

# MSC Consumer Insights 2018

Sweden

*GlobeScan, May 2018*

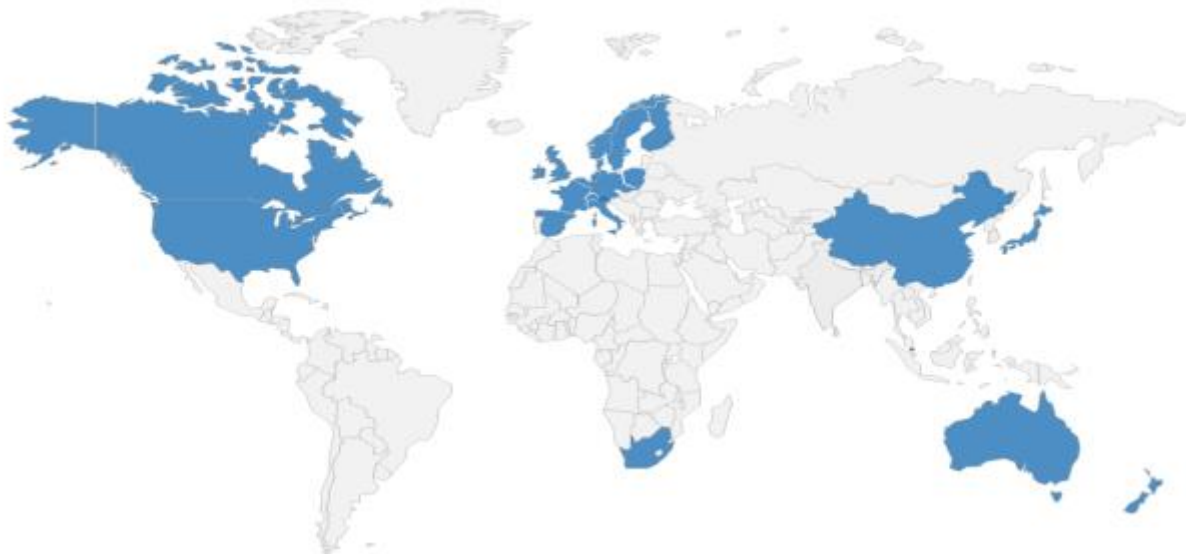
# Introduction and Methodology

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 Sweden was conducted between 19 January and 27 January 2018.



# Understanding the Consumers in this Study

	Type of consumer	Description	Sweden 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)	$n=1,450$	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	$n=1,006$	Differences of +/- 3 percentage points are statistically significant (approx.)
	<b>MSC-aware consumers</b>	Seafood consumers who recall having seen the MSC label “often” or “occasionally”	$n=606$	Differences of +/- 4 percentage points are statistically significant (approx.)
	<b>Seafood lovers</b>	Consumers who “really like” to eat seafood	$n=578$	<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	$n=189$	<i>Not applicable; no tracking since 2016 (we didn't ask this question previously)</i>



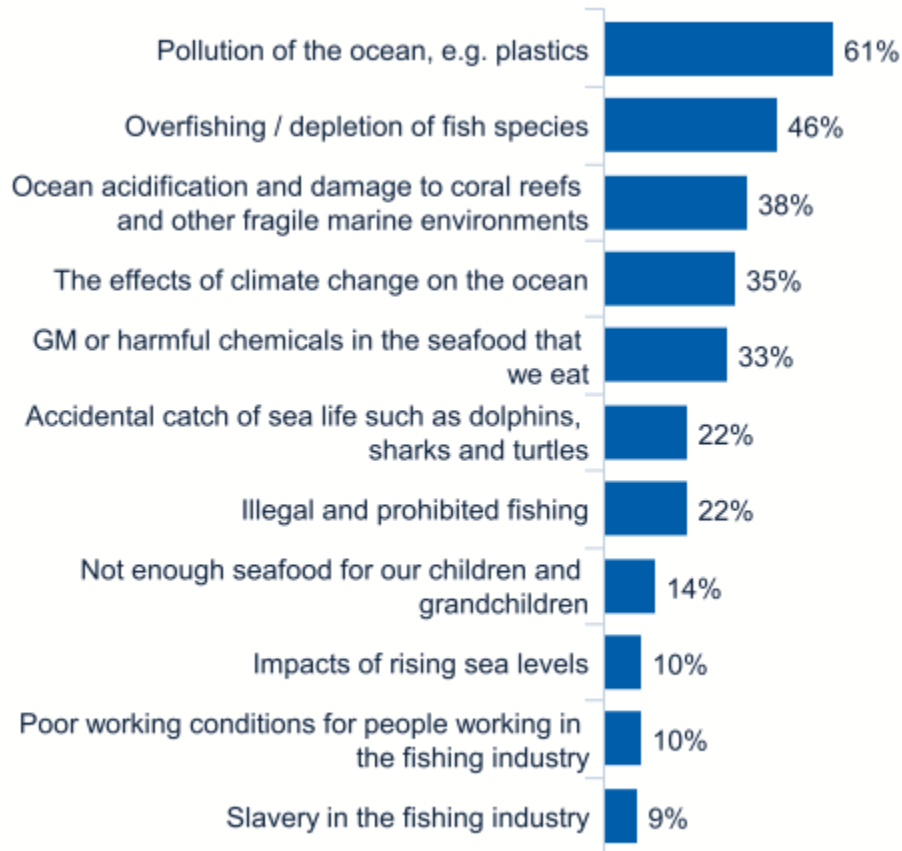
# Ocean Sustainability Context



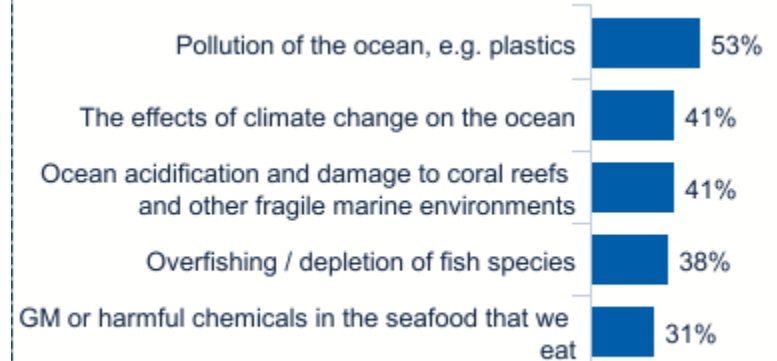
# Most Concerning Threats to Oceans

*Swedish consumers are most concerned about pollution of the oceans, followed by overfishing and ocean acidification; young consumers have slightly higher levels of concern about the effects of climate change on the oceans*

