

# Seafood consumers' perceptions of sustainability

*Learnings from the MSC global seafood consumer survey*

MSC | GlobeScan Incorporated  
October, 2017

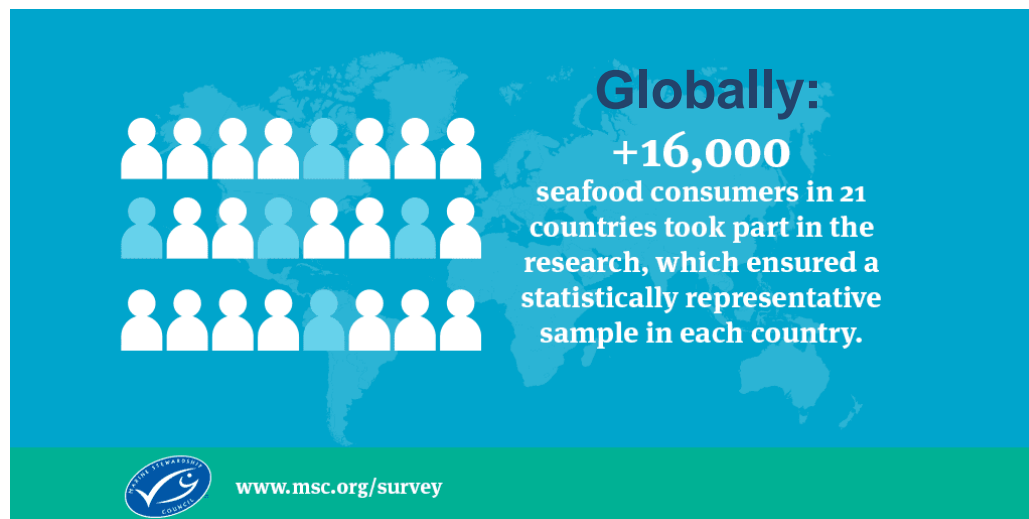
# Meet GlobeScan

- Strategy and insights consultancy, focussed on consumer and stakeholder intelligence and engagement
- Building trust to create a better world
- Cape Town, Hong Kong, London, Paris, Sao Paulo, San Francisco, Toronto

Some of our recent certification and broader sustainability clients:



# Introduction to MSC Consumer Perceptions Study 2016



**In EU markets, the sample size was  $n=9,656$  and covered: 13 markets:** Spain, France, Germany, Austria, Switzerland, Poland, UK, Netherlands, Belgium, Italy, Denmark, Sweden, Finland. Norway was also included.

- GlobeScan ran a consumer perceptions study in 2016 covering 21 markets globally
- This follows MSC research in previous years, using online panels but with updated methodology
- Aims to understand consumer attitudes to seafood consumption and sustainability



