



# Understanding & Activating Seafood Consumers – Asia-Pacific

MSC & GlobeScan, 9 October 2018

GLOBESCAN





# Today's agenda

- **10:00      Welcome**
- **10:05      Overview of key consumer trends**
- **10:30      Update on Asia Pacific activities**
- **10:40      Q/A**
- **11:00      Close**



**Chris Coulter**  
Co-CEO at GlobeScan



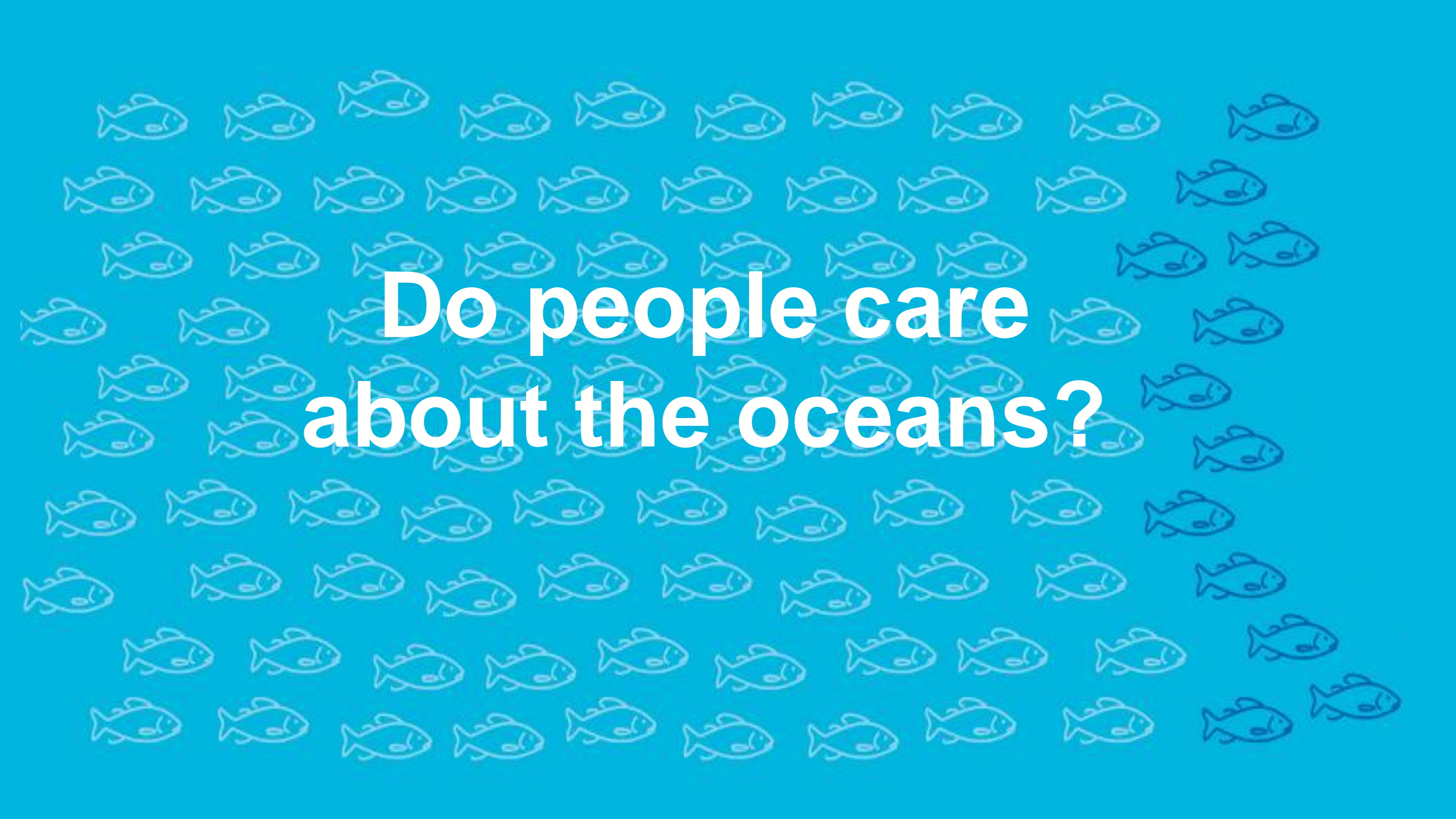
**Patrick Caleo**  
Regional Director, Asia Pacific, MSC

