



Understanding & Activating Seafood Consumers – North America

MSC & GlobeScan, 9 October 2018

GLOBESCAN



Today's agenda

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



James Morris
Director
GlobeScan



Brian Perkins
Regional Director
MSC Americas



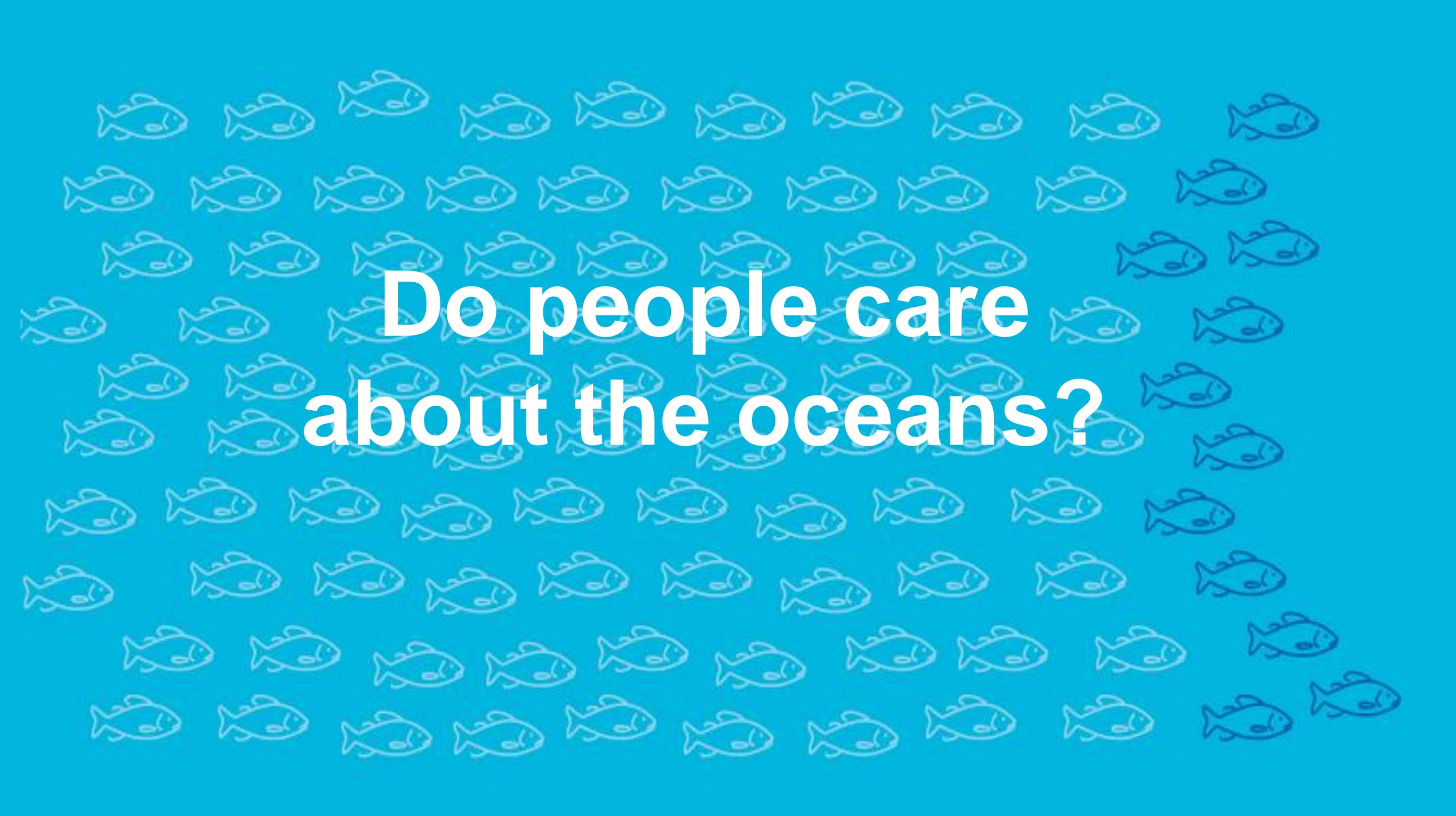
Céline Rouzaud
Sr. Marketing Communications Manager
MSC Canada

Introduction to MSC Consumer Insights for North America 2018



	Type of consumer	Sample
	General public	<i>n</i> =5,664
	Seafood consumers	<i>n</i> =4,155

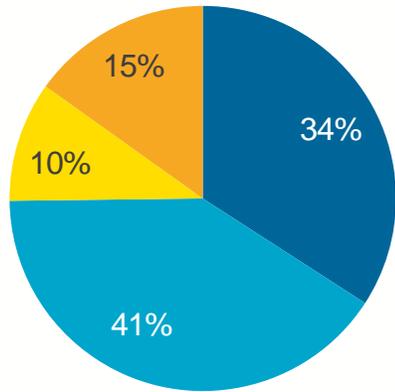
- Do people care about the oceans?
- Are people acting on their values?
- How do we trigger action?
- How MSC and partners engage consumers

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 arranged in a grid-like fashion, with some rows being more densely packed than others, creating a sense of movement and depth. The fish are simple line drawings, showing the basic shape of a fish with fins and a tail.