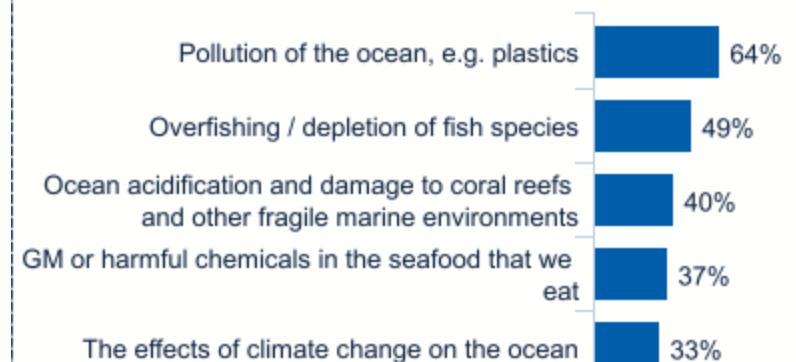
Issues (each respondent selected three issues)



Top issues for young consumers aged 18-34



Top issues for seafood lovers



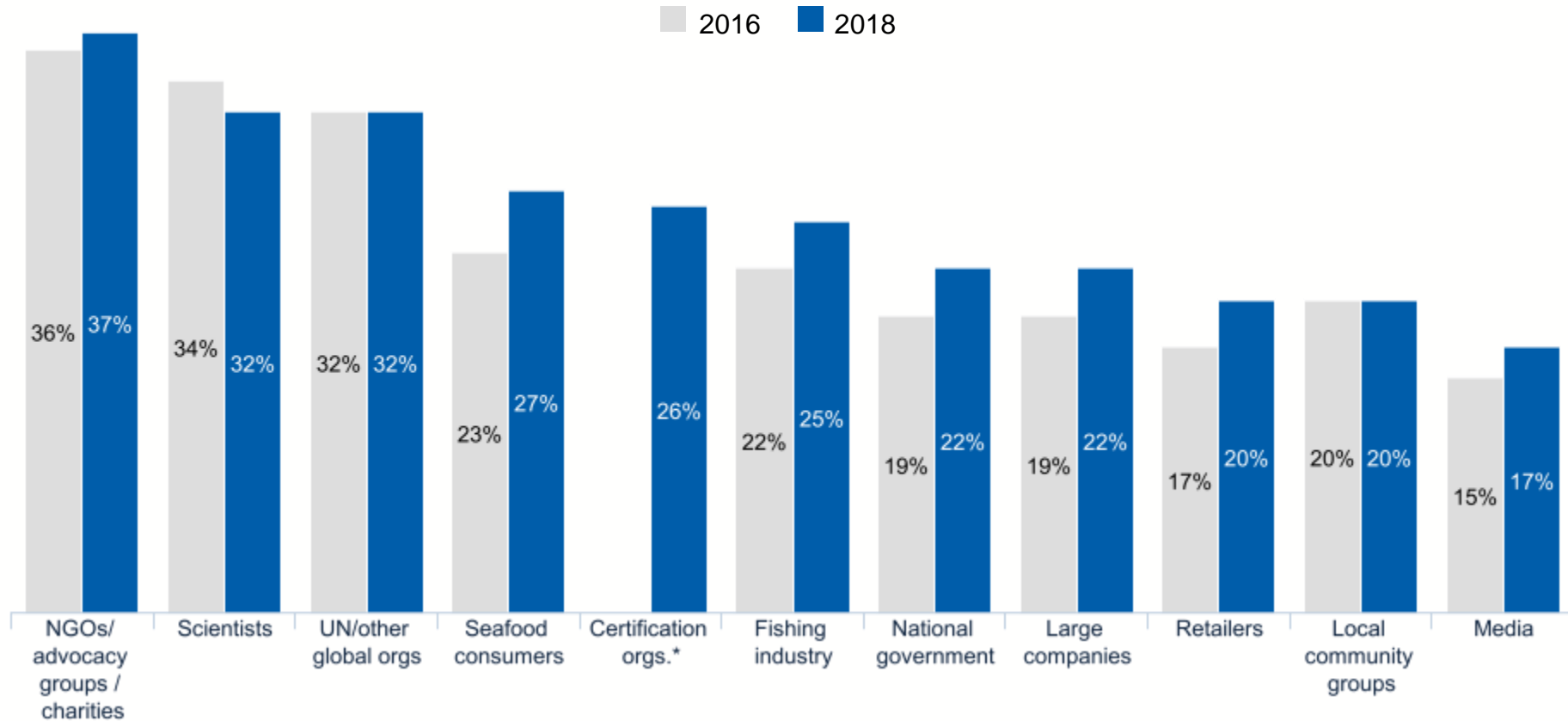
Base: Seafood consumers, Sweden

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

*Nearly all types of organisations are seen to be contributing more to ocean protection than in 2016, including large companies and retailers, though their performance remains comparatively weaker. NGOs, scientists and the UN enjoy the most positive perceptions*

