Understanding & Activating Seafood Consumers – Europe

MSC & GlobeScan, 9 October 2018
Today’s agenda

• Welcome

• Overview of key consumer trends

• Update on European activities

• Q/A

• Close
Introduction to MSC Consumer Insights for Europe 2018

Type of consumer

<table>
<thead>
<tr>
<th>Type of consumer</th>
<th>Sample</th>
</tr>
</thead>
<tbody>
<tr>
<td>General public</td>
<td>n=15,278</td>
</tr>
<tr>
<td>Seafood consumers</td>
<td>n=11,132</td>
</tr>
</tbody>
</table>

Sample sizes for each country:
- Austria
- Belgium
- Denmark
- Finland
- France
- Germany
- Italy
- Netherlands
- Norway
- Poland
- Spain
- Sweden
- Switzerland
- United Kingdom
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**: 10%
- **Dislike/really dislike eating fish/seafood / not purchased**: 15%

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

- **21 country / average**: 34%
- **South Africa**: 44%
- **Italy**: 44%
- **France**: 40%
- **Sweden**: 39%
- **Denmark**: 38%
- **Spain**: 37%
- **Germany**: 36%
- **USA**: 36%
- **Finland**: 36%
- **Australia**: 35%
- **Norway**: 35%
- **Canada**: 33%
- **UK**: 33%
- **Austria**: 32%
- **Switzerland**: 32%
- **Singapore**: 31%
- **Belgium**: 30%
- **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.

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

84% of seafood consumers agree that we need to protect seafood supplies for future generations.

<table>
<thead>
<tr>
<th>Country</th>
<th>Total agree (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>France</td>
<td>92%</td>
</tr>
<tr>
<td>Spain</td>
<td>91%</td>
</tr>
<tr>
<td>Poland</td>
<td>88%</td>
</tr>
<tr>
<td>Italy</td>
<td>87%</td>
</tr>
<tr>
<td>Switzerland</td>
<td>85%</td>
</tr>
<tr>
<td>Germany</td>
<td>85%</td>
</tr>
<tr>
<td>Norway</td>
<td>84%</td>
</tr>
<tr>
<td>Sweden</td>
<td>84%</td>
</tr>
<tr>
<td>UK</td>
<td>83%</td>
</tr>
<tr>
<td>Finland</td>
<td>83%</td>
</tr>
<tr>
<td>Belgium</td>
<td>82%</td>
</tr>
<tr>
<td>Austria</td>
<td>82%</td>
</tr>
<tr>
<td>Denmark</td>
<td>81%</td>
</tr>
<tr>
<td>Netherlands</td>
<td>77%</td>
</tr>
</tbody>
</table>

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?

<table>
<thead>
<tr>
<th>Factors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fresh</td>
</tr>
<tr>
<td>Preferred brand</td>
</tr>
<tr>
<td>Price</td>
</tr>
<tr>
<td>Safe to eat</td>
</tr>
<tr>
<td>Taste</td>
</tr>
<tr>
<td>Easy to cook</td>
</tr>
<tr>
<td>Good for health</td>
</tr>
<tr>
<td>A type of fish I've always eaten</td>
</tr>
<tr>
<td>Caught in the wild</td>
</tr>
<tr>
<td>Dolphin/turtle friendly</td>
</tr>
<tr>
<td>Organic</td>
</tr>
<tr>
<td>Fairly traded</td>
</tr>
<tr>
<td>Fishing method</td>
</tr>
<tr>
<td>Sustainably sourced</td>
</tr>
<tr>
<td>Independently certified/verified</td>
</tr>
<tr>
<td>Is not GMO</td>
</tr>
<tr>
<td>Clearly marked country of origin</td>
</tr>
<tr>
<td>Sourced locally</td>
</tr>
<tr>
<td>Knowing where the product originally comes from</td>
</tr>
</tbody>
</table>
Sustainably sourced and environmentally friendly is ranked just slightly above price as a purchase motivator – unique to Europe

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?

