Consumer Insights North America

MSC & GlobeScan, November 2018

On Our Call Today

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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	North America	Canada	USA
General public	Representative sample of consumers across (as possible using online panels)	*n*=5,664	*n*=2,024	*n*=3,640
Seafood consumers	Consumers who “really like” to eat seafood	*n*=4,155	*n*=1,543	*n*=2,612
MSC target: Aspirationals	Seafood consumers identified as being motivated by sustainability and enjoying shopping	*n*=658	*n*=231	*n*=427

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.

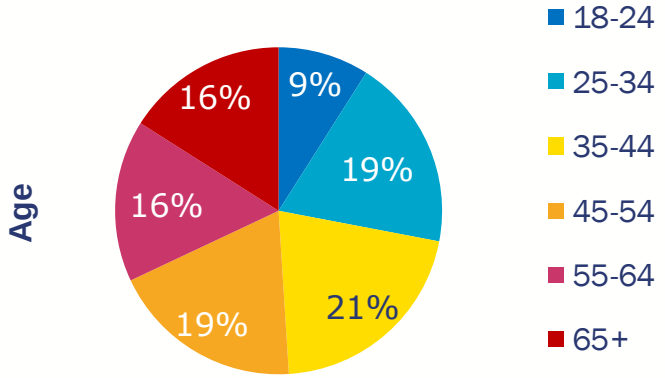
(*Wild. Traceable. Sustainable.)

Introducing MSC's target consumers: the MSC Aspirationals

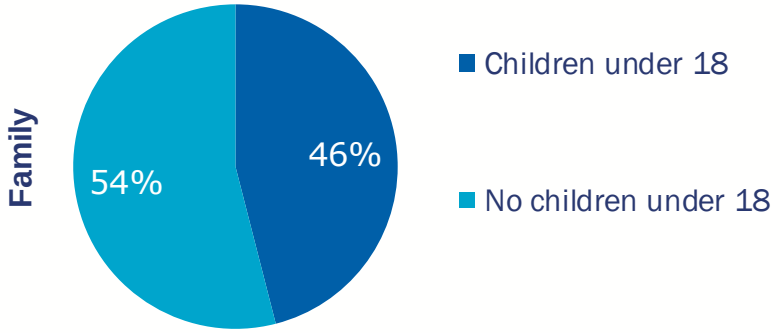
22% of seafood consumers in Canada and the USA

- 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

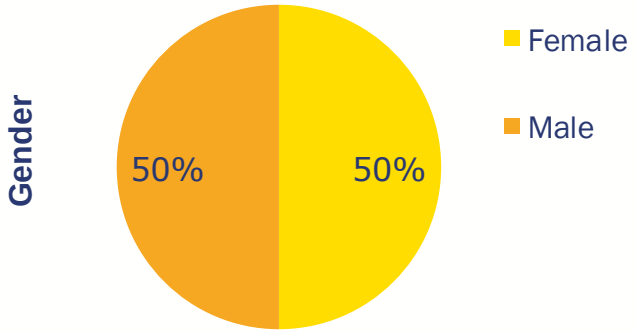
Introducing MSC's target consumers: MSC Aspirationals



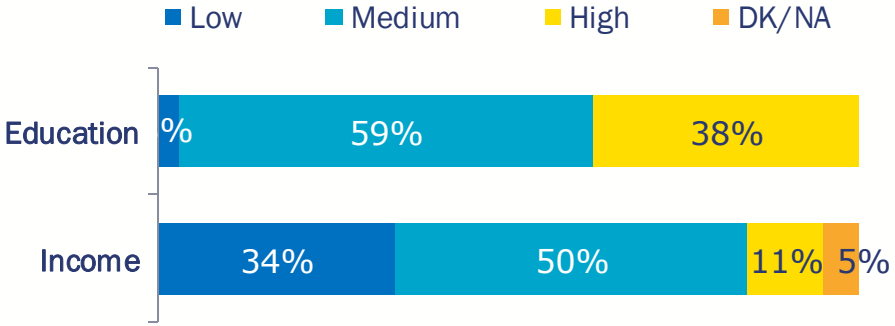
Similar age profile to general public – slightly larger portion of people aged 25-44



Significantly more likely to have younger children at home than the overall figures



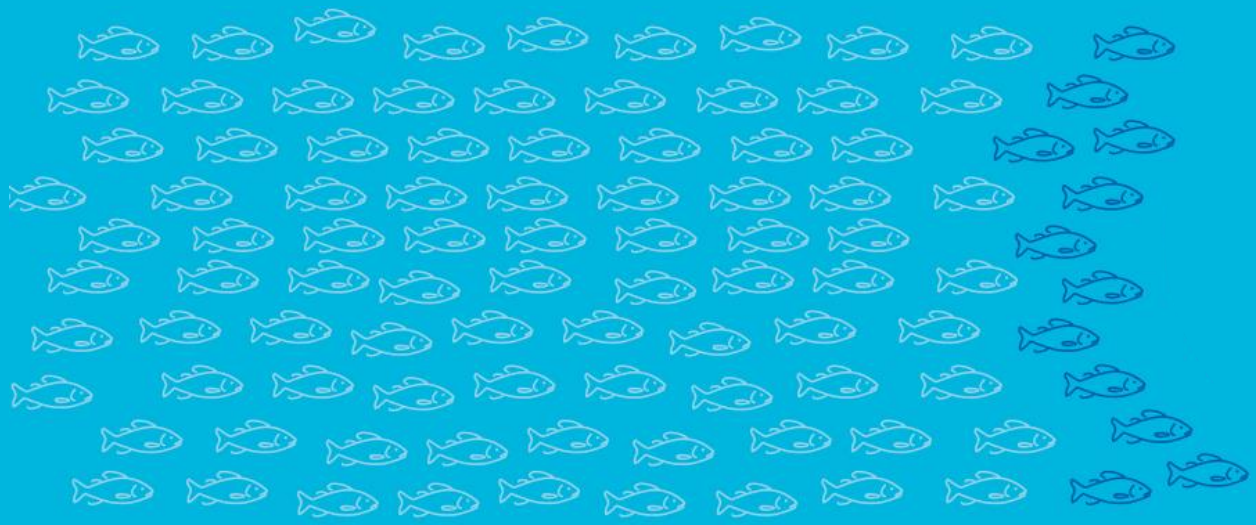
Same as overall NA



Slightly more likely to be highly educated than others; income levels similar

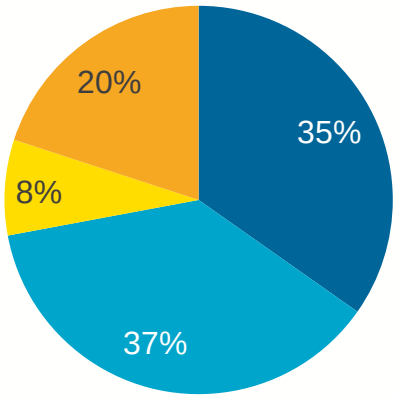
Base: MSC target consumers, North America *n*=658