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



Base: Seafood consumers, Sweden

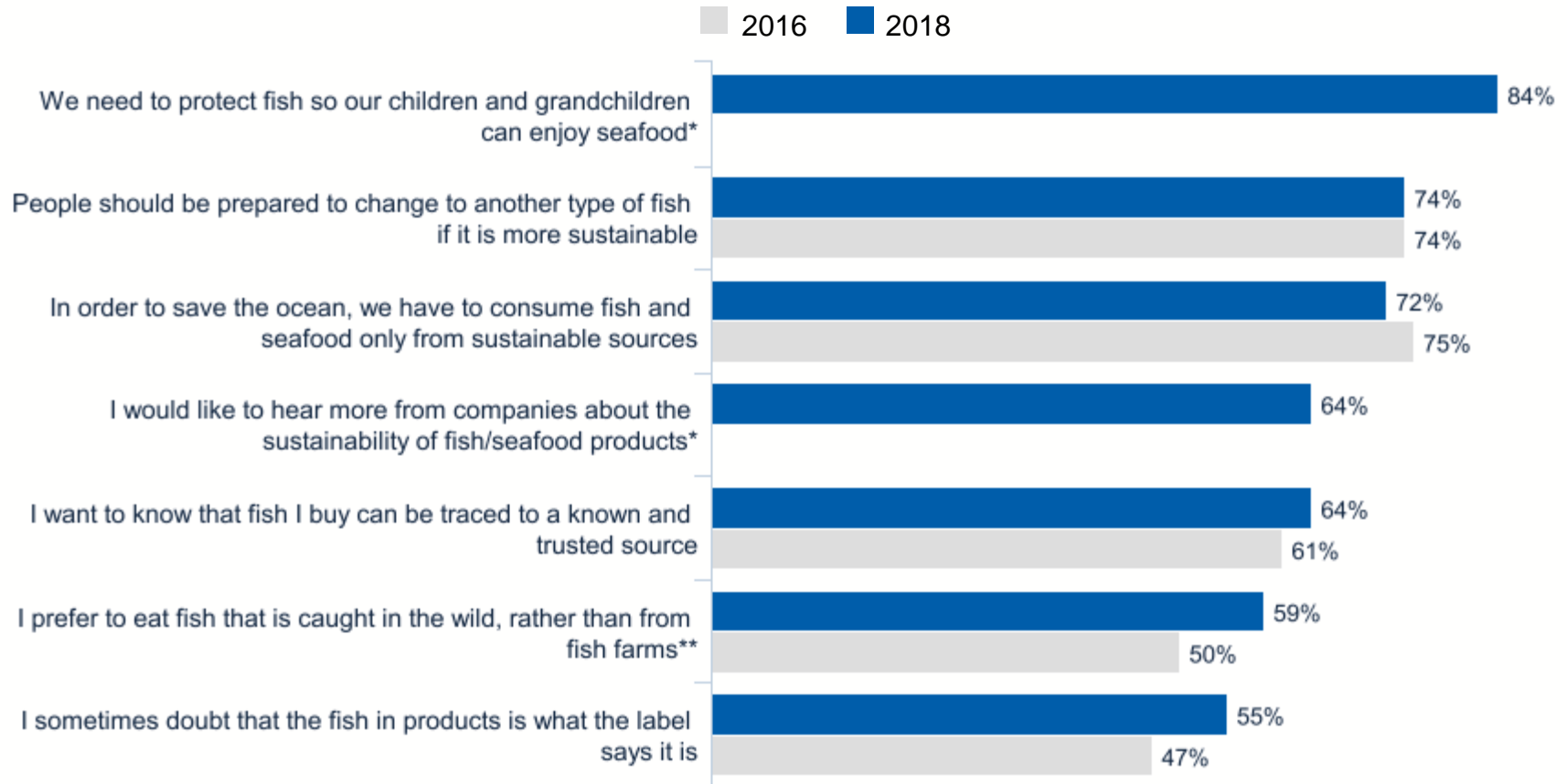
\*No tracking data available

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

# Perspectives on Ocean Sustainability and Fish

*Over four in five Swedes believe that we need to protect fish so that it can be enjoyed by future generations, and a strong majority feel that only fish from sustainable sources should be consumed to save the ocean. While about two-thirds want to know about companies' sustainability efforts, this is below the global average*

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



Base: Seafood consumers, Sweden

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

# Understanding of Sustainability\*

*The Swedish interpretation of sustainability focuses on the long-term continuation of natural resources and the protection of the environment for future generations*



Base: Seafood consumers, Sweden

Q6.2: What does the term “sustainability” mean to you?

\*Translated as Hållbarhet in Swedish

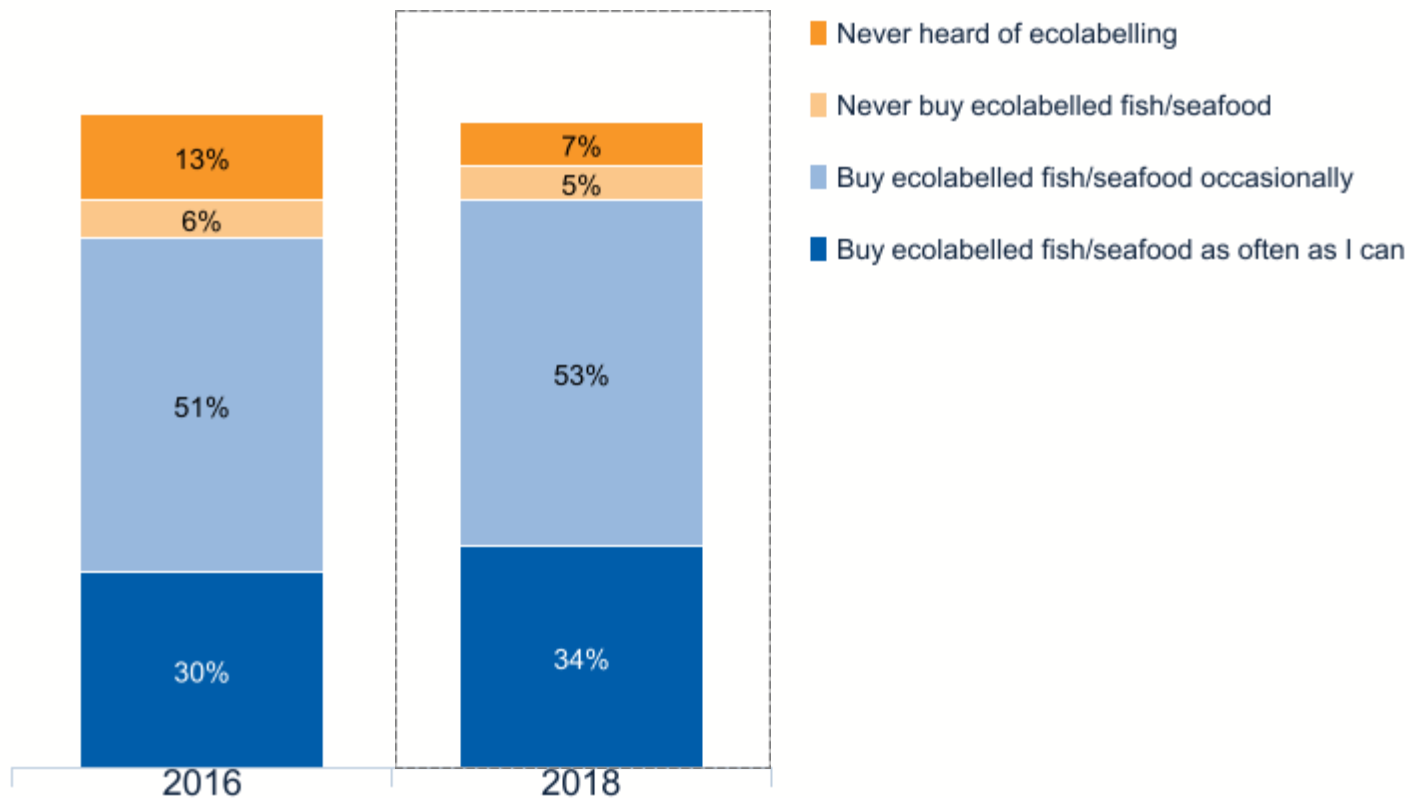
Note: Translations have not been checked and spelling has not been corrected



