Consumer Insights
North America
MSC & GlobeScan, November 2018
Today’s Agenda

- Who we’re talking to - introducing MSC’s target consumers

- How much do consumers enjoy and purchase seafood?

- Do people value ocean sustainability and are they acting on their values?

- How can we trigger action?
## Introduction to Consumer Insights for North America 2018

### Consumer Type Description

<table>
<thead>
<tr>
<th>Consumer Type</th>
<th>Description</th>
<th>North America</th>
<th>Canada</th>
<th>USA</th>
</tr>
</thead>
<tbody>
<tr>
<td>General public</td>
<td>Representative sample of consumers across (as possible using online panels)</td>
<td>$n=5,664$</td>
<td>$n=2,024$</td>
<td>$n=3,640$</td>
</tr>
<tr>
<td>Seafood consumers</td>
<td>Consumers who “really like” to eat seafood</td>
<td>$n=4,155$</td>
<td>$n=1,543$</td>
<td>$n=2,612$</td>
</tr>
<tr>
<td>MSC target: Aspirationals</td>
<td>Seafood consumers identified as being motivated by sustainability and enjoying shopping</td>
<td>$n=658$</td>
<td>$n=231$</td>
<td>$n=427$</td>
</tr>
</tbody>
</table>
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.*)
Introducing MSC’s target consumers: the MSC Aspirationals

22% of seafood consumers in Canada and the USA

• Care about the planet
• Also have a love of shopping and are excited to buy new things
• When purchasing seafood, they value health and sustainability more than price
• More likely to notice ecolabels on products than their peers and prefer buying certified products (this excites them)
• Slightly more pro-business and eager to hear more
Introducing MSC’s target consumers: MSC Aspirationals

**Age**
- 18-24: 16%
- 25-34: 19%
- 35-44: 21%
- 45-54: 19%
- 55-64: 16%
- 65+: 16%

**Family**
- Children under 18: 54%
- No children under 18: 46%

**Gender**
- Female: 50%
- Male: 50%

**Education**
- Low: 34%
- Medium: 59%
- High: 38%
- DK/NA: 5%

**Income**
- Low: 34%
- Medium: 50%
- High: 11%
- DK/NA: 5%

**Notes**
- Similar age profile to general public – slightly larger portion of people aged 25-44
- Significantly more likely to have younger children at home than the overall figures
- Slightly more likely to be highly educated than others; income levels similar

Base: MSC target consumers, North America n=658
How much do consumers enjoy and purchase seafood?
Almost three quarters of consumers like seafood, with over a third (35%) being self-declared seafood lovers.

Love of seafood, North America average

- Really like eating fish/seafood: 35%
- Like eating fish/seafood: 37%
- Neither like or dislike: 8%
- Dislike/really dislike eating fish/seafood / not purchased: 20%

Seafood lovers (“really like” seafood), by country

- USA: 36%
- Canada: 33%

54% of target Aspirational consumers really enjoy eating seafood.

Base: General public, North America, n=5,664
Q2.7: How much would you say you personally enjoy eating fish and other seafood?
More than a third of North Americans eat fish or seafood daily or weekly at home

Frequency of fish/seafood consumption by location
North America (Canada and USA combined)

- **At home**
  - Daily: 4%
  - Weekly: 34%
  - Monthly: 28%
  - Every few months: 18%
  - Yearly: 3%
  - Less than yearly / never: 12%

- **In sandwich, deli, sushi or coffee shops**
  - Daily: 7%
  - Weekly: 14%
  - Monthly: 20%
  - Every few months: 7%
  - Yearly: 52%

- **In restaurants**
  - Daily: 1%
  - Weekly: 7%
  - Monthly: 30%
  - Every few months: 11%
  - Yearly: 34%

- **In fast food chains**
  - Daily: 1%
  - Weekly: 7%
  - Monthly: 14%
  - Every few months: 21%
  - Yearly: 8%
  - Yearly: 49%

**Base**: General public North America, n=5,664
**Q2.6**: How regularly do you eat fish or seafood in the following locations?
Supermarkets are the preferred outlets for seafood purchase in the US, with Walmart being the preferred supermarket by most divisions.