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

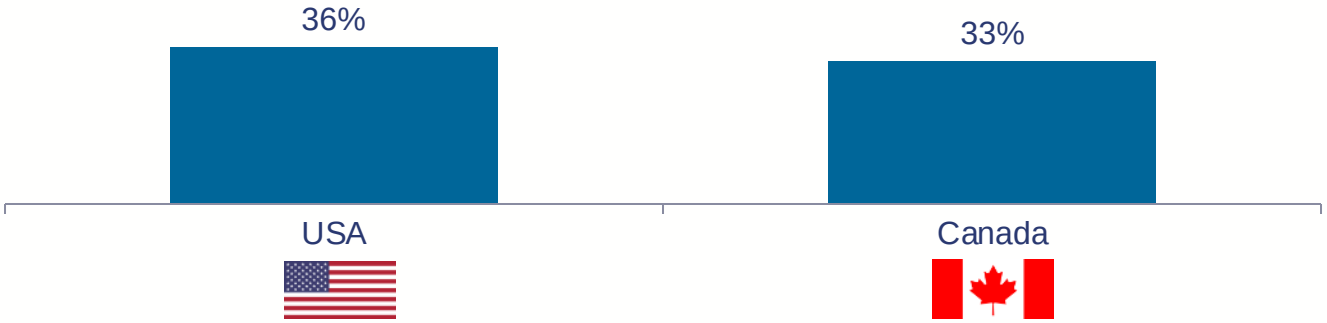
Love of seafood, North America average



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

54% of target Aspirational consumers really enjoy eating seafood

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

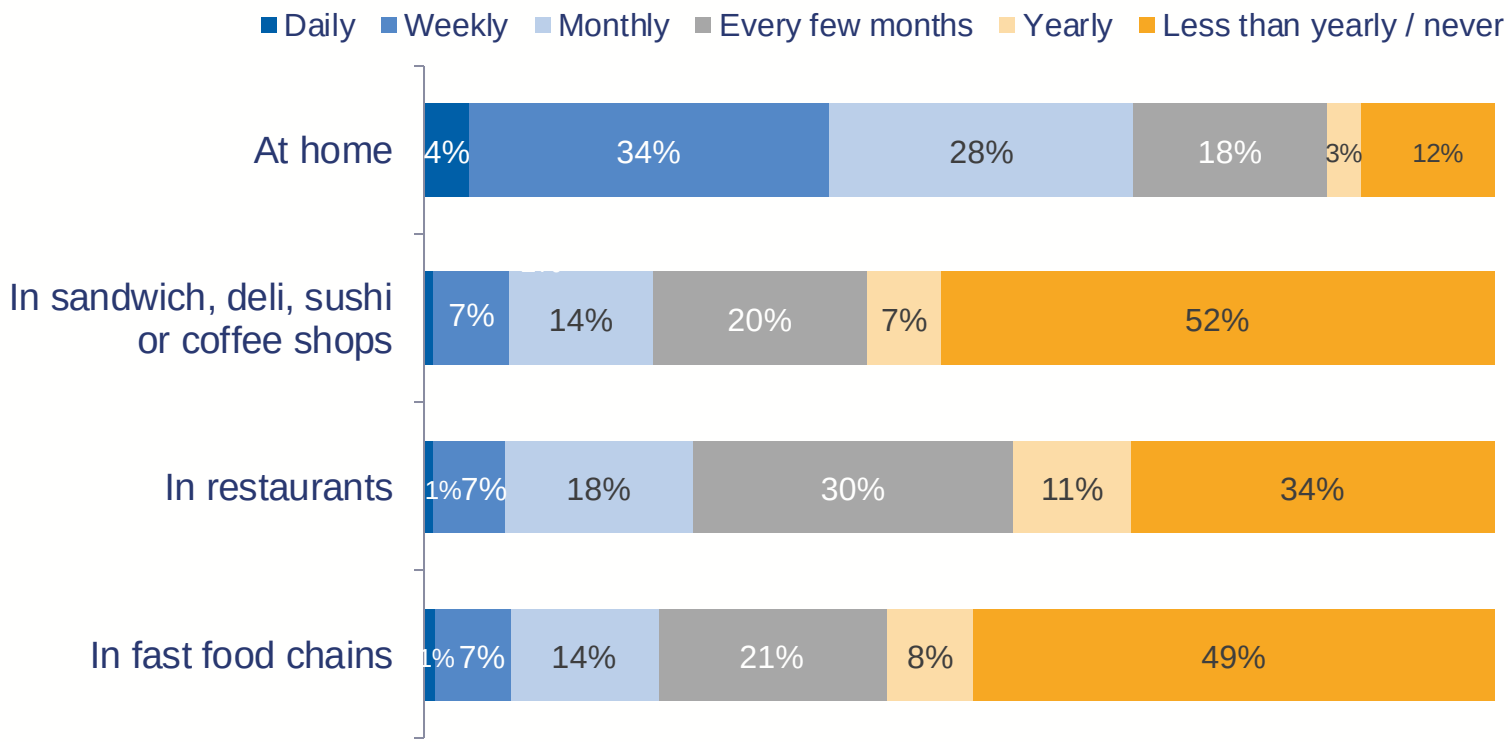


Base: General public, North America, *n*=5,664

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)