# Purchase of Ecolabelled Fish

*Since 2016, there has been an increase in those purchasing ecolabelled fish occasionally or as often as possible to nearly nine in ten, while the proportion of those who have never heard of ecolabelling has fallen*

Frequency of purchase of ecolabelled fish



Base: Seafood consumers, Sweden,

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

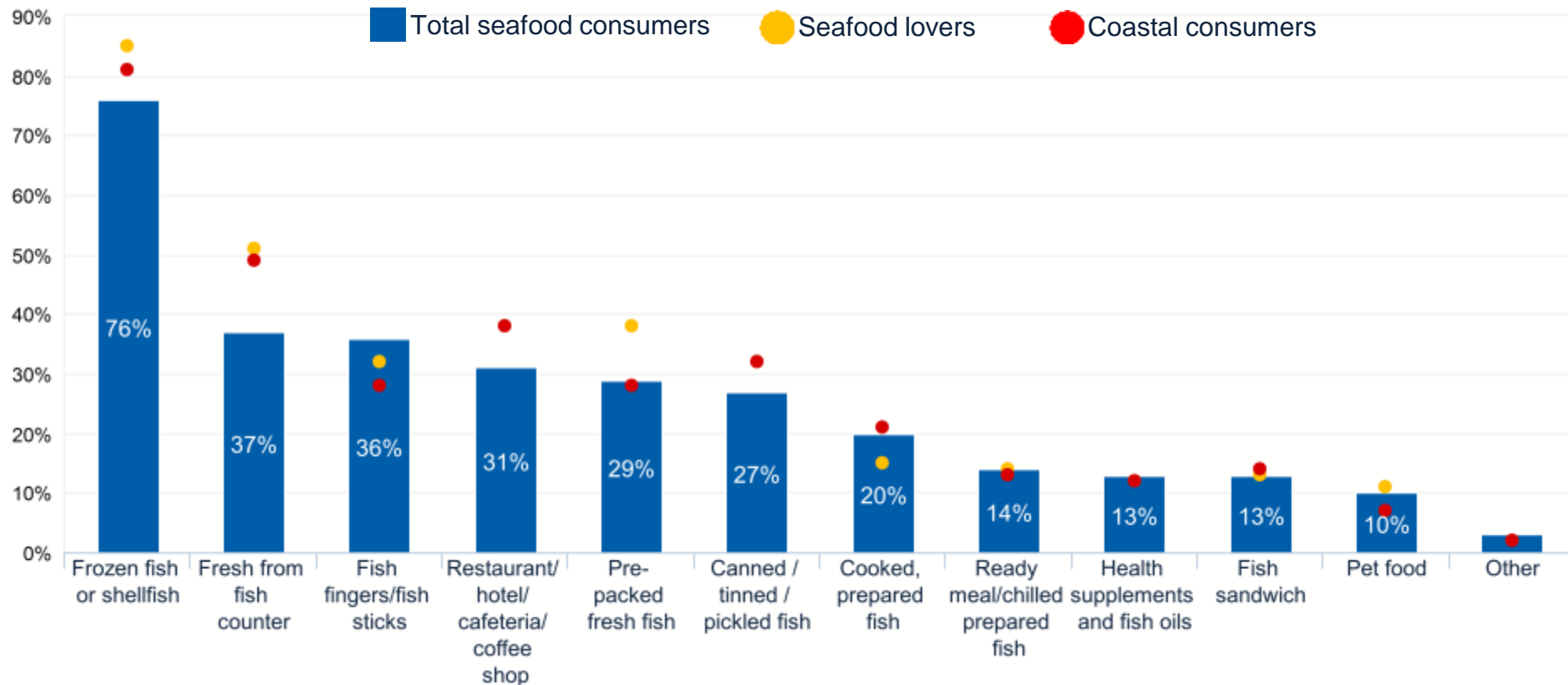
A photograph of two men, likely fishermen, sitting at a table and eating a meal of fish and chips. The man on the left is wearing a blue long-sleeved shirt and yellow and blue overalls, smiling as he eats. The man on the right is wearing a red hoodie and red overalls, also smiling and eating. In the background, a wall is decorated with a grid of framed black and white photographs of various fishing boats. A semi-transparent white box with the text 'Love of Seafood' is overlaid on the left side of the image.

## Love of Seafood

# Types of Fish/Seafood Purchased, by Consumer Type

*Frozen fish and seafood are by far the most popular product types among Swedish consumers, with over three-quarters making frequent purchases. Seafood lovers are more likely than seafood consumers in general to purchase fresh fish products*

