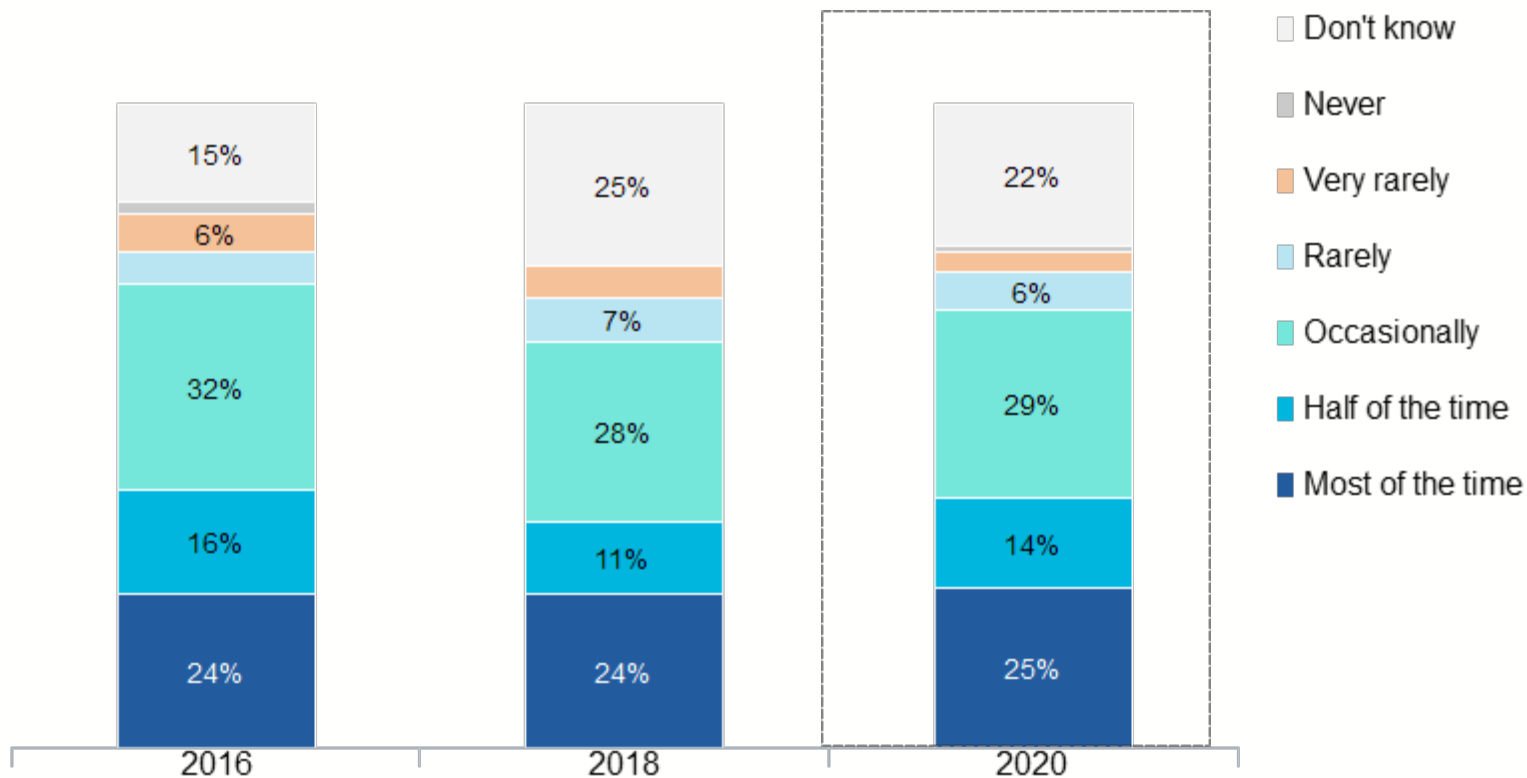


Base: MSC aware, Finland

Purchase of MSC-certified Fish

Among those who are aware of the MSC, claimed purchase of MSC-certified fish has remained relatively stable since 2016, with around four in ten purchasing MSC-certified fish half of the time or most of the time (this is on par with the global average of 39%).

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?



