



Understanding & Activating Seafood Consumers – Europe

MSC & GlobeScan, 9 October 2018

GLOBE SCAN



Today's agenda

- **Welcome**
- **Overview of key consumer trends**
- **Update on European activities**
- **Q/A**
- **Close**



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Introduction to MSC Consumer Insights for Europe 2018



- Austria

Belgium

Denmark

Finland

France

Germany

Italy
- Netherlands

Norway

Poland

Spain

Sweden

Switzerland

United Kingdom



Type of consumer

General public

Sample

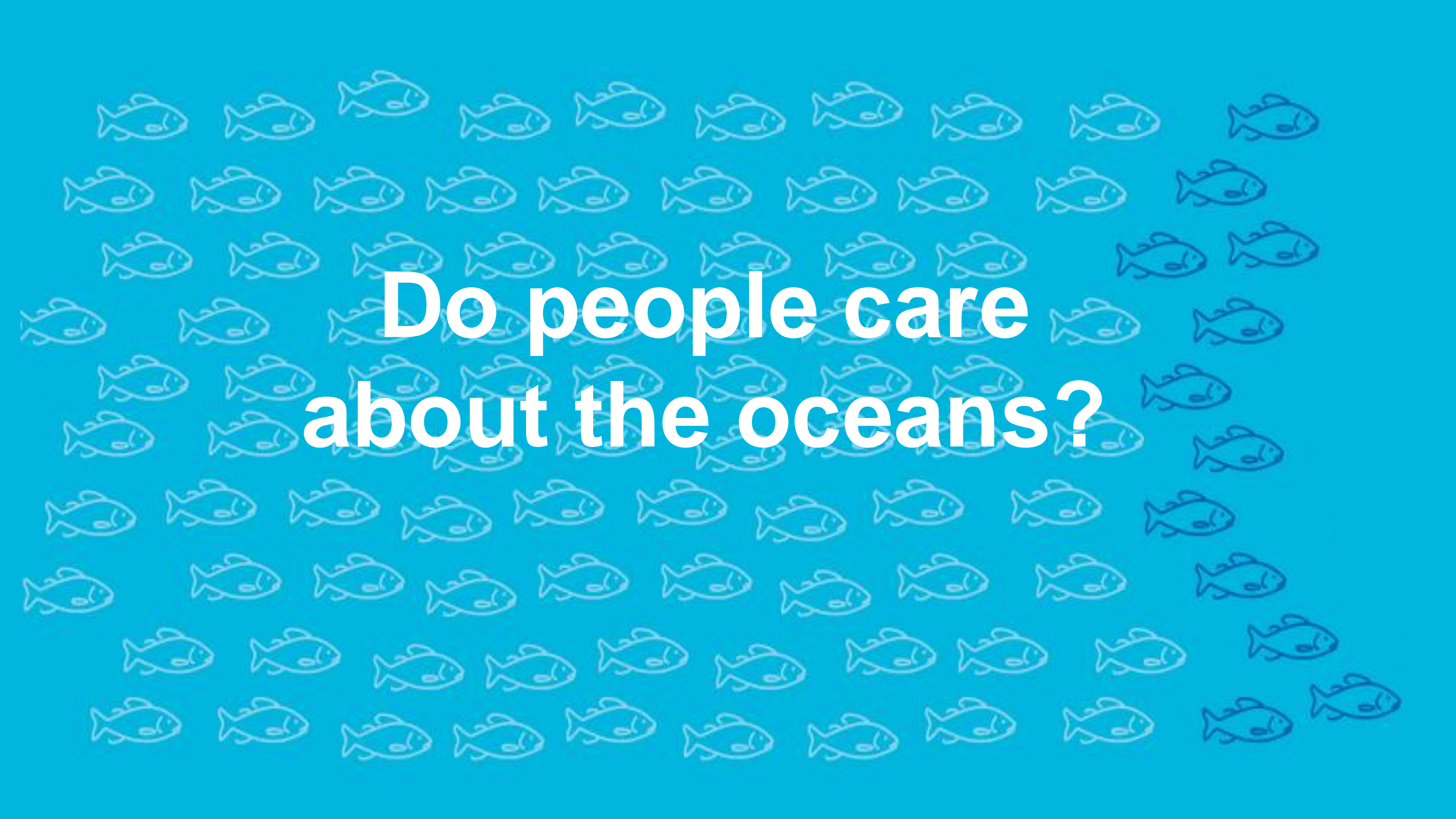
n=15,278



Seafood consumers

n=11,132

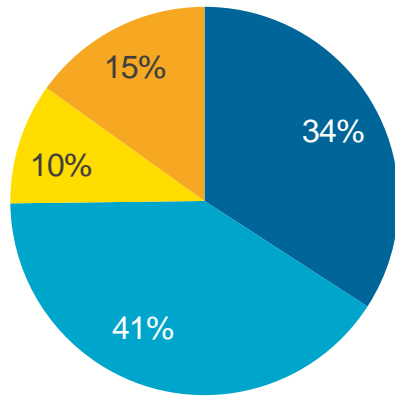
- Do people care about the oceans?
- Are people acting on their values?
- How do we trigger action?
- How MSC and partners engage consumers

The background of the slide is a solid blue color. It is covered with a repeating pattern of white, stylized fish outlines. The fish are simple line drawings, facing right, and are arranged in a grid-like fashion across the entire slide.