**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

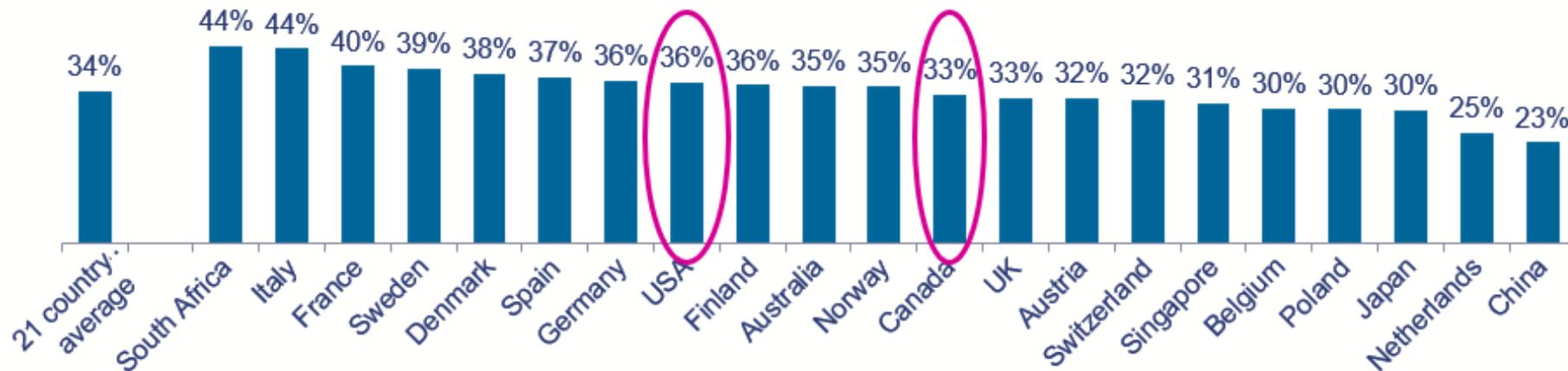


- Really like eating fish/seafood
- Like eating fish/seafood
- Neither like or dislike
- Dislike/really dislike eating fish/seafood / not purchased



Seafood lovers

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)



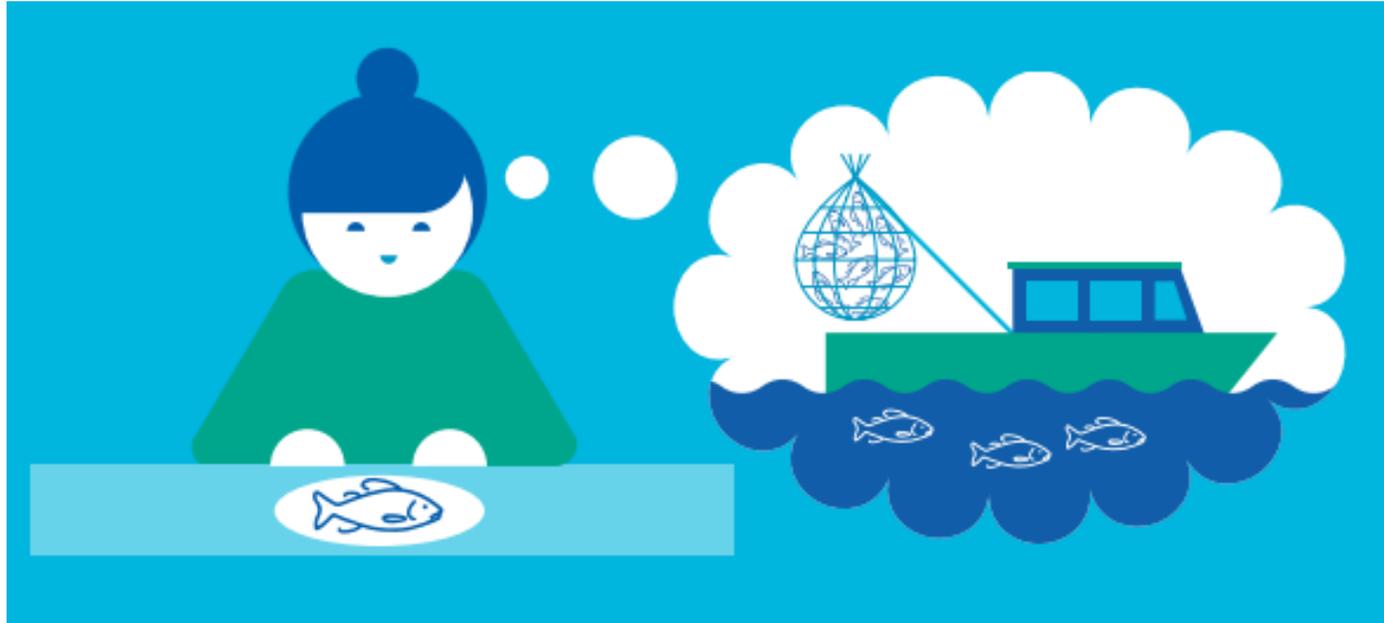
Base: Seafood consumers, North America $n=4,155$