Love of Seafood

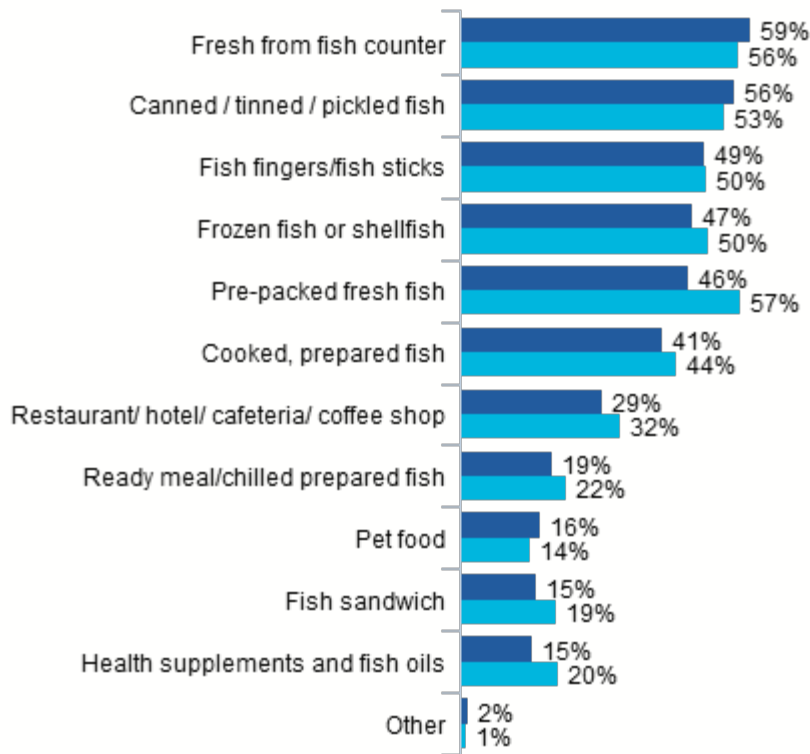
Types of Fish/Seafood Purchased, by Consumer Type

In 2020, fish fresh from the fish counter is purchased most frequently by seafood consumers, compared to pre-packed fresh fish in 2018. MSC Blues purchase canned/tinned/pickled fish most often while younger consumers mostly purchase fish fingers / fish sticks.

Types of fish/seafood purchased frequently, by consumer type

Total seafood consumers

■ 2020 ■ 2018



MSC Blues

Young consumers
(Aged 18-34)

Canned / tinned / pickled fish	63%	52%
Fresh from fish counter	61%	46%
Frozen fish or shellfish	55%	38%
Fish fingers/fish sticks	54%	55%
Pre-packed fresh fish	52%	46%
Cooked, prepared fish	50%	43%
Restaurant/ hotel/ cafeteria/ coffee shop	36%	29%
Pet food	27%	18%
Health supplements and fish oils	24%	14%
Ready meal/chilled prepared fish	23%	21%
Fish sandwich	17%	20%
Other	1%	2%

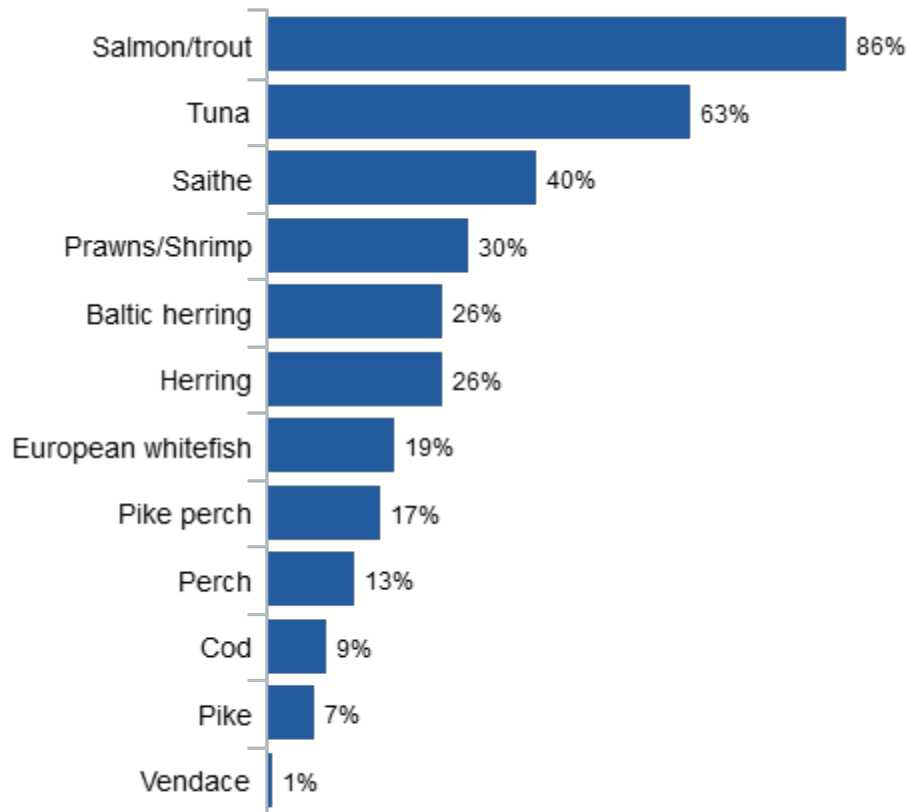
Base: Seafood consumers, Finland

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

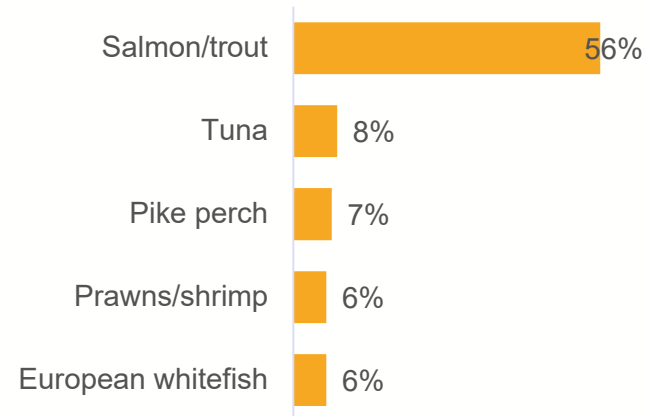
Frequently Purchased and Favourite Fish Species

Salmon/trout is the most frequently purchased fish species, with almost nine in ten purchasing it frequently, followed by tuna and saithe. Salmon/trout is also the fish species which seafood consumers say is their favourite to eat.