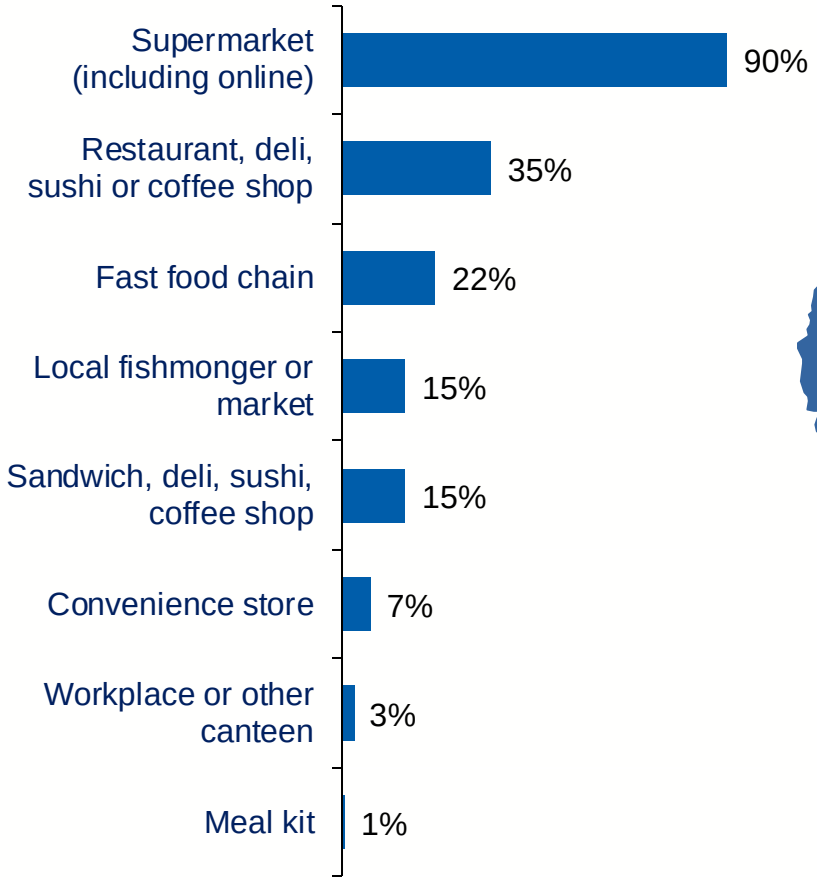


6% of target Aspirational seafood consumers consume daily at home and 53% weekly

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



Most frequent supermarket for fish/seafood purchase by division

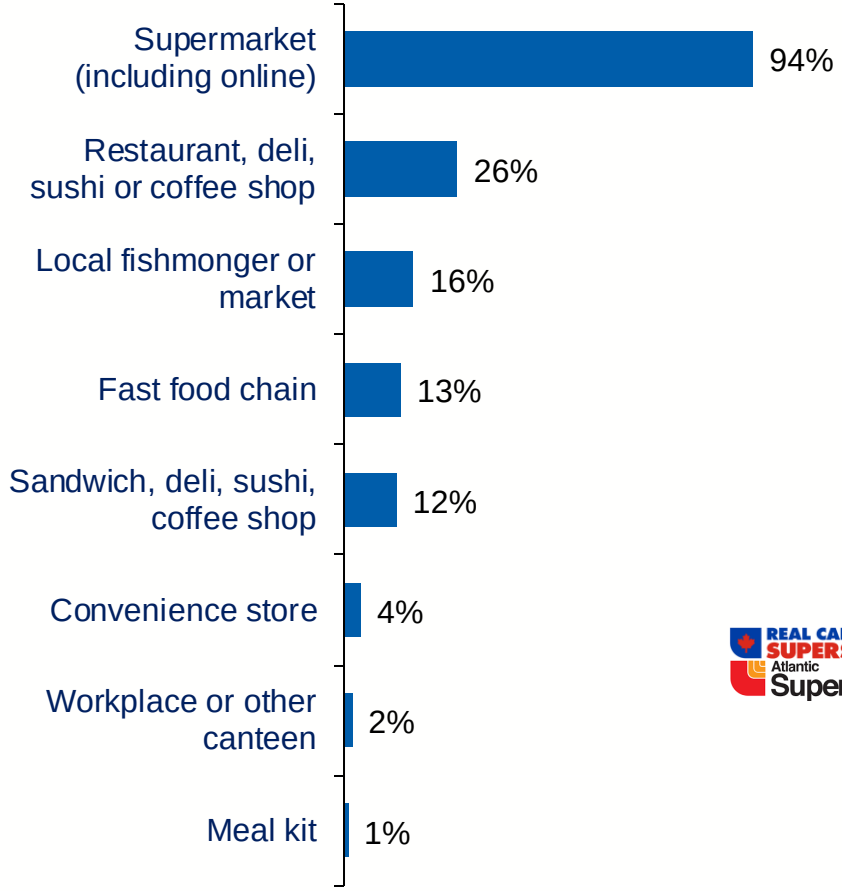
Base: Seafood consumers, USA *n*=2,439

Q2.3: Where do you/your family usually buy fish and seafood products from?

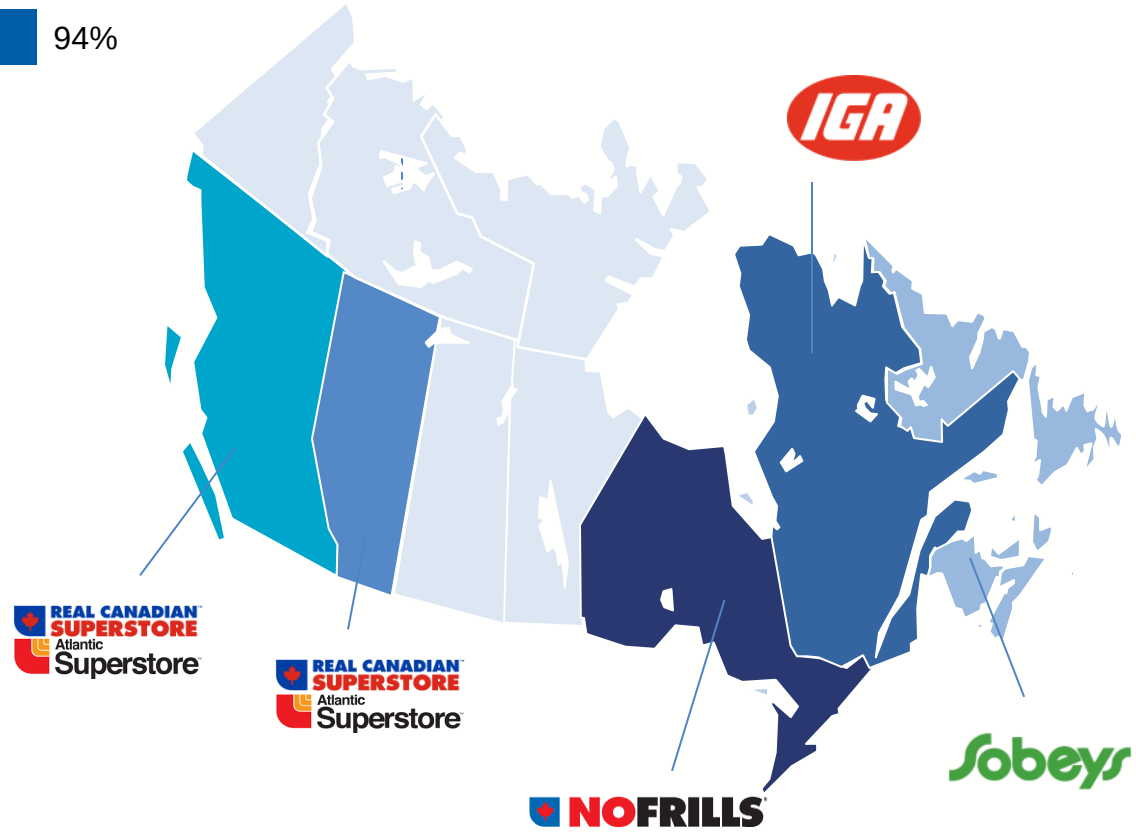
Q2.4 Which supermarkets do you/your family buy fish and seafood products from?

Supermarkets are the preferred outlets for seafood purchase in Canada

Preferred outlets for fish/seafood purchase, Canada



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



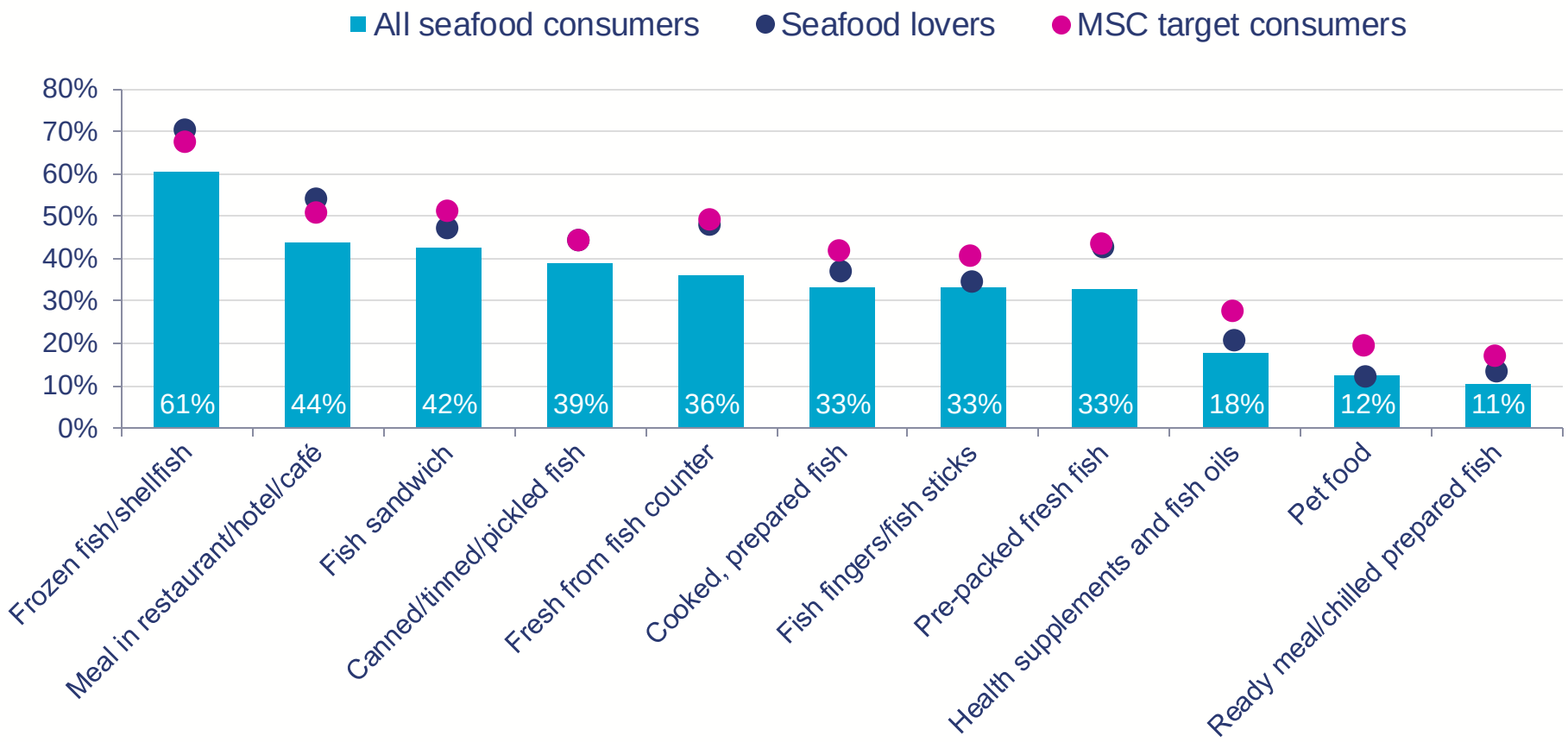
Base: Seafood consumers, Canada *n*=1,457