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?

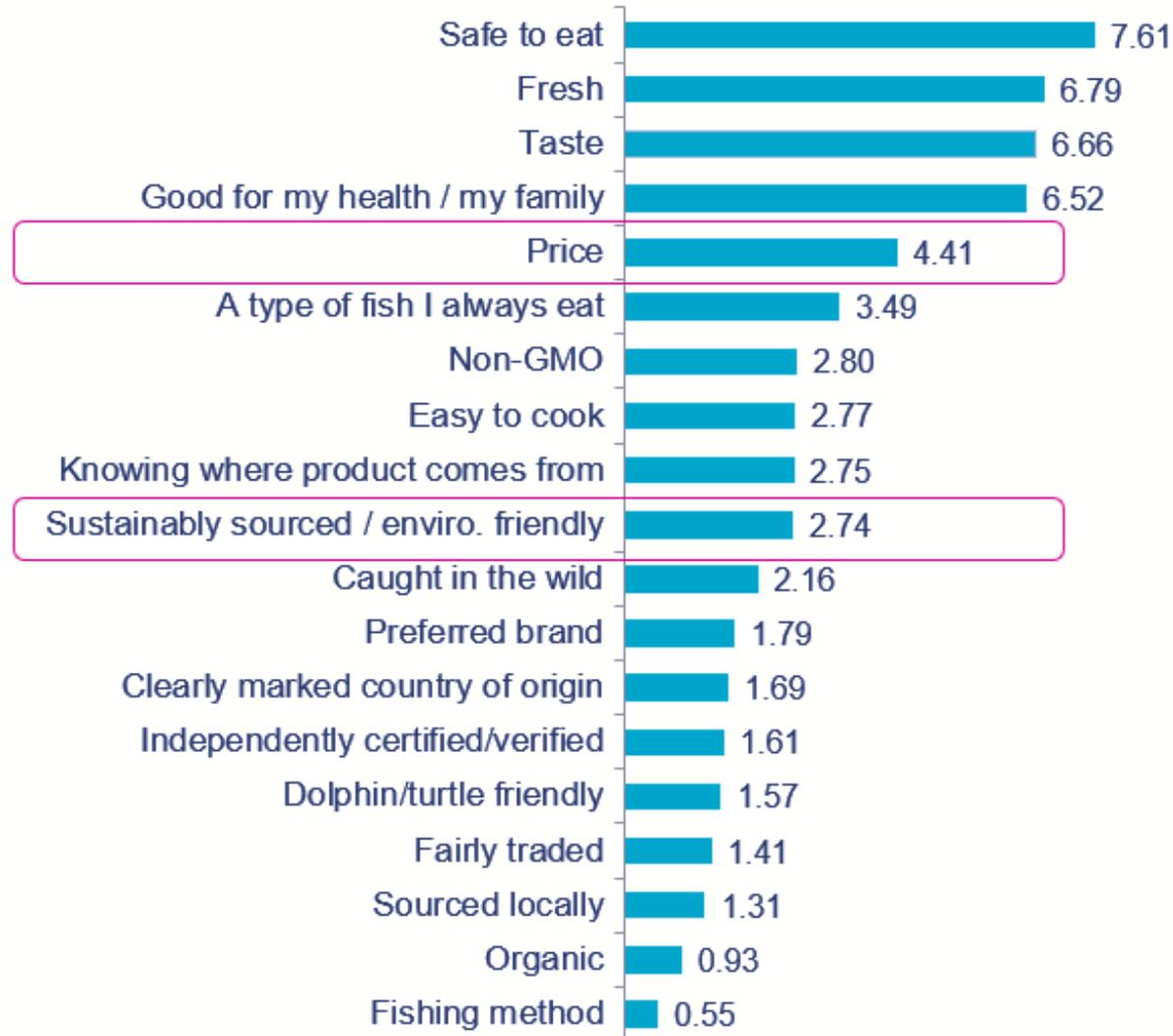


What motivates consumers when purchasing fish and seafood?



