Understanding & Activating Seafood Consumers – North America

MSC & GlobeScan, 9 October 2018
Today’s agenda

• Welcome

• Overview of key consumer trends

• Update on North America activities

• Q/A

• Close
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GlobeScan

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Regional Director  
MSC Americas

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Sr. Marketing Communications Manager  
MSC Canada
Introduction to MSC Consumer Insights for North America 2018

<table>
<thead>
<tr>
<th>Type of consumer</th>
<th>Sample</th>
</tr>
</thead>
<tbody>
<tr>
<td>General public</td>
<td>n=5,664</td>
</tr>
<tr>
<td>Seafood consumers</td>
<td>n=4,155</td>
</tr>
</tbody>
</table>
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:
- 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

81% of seafood consumers agree that we need to protect seafood supplies for future generations

Base: Seafood consumers, North America n=4,155
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.

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
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
Ocean plastic pollution has been at the forefront of environmental concerns in the media.
Pollution of the oceans is the most concerning ocean issue for consumers, followed by overfishing.
Seafood consumers are keen to find out more about sustainable seafood from product packaging, indicating a warm audience for MSC.

<table>
<thead>
<tr>
<th>Channel</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Seafood packaging</td>
<td>46%</td>
</tr>
<tr>
<td>TV/radio articles</td>
<td>35%</td>
</tr>
<tr>
<td>Adverts</td>
<td>35%</td>
</tr>
<tr>
<td>Magazine/newspaper articles</td>
<td>32%</td>
</tr>
<tr>
<td>Social networking sites</td>
<td>26%</td>
</tr>
<tr>
<td>Signs in stores</td>
<td>25%</td>
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<tr>
<td>Health blogs/websites</td>
<td>24%</td>
</tr>
<tr>
<td>Schools, museums, aquariums</td>
<td>23%</td>
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<tr>
<td>Environmental blogs/websites</td>
<td>23%</td>
</tr>
<tr>
<td>Restaurants/hotels</td>
<td>23%</td>
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<tr>
<td>Marine life blogs/websites</td>
<td>22%</td>
</tr>
<tr>
<td>Word of mouth</td>
<td>22%</td>
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<tr>
<td>Environmental charities</td>
<td>20%</td>
</tr>
<tr>
<td>Fliers delivered to your mailbox</td>
<td>14%</td>
</tr>
<tr>
<td>Popular chefs</td>
<td>13%</td>
</tr>
<tr>
<td>Lifestyle blogs/websites</td>
<td>12%</td>
</tr>
<tr>
<td>Food bloggers</td>
<td>6%</td>
</tr>
<tr>
<td>None of these</td>
<td>8%</td>
</tr>
</tbody>
</table>

Base: Seafood consumers, North America, n=3,896

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

70%

Base: Seafood consumers, North America, n=4,155
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”
Describes opinion well, top three (5+6+7 on 7-point scale)

Supermarkets' and brands' claims about sustainability should be clearly labelled by an independent organisation: 70%

I notice ecolabelled products when I'm shopping: 24%

Base: Seafood consumers, North America, n=4,155

Q5.1: How well does each of the following statements describe your opinion? 7-point scale: 1 = “Does not describe my opinion very well,” 7 = “Describes my opinion very well”
MSC label awareness levels in North America have increased since 2016

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

23% recall seeing the MSC label, up from 19% in 2016

Base: General public, North America, n=5,664
Q1.1: Have you ever seen the following logos?
A quarter of consumers in Canada have seen the MSC label often or occasionally, and in the USA, a fifth demonstrate awareness.

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

Base: General public, by country

Q1.1: Have you ever seen the following logos?
Two thirds of consumers in North America trust the MSC, and a quarter demonstrate understanding of the label

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

65% trust the MSC label

24% understand the MSC label spontaneously connecting it with ocean sustainability and/or certification

Base: MSC-aware consumers, North America, n=1,065

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

Independency

Strict standards

Openness and traceability

Enables sustainable shopping

Sustains fish populations

Purchase of MSC products

Trust in MSC

Availability on range of brands/prices
<table>
<thead>
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<th>Educate</th>
<th>Equip</th>
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<td>Raise awareness of the issues</td>
<td>Provide easy solutions: accessible, sustainable seafood</td>
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<td>Create a movement, using inspiring storytelling</td>
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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, North America, \(n=4,155\)

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.
WIIFM?
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 NORTH AMERICA
OUT OF HOME
(GREATER TORONTO AREA)
Good for you and the oceans
Look for the blue fish

For healthy oceans
Choose certified sustainable seafood

Healthy oceans, healthy you
Look for the blue fish

Choose certified sustainable seafood
Good for you and the oceans too

Why choose sustainable seafood?

If the oceans are to be healthy, productive and full of fish in the future, we have to fish sustainably.

Sustainable fishing reduces environmental impacts, guards our oceans, and boosts local and national economies. It helps ensure fish stocks are well managed, and that species are not overfished. It also provides a sustainable source of income for coastal communities around the world.

Learn about the MSC
Sam’s Club proved that when given a clearly communicated choice its members would choose certified sustainable, even at a slightly higher price point.

Side by side test
Certified and non-certified products side-by-side in stores across the U.S.

Messaging
Simple messaging on pallet skirts, trays, cards and product labels.

Sustainability wins
Shoppers voted overwhelmingly for the MSC certified sustainable option.

Marking 5 years as the 1st and only global restaurant company to serve MSC certified fish at every U.S. location.

McDonald’s launched ‘Reel it in!’ to raise awareness of sustainable fishing and get families involved in the conversation.

Media coverage
118 articles generated

Video views
Tens of thousands on FB and IG

Advertising
Millions of impressions

Influencer outreach
Mailers to 24 influencers and journalists
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
- **Equip** – people care about independent certification, but lack awareness of ecolabels when shopping
- **Excite** – messaging ensuring protection of fish for future generations can help to inspire
- **Engage** – the power of partnerships are key to engaging the mainstream
Thank you

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