# Topics we'll cover today

Importance of seafood  
sustainability

Awareness and understanding  
of MSC

Ecolabelling receptiveness

Trust in MSC



# Ocean Sustainability: Do Consumers Care?

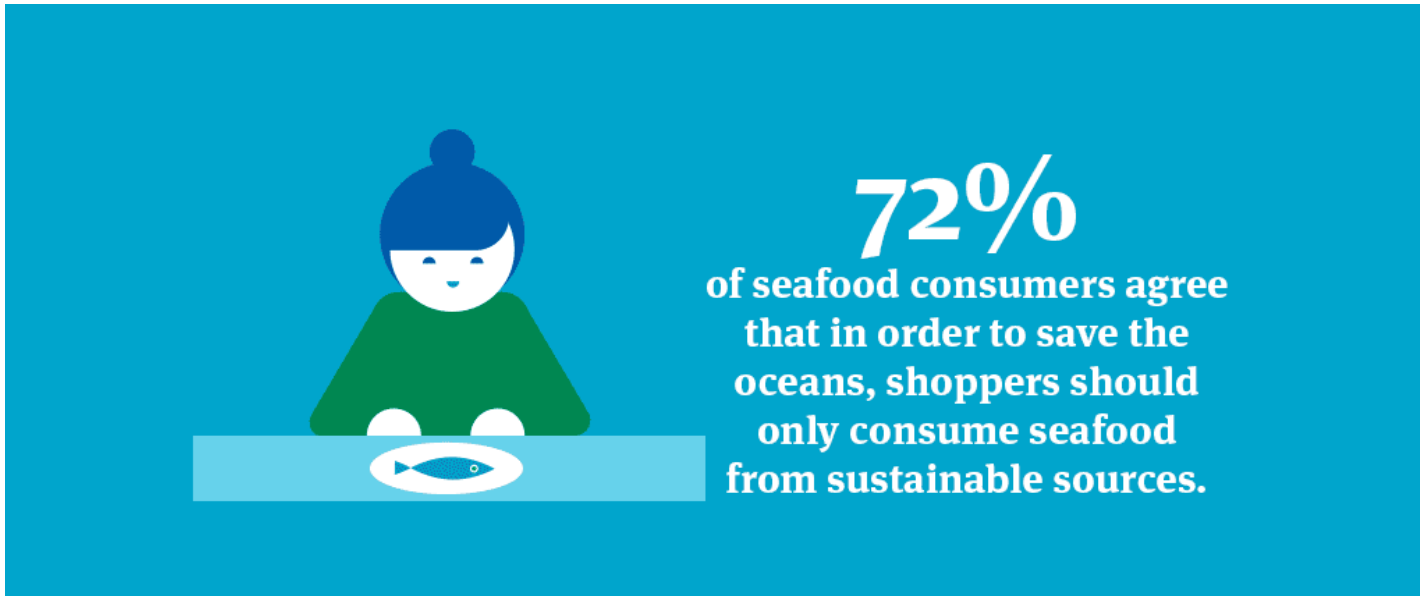




# Consumers see the need to switch to sustainable sources

*Across the world, seafood consumers generally agree that to save the oceans we need to **only** consume seafood from sustainable sources;*

**support is highest among older consumers and particularly high in European markets including Finland, France, Italy, Spain, Sweden, Switzerland and UK**



*This is a strong statement (only consume from...) so this result is higher than we expected.*

# Majority demand a trusted seafood source

■ Describes opinion well (5+6+7)   ■ Neutral (4)   ■ Doesn't describe opinion well (1+2+3)   ■ Don't know

I want to know that fish I buy can be traced back to a known, trusted source

65%

18%

15%

2%

I sometimes doubt that the fish I buy is what the label says it is

55%

21%

21%

3%

Fish that is caught in the wild is better than farmed fish

52%

20%

17%

10%

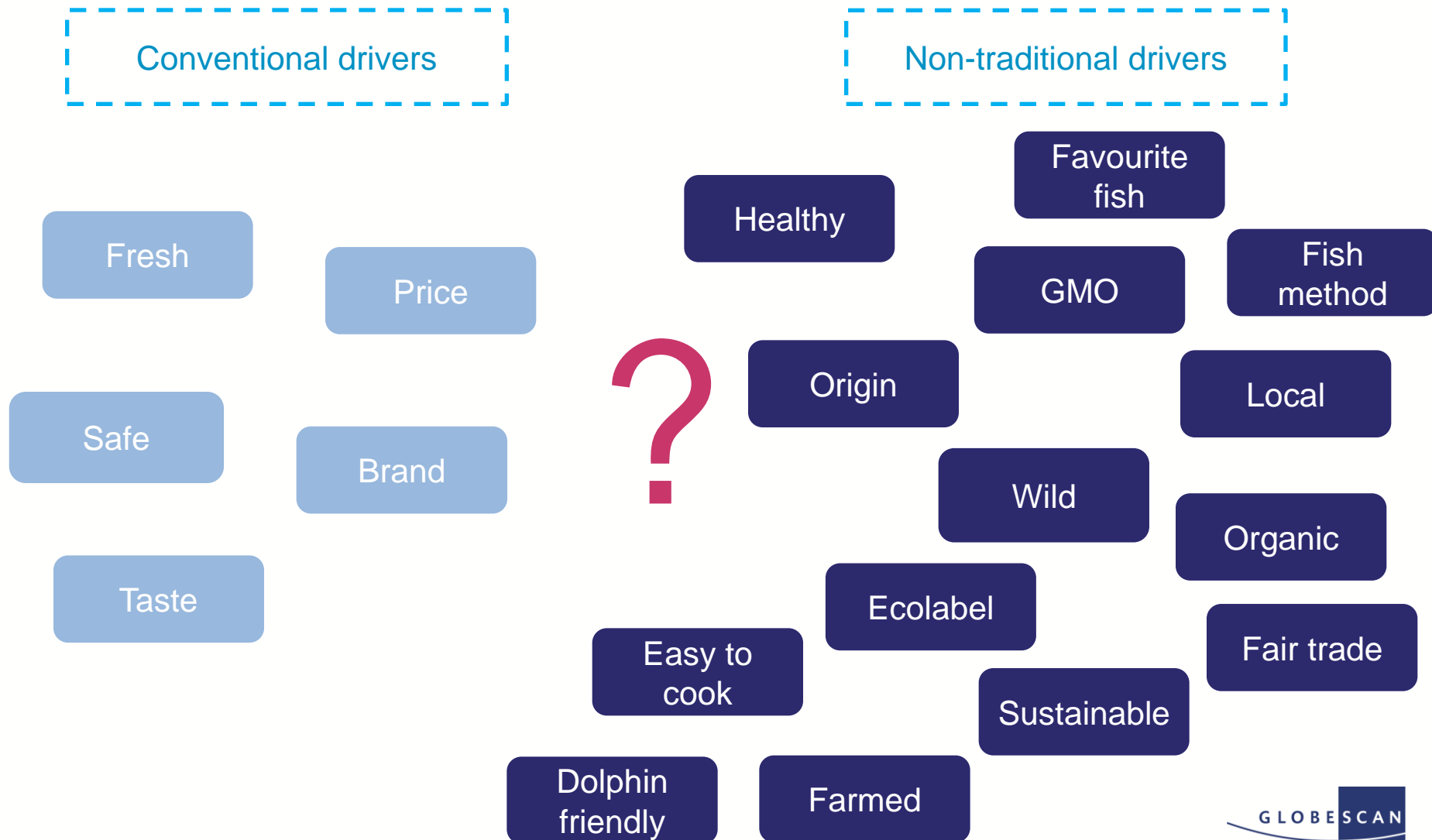
Particularly strong support for traceability in Germany, France, Poland, Switzerland, Spain, Italy and Austria (70% +)

Base: Seafood consumers globally,  $n=16,876$

Question: 5. How well does each of the following statements describe your opinions? Please use a scale from 1-7 where 1 means "Does not describe my opinion very well" and 7 means "Describes my opinion very well"

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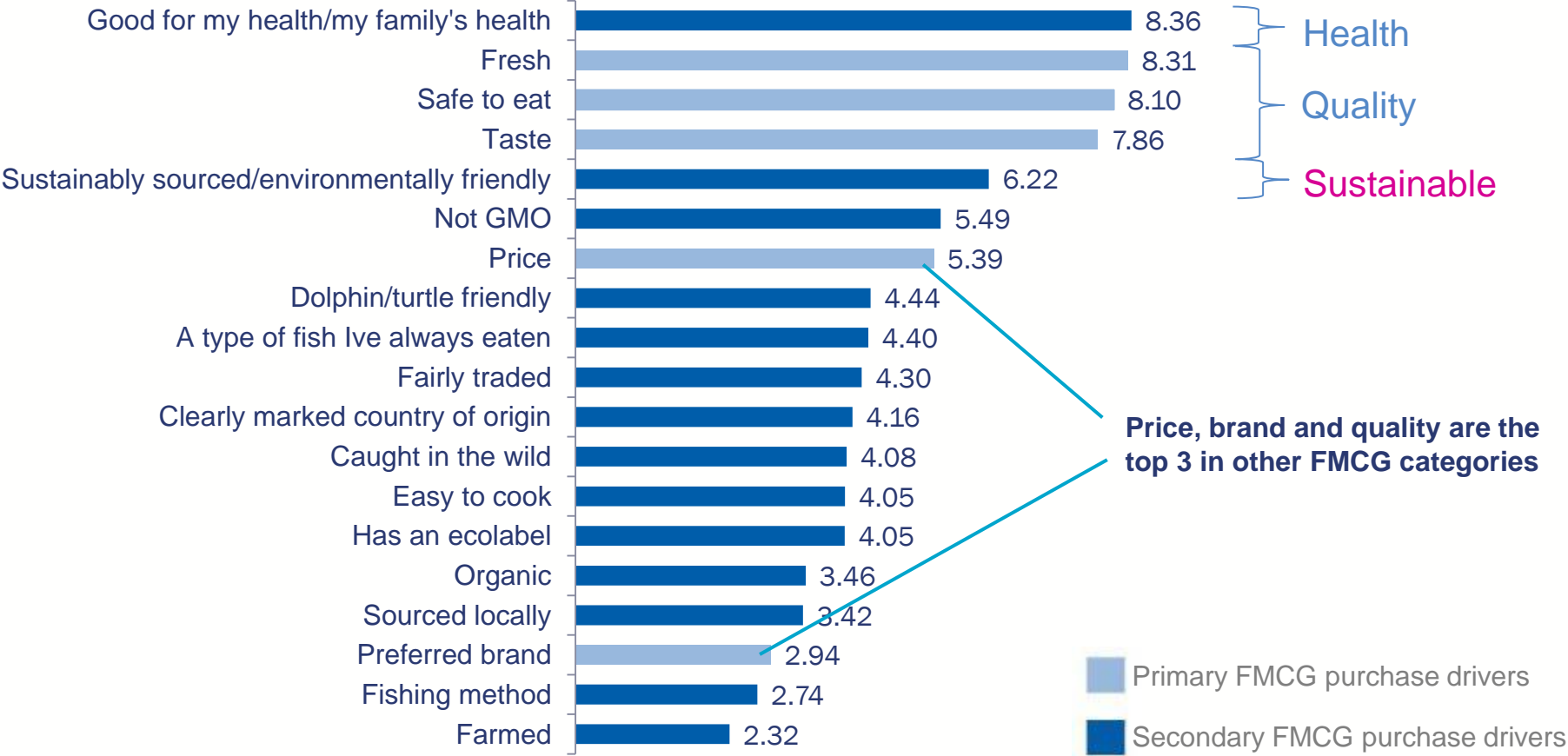
# What motivates consumers when purchasing fish/seafood products?





# Consumers value sustainability when purchasing seafood

Importance score (out of ten)



Base: Seafood consumers globally, n=16,876

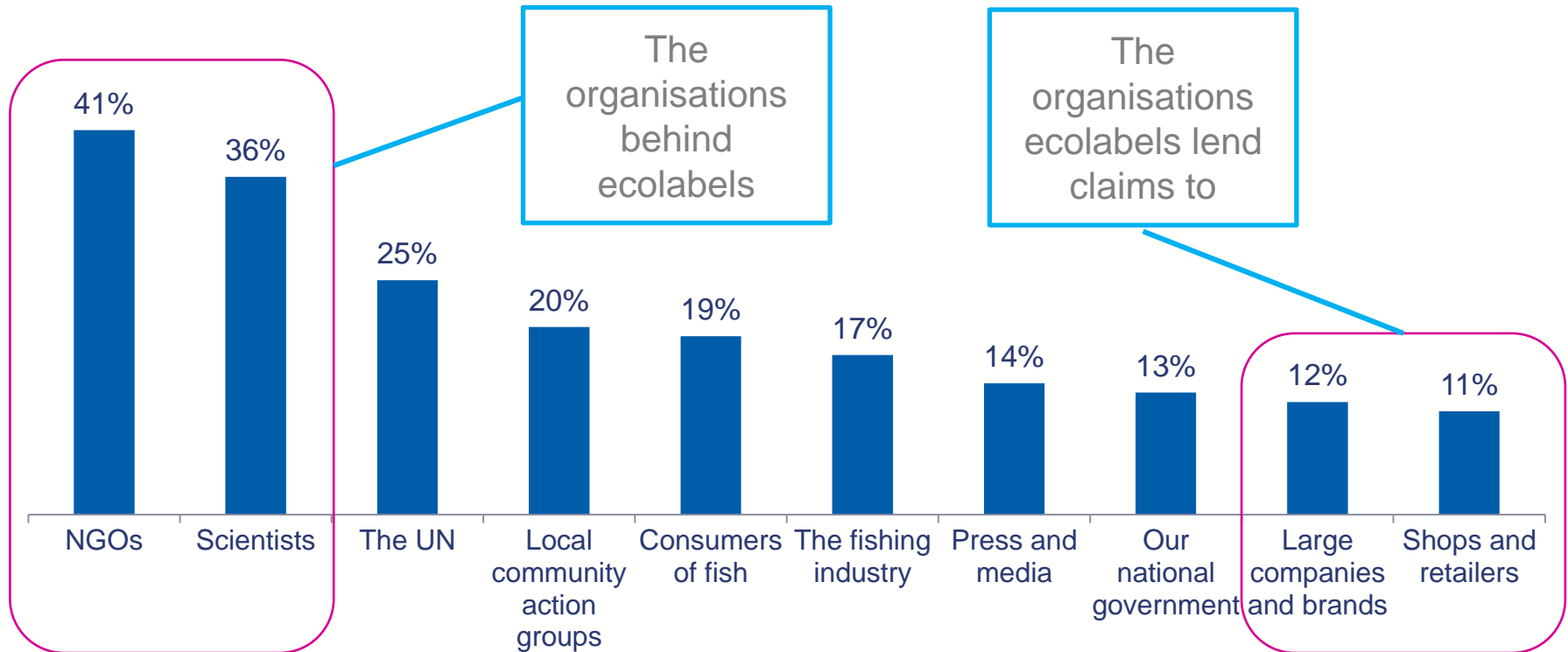
Question: 4.2 Thinking about your recent purchase of '[answer from 4.1]', which of the following five considerations was the most important and which was the least important? [Each respondent sees eight sets of five statements rotated]



# How Can Ecolabels Empower Consumers and Enhance Trust In Brands?

# NGOs and scientists perceived to contribute significantly more than business to protecting oceans

Contributing well (6+7 on 7-pt scale)

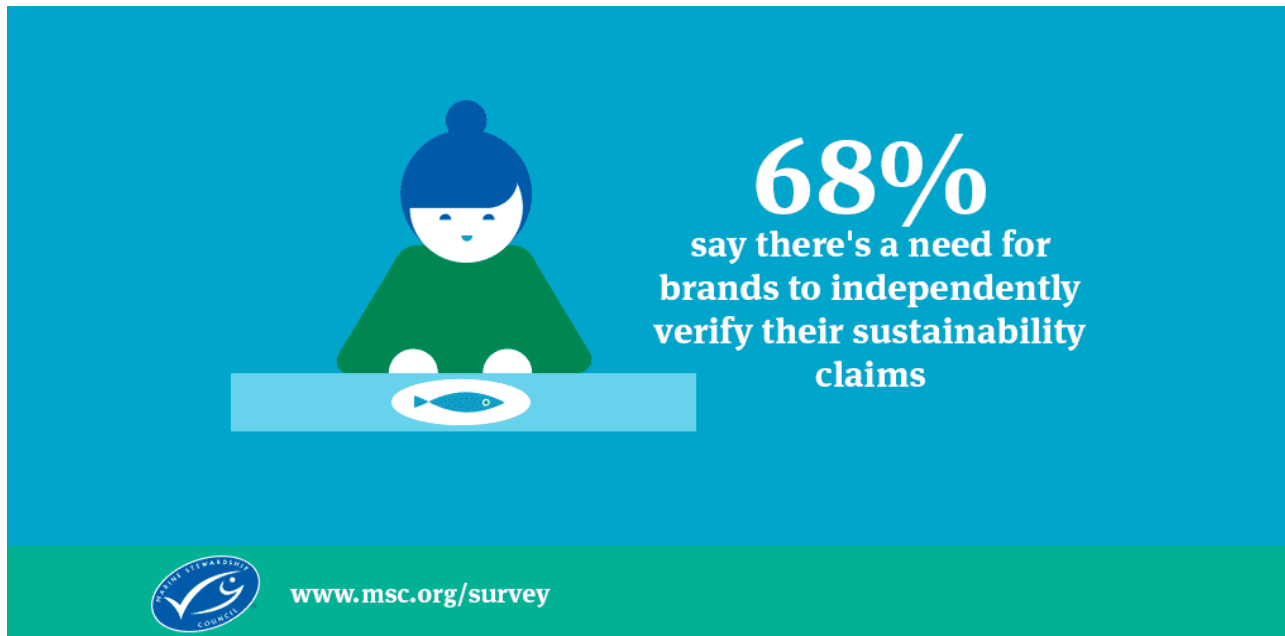


Base: Seafood consumers globally,  $n=16,876$

Question: 3. How well do you think the following institutions are contributing to protecting the ocean environment? Please use a scale from 1-7 where 1 is "not very well" and 7 is "very well"

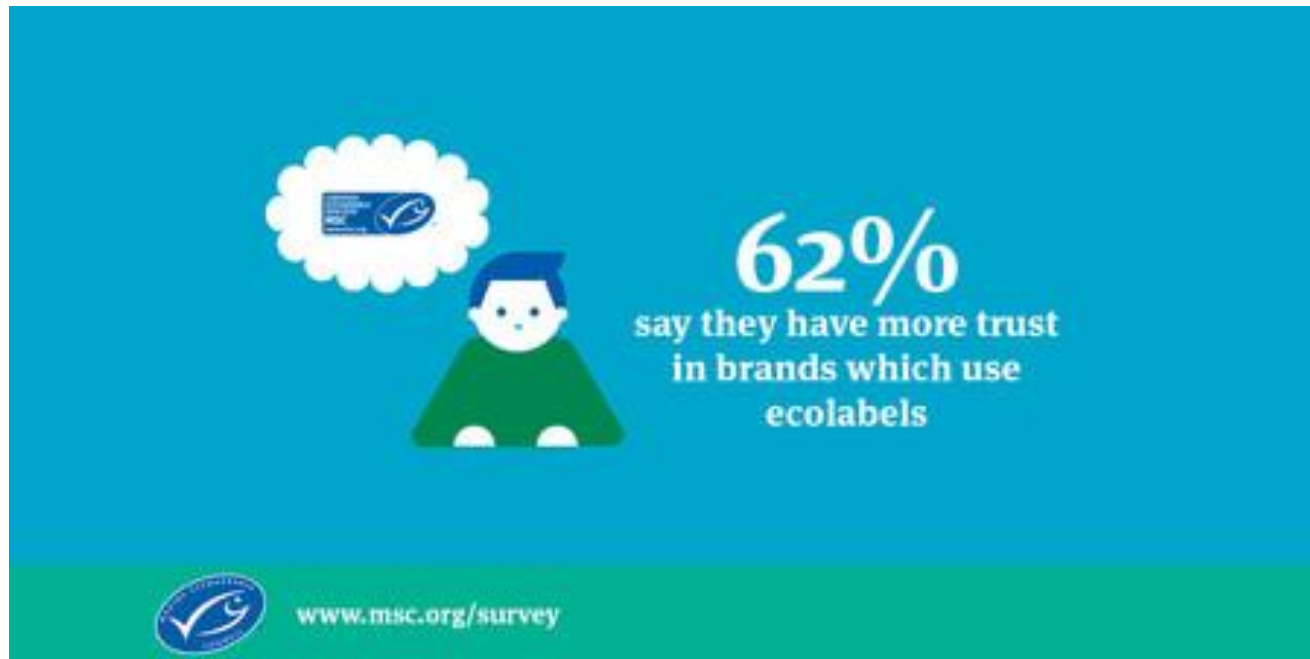
# Demand for independent labelling is strong

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



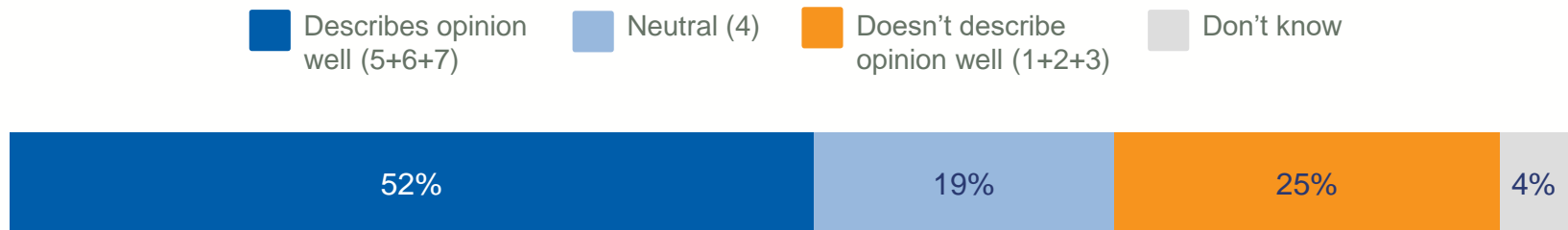
# Consumers are positive about the impact of ecolabels on their trust in product brands

Ecolabels on seafood products raise my trust and confidence in the brand



# Despite the demand, the challenge is low visibility of ecolabelled products

Sustainability is important but I don't notice ecolabels when shopping



Base: Seafood consumers globally,  $n=16,876$

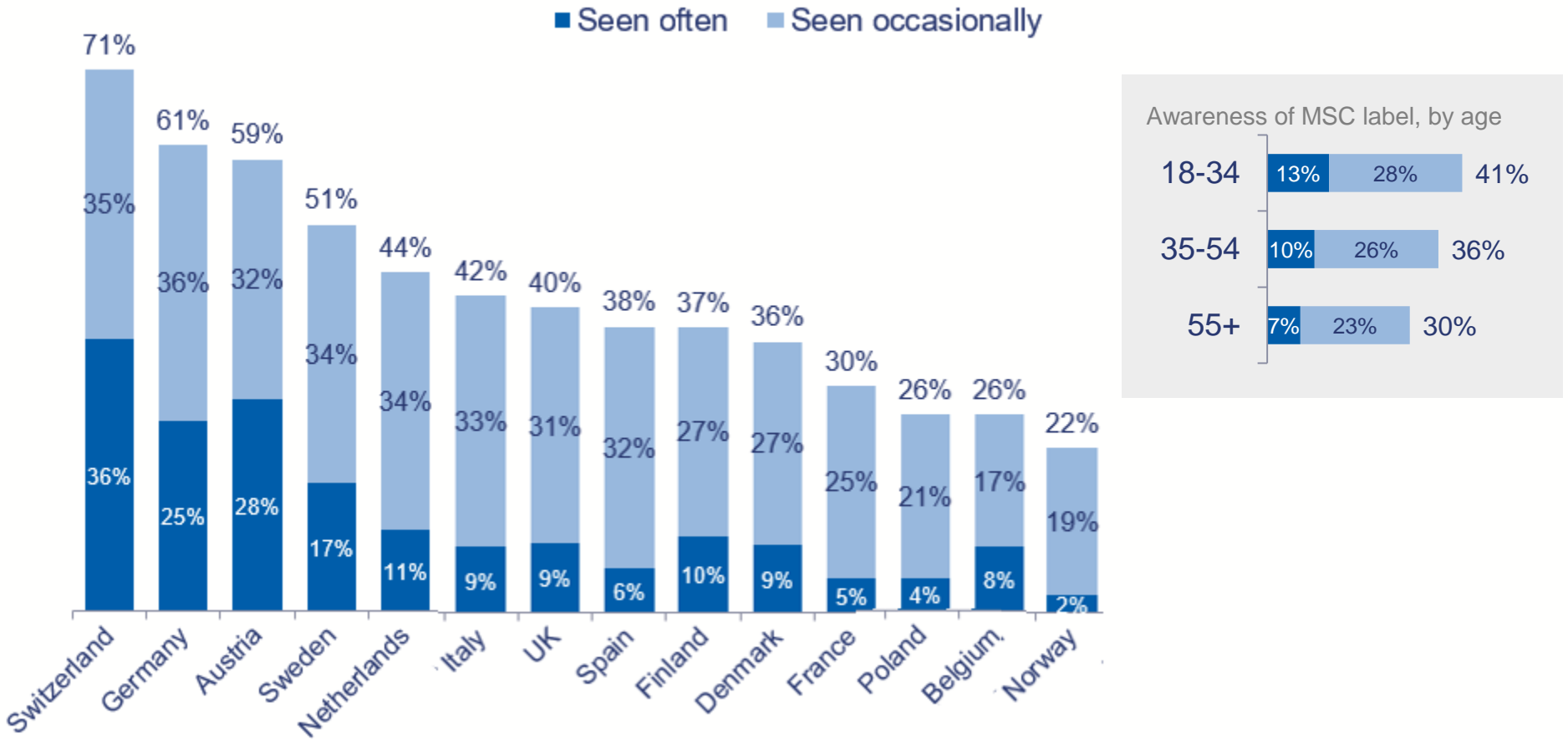
Question: 5. How well does each of the following statements describe your opinions? Please use a scale from 1-7 where 1 means "Does not describe my opinion very well" and 7 means "Describes my opinion very well"



The background of the slide is a vibrant blue underwater scene. In the center, a large, detailed fish, possibly a salmon, is surrounded by a large school of smaller fish, creating a dynamic and lively visual. The lighting is bright, suggesting sunlight filtering through the water.

Do consumers know and understand MSC?

# Awareness of MSC label among general public varies

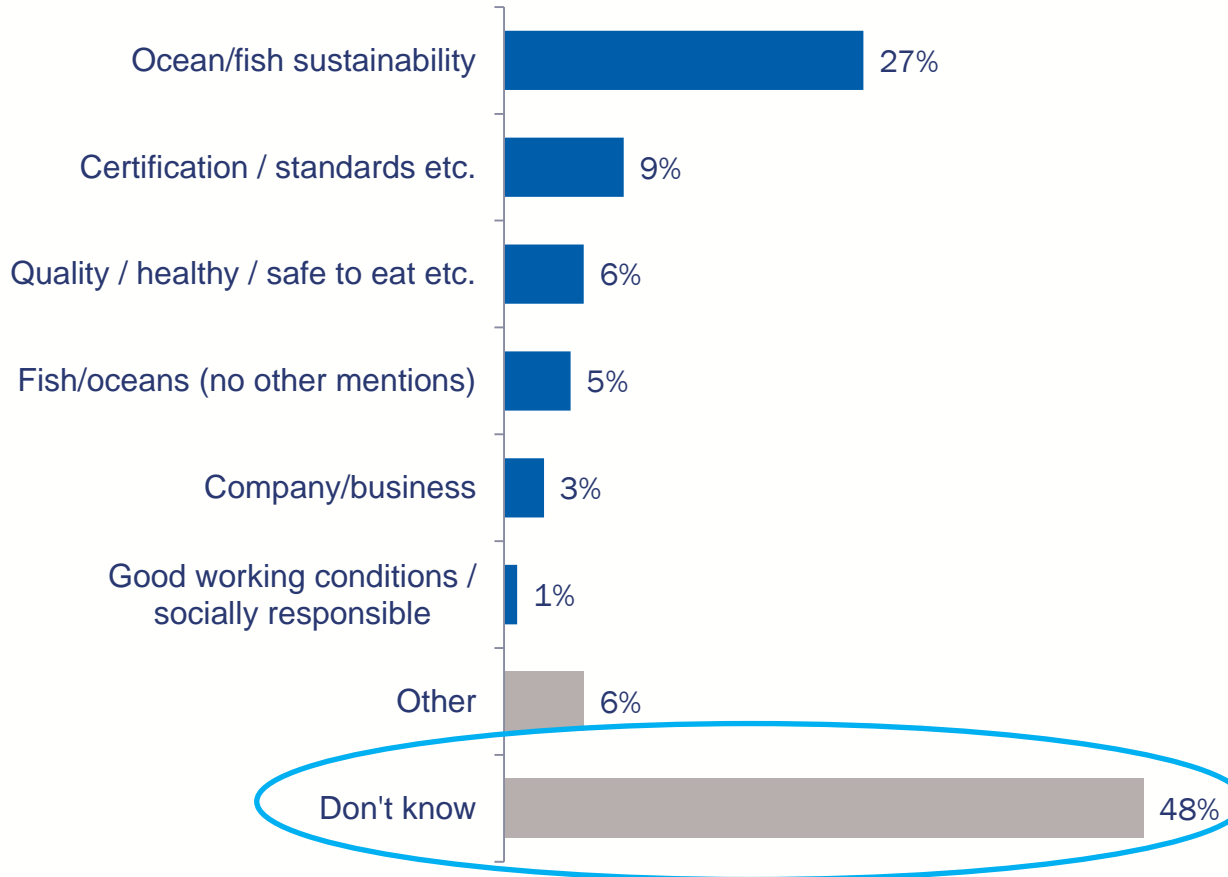


Base: General public, global by country

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

# Many consumers are not clear on what MSC label stands for

Unprompted associations with MSC label



Base: Seafood consumers globally,  $n=16,876$

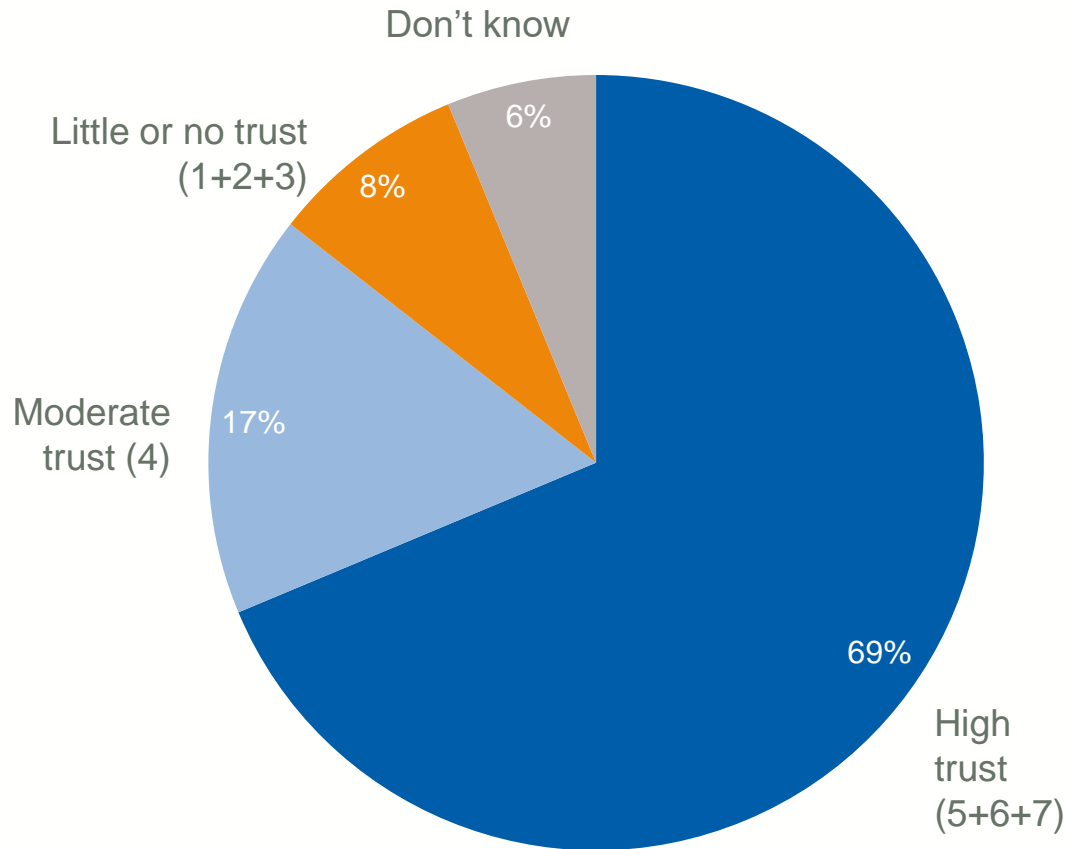
Question: 6. What does this logo mean or represent? *We are interested in what this label represents to you, please provide as much detail as possible*

The background of the slide is an underwater scene. A large, detailed fish, possibly a shark or a large tuna, is swimming towards the viewer. It is surrounded by a large school of smaller fish. Sunlight rays penetrate the water from the top, creating a blue and green gradient.

**Do consumers trust a label  
like MSC?**

# Among those who recognise it, trust in MSC is strong

Trust in the MSC label



Base: MSC-aware consumers globally,  $n=5,505$

Question: 9.2 How much trust do you have in the claims of each of the following initiatives/organisations? Please answer on a scale from 1-7 where 1 is "No trust" and 7 is "A lot of trust"

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# Summary of learnings

**Ocean sustainability is a topic with global relevance and ranks relatively highly in seafood purchase decisions**

**Awareness of MSC generally mirrors receptiveness of each market to ecolabelling; however, consumer understanding needs improvement**

**Consumers support the concept of certification but in many markets ecolabels are not part of consumer consciousness**

**MSC's strong trust profile is underpinned by strict standards which empower consumers and sustain seafood for future generations**



# Tracking progress in 2018

## **We will re-run the survey in early 2018:**

- Countries and methodology the same
- Indication of changes from 2016 benchmarks
- Focus on understanding how consumers relate sustainable seafood to wider global / ocean concerns
- Happy to share results with MAC (May 2018)

# Thank you



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