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



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

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

Equip

Provide easy solutions:
accessible, sustainable seafood

Excite

Positive vision and personal
benefits

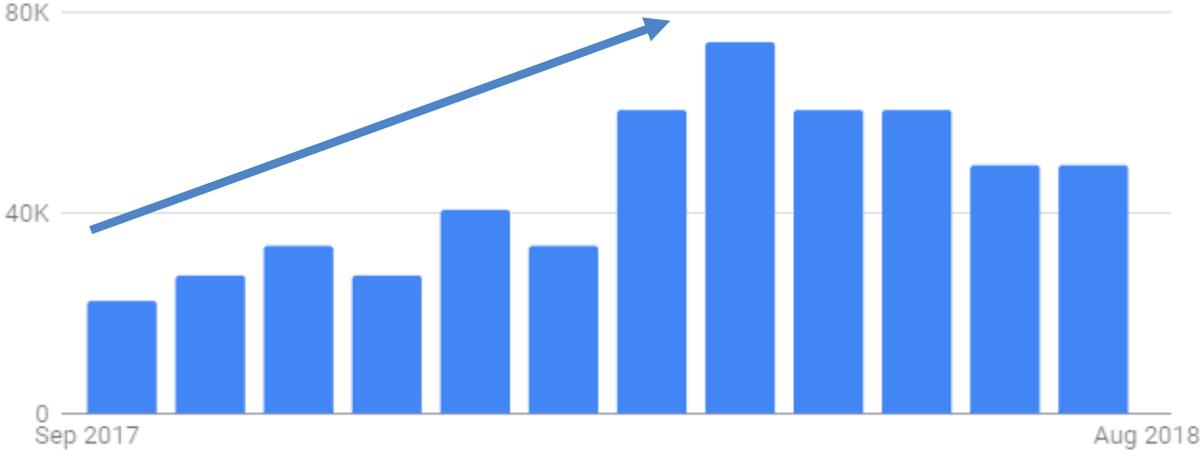
Engage

Create a movement, using
inspiring storytelling

Ocean plastic pollution has been at the forefront of environmental concerns in the media