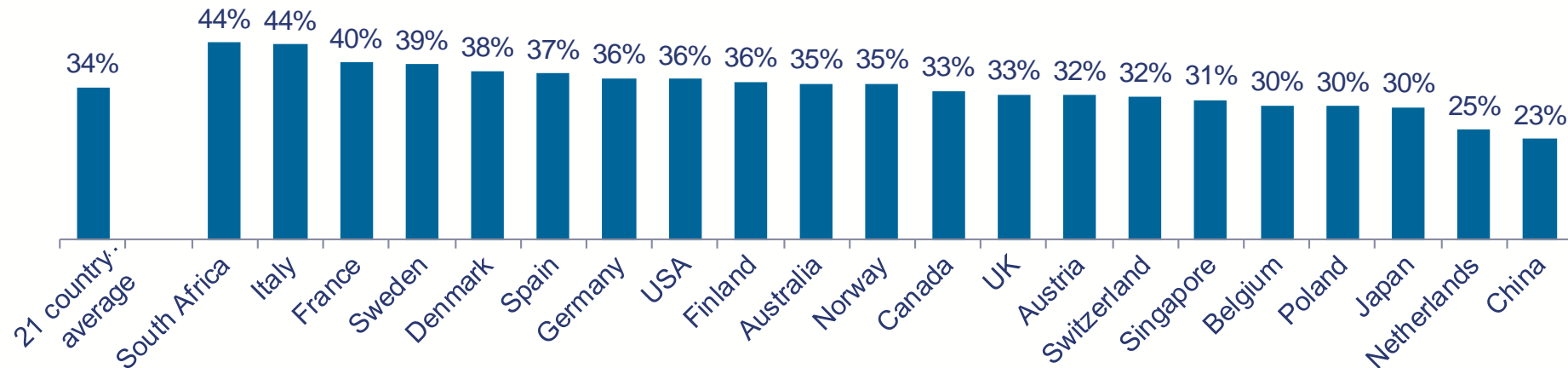
**Do people care
about the oceans?**

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, $n=25,810$

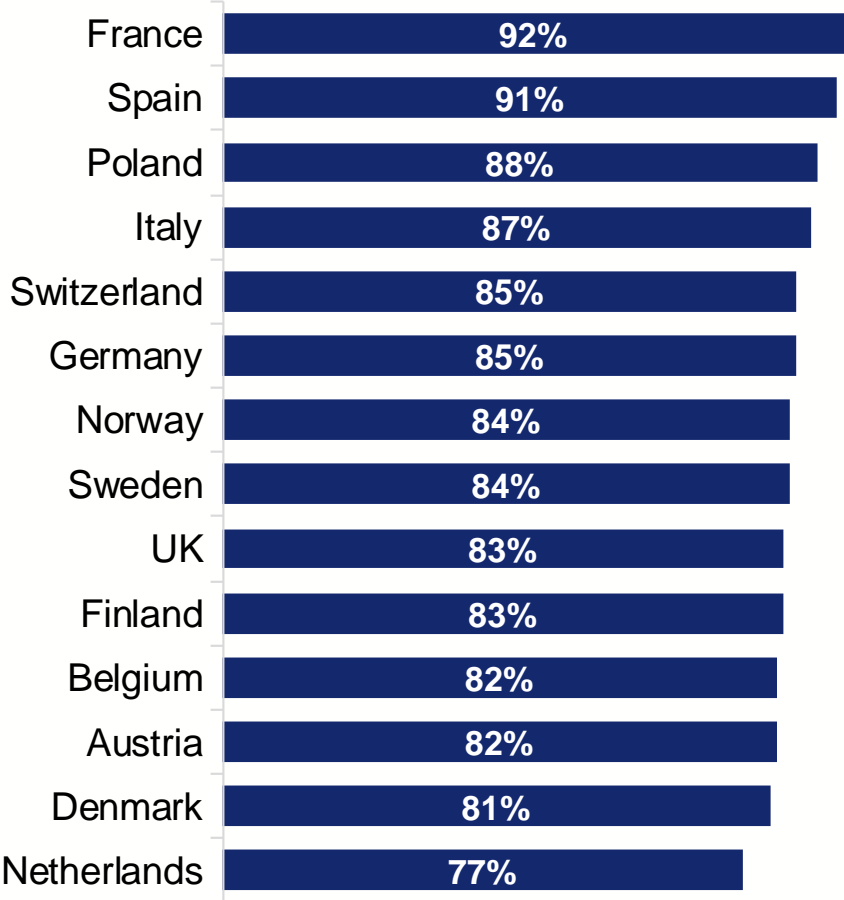
Q2.7: How much would you say you personally enjoy eating fish and other seafood?

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)