Types of fish/seafood purchased frequently, by consumer type



Base: Seafood consumers, Sweden

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



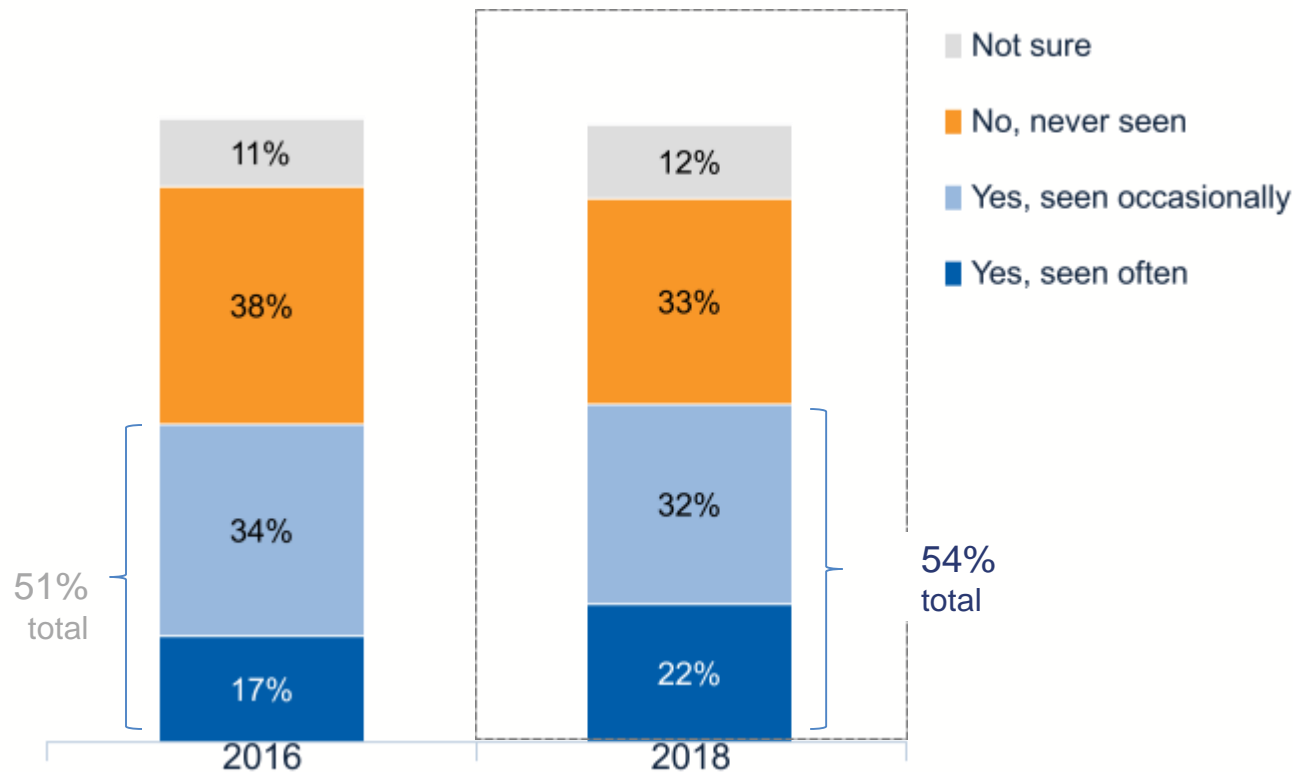
# MSC Awareness and Understanding



# Awareness of the MSC Label

*The proportion who see the MSC label often has grown since 2016 to over a fifth, while a further third see the label occasionally; there are fewer consumers who have never seen the label*

Frequency of seeing the MSC label



Base: General public, Sweden

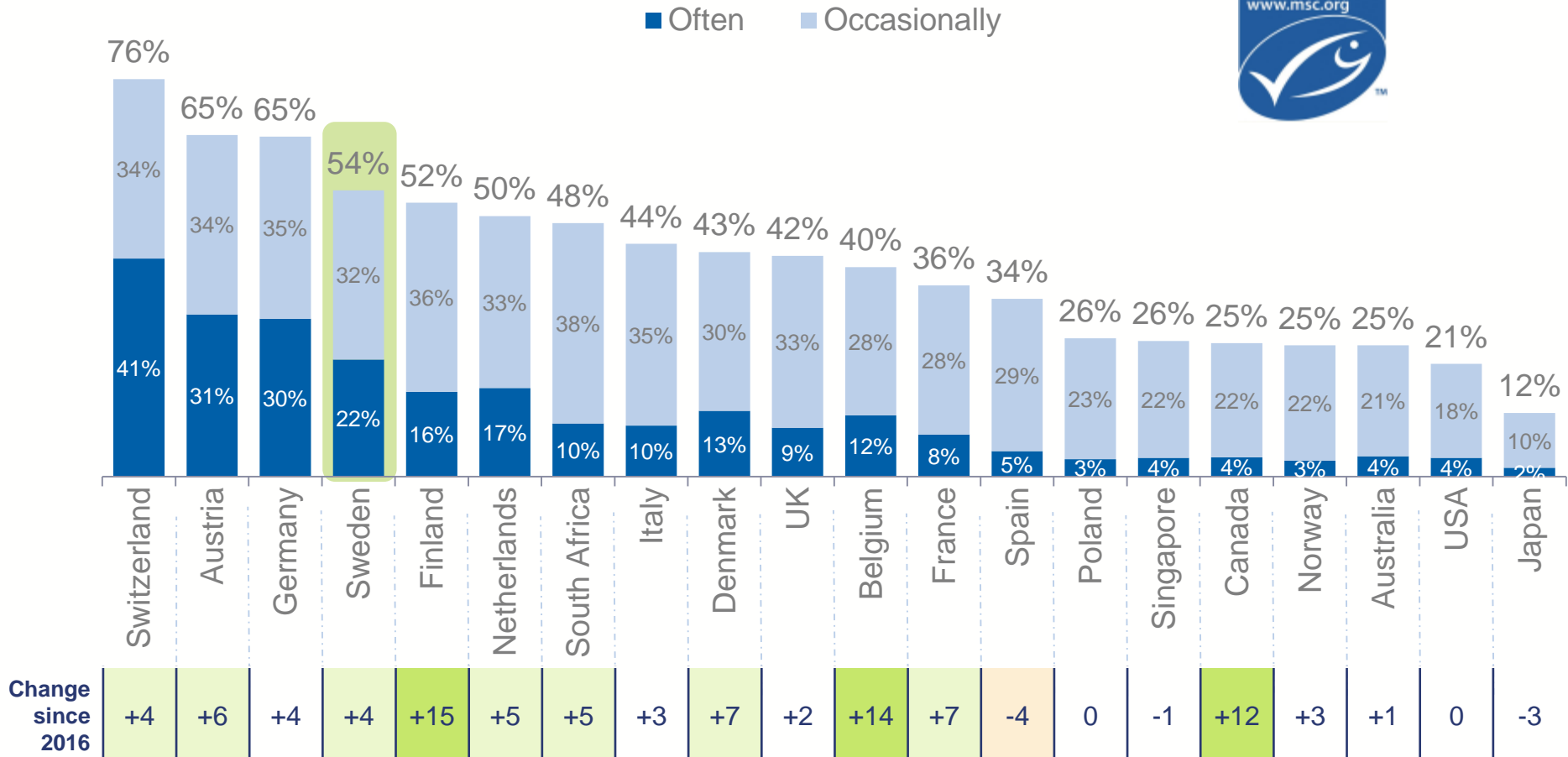
Q1.1: Have you ever seen the following logos?



