



GLOBESCAN

evidence and ideas. applied

MSC CONSUMER INSIGHTS 2020

PR Narrative – World Oceans Day

PREPARED BY GLOBESCAN
APRIL 2020



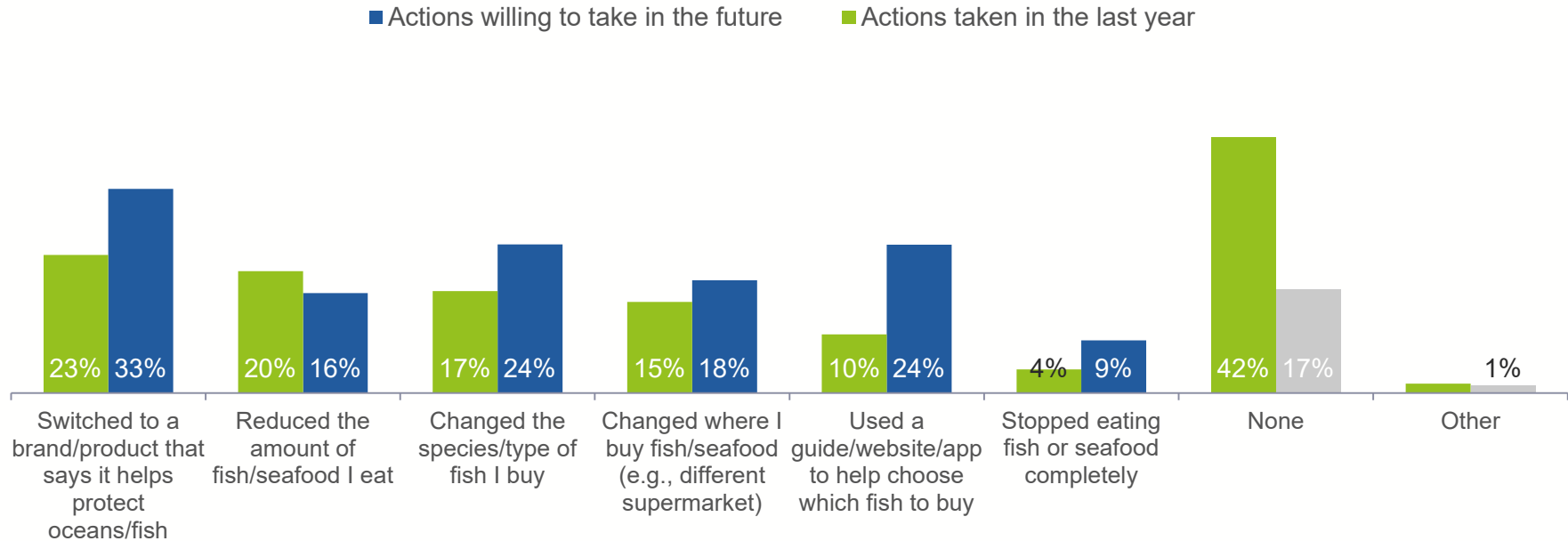
ACTIONS (TAKEN AND WILLING TO TAKE) TO PROTECT FISH AND SEAFOOD



- Nearly 6 in 10 (58%) seafood consumers say they have taken action in the last year to protect fish and seafood
- The top actions taken are to switch to a brand or product that says it helps protect the oceans/fish (23% of seafood consumers) or reduced the amount of seafood they eat (20%)
- 17% have changed the type or species of fish they buy and 15% have changed where they buy seafood from
- Significant numbers of other consumers are also willing to make changes
 - A further third of seafood consumers say they would be willing to switch product or brand
 - A further quarter of seafood consumers say they would be willing to change the species/type and a quarter to use app/guide/website to help choose
 - 1 in 10 say they would consider giving up seafood completely

CONSUMER ACTION TO PROTECT FISH / SEAFOOD

Actions taken in the last year to protect fish and seafood and actions willing to take in the future, total mentions



Base: Seafood consumers, global, n=20,876

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?