Total agree, by country

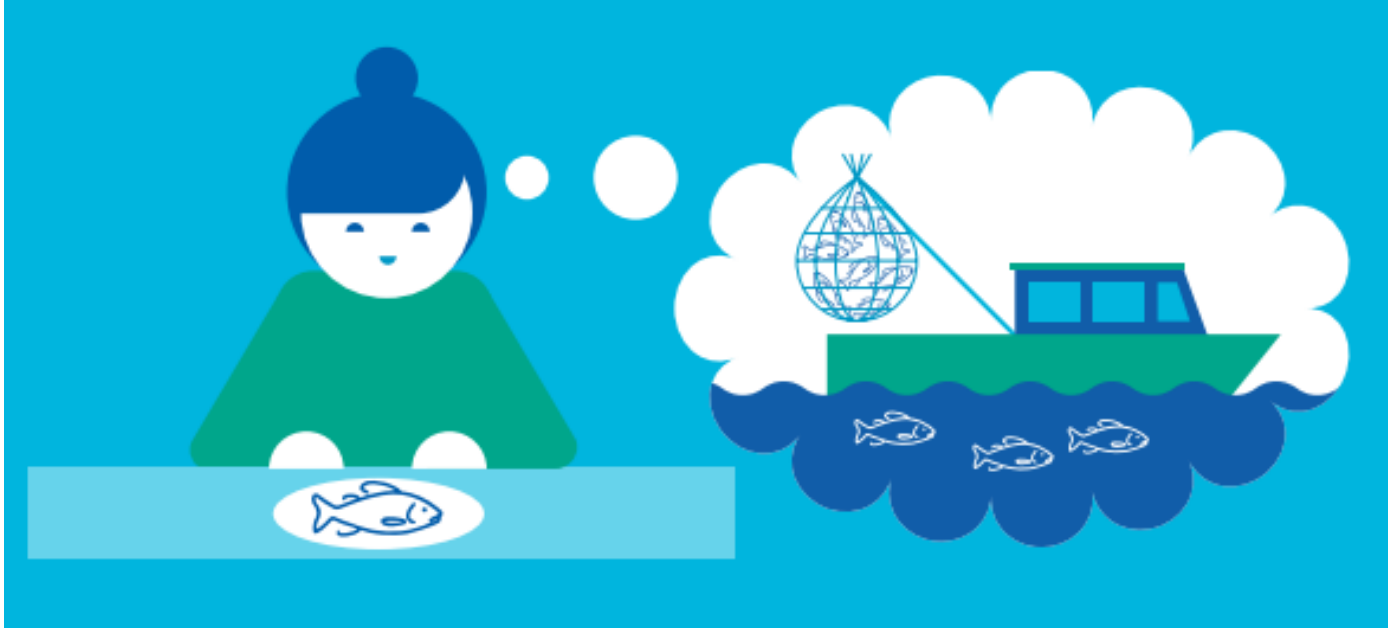


Base: Seafood consumers, Europe *n*=11,132
Q5.1: How well does each of the following statements describe your opinion? 7-pt scale:
1 = “Does not describe my opinion very well,” 7 = “Describes my opinion very well”

Are people acting on their values?

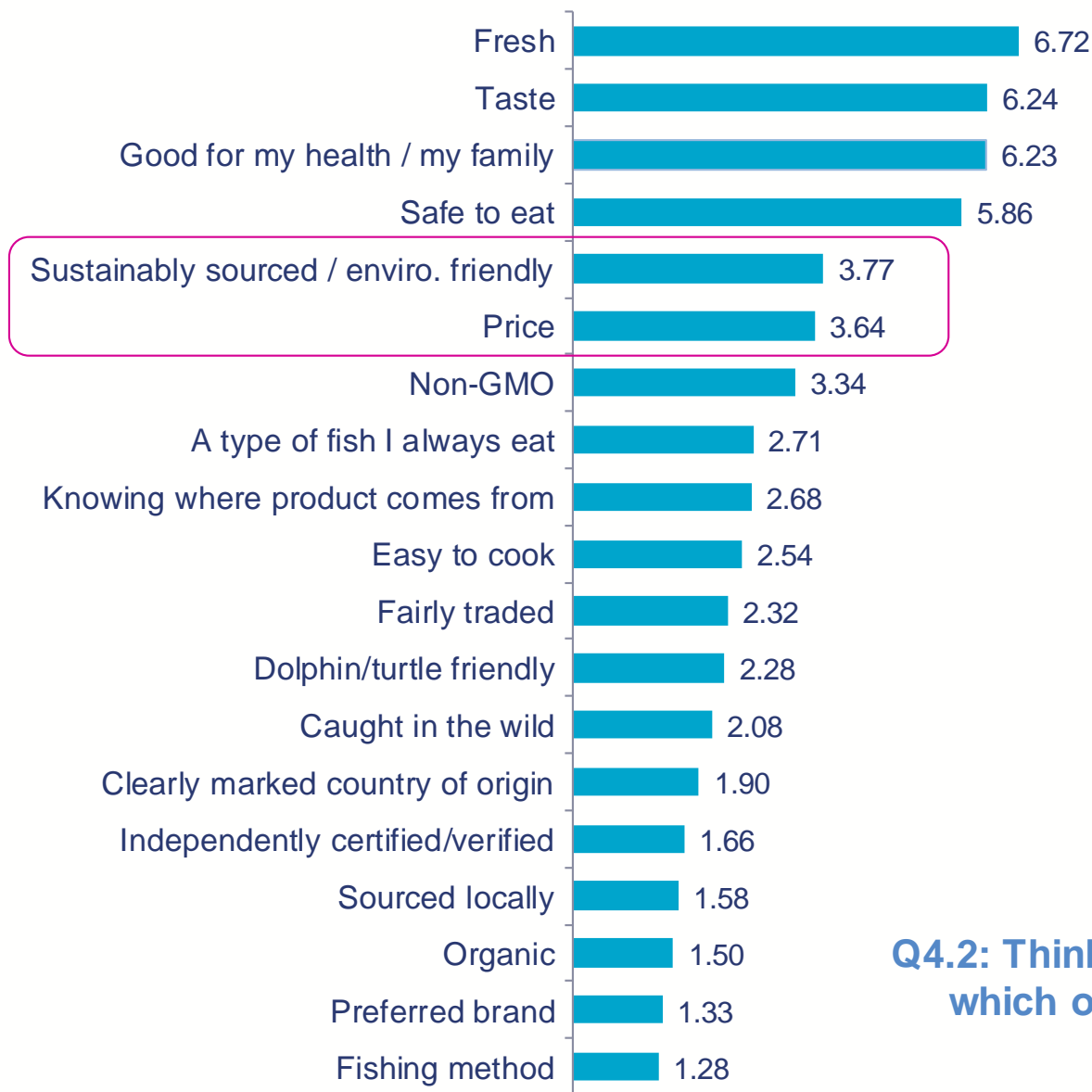


What motivates consumers when purchasing fish and seafood?