# Global Awareness of the MSC Label

*Sweden enjoys some of the highest awareness rates of the MSC label globally, with over half seeing the label occasionally or often – a stable proportion since 2016*

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

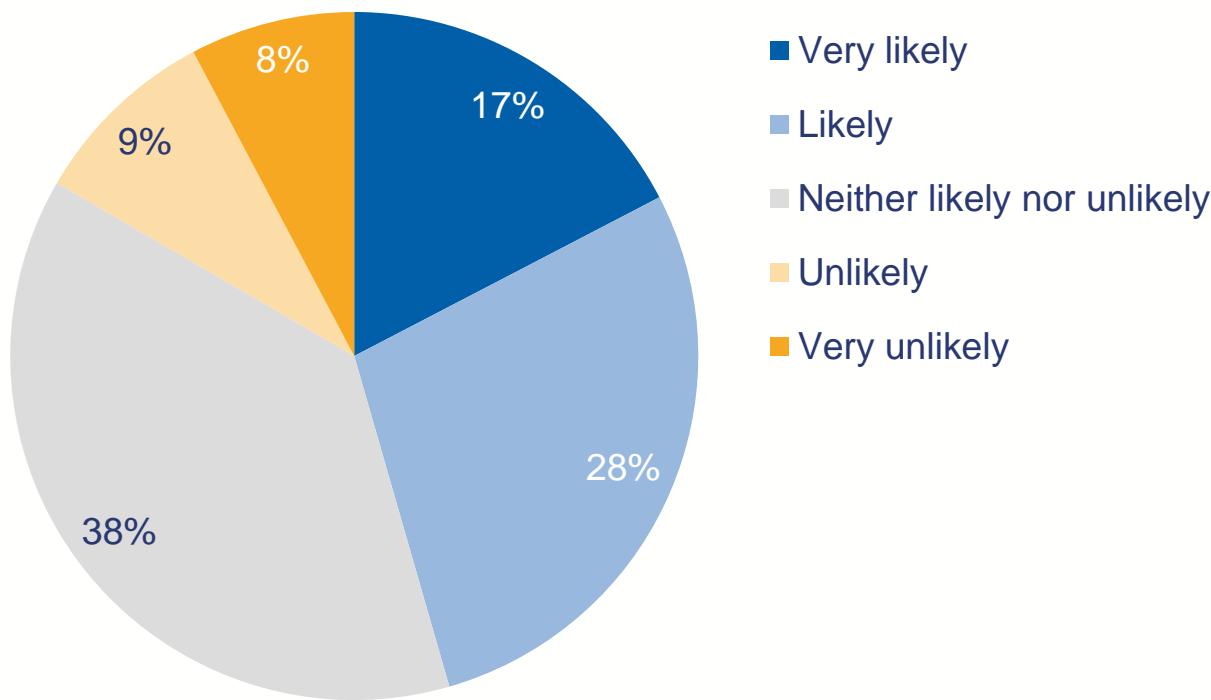


Base: General public, by country; Q1.1: Have you ever seen the following logos?

# Recommendation of MSC

*In Sweden, 45 per cent of MSC-aware consumers are likely to recommend MSC-certified products to their friends and family*

Likelihood of recommending MSC-certified products



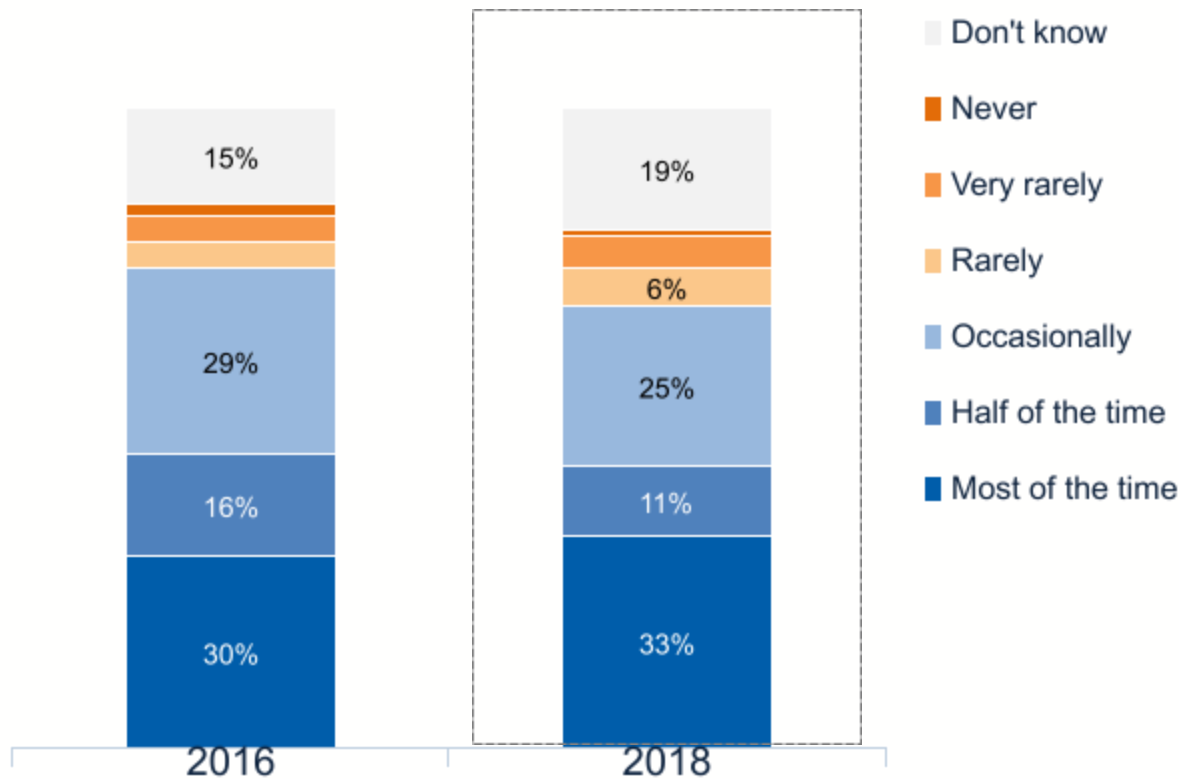
Base: MSC aware, Sweden

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 MSC-aware consumers purchasing MSC-certified products at least occasionally since 2016, falling to seven in ten; however, more than three in ten say they purchase such products as often as possible – a slight increase on 2016*