Base: Seafood consumers, Europe, n=11,132
How do we trigger action?
Educate  Equip

Excite  Engage
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:

- Pollution of the oceans: 66%
- Overfishing/depletion of fish species: 46%
- GM/harmful chemicals: 33%
- Ocean acidification/damage to coral reefs: 28%
- Effects of climate change on the oceans: 27%
- Illegal/prohibited fishing: 26%
- Accidental catch of dolphins, sharks, turtles: 25%
- Not enough seafood for children/grandchildren: 16%
- Poor working conditions: 11%
- Impacts of rising sea levels: 11%
- Slavery in fishing industry: 10%

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)

<table>
<thead>
<tr>
<th>Channel</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Seafood packaging</td>
<td>52%</td>
</tr>
<tr>
<td>TV/radio articles</td>
<td>47%</td>
</tr>
<tr>
<td>Magazine/newspaper articles</td>
<td>39%</td>
</tr>
<tr>
<td>Environmental charities</td>
<td>29%</td>
</tr>
<tr>
<td>Signs in stores</td>
<td>28%</td>
</tr>
<tr>
<td>Adverts</td>
<td>26%</td>
</tr>
<tr>
<td>Social networking sites</td>
<td>25%</td>
</tr>
<tr>
<td>Schools, museums, aquariums</td>
<td>23%</td>
</tr>
<tr>
<td>Restaurants/hotels</td>
<td>22%</td>
</tr>
<tr>
<td>Health blogs/websites</td>
<td>17%</td>
</tr>
<tr>
<td>Word of mouth</td>
<td>17%</td>
</tr>
<tr>
<td>Environmental blogs/websites</td>
<td>16%</td>
</tr>
<tr>
<td>Marine life blogs/websites</td>
<td>15%</td>
</tr>
<tr>
<td>Fliers delivered to your mailbox</td>
<td>15%</td>
</tr>
<tr>
<td>Popular chefs</td>
<td>14%</td>
</tr>
<tr>
<td>Lifestyle blogs/websites</td>
<td>8%</td>
</tr>
<tr>
<td>None of these</td>
<td>7%</td>
</tr>
</tbody>
</table>

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%

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)

- Supermarkets' and brands' claims about sustainability should be clearly labelled by an independent organisation: 73%
- I notice ecolabelled products when I’m shopping: 45%

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”

47% recall seeing the MSC label, up from 43% in 2016

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)

69% trust the MSC label

40% understand the MSC label spontaneously connecting it with ocean sustainability and/or certification

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

- Independence
  - Strict standards
    - Openness and traceability
  - Enables sustainable shopping
  - Sustains fish populations
  - Purchase of MSC products
    - Availability on range of brands/prices
  - Trust in MSC
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.
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...

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

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.

...to people's lives and plates
PEOPLE WHO LOVE SEAFOOD CHOOSE MSC
THE LATEST DEVELOPMENTS IN EUROPE
## MSC in European public procurement

### MSC certifications recognised in government guidance:

<table>
<thead>
<tr>
<th>Country</th>
<th>Government Agency</th>
<th>Policy Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Norway</td>
<td>Norwegian Directorate of Agriculture and Forestry</td>
<td>A new legislation allowing eco-labels to be part of the public procurement</td>
</tr>
<tr>
<td>Sweden</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Finland</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Denmark</td>
<td></td>
<td></td>
</tr>
<tr>
<td>France</td>
<td>City of Paris Sustainable Food Plan</td>
<td></td>
</tr>
<tr>
<td>Germany</td>
<td>German Council for Sustainable Development</td>
<td>The German Council for Sustainable Development recommend MSC in their Sustainable Shopping Basket</td>
</tr>
<tr>
<td>Italy</td>
<td>Italian Government public procurement policy GPP for collective restaurants</td>
<td>The Italian Government public procurement policy GPP for collective restaurants</td>
</tr>
<tr>
<td>The Netherlands</td>
<td>Dutch Ministry of Economic Affairs, Fisheries Directorate</td>
<td>The Dutch Ministry of Economic Affairs, Fisheries Directorate recognised MSC in public procurement policies as equivalent to organic</td>
</tr>
</tbody>
</table>
I worry where Lidl get their seafood. I don’t want to find it’s from a ditch.

Chris

Doit-on préférer le sauvage à l’élevage?
OUR 20TH ANNIVERSARY CAMPAIGNS SUMMARY
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

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