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

Sustainably sourced and environmentally friendly is ranked just slightly above price as a purchase motivator – unique to Europe



Base: Seafood consumers, Europe, $n=11,132$

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

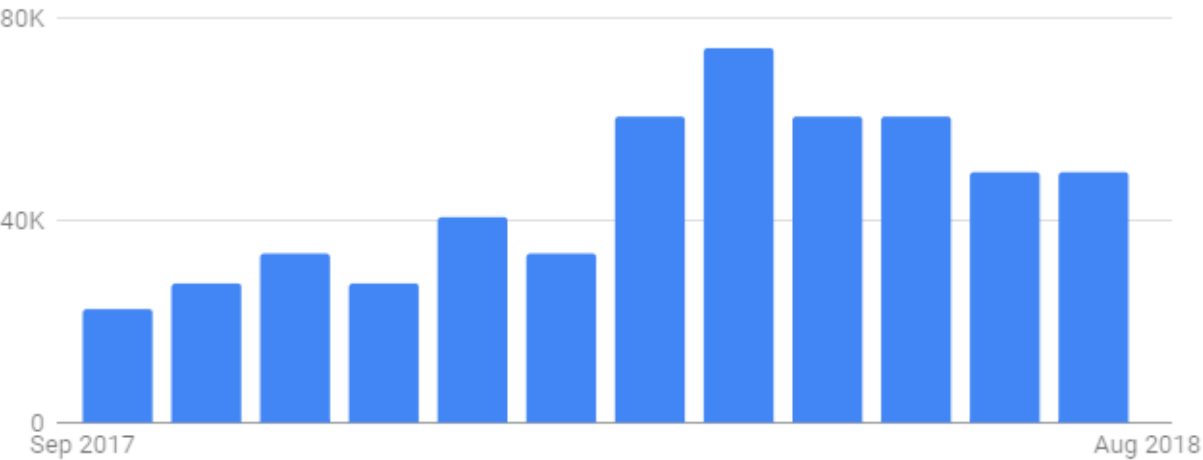
Engage

Create a movement, using
inspiring storytelling

Blue Planet II has been a success across Europe

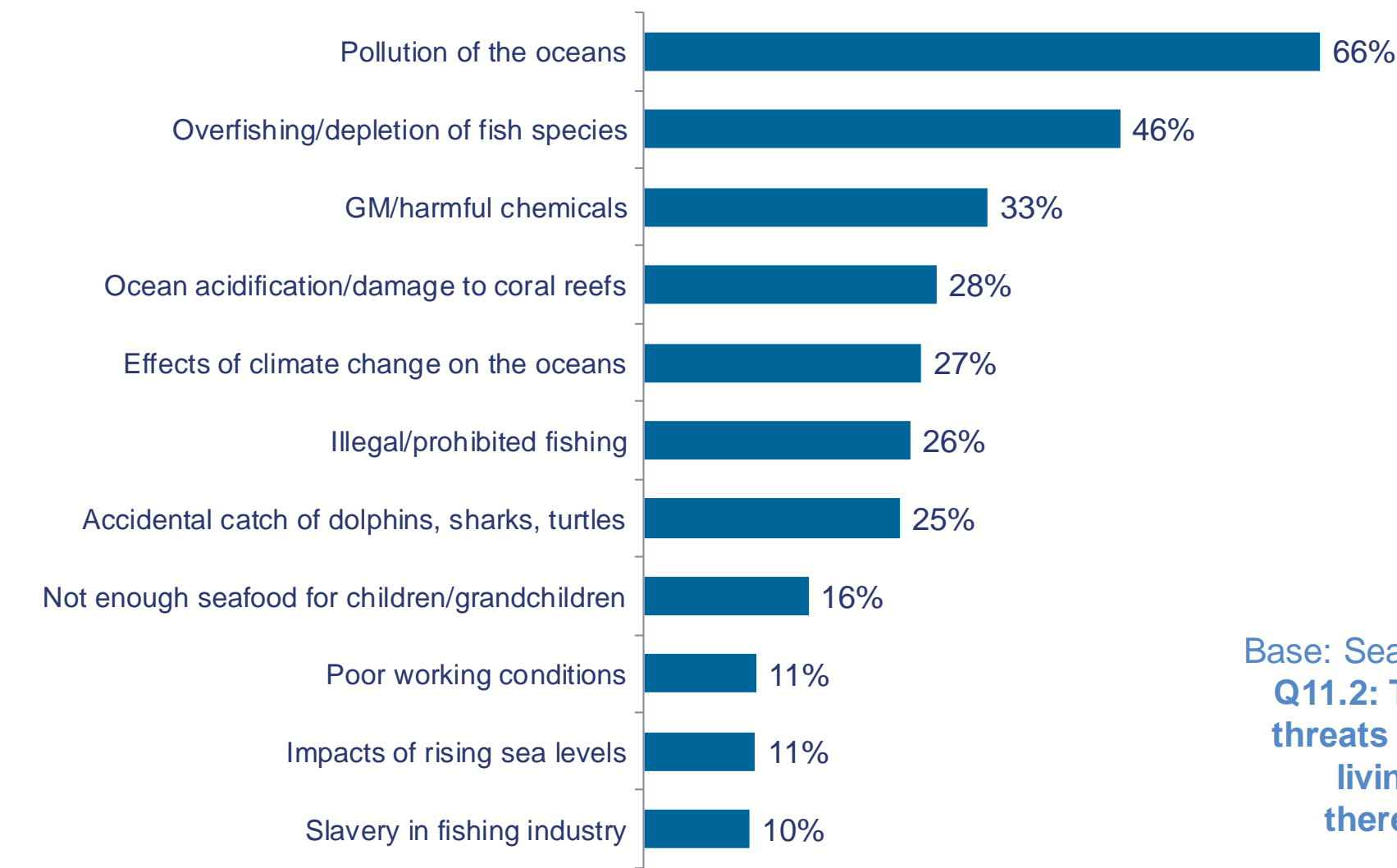


Google search volume: 'plastic in oceans'