# Introduction to MSC Consumer Insights for Asia-Pacific 2018



	Type of consumer	Sample
	General public	$n=4,795$
	Seafood consumers	$n=3,638$

- Do people care about the oceans?
- Are people acting on their values?
- How do we trigger action?
- How MSC and partners engage consumers



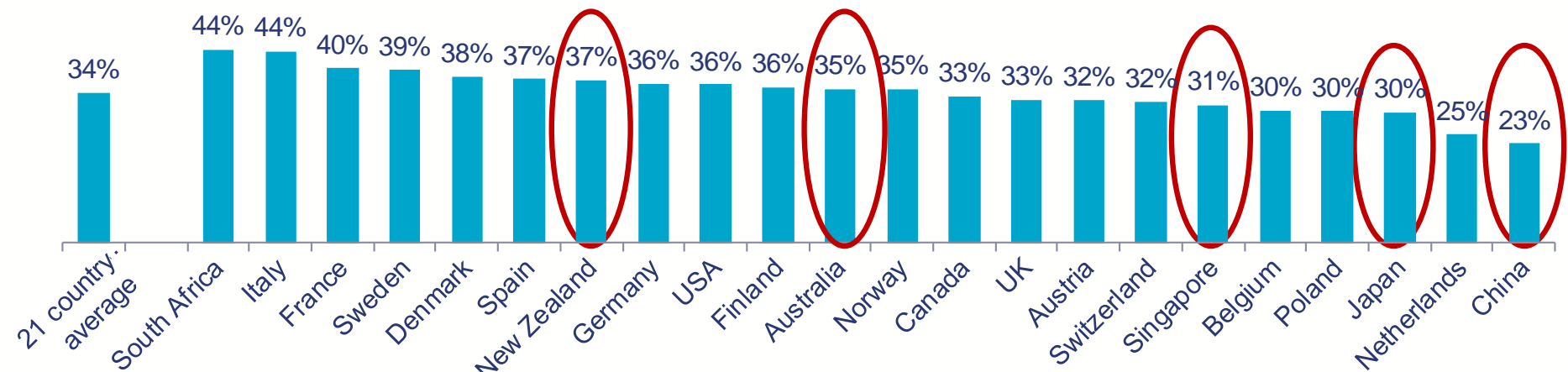
**Do people care  
about the oceans?**

# 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



Love of seafood (“really like”), by country



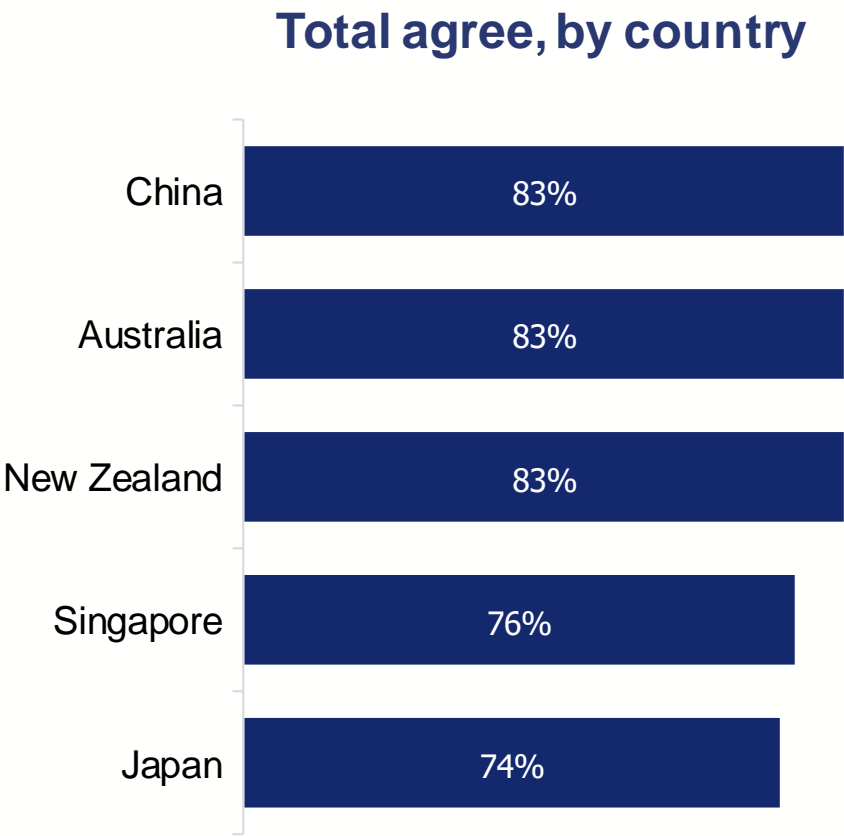
Base: General public, global,  $n=25,810$