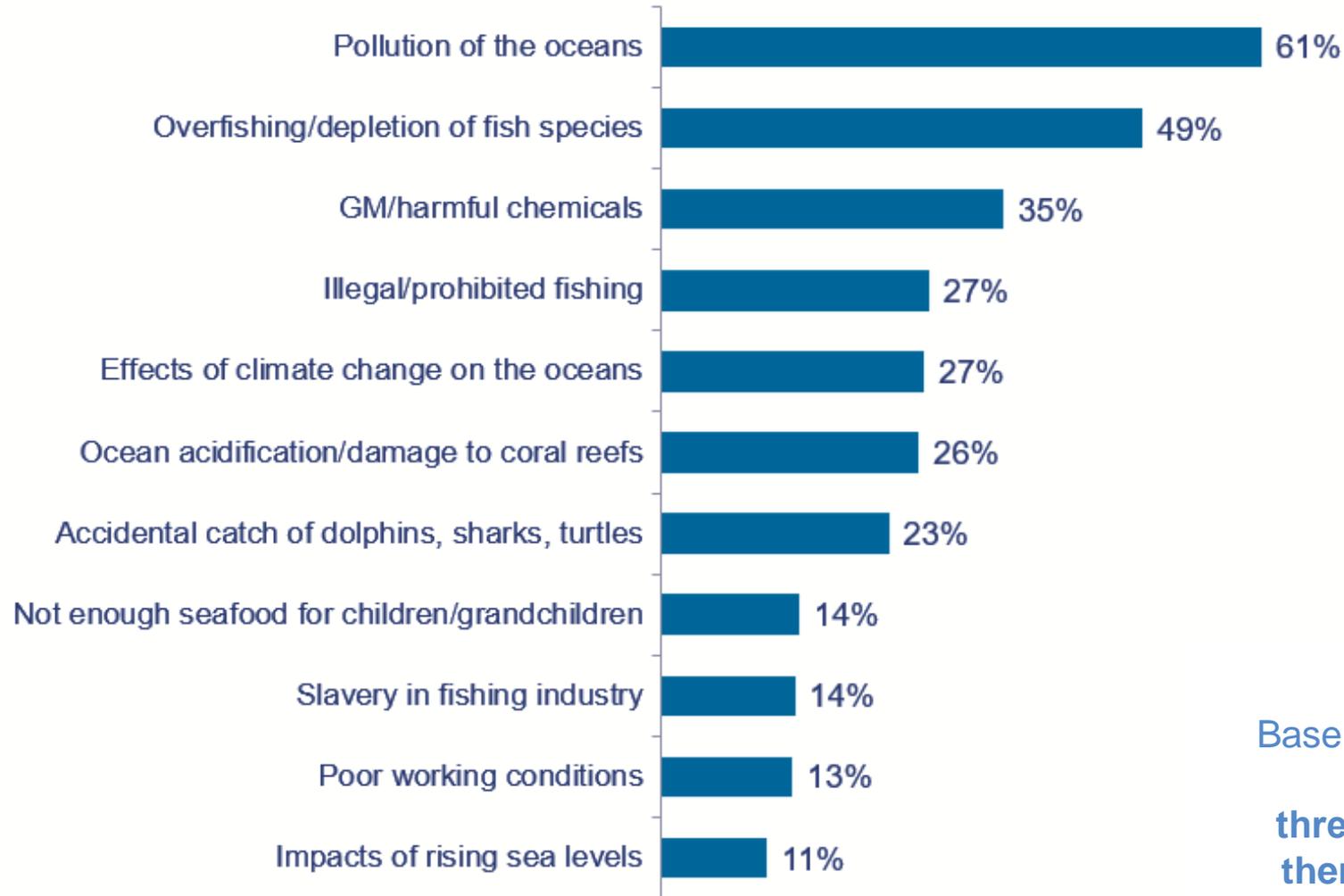


Google search volume: 'plastic in oceans'