Frequency of purchase of MSC-certified fish



Base: MSC aware, Sweden

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

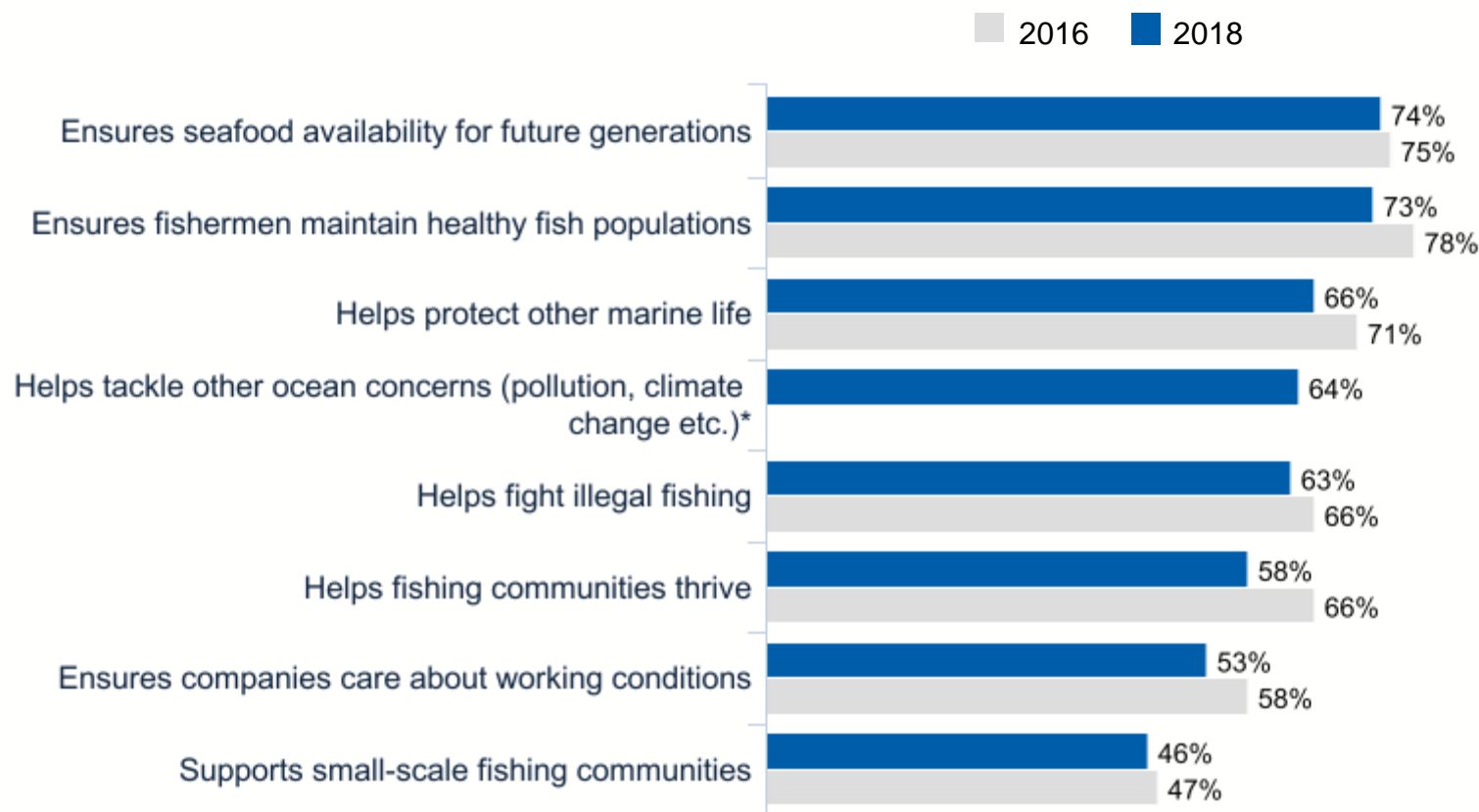
# MSC Perceptions



# Perceptions of MSC: Sustainability Impact

*MSC-aware consumers are the most likely to believe that the MSC ensures seafood availability for future generations and ensures fishermen maintain healthy fish populations, though associations with the latter have slightly fallen since 2016; Swedes are least likely to associate the MSC with social responsibility*

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



Base: MSC aware, Sweden

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"