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

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



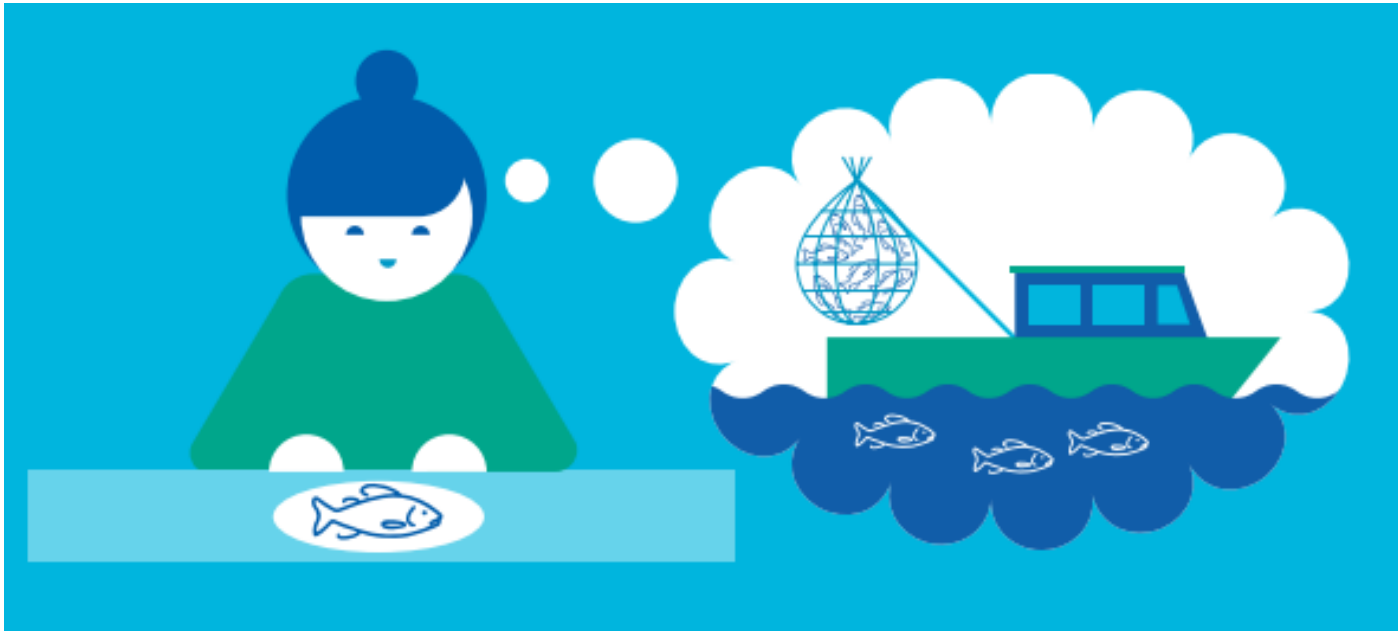
Base: Seafood consumers, Asia-Pacific *n*=3,638  
Q5.1: How well does each of the following statements describe your opinion? 7-pt scale: 1 = “Does not describe my opinion very well,” 7 = “Describes my opinion very well”