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

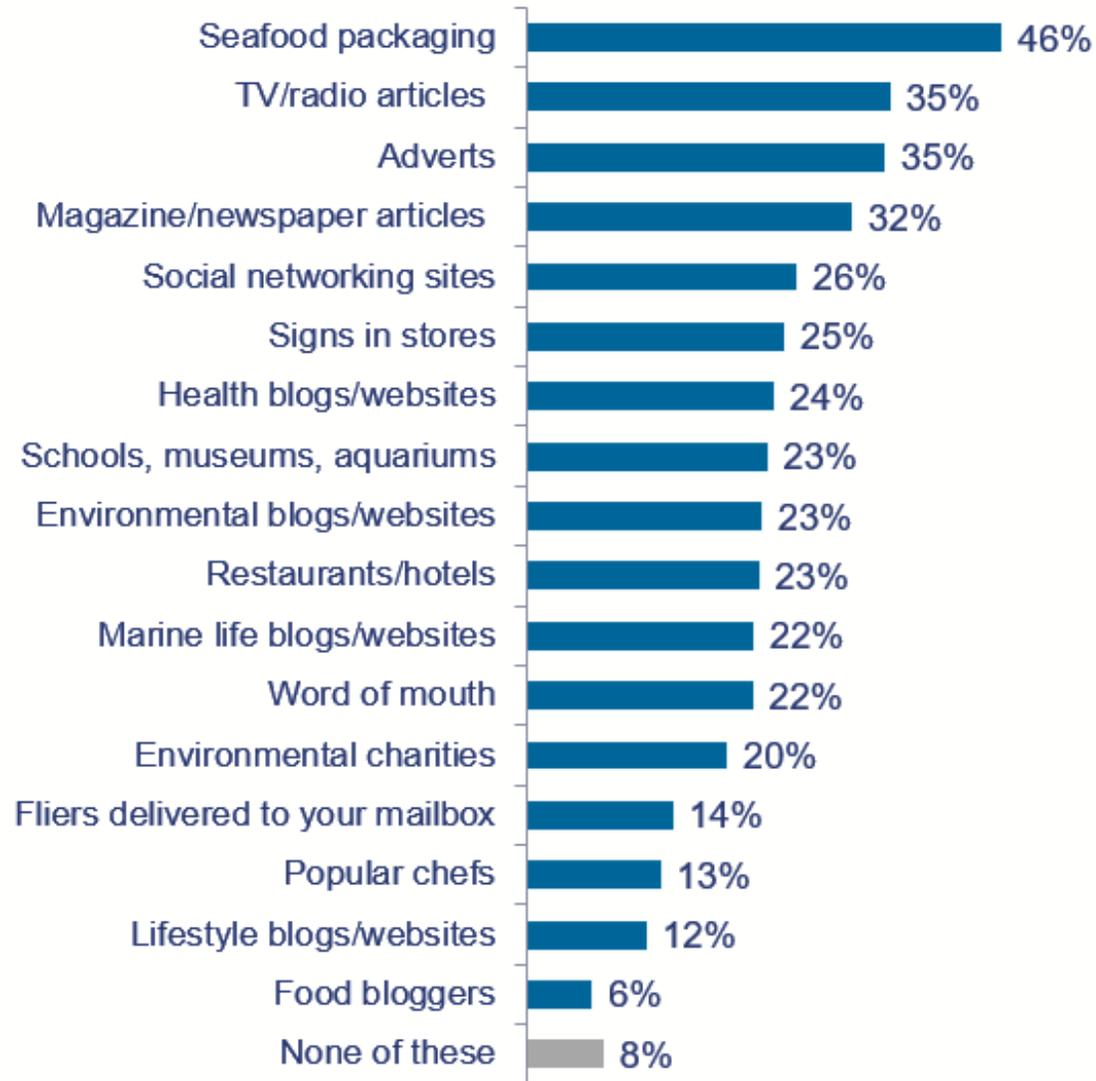


Base: Seafood consumers, North America, $n=4,155$

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, indicating a warm audience for MSC

Percentage choosing each channel (multiple select)



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

Equip

Provide easy solutions:
accessible, sustainable seafood

Excite

Positive vision and personal
benefits

Engage

Create a movement, using
inspiring storytelling

General opinion is also 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

70%

A horizontal bar chart with a blue bar representing 70%. The bar is positioned to the right of the text 'Supermarkets' and brands' claims about sustainability should be clearly labelled by an independent organisation'. The percentage '70%' is written at the end of the bar.

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"

General opinion is also favourable toward independent labelling but consumers still do not notice certifications on products – a key challenge

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



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"