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

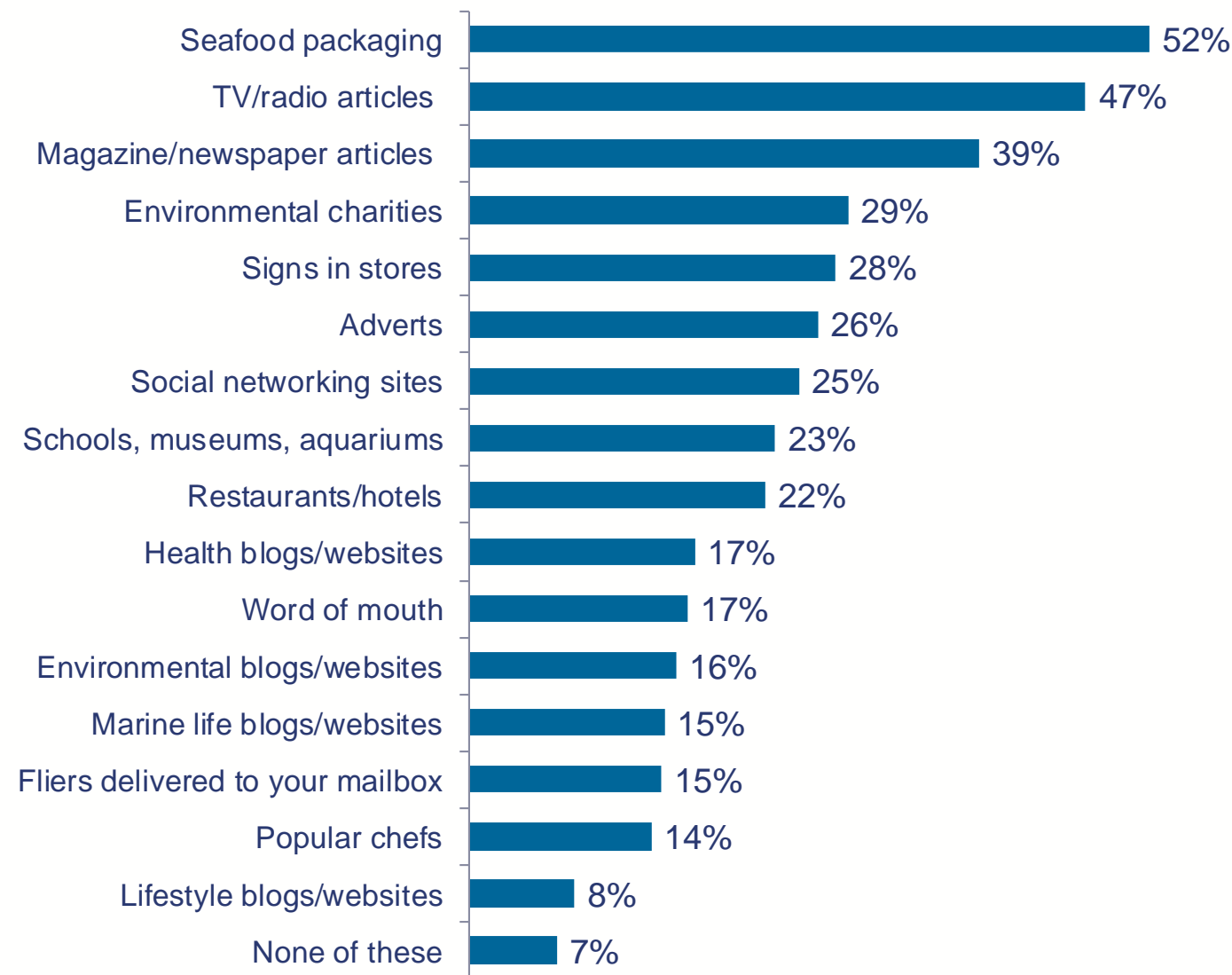
Most concerning issues; percentage choosing each issue in top three



Base: Seafood consumers, Europe, $n=11,132$
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 product packaging

Percentage choosing each channel (multiple select)



Base: Seafood consumers, Europe,
n=10,677

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

General opinion is also very favourable toward independent labelling

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

73%

A horizontal bar chart with a blue bar representing 73% of the responses. The bar is positioned to the right of the statement text. A vertical line is drawn at the end of the bar, and a bracket is placed to the right of the bar, indicating the percentage.

Base: Seafood consumers, Europe $n=11,132$

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”

Visibility of ecolabels is significantly higher than in other regions of the world but there is still a gap between demand and visibility