# Are people acting on their values?

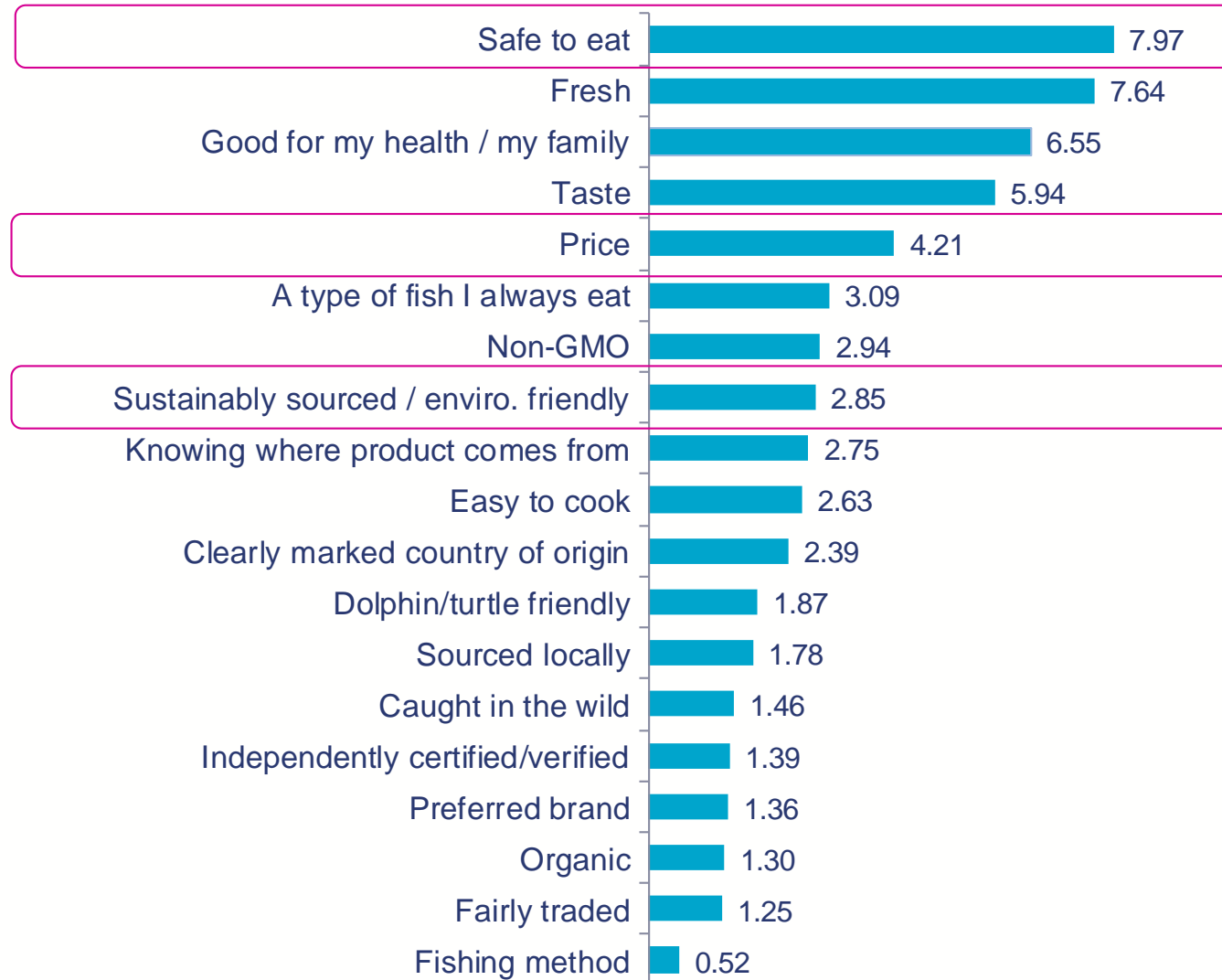


# What motivates consumers when purchasing fish and seafood?



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**

A 2x2 matrix diagram with a vertical and horizontal line intersecting in the center. The four quadrants are labeled: 'Educate' (top-left), 'Equip' (top-right), 'Excite' (bottom-left), and 'Engage' (bottom-right). The 'Educate' quadrant is circled with a pink oval. Each quadrant has a subtitle in teal text below the main header.

# Educate

Raise awareness of the issues

# Equip

Provide easy solutions:  
accessible, sustainable seafood

# Excite

Positive vision and personal  
benefits

# Engage

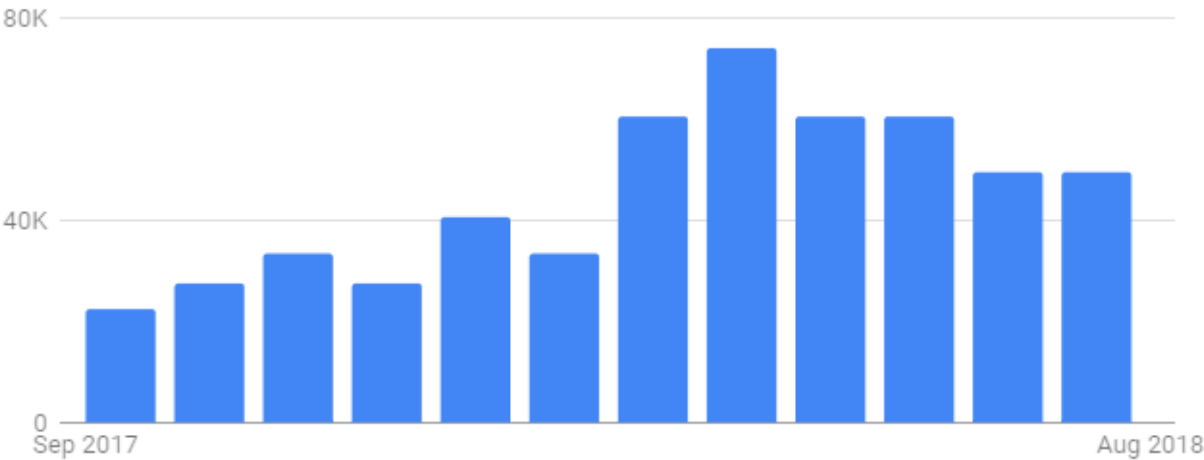
Create a movement, using  
inspiring storytelling