MSC label awareness levels in North America have increased since 2016

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

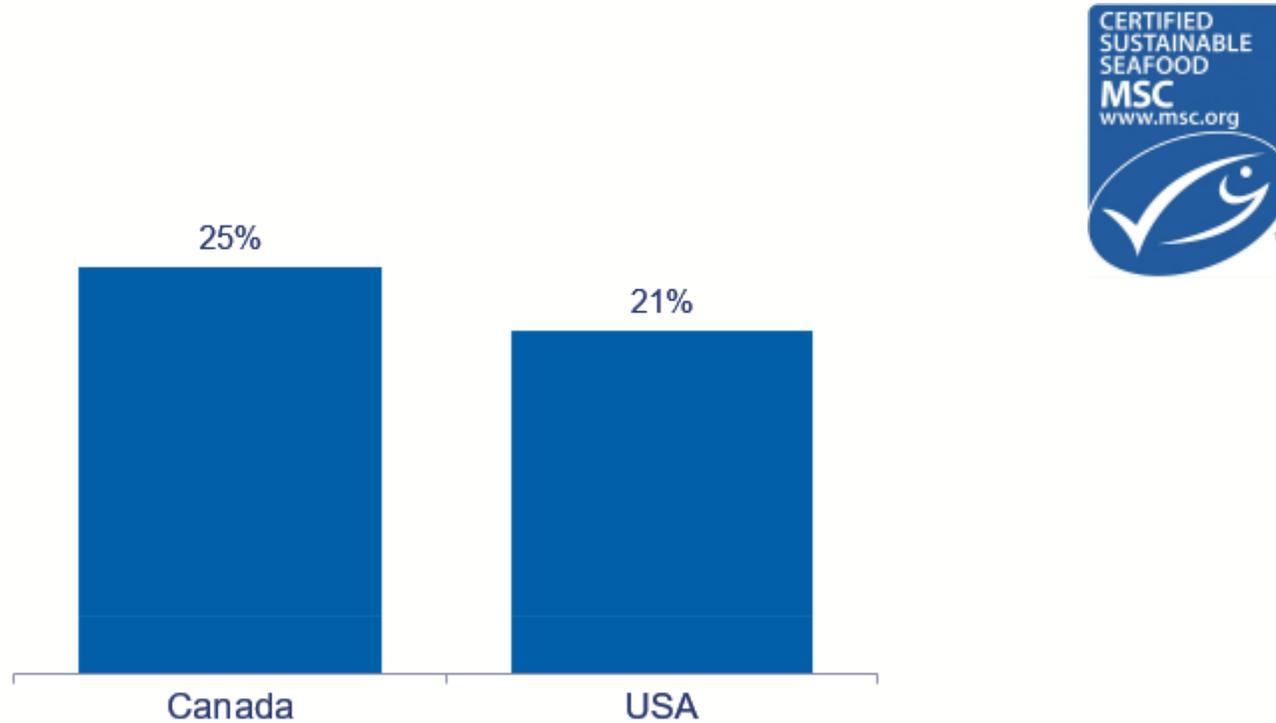


Base: General public, North America, $n=5,664$

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



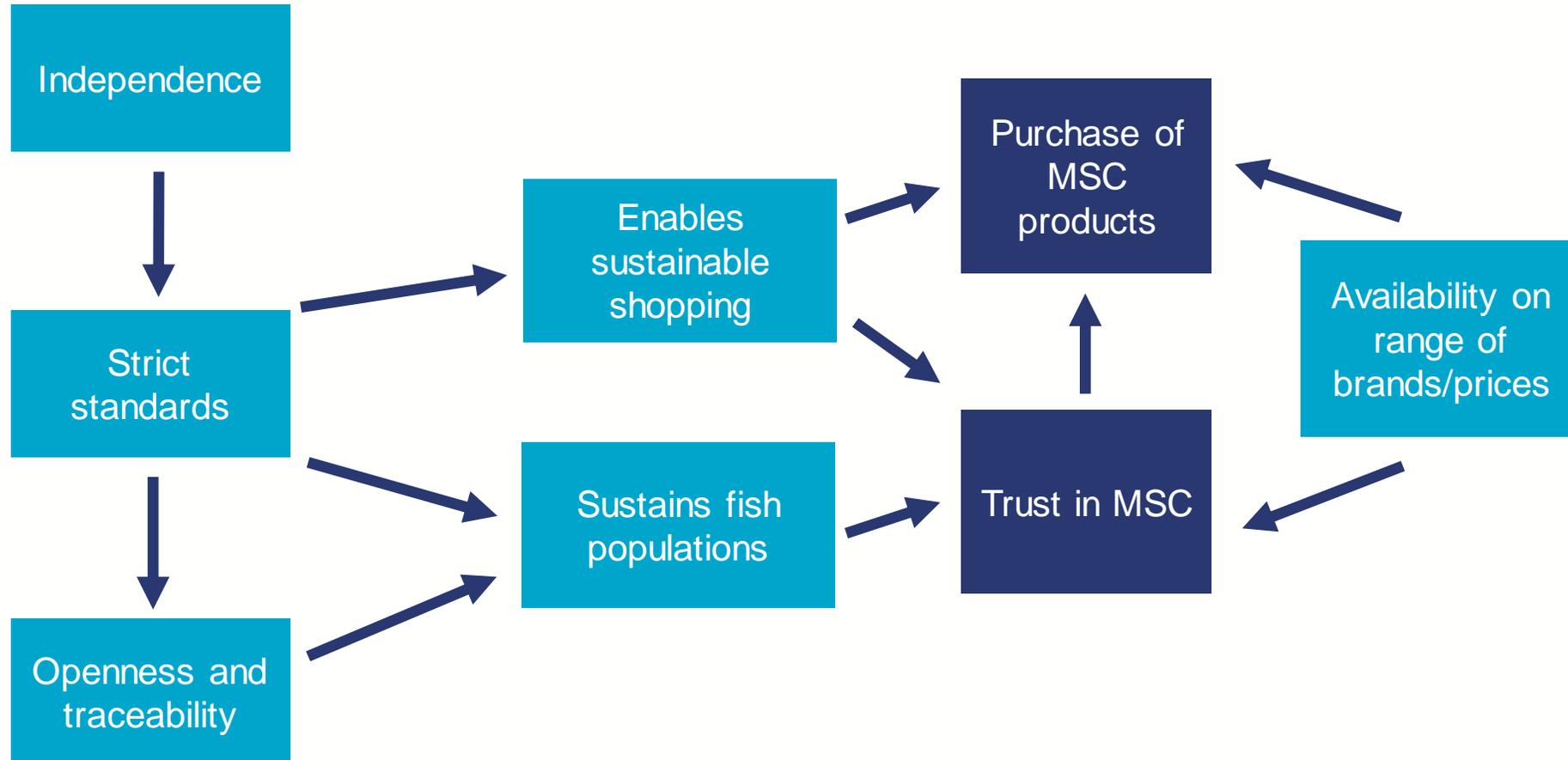
Base: MSC-aware consumers, North America, $n=1,065$