CONSUMERS' ACTION IN THE LAST YEAR TO PROTECT FISH / SEAFOOD

	Switched to a brand or product that says it helps protect the oceans or fish	Changed where I buy fish or seafood (e.g. different supermarket, fishmonger)	Changed the species/type of fish I buy	Reduced the amount of fish or seafood I eat	Stopped eating fish or seafood completely	Used a guide, website or app to help choose which fish to buy	Any action
Global	23%	15%	17%	20%	4%	10%	58%
Germany	24%	12%	12%	23%	5%	9%	60%
Japan	6%	6%	9%	10%	1%	5%	28%
UK	21%	12%	15%	18%	5%	7%	52%
USA	18%	16%	15%	18%	5%	12%	53%
Canada	22%	13%	16%	21%	3%	10%	56%
France	20%	23%	19%	23%	4%	7%	68%
Netherlands	17%	13%	12%	16%	3%	5%	52%
Sweden	32%	13%	24%	21%	3%	8%	68%
Denmark	23%	12%	13%	13%	4%	6%	50%
Australia	22%	12%	12%	17%	4%	9%	49%
Belgium	19%	17%	15%	17%	4%	7%	58%
Poland	22%	22%	22%	21%	3%	9%	65%
Switzerland	25%	15%	16%	24%	4%	7%	65%
Singapore	31%	21%	24%	34%	7%	16%	70%
Spain	17%	14%	15%	20%	3%	9%	54%
Finland	28%	9%	20%	11%	3%	5%	53%
Norway	19%	11%	13%	11%	3%	10%	45%
Italy	26%	15%	21%	18%	4%	9%	64%
South Africa	37%	22%	18%	33%	5%	22%	77%
Austria	28%	12%	12%	20%	3%	6%	62%
China	32%	24%	33%	30%	7%	31%	88%
New Zealand	14%	10%	13%	21%	4%	5%	48%
Portugal	17%	16%	15%	20%	2%	7%	54%

4 Base: Seafood consumers, by country

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?

CONSUMERS' WILLINGNESS TO TAKE ACTION TO PROTECT FISH / SEAFOOD IN THE FUTURE

	Switched to a brand or product that says it helps protect the oceans or fish	Changed where I buy fish or seafood (e.g. different supermarket, fishmonger)	Changed the species/type of fish I buy	Reduced the amount of fish or seafood I eat	Stopped eating fish or seafood completely	Used a guide, website or app to help choose which fish to buy	Any action
Global	33%	18%	24%	16%	9%	24%	83%
Germany	31%	18%	26%	16%	7%	14%	77%
Japan	30%	11%	25%	11%	3%	19%	69%
UK	36%	20%	30%	18%	10%	26%	83%
USA	36%	22%	24%	17%	10%	26%	82%
Canada	38%	22%	27%	16%	9%	29%	85%
France	29%	20%	25%	23%	12%	25%	90%
Netherlands	30%	12%	14%	12%	6%	17%	73%
Sweden	27%	20%	26%	17%	10%	29%	87%
Denmark	30%	17%	21%	11%	7%	25%	78%
Australia	33%	20%	26%	18%	12%	22%	79%
Belgium	26%	14%	21%	15%	7%	19%	76%
Poland	38%	24%	28%	16%	9%	26%	88%
Switzerland	33%	17%	26%	20%	14%	17%	86%
Singapore	30%	19%	20%	19%	7%	26%	86%
Spain	37%	18%	22%	15%	8%	29%	83%
Finland	37%	19%	24%	15%	8%	24%	83%
Norway	35%	18%	18%	9%	4%	24%	73%
Italy	32%	18%	22%	17%	7%	29%	86%
South Africa	36%	23%	22%	18%	13%	36%	96%
Austria	32%	15%	24%	16%	8%	17%	80%
China	26%	23%	29%	26%	10%	25%	95%
New Zealand	44%	18%	31%	16%	10%	25%	84%
Portugal	42%	17%	27%	15%	7%	30%	90%

5 Base: Seafood consumers, by country

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?

THREE-QUARTERS OF 18-24'S SAY THEY HAVE TAKEN SOME TYPE OF ACTION TO PROTECT FISH AND SEAFOOD IN THE LAST YEAR. YOUNGER AGE GROUPS AND PARENTS ARE LEADING THE WAY IN TAKING PERSONAL ACTION

Actions taken in the last year to protect fish and seafood

	Global Total	18-24	25-34	35-54	55+	Parents	Not parents
Switched to a brand or product that says it helps protect the oceans or fish	23%	26%	26%	23%	20%	26%	20%
Changed where I buy fish or seafood (e.g. different supermarket, fishmonger)	15%	19%	19%	14%	12%	18%	13%
Changed the species/type of fish I buy	17%	19%	19%	16%	16%	19%	15%
Reduced the amount of fish or seafood I eat	20%	33%	25%	20%	14%	23%	18%
Stopped eating fish or seafood completely	4%	9%	7%	4%	1%	6%	3%
Used a guide, website or app to help choose which fish to buy	10%	14%	13%	10%	6%	13%	7%
Other Action	2%	1%	1%	1%	2%	1%	2%
Any action	58%	74%	68%	58%	49%	65%	53%
Base:	20,876	2,229	3,359	7,487	7,801	9,061	11,815

6 Base: Seafood consumers, global, n=20,876

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?