# Blue Planet II has been a success across the world

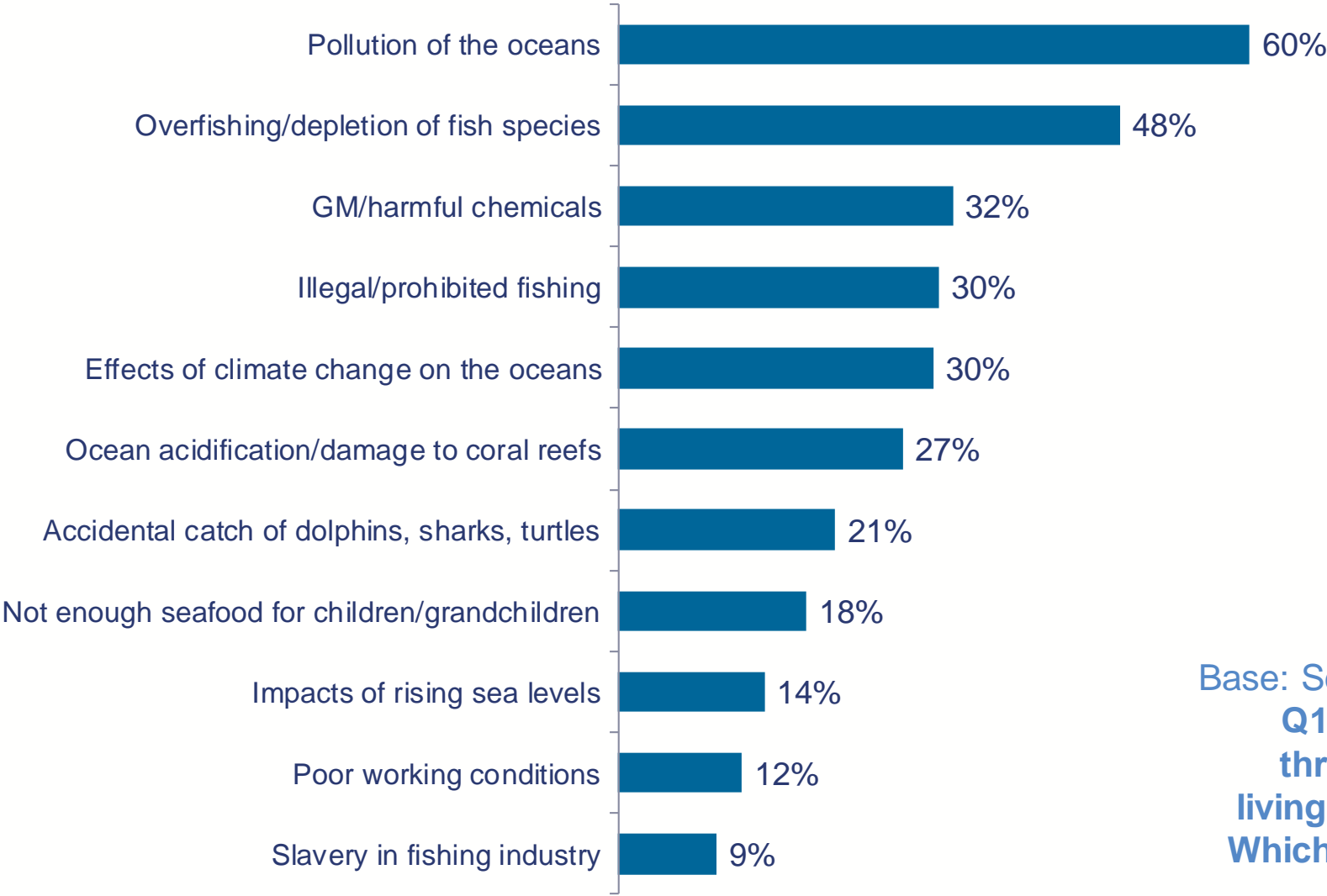


Google search volume: 'plastic in oceans'