Most frequently purchased fish species



Top 5 favourite species to eat



Base: Seafood consumers, Finland

Q4.3: Which species of fish do you purchase frequently?

Q4.4: Which species of fish is your favourite to eat?

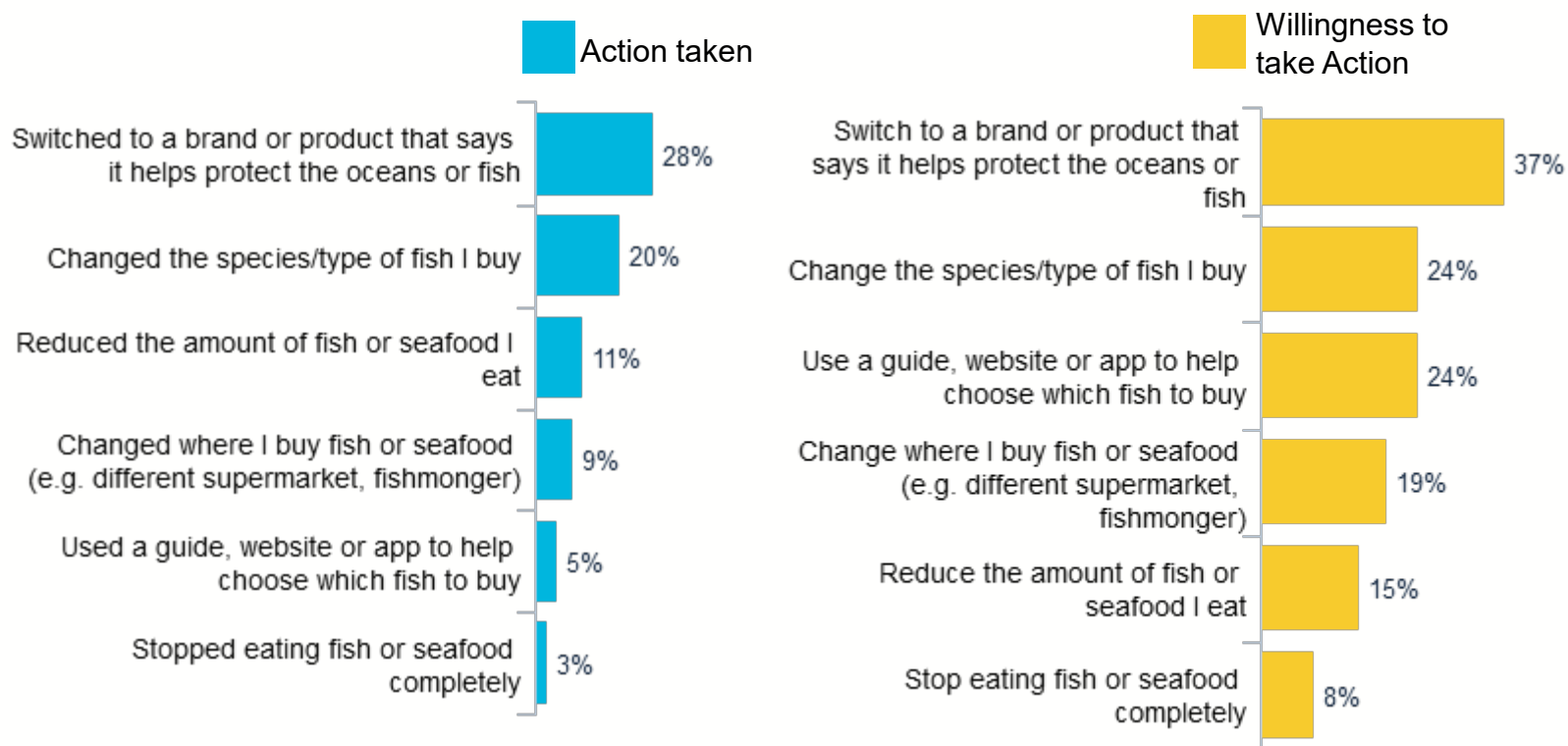


Changes to Seafood Consumption

Current and Future Consumer Actions to Protect Seafood

Switching to a brand or product that says it helps the oceans is the action most commonly taken, and is the action that consumers say they would be most willing to take in the future, followed by changing the species/type of fish purchased. More consumers are willing to take action in the future compared to those who say they have already taken action.

Actions consumers have taken and would be willing to take to protect the fish and seafood in our oceans



Base: Seafood consumers, Finland

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?



evidence and ideas. **applied**

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