HIGH NUMBERS ARE WILLING TO TAKE ACTION IN THE FUTURE – ACROSS ALL AGE GROUPS. YOUNGER AGE GROUPS ARE MORE LIKELY TO CONSIDER REDUCING AND STOPPING EATING SEAFOOD

Actions willing to take in the future

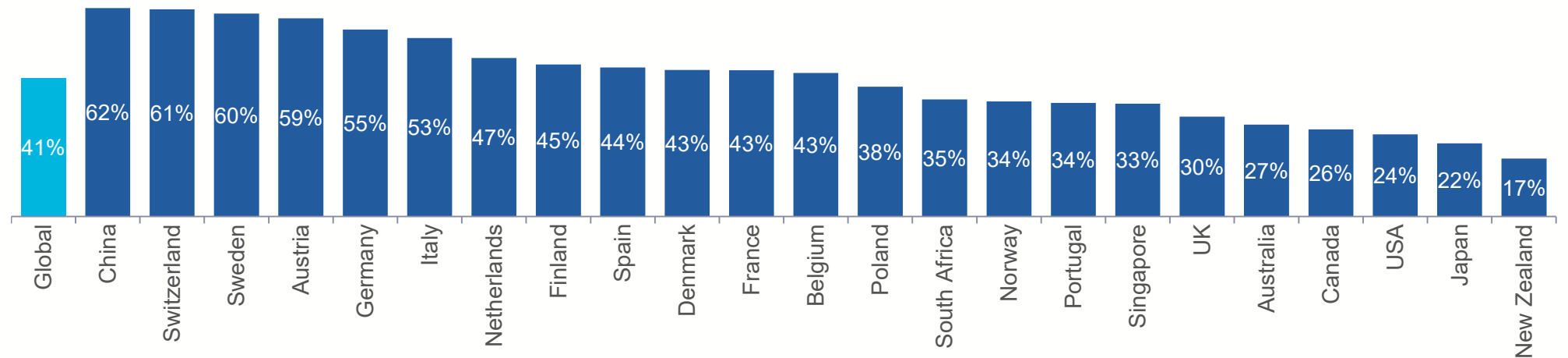
	Global Total	18-24	25-34	35-54	55+	Parents	Not parents
Switched to a brand or product that says it helps protect the oceans or fish	33%	34%	32%	33%	34%	32%	34%
Changed where I buy fish or seafood (e.g. different supermarket, fishmonger)	18%	22%	22%	20%	14%	19%	18%
Changed the species/type of fish I buy	24%	22%	24%	25%	24%	25%	24%
Reduced the amount of fish or seafood I eat	16%	21%	21%	17%	13%	18%	15%
Stopped eating fish or seafood completely	9%	16%	13%	9%	5%	9%	8%
Used a guide, website or app to help choose which fish to buy	24%	26%	26%	25%	23%	25%	24%
Other Action	1%	1%	1%	1%	2%	1%	2%
Any action	83%	89%	89%	84%	78%	86%	81%
Base:	20,876	2,229	3,359	7,487	7,801	9,061	11,815

Base: Seafood consumers, global, n=20,876

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?