# Pollution of the oceans is the most concerning ocean issue for consumers, followed by overfishing

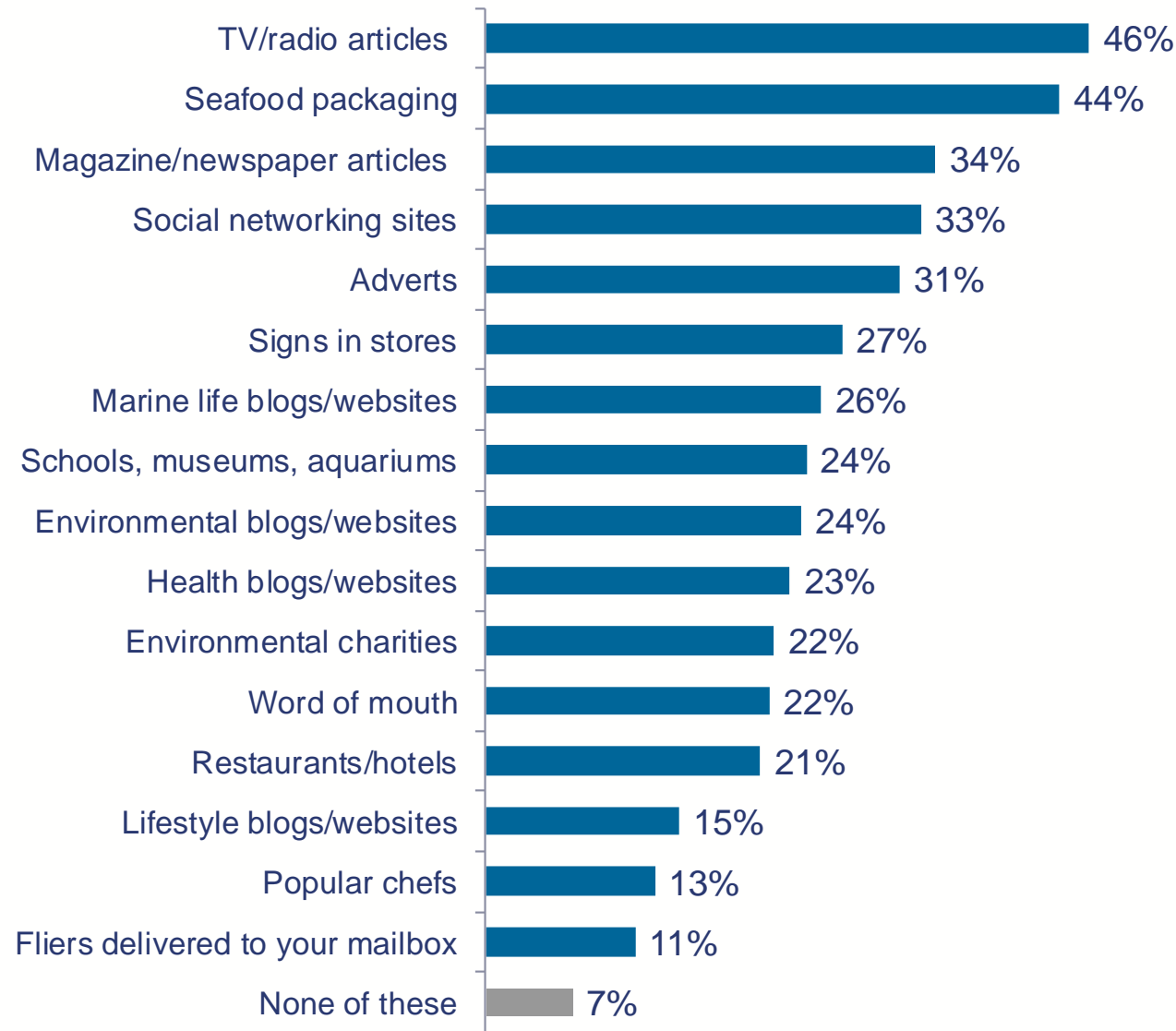
Most concerning issues; percentage choosing each issue in top three



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)



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

# Equip

Provide easy solutions:  
accessible, sustainable seafood

# Excite

Positive vision and personal  
benefits

# 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



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”



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)