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



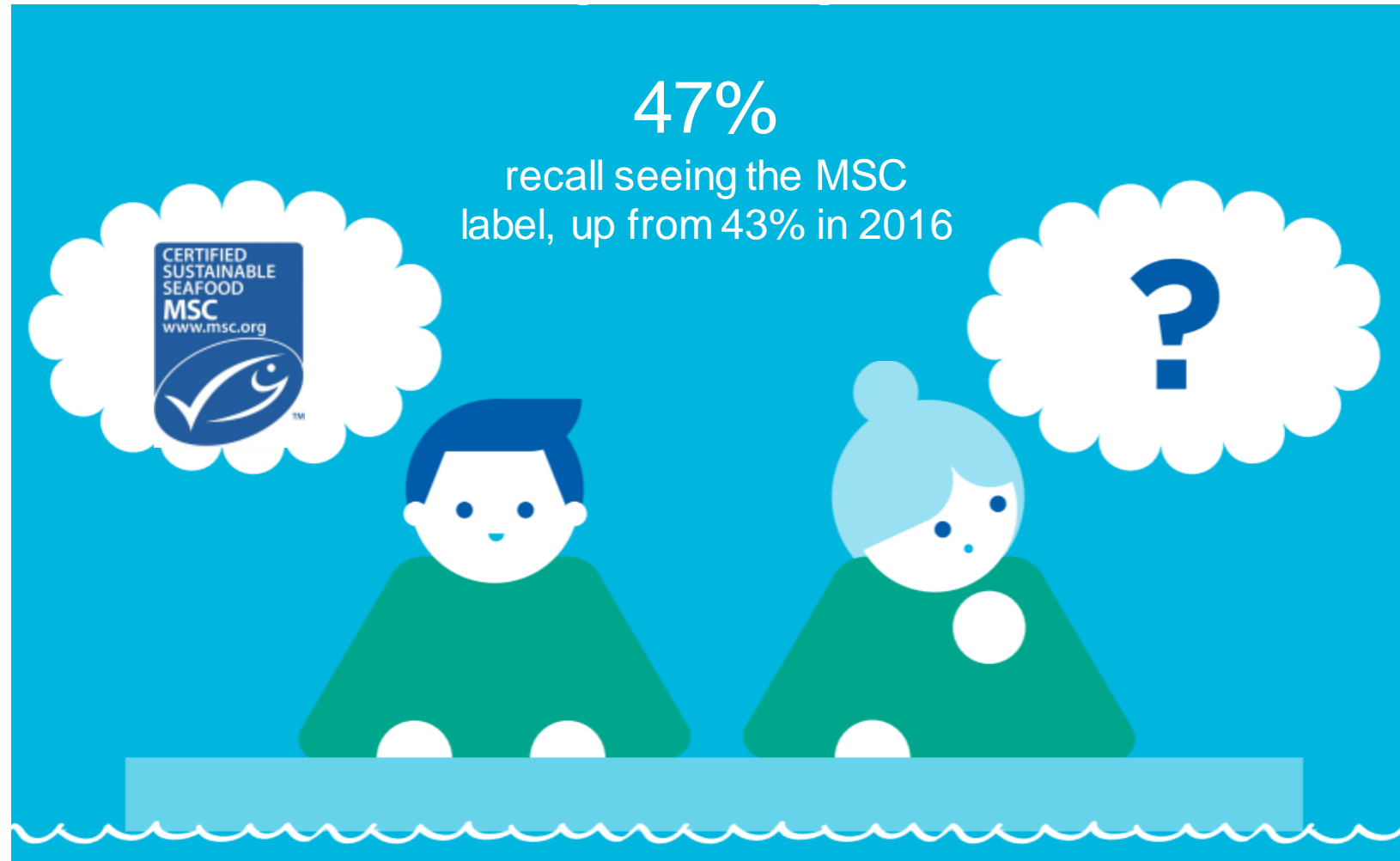
Base: Seafood consumers, Europe $n=11,132$

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"

MSC awareness levels have seen an increase in Europe

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

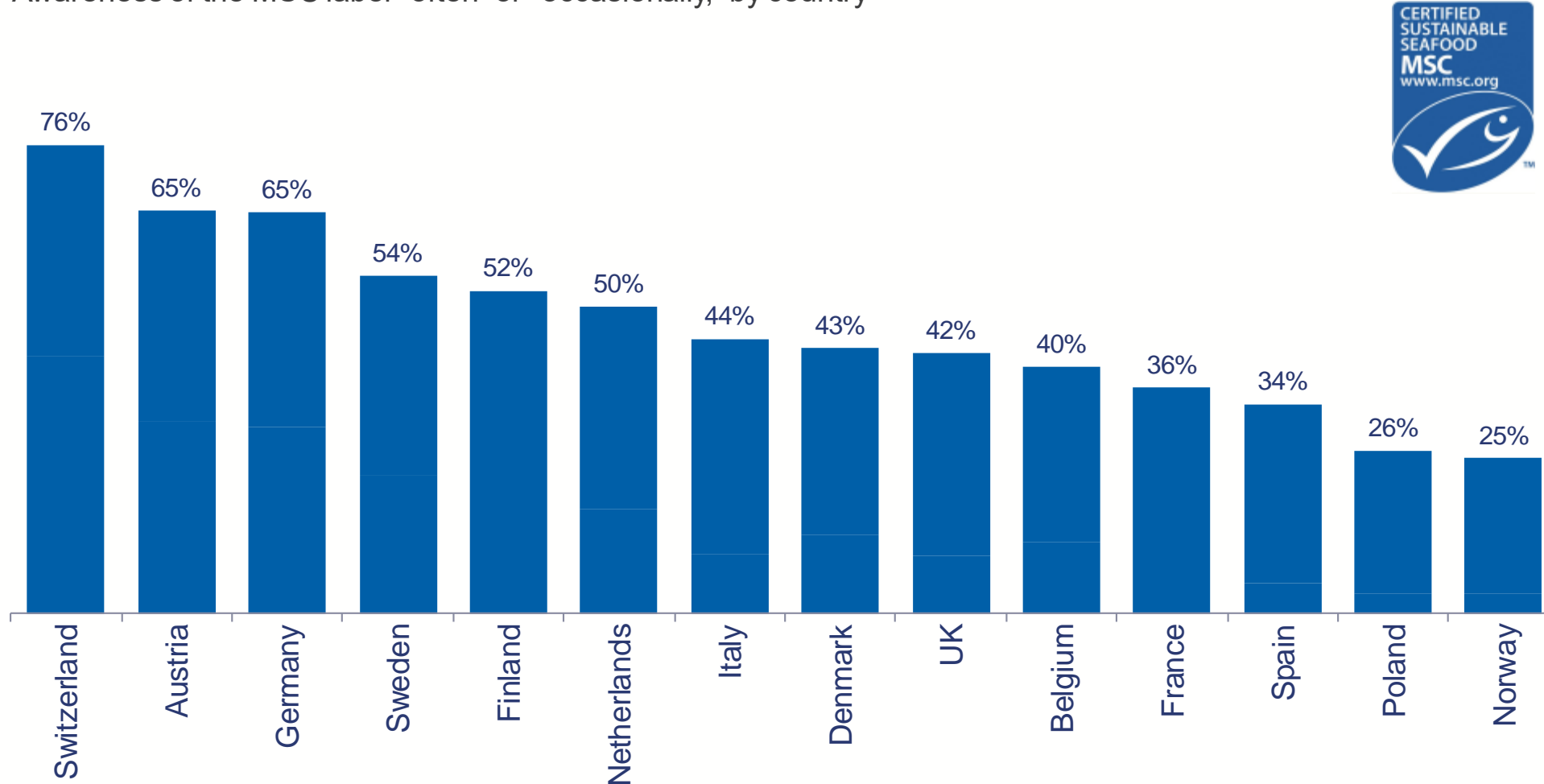


Base: General public, Europe, $n=15,278$

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

MSC awareness is strong in Europe, with the highest levels of awareness seen in Switzerland, Austria and Germany