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

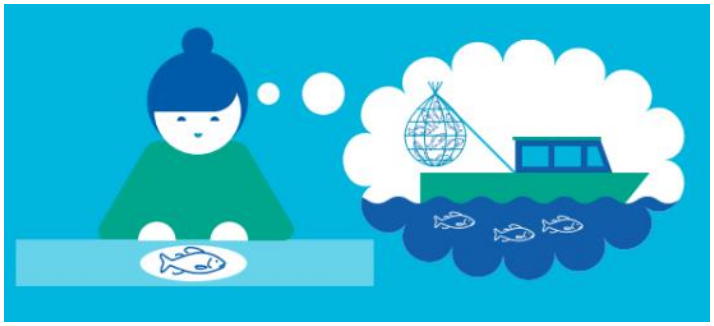


Base: North America seafood consumers *n*=4,155; seafood lovers *n*=1,748; target consumers, *n*=658
Q4.1: Which types of fish or seafood do you purchase frequently?

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

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



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

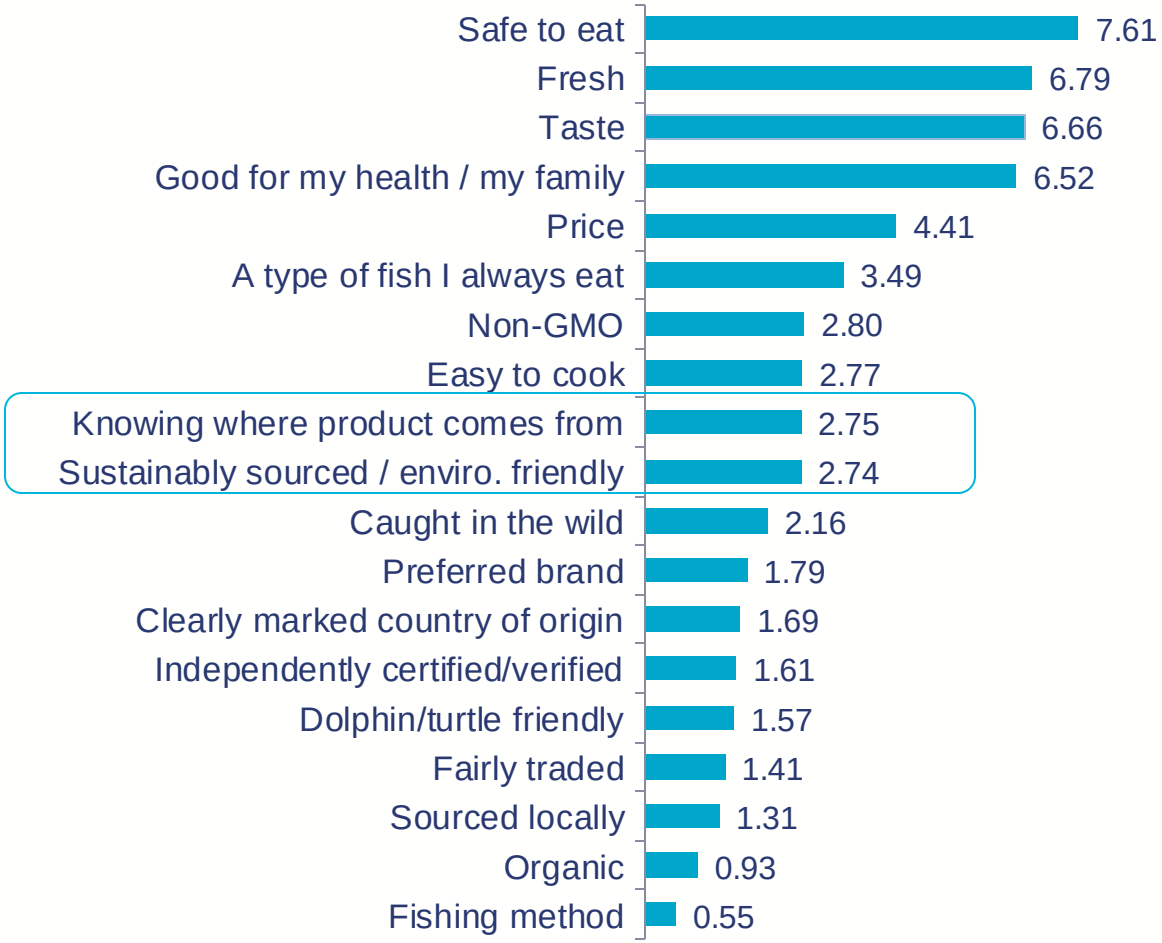
Base: North America seafood consumers, *n*=4,155
Q5.1. How well does each of the following statements describe your opinion? 7-pt scale: 1="Does not describe my opinion very well", 7 = "Describes my opinion very well"

What motivates consumers when purchasing fish and seafood?

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 halfway down; despite people valuing this highly, they are not empowered to act on it

Importance score, North America



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)

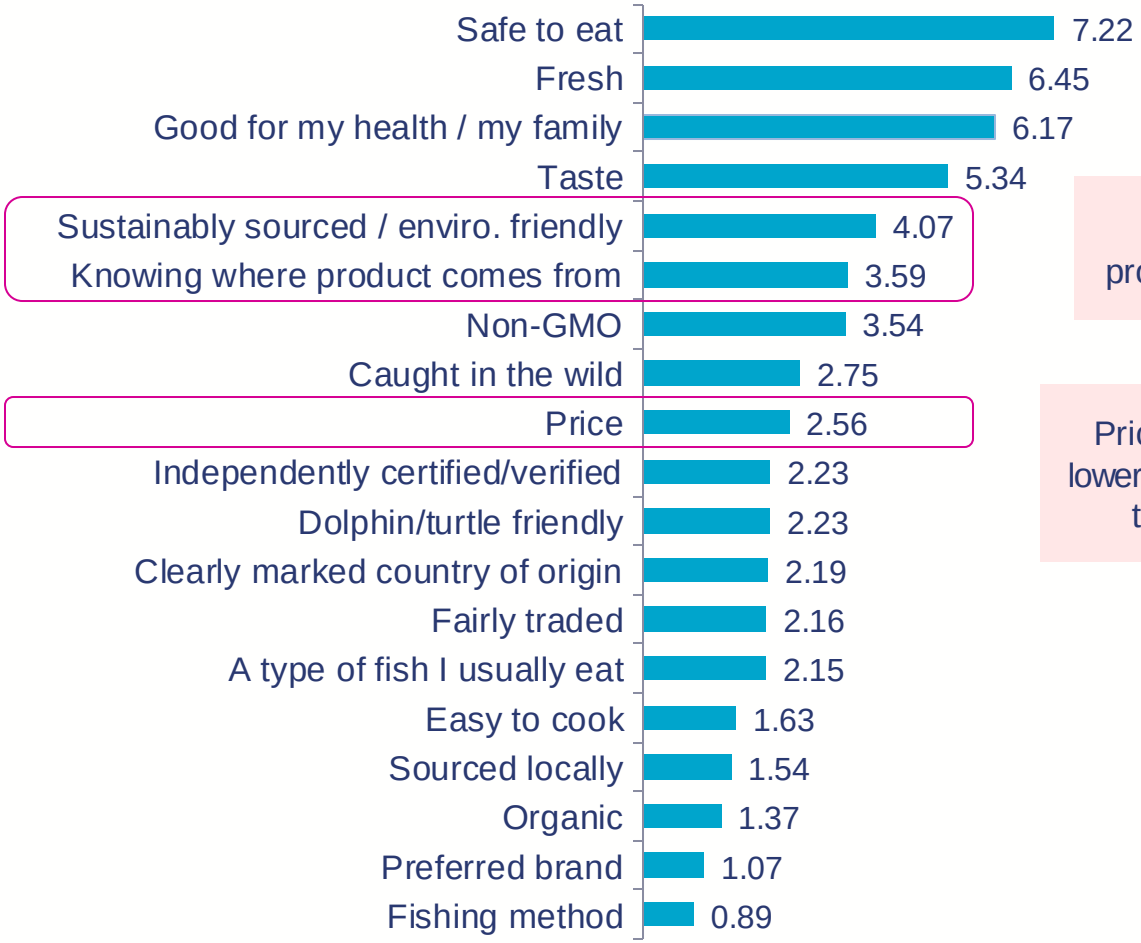
Sustainability of more importance to younger consumers in North America – knowing where products come from is similar to the average