**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



Educate

Raise awareness of the issues

Equip

Provide easy solutions:
accessible, sustainable seafood

Excite

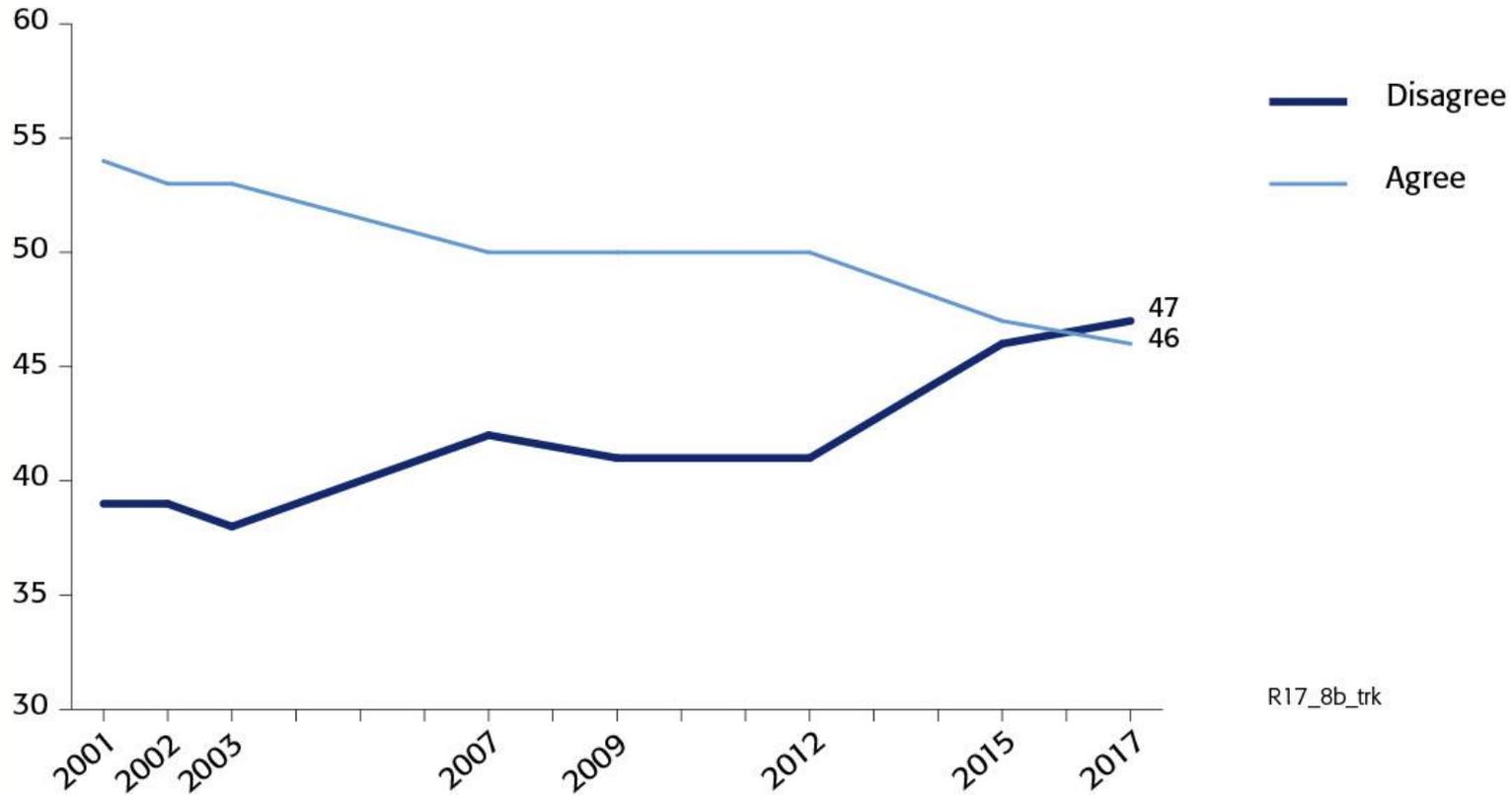
Positive vision and personal
benefits

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, 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

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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

WIIIFM?

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





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



**THE LATEST
DEVELOPMENTS
IN NORTH AMERICA**

OUT OF HOME (GREATER TORONTO AREA)



33

 **SOUNDTRANSIT**

 **Link**

133A



LOOK FOR
MSC CERTIFIED SEAFOOD



GOOD FOR YOU,
ME & OUR SEA

MSC/RTS/15/16

CERTIFIED
SUSTAINABLE
SEAFOOD



LOOK FOR
MSC CERTIFIED SEAFOOD



TESTING (GOOGLE ADS)

Example of your image ad at 300x250



Good for you and the oceans



Look for the blue fish



Example of your image ad at 300x250



Good for you and the oceans



Choose certified
sustainable seafood



Example of your image ad at 300x250



For healthy oceans



Look for the blue fish



Example of your image ad at 300x250



Healthy oceans, healthy you



Choose certified
sustainable seafood



PULL THROUGH (MSC.ORG)



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 from being overfished and protects more marine animals. That's why the MSC developed the Blue Fish label - so you can identify seafood that comes from certified sustainable fisheries.



Look for the MSC Blue Fish label on your favorite seafood products and know your purchase is supporting a well-managed, sustainable fishery that works hard to conserve the marine environment.

By buying fish from sustainable fisheries, you're encouraging more fisheries to start sustainably sourced seafood and more fisheries to improve their fishing standards and become certified, leading after the oceans and the resources they provide to most important now than ever before. Help us protect our oceans so future generations are able to enjoy seafood, forever.

Learn about the MSC



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 from being overfished and protects more marine

Jump to section

MESSAGING SUSTAINABILITY



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



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

- 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

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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