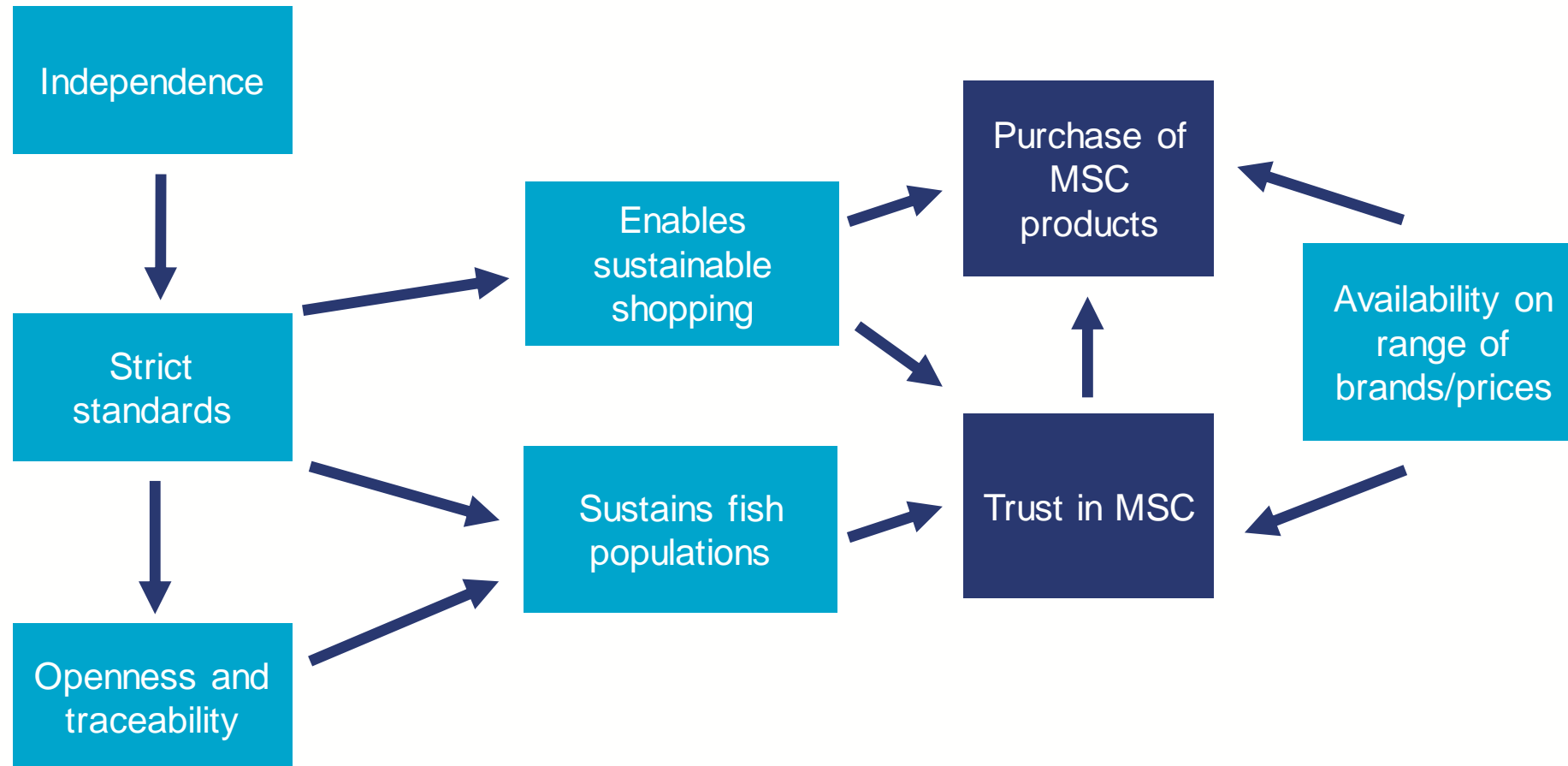
Base: MSC-aware consumers, Asia-Pacific,  $n=993$

**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



<b>Educate</b> Raise awareness of the issues	<b>Equip</b> Provide easy solutions: accessible, sustainable seafood
<b>Excite</b> Positive vision and personal benefits	<b>Engage</b> Create a movement, using inspiring storytelling