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 Aspirationals 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



Sustainability and knowing where the product comes from are significantly higher

Price significantly lower importance for this segment

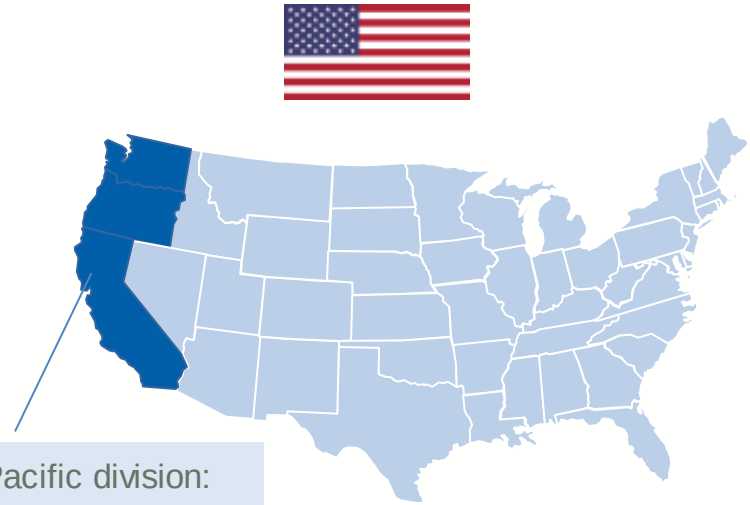
Base: MSC target consumers, North America *n*=658

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	**Equip**
Excite	**Engage**

Educate
Raise awareness of the issues

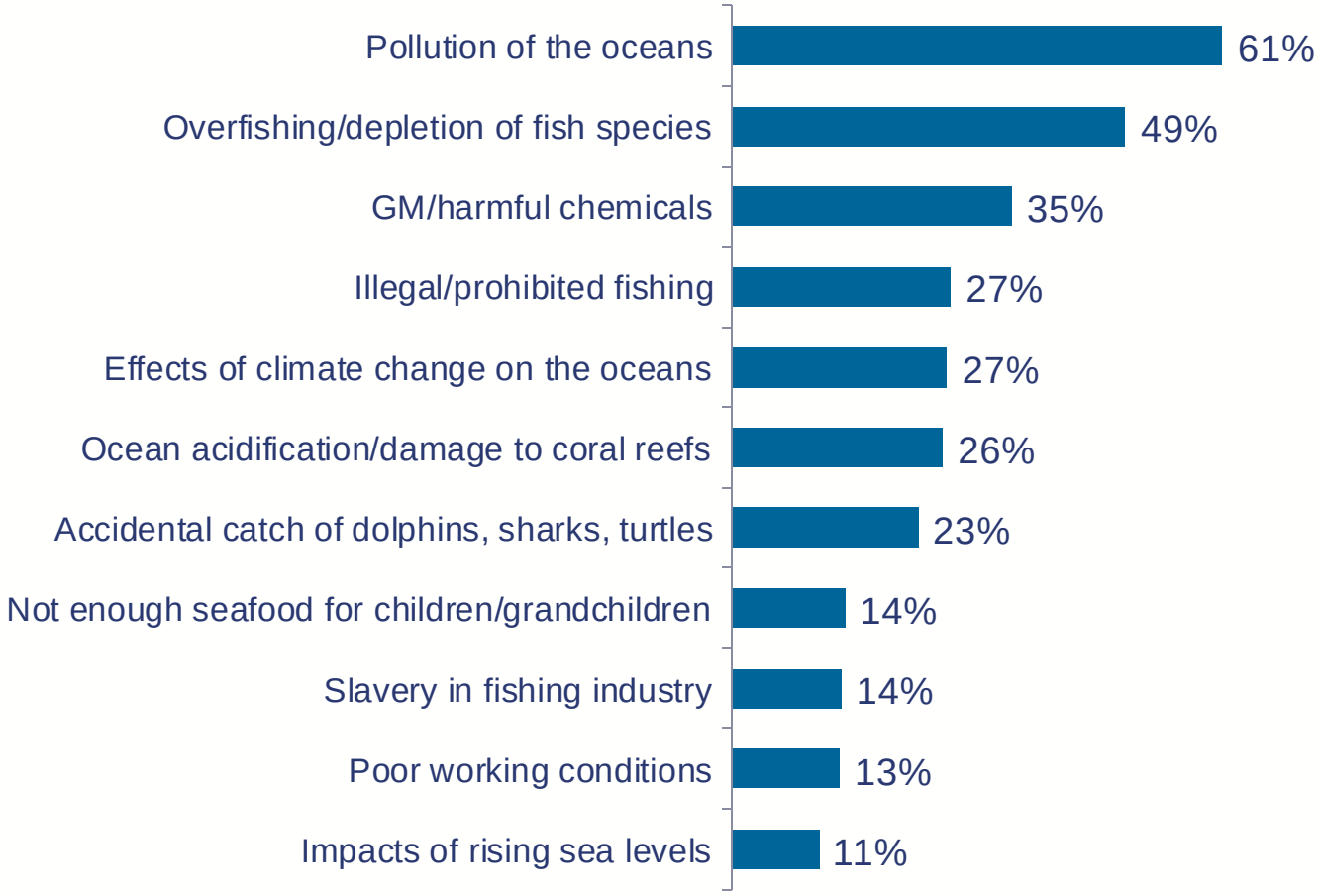
Equip
Provide easy solutions: accessible, sustainable seafood

Excite
Positive vision and personal benefits

Engage
Create a movement, using inspiring storytelling

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



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

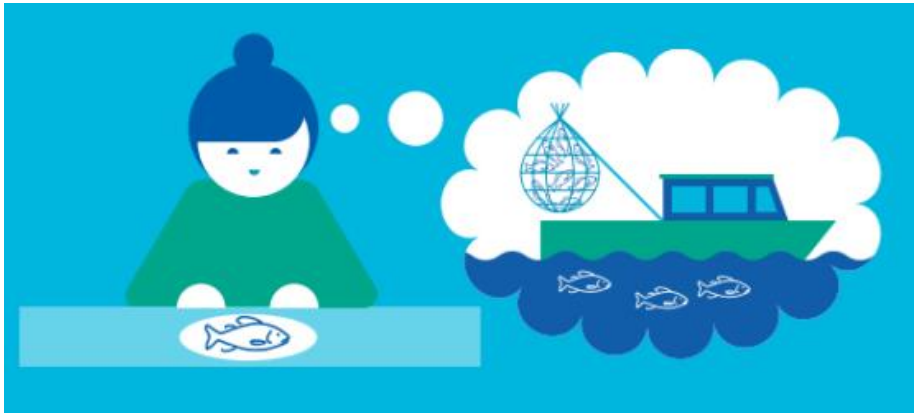
Q11.2: There are many different potential threats to the world's oceans, the wildlife living there and the people who work there. Which of these potential issues worries you the most?