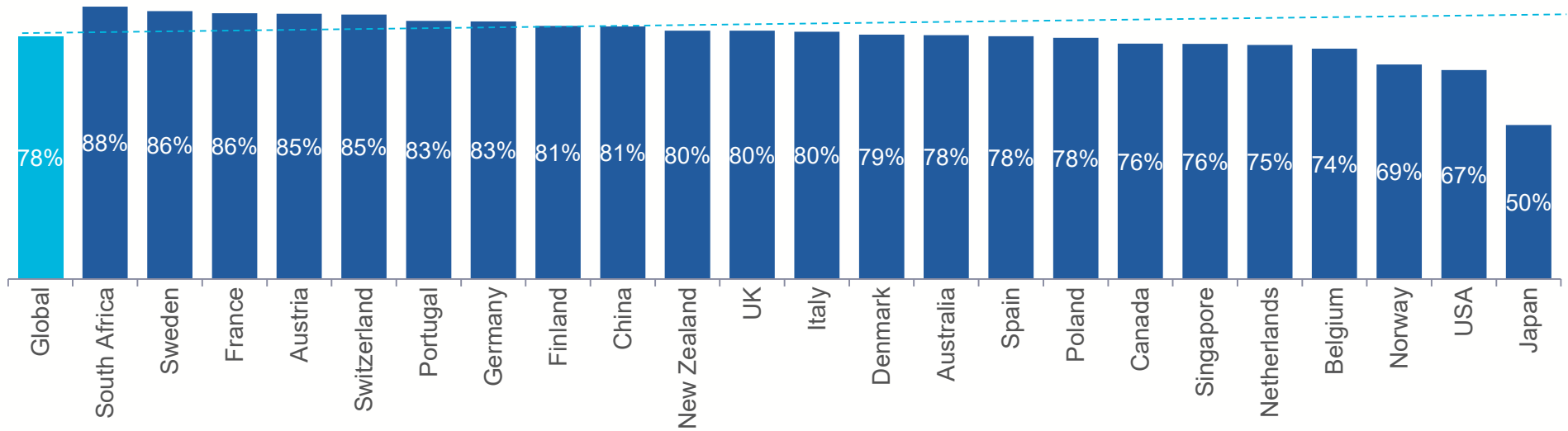
I NOTICE ECOLABELS WHEN SHOPPING

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



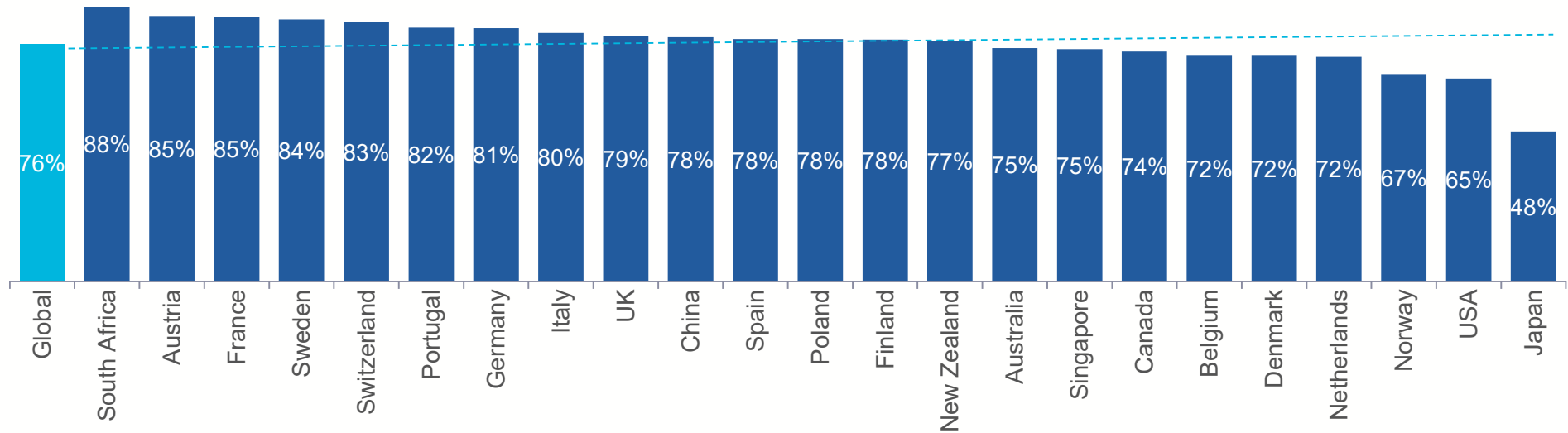
RESTAURANTS SHOULD BAN ALL UNSUSTAINABLE FISH AND SEAFOOD FROM THEIR MENUS

% agree, by country



SUPERMARKETS/GROCERY STORES SHOULD TAKE ALL UNSUSTAINABLE FISH AND SEAFOOD PRODUCTS OFF THEIR SHELVES

% agree, by country



10 Base: Seafood consumers, by country
Q11.3: Please indicate below how much you agree or disagree with the following statements: