Understanding & Activating Seafood Consumers – Asia-Pacific

MSC & GlobeScan, 9 October 2018
Today’s agenda

• 10:00   Welcome
• 10:05   Overview of key consumer trends
• 10:30   Update on Asia Pacific activities
• 10:40   Q/A
• 10:40   Q/A
• 11:00   Close
Chris Coulter  
Co-CEO at GlobeScan

Patrick Caleo  
Regional Director, Asia Pacific, MSC
Introduction to MSC Consumer Insights for Asia-Pacific 2018

Type of consumer

- General public
- Seafood consumers

Sample

- General public: n=4,795
- Seafood consumers: n=3,638

Countries:
- Australia
- China
- Japan
- New Zealand
- Singapore
Do people care about the oceans?

Are people acting on their values?

How do we trigger action?

How MSC and partners engage consumers
Do people care about the oceans?
A third of consumers are self-declared seafood lovers; seafood love varies by country but increases closer to the coast.

Love of seafood, 21-country average

- **Really like eating fish/seafood**: 34%
- **Like eating fish/seafood**: 41%
- **Neither like or dislike**: 15%
- **Dislike/really dislike eating fish/seafood / not purchased**: 10%

Love of seafood ("really like"), by country

- **21 country average**: 34%
- **South Africa**: 44%
- **Italy**: 44%
- **France**: 40%
- **Sweden**: 39%
- **Denmark**: 38%
- **Spain**: 37%
- **New Zealand**: 37%
- **Germany**: 36%
- **USA**: 36%
- **Finland**: 36%
- **Australia**: 35%
- **Norway**: 35%
- **Canada**: 33%
- **UK**: 33%
- **Austria**: 32%
- **Singapore**: 32%
- **Belgium**: 31%
- **Poland**: 30%
- **Japan**: 30%
- **Netherlands**: 25%
- **China**: 23%

Base: General public, global, n=25,810

Q2.7: How much would you say you personally enjoy eating fish and other seafood?
A large majority of consumers agree that we need to protect fish so our children and grandchildren can continue to enjoy seafood.

80% of seafood consumers agree that we need to protect seafood supplies for future generations.

Total agree, by country:

- China: 83%
- Australia: 83%
- New Zealand: 83%
- Singapore: 76%
- Japan: 74%

Base: Seafood consumers, Asia-Pacific n=3,638

Q5.1: How well does each of the following statements describe your opinion? 7-pt scale: 1 = “Does not describe my opinion very well,” 7 = “Describes my opinion very well”
Are people acting on their values?
What motivates consumers when purchasing fish and seafood?

- Fresh
- Preferred brand
- Price
- Safe to eat
- Taste
- Easy to cook
- Good for health
- A type of fish I've always eaten
- Caught in the wild
- Dolphin/turtle friendly
- Organic
- Fairly traded
- Fishing method
- Sustainably sourced
- Independently certified/verified
- Is not GMO
- Clearly marked country of origin
- Sourced locally
- Knowing where the product originally comes from
Conventional factors, led by freshness, dominate seafood purchase decisions – sustainably sourced sits around halfway down, despite people valuing this highly, they are not empowered to act on it.

Base: Seafood consumers, Asia-Pacific $n=3,638$

Q4.2: Thinking about your recent purchase of “[fish product purchased],” which of the following five considerations was the most important and which was the least important?
How do we trigger action?
Educate  Equip

Excite  Engage
Educate
Raise awareness of the issues

Excite
Positive vision and personal benefits

Equip
Provide easy solutions: accessible, sustainable seafood

Engage
Create a movement, using inspiring storytelling
Blue Planet II has been a success across the world

Google search volume: ‘plastic in oceans’
Pollution of the oceans is the most concerning ocean issue for consumers, followed by overfishing.

Most concerning issues; percentage choosing each issue in top three

- **Pollution of the oceans**: 60%
- **Overfishing/depletion of fish species**: 48%
- **GM/harmful chemicals**: 32%
- **Illegal/prohibited fishing**: 30%
- **Effects of climate change on the oceans**: 30%
- **Ocean acidification/damage to coral reefs**: 27%
- **Accidental catch of dolphins, sharks, turtles**: 21%
- **Not enough seafood for children/grandchildren**: 18%
- **Impacts of rising sea levels**: 14%
- **Poor working conditions**: 12%
- **Slavery in fishing industry**: 9%

Base: Seafood consumers, Asia-Pacific, n=3,638

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?
Seafood consumers are keen to find out more about sustainable seafood from TV and radio articles, indicating a warm audience for MSC.

Percentage choosing each channel (multiple select)

- TV/radio articles: 46%
- Seafood packaging: 44%
- Magazine/newspaper articles: 34%
- Social networking sites: 33%
- Adverts: 31%
- Signs in stores: 27%
- Marine life blogs/websites: 26%
- Schools, museums, aquariums: 24%
- Environmental blogs/websites: 24%
- Health blogs/websites: 23%
- Environmental charities: 22%
- Word of mouth: 22%
- Restaurants/hotels: 21%
- Lifestyle blogs/websites: 15%
- Popular chefs: 13%
- Fliers delivered to your mailbox: 11%
- None of these: 7%

Base: Seafood consumers, Asia-Pacific, n=3,323
Q13: How would you like to find out more about sustainable fish and seafood?
Educate
Raise awareness of the issues

Excite
Positive vision and personal benefits

Equip
Provide easy solutions: accessible, sustainable seafood

Engage
Create a movement, using inspiring storytelling
One of the ways we can equip people to find sustainable seafood is through independent labelling and there is appetite for this from consumers….

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

Supermarkets' and brands' claims about sustainability should be clearly labelled by an independent organisation

66%

Base: Seafood consumers, Asia-Pacific n=3,638
Q5.1: How well does each of the following statements describe your opinion? 7-pt scale: 1 = “Does not describe my opinion very well,” 7 = “Describes my opinion very well”
.... but people often still do not notice certifications on products

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

Supermarkets' and brands' claims about sustainability should be clearly labelled by an independent organisation 66%

I notice ecolabelled products when I'm shopping 27%

Base: Seafood consumers, Asia-Pacific n=3,638
Q5.1: How well does each of the following statements describe your opinion? 7-pt scale:
1 = “Does not describe my opinion very well,” 7 = “Describes my opinion very well”
A quarter of consumers recall seeing the MSC label at least occasionally

Awareness of the MSC label “often” or “occasionally”

- 25% recall seeing the MSC label across the five Asia Pacific markets

Base: General public, Asia-Pacific, n=4,795
Q1.1: Have you ever seen the following logos?
Trust in the MSC is high, and nearly a third demonstrate understanding of the label

Trust in the MSC label (5+6+7 on 7-pt scale) and spontaneous understanding of the label (unprompted)

69% trust the MSC label

29% understand the MSC label spontaneously connecting it with ocean sustainability and/or certification

Base: MSC-aware consumers, Asia-Pacific, n=993

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

Q6.1: What does this logo mean or represent?
Trust in the MSC label is underpinned by its independence
Pathways to trust in the MSC label, structural equation modelling, simplified path model
Educate
Raise awareness of the issues

 Equip
Provide easy solutions: accessible, sustainable seafood

Excite
Positive vision and personal benefits

Engage
Create a movement, using inspiring storytelling
People around the world are increasingly pessimistic about the future for their children and grandchildren

Our Children and Grandchildren Will Have a Higher Quality of Life than We Do Today
Agree vs Disagree,* Average of 16 Countries,** 2001–2017

**“Strongly agree” and “Somewhat agree” vs “Strongly disagree” and “Somewhat disagree”
**Includes Australia, Canada, Chile, China, France, Germany, India, Indonesia, Kenya, Mexico, Nigeria, Russia, Spain, Turkey, UK, and USA
Future generations is the most motivating message for MSC to communicate

Optimal MSC messages: four most compelling messages

Top motivating MSC message:
Ensures seafood we enjoy now is available for future generations

Secondary MSC messages:
- Helps stop the destruction of life in our oceans
- Helps protect our oceans
- Ensures seafood is from a sustainable source

Optimal messaging: emotion + evidence + reassurance

NOTE: Total of 15 messages were tested – other messages not shown here as they did not resonate as strongly with consumers

Base: Seafood consumers, Asia-Pacific, n=3,638

Q12. Which of the following statements is the most likely to motivate you to purchase seafood with the MSC blue fish label and which statement is the least likely? The MSC blue fish label...
**Educate**
Raise awareness of the issues

**Equip**
Provide easy solutions: accessible, sustainable seafood

**Excite**
Positive vision and personal benefits

**Engage**
Create a movement, using inspiring storytelling
People who consume seafood, and have enough basic knowledge (of the oceans, fishing and the origins of food) to digest the MSC’s value proposition*.

When shopping, they “aspire” to a better, healthier life and balancing “right thing to do” with the “cool thing to do”.

They are represented across every age, culture, geography and income.

(*Wild. Traceable. Sustainable.*)
OUR OBJECTIVE:

to become
the easiest
and most trustworthy choice for enjoying wild, sustainable seafood
OUR APPROACH:

FROM THE DEEP BLUE OCEANS...

MSC CONNECTS FOOD TO SUSTAINABLE OCEANS

...TO PEOPLE'S LIVES AND PLATES

Science and rigour will always be our backbone. But we need to become relevant to the people who buy seafood. We will do that by moving the conversation.
THE LATEST DEVELOPMENTS IN ASIA-PACIFIC
OUR PROGRESS

- 27 MSC COLLEAGUES OPERATING FROM 6 COUNTRIES

- 78 FISHERIES ENGAGED IN PROGRAM

- VOLUME OF CERTIFIED PRODUCT UP 50%

- STRONG RETAIL & BRAND PARTNERSHIPS

- GROWING REALISATION OF ISSUES, SDGS & TOKYO OLYMPICS BIG CATALYSTS
THE POWER OF PARTNERSHIPS
OUR SUSTAINABLE SEAFOOD EVENTS
OUR AMBASSADORS
People care about protecting seafood for future generations, but are not necessarily empowered to act on it.

In order to trigger action, we need to:

- **Educate** – use popular channels to raise awareness of ocean sustainability issues important to consumers

- **Equip** – raise awareness of independent certification to enable greater visibility of ecolabels – using a multi-channel approach

- **Excite** – messaging around future generations, and sustainable sourcing can help to inspire

- **Engage** – the power of partnerships are key to engaging the mainstream
Thank you

GlobeScan is an insights and strategy consultancy, focused on helping our clients build long-term trusting relationships with their stakeholders. Offering a suite of specialist research and advisory services, we partner with business, NGOs and governmental organizations to meet strategic objectives across reputation, sustainability and purpose.

Established in 1987, GlobeScan has offices in Cape Town, Hong Kong, London, Paris, San Francisco, São Paulo and Toronto, and is a signatory to the UN Global Compact and a Certified B Corporation.

For further information, please contact:

Abbie Curtis O’Reilly
abby.curtis@globescan.com

www.globescan.com