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)

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

Equip
Provide easy solutions: accessible, sustainable seafood

Excite
Positive vision and personal benefits

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

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

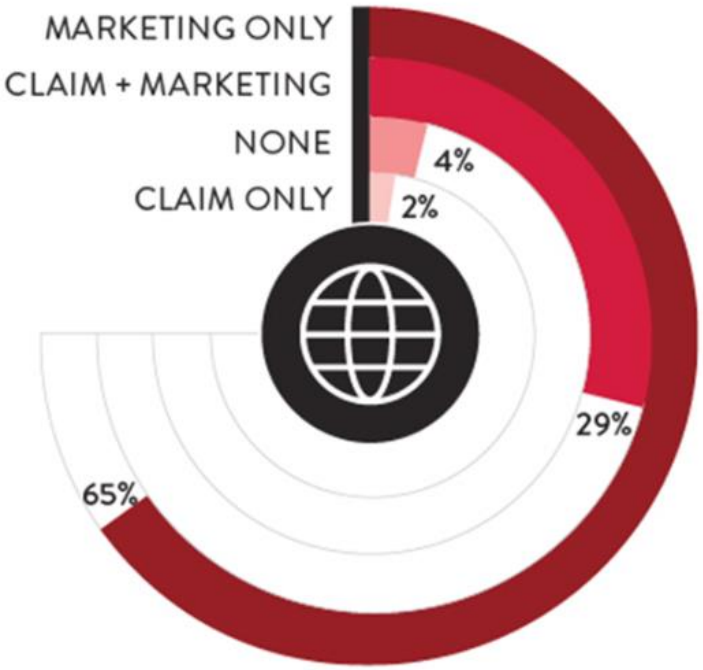
Describes opinion well, top three (5+6+7 on 7-pt scale)
North America

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"***

Nielsen study

*"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

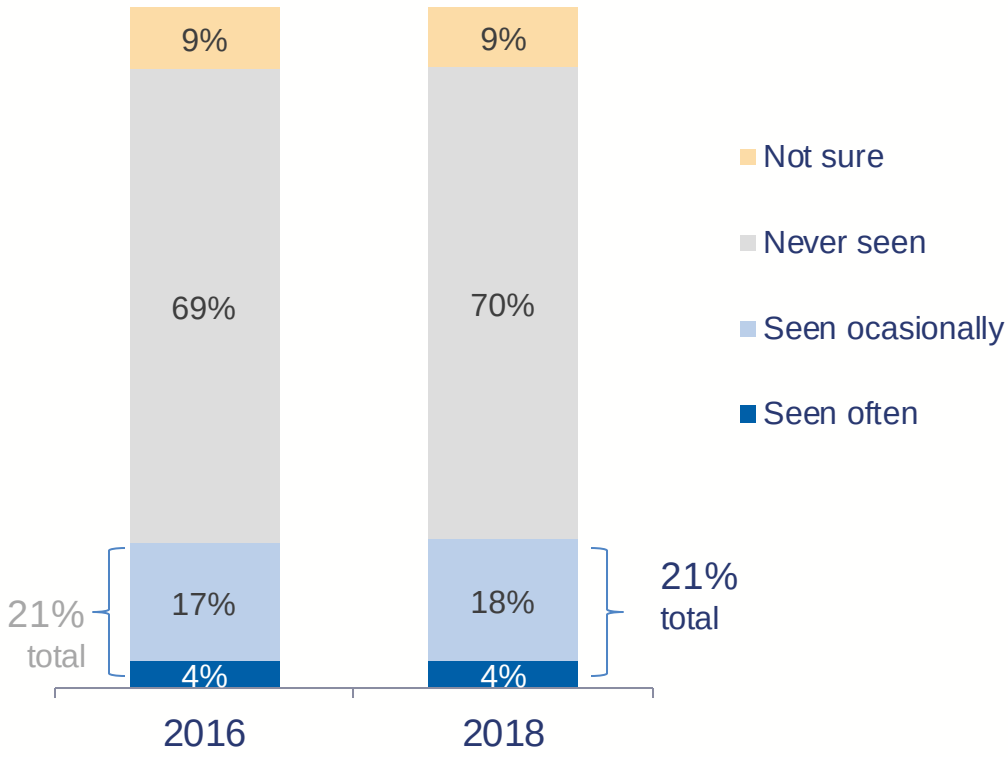


*As a percentage of total sales measured globally

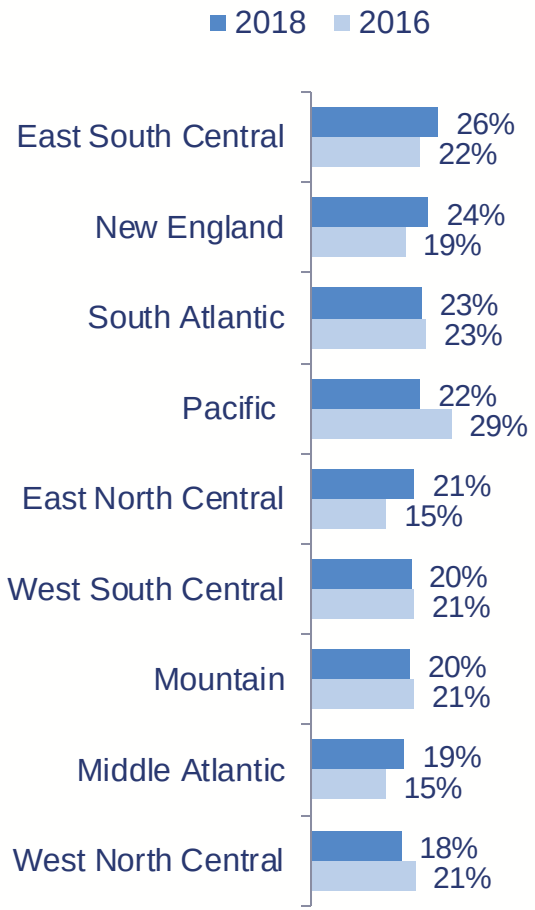
*Source: https://www.nielsen.com/us/en/insights/news/2015/tracking-tactics-sustainability-practices-that-lead-to-sales.html