Preferred outlets for fish/seafood purchase, USA

- **Supermarket (including online)**: 90%
- **Restaurant, deli, sushi or coffee shop**: 35%
- **Fast food chain**: 22%
- **Local fishmonger or market**: 15%
- **Sandwich, deli, sushi, coffee shop**: 15%
- **Convenience store**: 7%
- **Workplace or other canteen**: 3%
- **Meal kit**: 1%

**Most frequent supermarket for fish/seafood purchase by division**

Base: Seafood consumers, USA n=2,439

Q2.3: Where do you/your family usually buy fish and seafood products from?
Q2.4 Which supermarkets do you/your family buy fish and seafood products from?
Supermarkets are the preferred outlets for seafood purchase in Canada

Preferred outlets for fish/seafood purchase, Canada

- Supermarket (including online): 94%
- Restaurant, deli, sushi or coffee shop: 26%
- Local fishmonger or market: 16%
- Fast food chain: 13%
- Sandwich, deli, sushi, coffee shop: 12%
- Convenience store: 4%
- Workplace or other canteen: 2%
- Meal kit: 1%

Most frequent supermarket for fish/seafood purchase in five largest provinces

Base: Seafood consumers, Canada n=1,457
Q2.3: Where do you/your family usually buy fish and seafood products from?
Q2.4 Which supermarkets do you/your family buy fish and seafood products from?
Preference for frozen fish and restaurant meals is clear among seafood lovers and target MSC Aspirational consumers, as well as overall.

### Types of fish/seafood purchased frequently

**North America**

<table>
<thead>
<tr>
<th>Type</th>
<th>All seafood consumers</th>
<th>Seafood lovers</th>
<th>MSC target consumers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Frozen fish/shellfish</td>
<td>61%</td>
<td>67%</td>
<td>70%</td>
</tr>
<tr>
<td>Meal in restaurant/hotel/café</td>
<td>44%</td>
<td>46%</td>
<td>50%</td>
</tr>
<tr>
<td>Fish sandwich</td>
<td>42%</td>
<td>44%</td>
<td>48%</td>
</tr>
<tr>
<td>Canned/tinned/pickled fish</td>
<td>39%</td>
<td>38%</td>
<td>37%</td>
</tr>
<tr>
<td>Fresh from fish counter</td>
<td>36%</td>
<td>36%</td>
<td>35%</td>
</tr>
<tr>
<td>Cooked, prepared fish</td>
<td>33%</td>
<td>33%</td>
<td>32%</td>
</tr>
<tr>
<td>Fish fingers/fish sticks</td>
<td>33%</td>
<td>34%</td>
<td>33%</td>
</tr>
<tr>
<td>Pre-packed fresh fish</td>
<td>33%</td>
<td>33%</td>
<td>32%</td>
</tr>
<tr>
<td>Health supplements and fish oils</td>
<td>33%</td>
<td>33%</td>
<td>32%</td>
</tr>
<tr>
<td>Pet food</td>
<td>18%</td>
<td>19%</td>
<td>18%</td>
</tr>
<tr>
<td>Ready meal/chilled prepared fish</td>
<td>12%</td>
<td>12%</td>
<td>11%</td>
</tr>
</tbody>
</table>

Base: North America seafood consumers $n=4,155$; seafood lovers $n=1,748$; target consumers, $n=658$

Q4.1: Which types of fish or seafood do you purchase frequently?
Do people value ocean sustainability and are they acting on their values?
Significant majority of North Americans agree that we need to protect fish for future generations

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

67% believe we need to consume seafood only from sustainable sources to save the ocean

Base: North America seafood consumers, 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”
What motivates consumers when purchasing fish and seafood?

<table>
<thead>
<tr>
<th>Fresh</th>
</tr>
</thead>
<tbody>
<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>
Conventional factors, led by freshness, dominate seafood purchase decisions – sustainably sourced sits halfway down; despite people valuing this highly, they are not empowered to act on it.