**Educate**

Raise awareness of the issues

**Equip**

Provide easy solutions:  
accessible, sustainable seafood

**Excite**

Positive vision and personal  
benefits

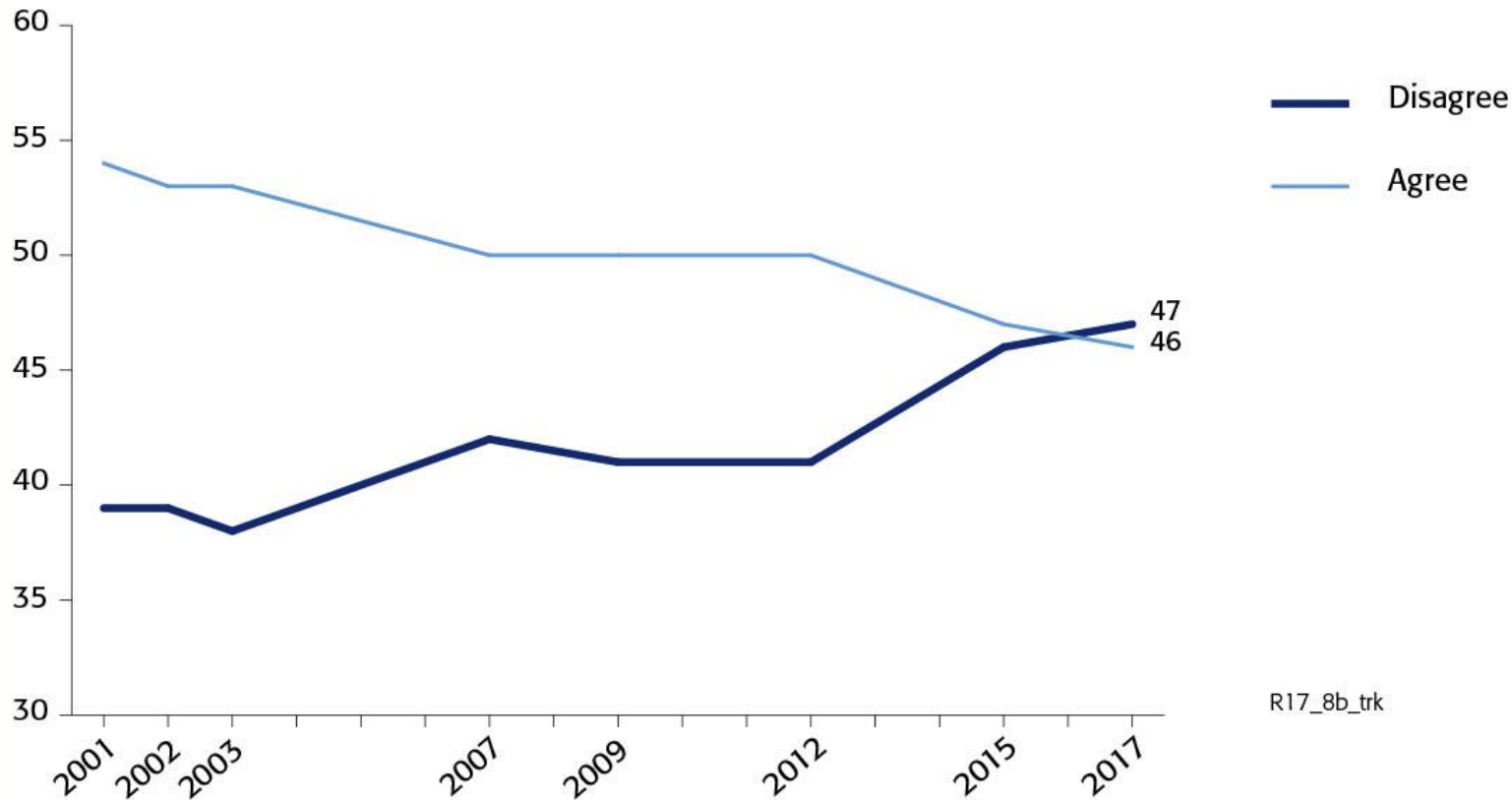
**Engage**

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



R17\_8b\_trk

\*"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



A background image showing a woman and a young child looking at various seafood items, including salmon, displayed on a market stall. The image is slightly faded to allow the text to be the primary focus.

## WHO WE'RE TALKING TO

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...

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

MSC  
CONNECTS FOOD  
TO SUSTAINABLE  
OCEANS

...TO PEOPLE'S  
LIVES AND PLATES





The background of the slide is a composite image. It features a central blue rectangular area with a semi-transparent overlay. Within this blue area, there is a faint, high-angle photograph of several fish, possibly mackerels, swimming in clear water. The fish are oriented horizontally, with their heads pointing towards the left. The blue overlay is not uniform; it has a subtle gradient and some darker, textured areas that suggest the presence of the fish beneath it. On the left and right sides of the blue area, there are vertical strips of a different image. These strips show a close-up of fish scales, which are iridescent and display a mix of blue, purple, and silver hues. The scales are arranged in a regular, overlapping pattern. The overall composition is clean and professional, with a focus on marine life.

# 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





# REACHING THE MAINSTREAM





# 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**

[abbie.curtis@globescan.com](mailto:abbie.curtis@globescan.com)

[www.globescan.com](http://www.globescan.com)