MSC awareness levels in the USA are stable since 2016

Frequency of seeing the MSC label
USA



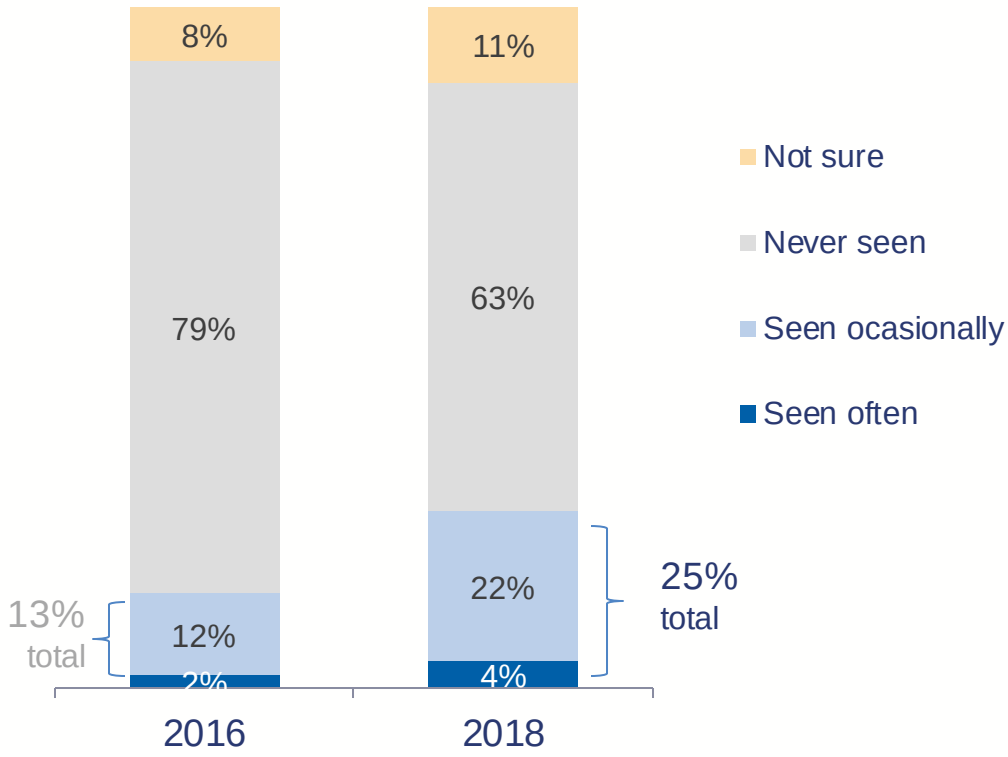
Awareness of the MSC label "often" or "occasionally,"
By division



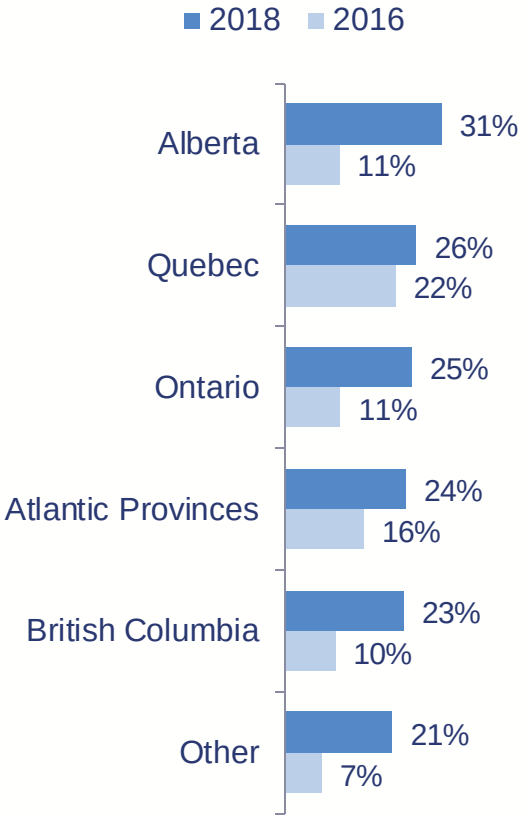
Base: General public, USA, *n*=3,640; 2016 *n*=2,695
Q1.1: Have you ever seen the following logos?

Awareness of MSC label has increased significantly in Canada since 2016, with the greatest increase in awareness in Alberta

Frequency of seeing the MSC label
Canada



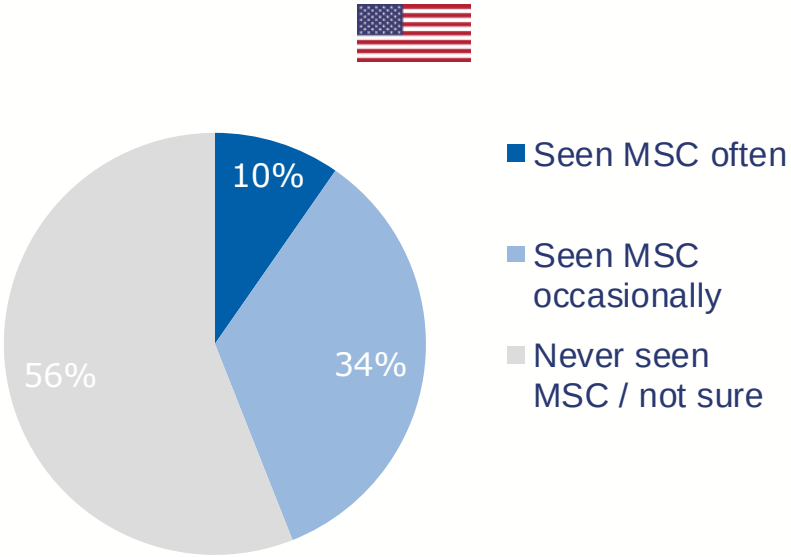
Awareness of the MSC label "often" or "occasionally,"
By province



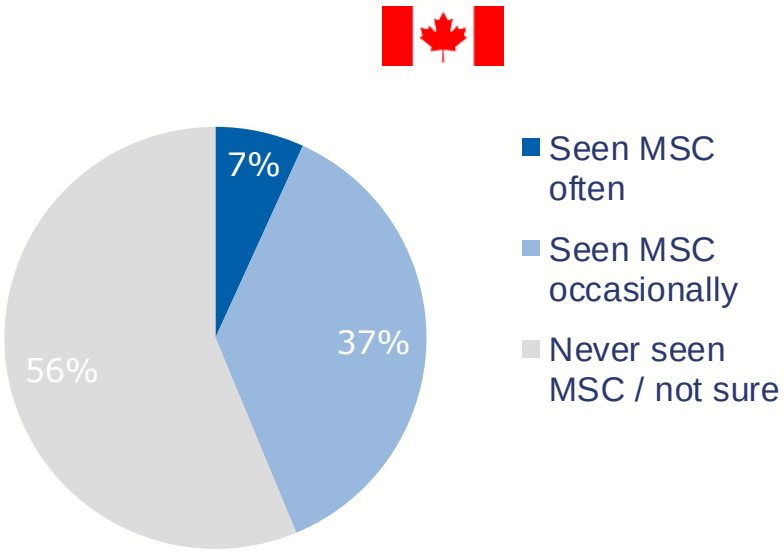
Base: General public, Canada, *n*=2,024; 2016, *n*=1,355
Q1.1: Have you ever seen the following logos?

MSC target Aspirational consumers have high levels of awareness of the label

Frequency of seeing the MSC label among MSC target consumers: MSC Aspirationals 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