Importance score, North America

<table>
<thead>
<tr>
<th>Consideration</th>
<th>Importance Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Safe to eat</td>
<td>7.61</td>
</tr>
<tr>
<td>Fresh</td>
<td>6.79</td>
</tr>
<tr>
<td>Taste</td>
<td>6.66</td>
</tr>
<tr>
<td>Good for my health / my family</td>
<td>6.52</td>
</tr>
<tr>
<td>Price</td>
<td>4.41</td>
</tr>
<tr>
<td>A type of fish I always eat</td>
<td>3.49</td>
</tr>
<tr>
<td>Non-GMO</td>
<td>2.80</td>
</tr>
<tr>
<td>Easy to cook</td>
<td>2.77</td>
</tr>
<tr>
<td>Knowing where product comes from</td>
<td>2.75</td>
</tr>
<tr>
<td>Sustainably sourced / enviro. friendly</td>
<td>2.74</td>
</tr>
<tr>
<td>Caught in the wild</td>
<td>2.16</td>
</tr>
<tr>
<td>Preferred brand</td>
<td>1.79</td>
</tr>
<tr>
<td>Clearly marked country of origin</td>
<td>1.69</td>
</tr>
<tr>
<td>Independently certified/verified</td>
<td>1.61</td>
</tr>
<tr>
<td>Dolphin/turtle friendly</td>
<td>1.57</td>
</tr>
<tr>
<td>Fairly traded</td>
<td>1.41</td>
</tr>
<tr>
<td>Sourced locally</td>
<td>1.31</td>
</tr>
<tr>
<td>Organic</td>
<td>0.93</td>
</tr>
<tr>
<td>Fishing method</td>
<td>0.55</td>
</tr>
</tbody>
</table>

Female consumers rank sustainably sourced slightly higher than males (8th vs 10th).

Consumers of canned fish products rank sustainably sourced slightly higher at 7th.

Seafood lovers rank both “knowing where product comes from” and “sustainably sourced” slightly higher.

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?
Sustainability of more importance to younger consumers in North America – in contrast to global findings

Importance score, North American younger consumers (ages 18-34)

<table>
<thead>
<tr>
<th>Consideration</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Safe to eat</td>
<td>7.61</td>
</tr>
<tr>
<td>Fresh</td>
<td>6.74</td>
</tr>
<tr>
<td>Good for my health / my family</td>
<td>6.62</td>
</tr>
<tr>
<td>Taste</td>
<td>6.48</td>
</tr>
<tr>
<td>Price</td>
<td>4.49</td>
</tr>
<tr>
<td>Sustainably sourced / enviro. friendly</td>
<td>3.00</td>
</tr>
<tr>
<td>A type of fish I always eat</td>
<td>2.99</td>
</tr>
<tr>
<td>Non-GMO</td>
<td>2.84</td>
</tr>
<tr>
<td>Easy to cook</td>
<td>2.82</td>
</tr>
<tr>
<td>Knowing where the product comes from</td>
<td>2.53</td>
</tr>
<tr>
<td>Caught in the wild</td>
<td>1.88</td>
</tr>
<tr>
<td>Dolphin/turtle friendly</td>
<td>1.75</td>
</tr>
<tr>
<td>Independently certified/verified</td>
<td>1.67</td>
</tr>
<tr>
<td>Preferred brand</td>
<td>1.58</td>
</tr>
<tr>
<td>Fairly traded</td>
<td>1.56</td>
</tr>
<tr>
<td>Clearly marked country of origin</td>
<td>1.46</td>
</tr>
<tr>
<td>Sourced locally</td>
<td>1.28</td>
</tr>
<tr>
<td>Organic</td>
<td>1.19</td>
</tr>
<tr>
<td>Fishing method</td>
<td>0.61</td>
</tr>
</tbody>
</table>

Base: Seafood consumers aged 18-34, North America n=1,140

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?
Target MSC Aspirationalists also prioritise sustainability, as well as knowing where the product comes from – far higher than price