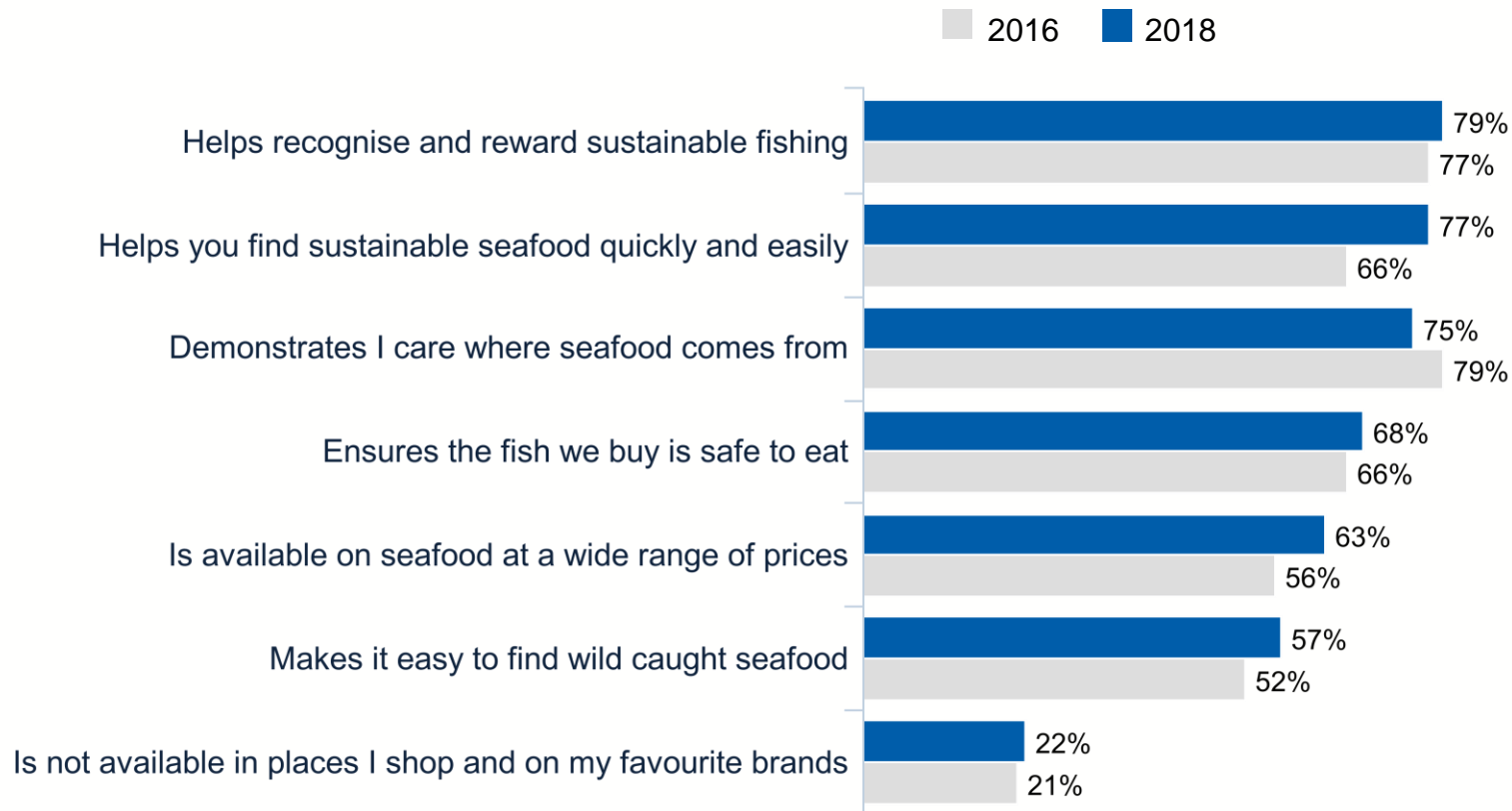
\*No tracking data available



# Perceptions of MSC: Consumer Benefits

*Four in ten feel that the MSC helps them recognise and reward sustainable fishing, and a similar proportion feels that the label helps them quickly and easily find sustainable seafood – a notable increase since 2016*

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



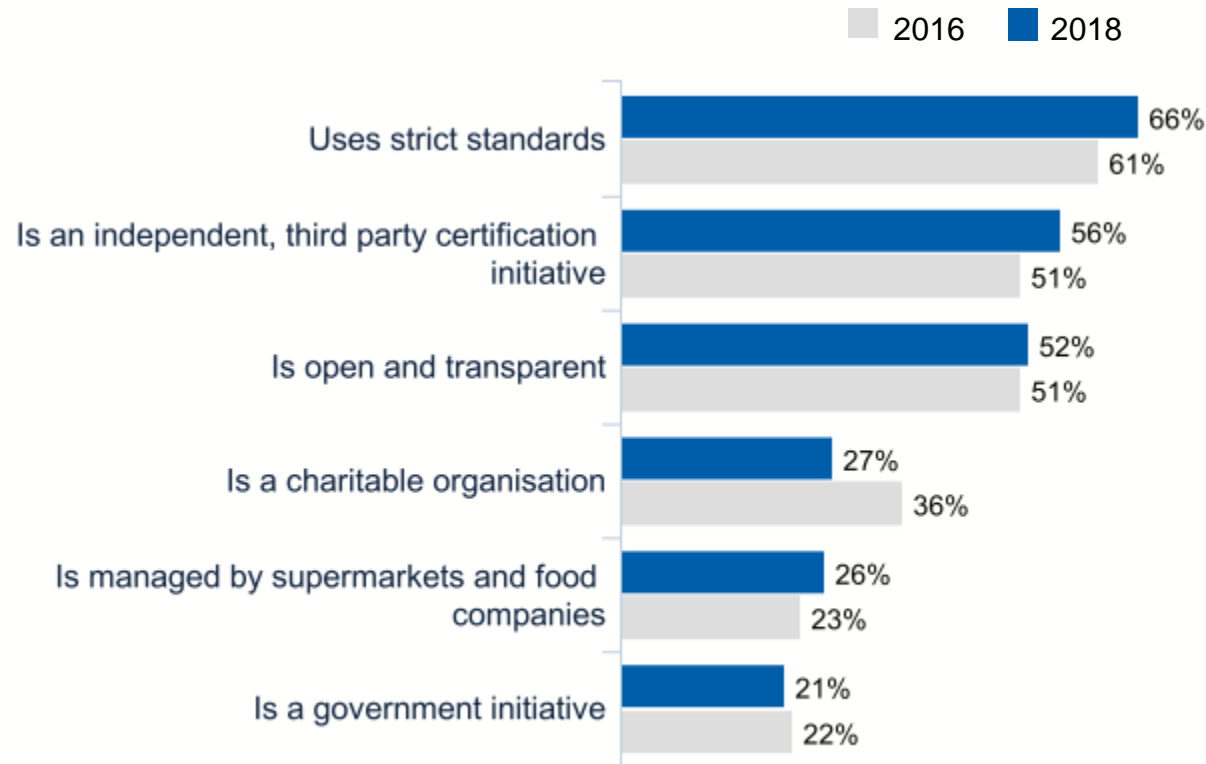
Base: MSC aware, Sweden

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

*Two-thirds believe that the MSC uses strict assessment standards – a slight increase since 2016. Over half see the MSC as an open and transparent, independent third-party initiative. Nonetheless, associations with each of these top attributes are below global averages*

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



Base: MSC aware, Sweden

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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