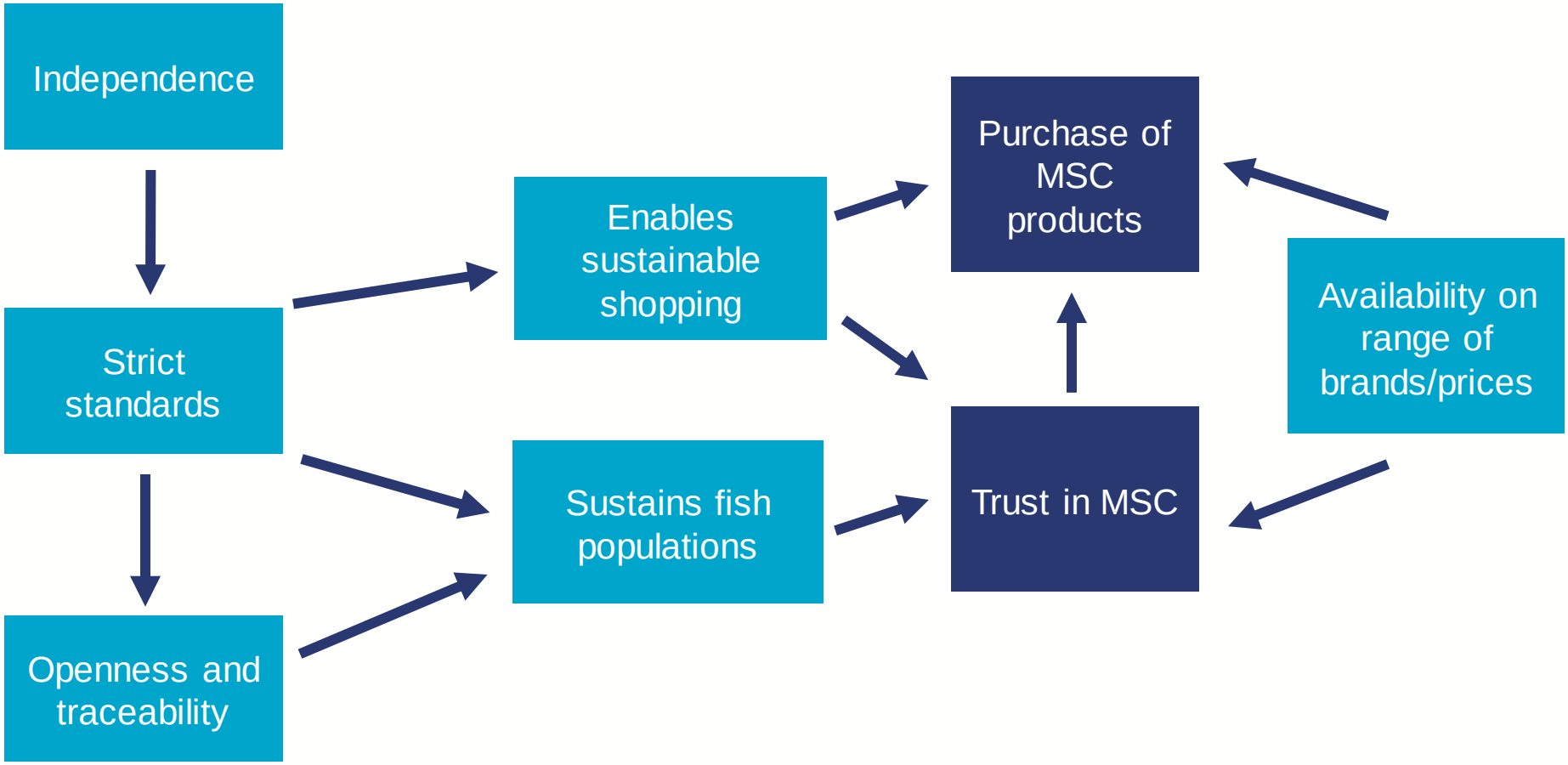
22% of US seafood consumers understand the MSC label, up from 17% in 2016

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

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

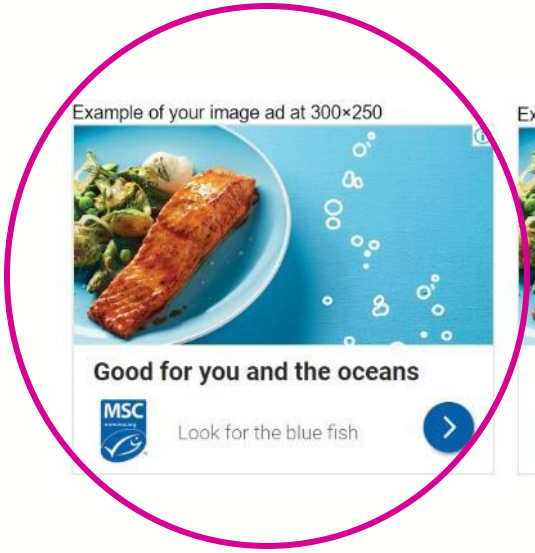
Out of home

(Greater Toronto area, Canada)

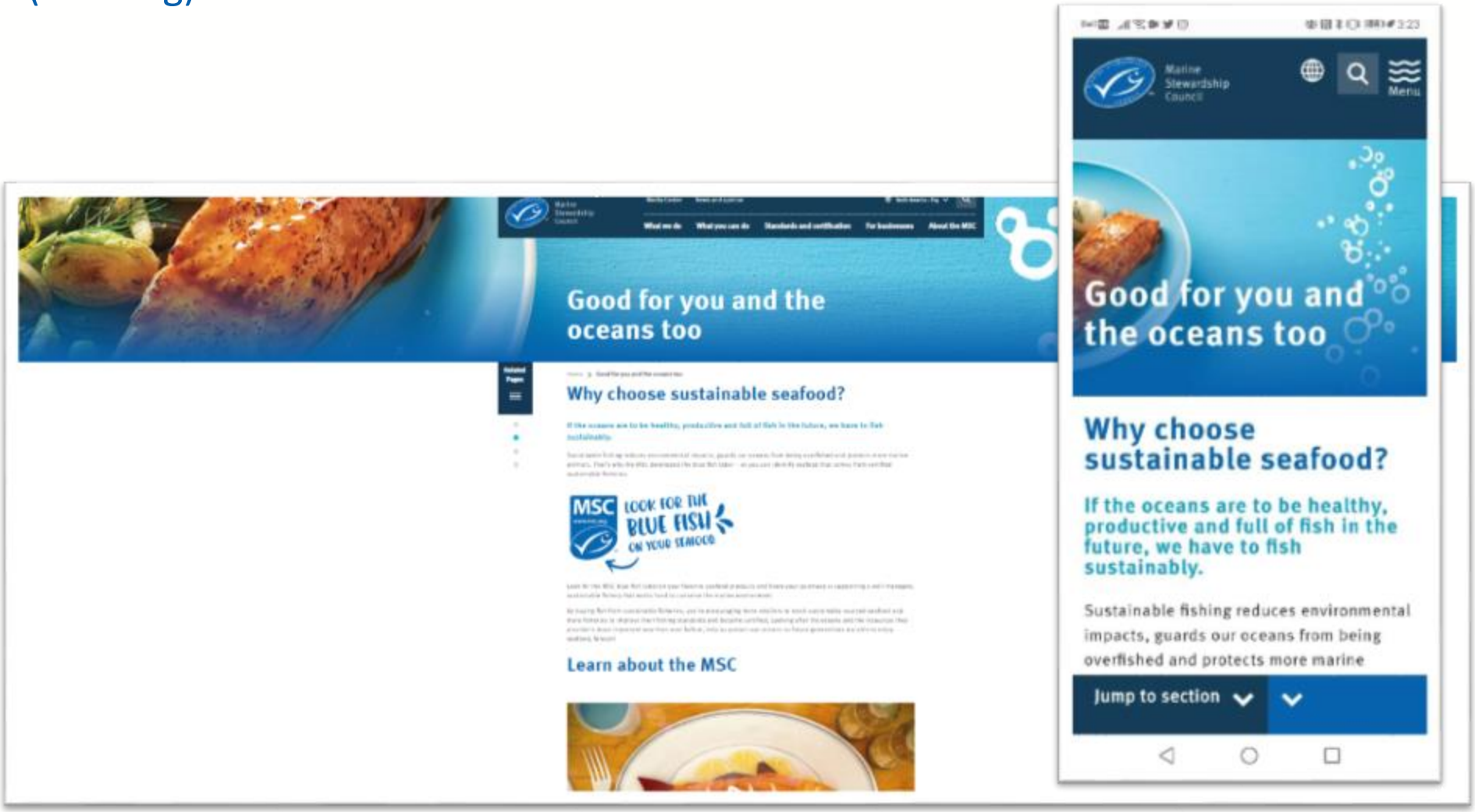
Out of home

(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 majoirty 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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