Importance score, North American MSC target consumers: MSC Aspirationals

<table>
<thead>
<tr>
<th>Consideration</th>
<th>Importance Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Safe to eat</td>
<td>7.22</td>
</tr>
<tr>
<td>Fresh</td>
<td>6.45</td>
</tr>
<tr>
<td>Good for my health / my family</td>
<td>6.17</td>
</tr>
<tr>
<td>Taste</td>
<td>5.34</td>
</tr>
<tr>
<td>Sustainably sourced / enviro. friendly</td>
<td>4.07</td>
</tr>
<tr>
<td>Knowing where product comes from</td>
<td>3.59</td>
</tr>
<tr>
<td>Non-GMO</td>
<td>3.54</td>
</tr>
<tr>
<td>Caught in the wild</td>
<td>2.75</td>
</tr>
<tr>
<td>Price</td>
<td>2.56</td>
</tr>
<tr>
<td>Independently certified/verified</td>
<td>2.23</td>
</tr>
<tr>
<td>Dolphin/turtle friendly</td>
<td>2.23</td>
</tr>
<tr>
<td>Clearly marked country of origin</td>
<td>2.19</td>
</tr>
<tr>
<td>Fairly traded</td>
<td>2.16</td>
</tr>
<tr>
<td>A type of fish I usually eat</td>
<td>2.15</td>
</tr>
<tr>
<td>Easy to cook</td>
<td>1.63</td>
</tr>
<tr>
<td>Sourced locally</td>
<td>1.54</td>
</tr>
<tr>
<td>Organic</td>
<td>1.37</td>
</tr>
<tr>
<td>Preferred brand</td>
<td>1.07</td>
</tr>
<tr>
<td>Fishing method</td>
<td>0.89</td>
</tr>
</tbody>
</table>

Base: MSC target consumers, North America n=658

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?

*Source: Raphael Bemporad, founding partner at brand consultancy BBMG.*
Sustainably sourced/environmentally friendly ranks higher in Pacific states and British Columbia

Importance of sustainably sourced/environmentally friendly, by USA divisions and Canadian provinces

Pacific division: Sustainability ranks above US average

All other divisions: Sustainability ranks similar to average for US

British Columbia: Sustainability ranks above Canadian average

All other provinces: Sustainability ranks similar to average for Canada

Base: Seafood consumers, USA n=2,612
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
Pollution of the oceans is the most concerning ocean issue for consumers, followed by overfishing.

<table>
<thead>
<tr>
<th>Issue</th>
<th>Percentage Choosing Each Issue in Top Three</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pollution of the oceans</td>
<td>61%</td>
</tr>
<tr>
<td>Overfishing/depletion of fish species</td>
<td>49%</td>
</tr>
<tr>
<td>GM/harmful chemicals</td>
<td>35%</td>
</tr>
<tr>
<td>Illegal/prohibited fishing</td>
<td>27%</td>
</tr>
<tr>
<td>Effects of climate change on the oceans</td>
<td>27%</td>
</tr>
<tr>
<td>Ocean acidification/damage to coral reefs</td>
<td>26%</td>
</tr>
<tr>
<td>Accidental catch of dolphins, sharks, turtles</td>
<td>23%</td>
</tr>
<tr>
<td>Not enough seafood for children/grandchildren</td>
<td>14%</td>
</tr>
<tr>
<td>Slavery in fishing industry</td>
<td>14%</td>
</tr>
<tr>
<td>Poor working conditions</td>
<td>13%</td>
</tr>
<tr>
<td>Impacts of rising sea levels</td>
<td>11%</td>
</tr>
</tbody>
</table>

Concerns of MSC target Aspirational consumers are similar
Illegal/prohibited fishing is ranked higher in North America as a concerning issue, than it is globally.

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?
Clear demand for more information from companies on sustainability of fish and seafood products

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

70% would like to hear more from companies about the sustainability of their fish products

98% of target Aspirational consumers would like to hear more – a defining characteristic

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”
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)

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

61% of target Aspirational consumers would like more information on packaging, followed by 42% commercials and 40% magazine/newspaper articles.

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
General opinion is highly favourable toward independent labelling…..

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

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

In Québec 77% agree

70%

This is particularly important for those buying health supplements and fish oils (76%) and pre-packed fresh fish (75%)

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”
........ But there remain visibility challenges

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

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

I notice ecolabelled products when I’m shopping

Visibility gap

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”
“Using a traditional marketing tactic is a driver of sales growth for brands communicating sustainability. On-pack communication is helpful, but it requires marketing muscle to reinforce the messaging and ensure that the message reaches the relevant consumers”*

*Tactics used by brands globally

*As a percentage of total sales measured globally

MSC awareness levels in the USA are stable since 2016

**Frequency of seeing the MSC label USA**
- 2016: 9% (9%), 69% (Not sure), 17% (Never seen), 21% (Seen occasionally), 4% (Seen often)
- 2018: 9% (9%), 70% (Not sure), 18% (Never seen), 21% (Seen occasionally), 4% (Seen often)