Awareness of the MSC label “often” or “occasionally,” by country



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

Trust in the MSC label is high, and understanding of the label is very strong compared to other regions

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



Base: MSC-aware consumers, Europe, $n=5,581$ *NOTE: in 2016, this question was not asked in Italy

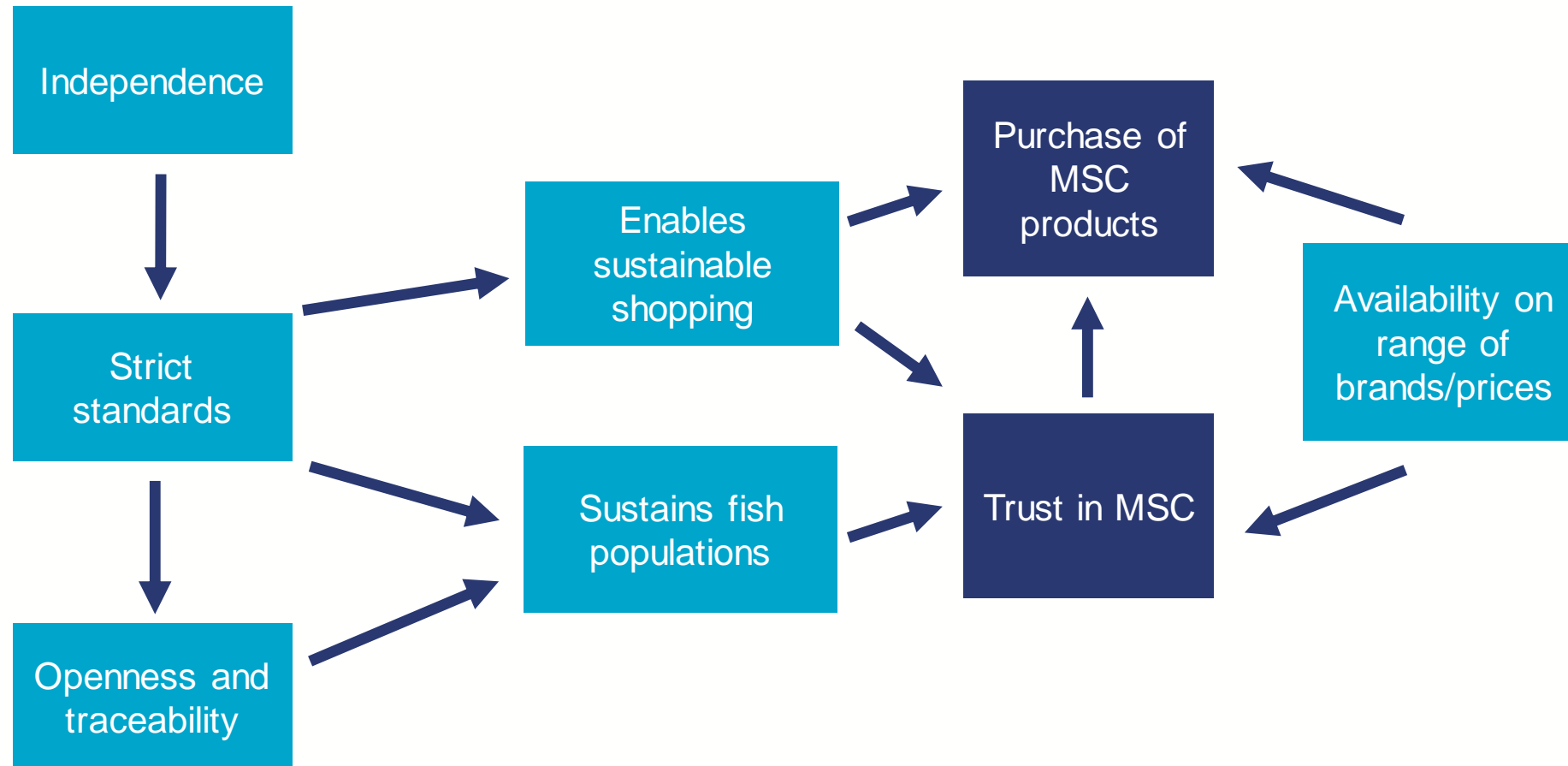
Q9.2: How much trust do you have in the claims of each of the following initiatives/organisations? 7-pt scale:

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:
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Excite

Positive vision and personal
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Engage

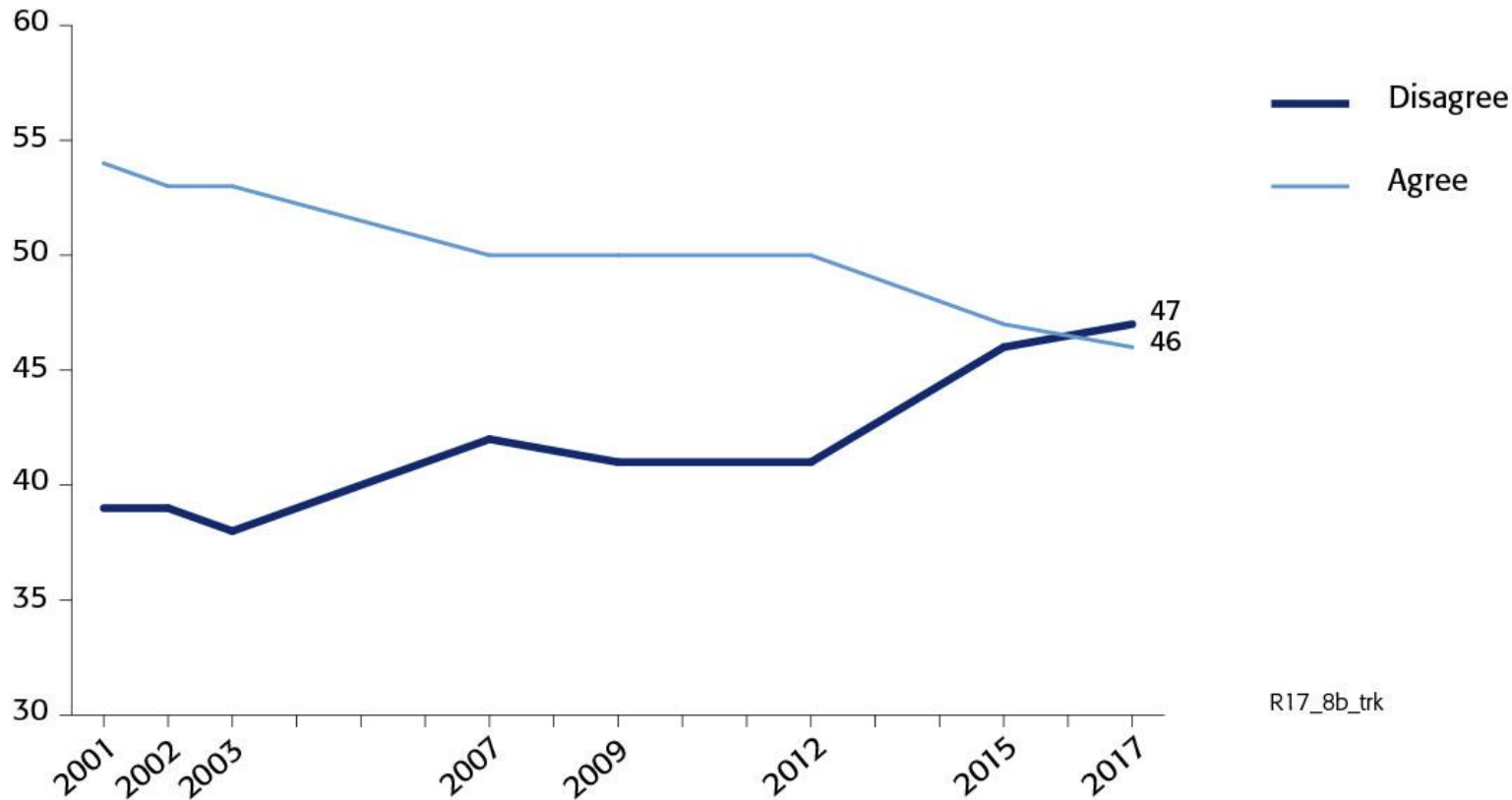
Create a movement, using
inspiring storytelling



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, Europe, $n=11,132$

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...*

A 2x2 matrix diagram with a vertical and horizontal line intersecting at the center. The four quadrants are labeled: 'Educate' (top-left), 'Equip' (top-right), 'Excite' (bottom-left), and 'Engage' (bottom-right). The 'Engage' quadrant is circled with a thick pink oval. The text in each quadrant is as follows:

Quadrant	Header	Description
Top-Left	Educate	Raise awareness of the issues
Top-Right	Equip	Provide easy solutions: accessible, sustainable seafood
Bottom-Left	Excite	Positive vision and personal benefits
Bottom-Right	Engage	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

A woman with dark hair, wearing a white shirt, is leaning over a market stall, pointing at a display of seafood. A young child with dark hair is standing in front of her, looking at the seafood. The stall is filled with various types of seafood, including fish and shellfish, arranged in trays. The background is slightly blurred, showing other market stalls and people.

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



OUR
POSITION:

PEOPLE WHO
LOVE SEAFOOD

CHOOSE

MSC



[msc.org/teach](https://www.msc.org/teach)



THE LATEST DEVELOPMENTS IN EUROPE

MSC in European public procurement

MSC certifications recognised in government guidance:



The Norwegian Directorate of Health



Ministry of Agriculture and forestry



A new legislation allowing ecolabels to be part of the public procurement



Public agriculture and fisheries directorate and DFPO Fisheries Association of Denmark



City of Paris Sustainable Food Plan



The German Council for Sustainable Development recommend MSC in their Sustainable Shopping Basket



The Italian Government public procurement policy GPP for collective restaurants



The Dutch Ministry of Economic Affairs, Fisheries Directorate recognised MSC in public procurement policies as equivalent to organic



A scenic view of a Norwegian fjord. In the background, steep, snow-capped mountains rise from the water's edge. A small town with colorful buildings is nestled at the base of the mountains. In the foreground, several fishing boats are docked at a wooden pier. The water is calm, reflecting the sky and the surrounding landscape. The sky is blue with some white clouds.

OUR 20TH ANNIVERSARY CAMPAIGNS SUMMARY



[msc.org/marketing](https://www.msc.org/marketing)

- Ocean sustainability is very important to European consumers, and is balanced against price as a purchase driver
- In order to trigger more action, we need to:
 - **Educate** – use popular channels to raise awareness of ocean sustainability
 - **Equip** – utilise high visibility of ecolabels in Europe
 - **Excite** – sustainability messaging around future generations 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.

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