**Awareness of the MSC label “often” or “occasionally,” By division**
- East South Central: 26% (2018), 22% (2016)
- New England: 24% (2018), 19% (2016)
- South Atlantic: 23% (2018), 23% (2016)
- Pacific: 22% (2018), 29% (2016)
- East North Central: 21% (2018), 15% (2016)
- West South Central: 20% (2018), 21% (2016)
- Mountain: 20% (2018), 21% (2016)
- Middle Atlantic: 19% (2018), 15% (2016)
- West North Central: 18% (2018), 21% (2016)

Base: General public, USA, n=3,640; 2016 n=2,695
Q1.1: Have you ever seen the following logos?
Awareness of the MSC label has increased significantly in Canada since 2016, with the greatest increase in awareness in Alberta.

Frequency of seeing the MSC label
Canada

- **2016**
  - Never seen: 79%
  - Seen occasionally: 12%
  - Seen often: 2%
  - Not sure: 13%

- **2018**
  - Never seen: 63%
  - Seen occasionally: 22%
  - Seen often: 11%
  - Not sure: 13%
  - Total: 25%

Awareness of the MSC label “often” or “occasionally,” By province

- **Alberta**
  - 2018: 31%
  - 2016: 11%

- **Quebec**
  - 2018: 26%
  - 2016: 22%

- **Ontario**
  - 2018: 25%
  - 2016: 22%

- **Atlantic Provinces**
  - 2018: 24%
  - 2016: 16%

- **British Columbia**
  - 2018: 23%
  - 2016: 10%

- **Other**
  - 2018: 21%
  - 2016: 7%

Base: General public, Canada, n=2,024; 2016, n=1,355
Q.1.1: Have you ever seen the following logos?
MSC target Aspirational consumers have high levels of awareness of the label

Frequency of seeing the MSC label among MSC target consumers: MSC Aspirational
USA and Canada

44% total awareness, compared to 21%

44% total awareness, compared to 25%

Base: Target consumers
Q6.1. What does this logo mean or represent?
Understanding of the MSC label has increased in Canada and the USA

Spontaneous understanding of the label (unprompted) and trust, Canada and USA

27% of Canadian seafood consumers understand MSC label, up from 20% in 2016

22% of US seafood consumers understand the MSC label, up from 17% in 2016

And 65% of those who have seen the label, trust it

Base: Seafood consumers, Canada n=773; USA n=2,612
Q6.1. What does this logo mean or represent?
65% of those who’ve seen MSC label, trust it; trust is underpinned by 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
Ensuring seafood is from a sustainable source, availability for future generations, and helping protect oceans are most motivating messages.

Optimal MSC messages: full rank order

1. Ensures seafood we enjoy now is available for generations to come: 4.44
2. Helps stop the destruction of life in our oceans: 4.36
3. Ensures seafood is from a sustainable source: 4.35
4. Helps protect our oceans: 4.06
5. Is good for me and good for the oceans: 3.57
6. Makes it easy for me to identify sustainable seafood: 3.32
7. Helps protect our fishing culture, jobs and communities: 2.83
8. Enables me to trust in the product: 2.49
9. Ensures seafood forever: 2.17
10. Assures me that my seafood has been handled with care: 2.05
11. Clearly identifies wild-caught seafood: 1.69
12. Ensures a rich variety of seafood is available: 1.69
13. Is the smartest seafood choice in a modern world: 1.19
14. Is for people who care about seafood: 1.03
15. Allows me to feel that I’m doing good: 1.02

Base: Seafood consumers, North America, n=1,200

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
The latest developments in North America
Out of home
(Greater Toronto area, Canada)
Out of home
(seattle & san Francisco, U.S.)
testing
(google ads)
pull through
(Msc.org)
MSC’s target consumers are Aspirationals – they care about the planet but also love to shop.

North Americans tend to enjoy seafood and large majority would like to protect it for future generations. Some segments are considering this in shopping decisions: young consumers and MSC’s target Aspirationals.

In order to trigger more action, we need to:

- **Educate** – use popular channels to maintain the high 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.
Any questions?
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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