

GLOBESCAN

evidence and ideas. applied

How Can Independent Labelling Enhance Trust in Brands?

Learnings from the MSC and the seafood sector

GlobeScan Incorporated
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Introductions



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Today's Agenda

1. Ocean Sustainability: Do Consumers Care?

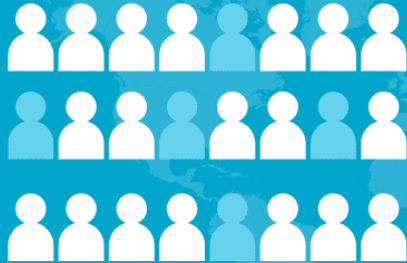
- Consumer insights from GlobeScan and MSC
- Discussion and reaction from MSC and Tesco

2. How Can Ecolabels Empower Consumers and Enhance Trust In Brands?

- Consumer insights from GlobeScan and MSC
- Discussion and reaction from MSC and Tesco

Please write your questions in the chat box and we will address these after each section. We'll try to allow 15 minutes at the end of today's session for questions and discussion.

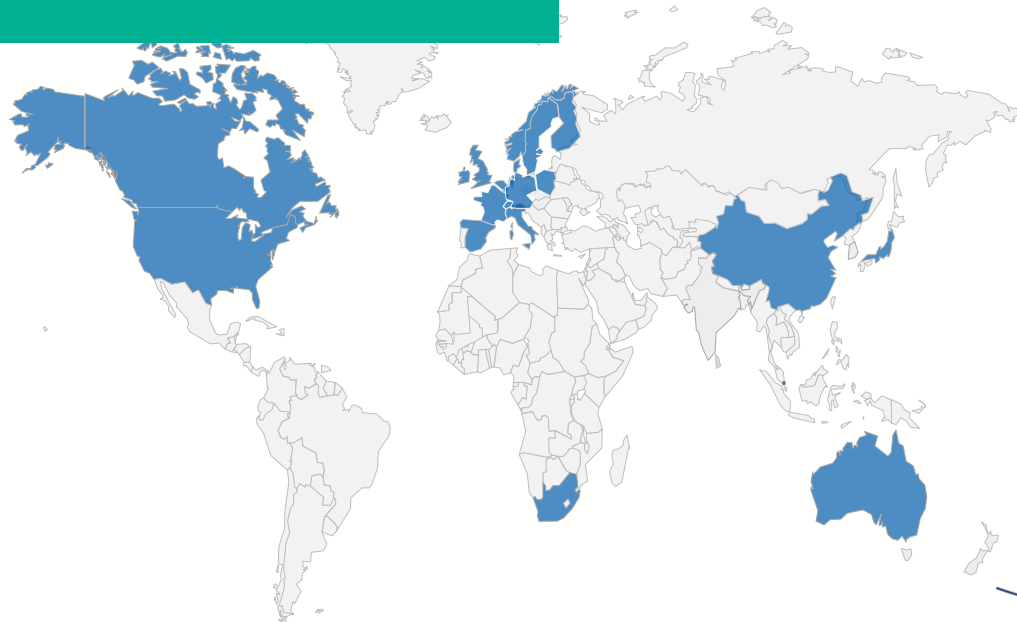
Introduction to MSC Consumer Perceptions Study 2016



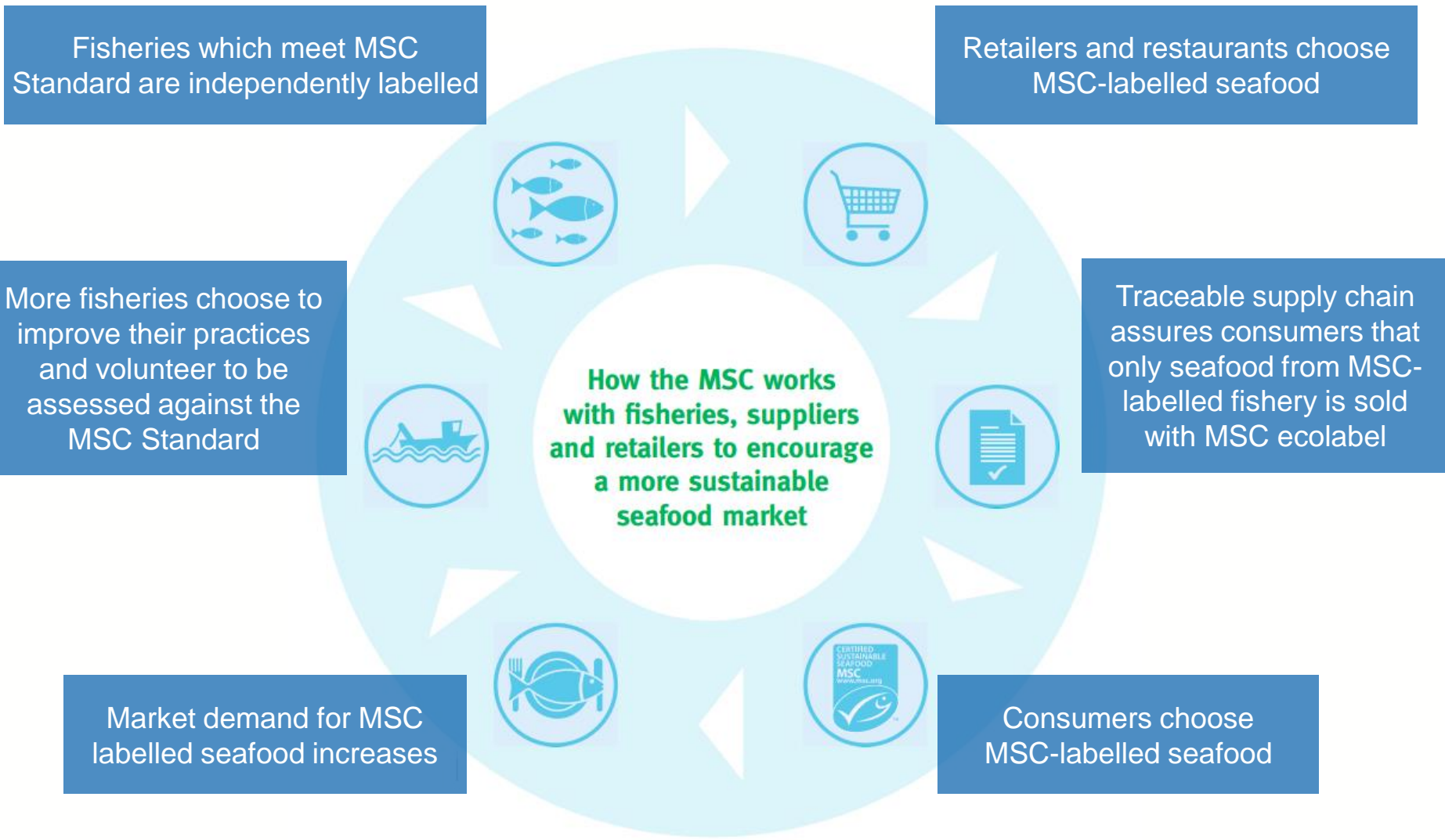
+16,000
seafood consumers in 21
countries took part in the
research, which ensured a
statistically representative
sample in each country.



www.msc.org/survey



How consumer intelligence supports MSC theory of change

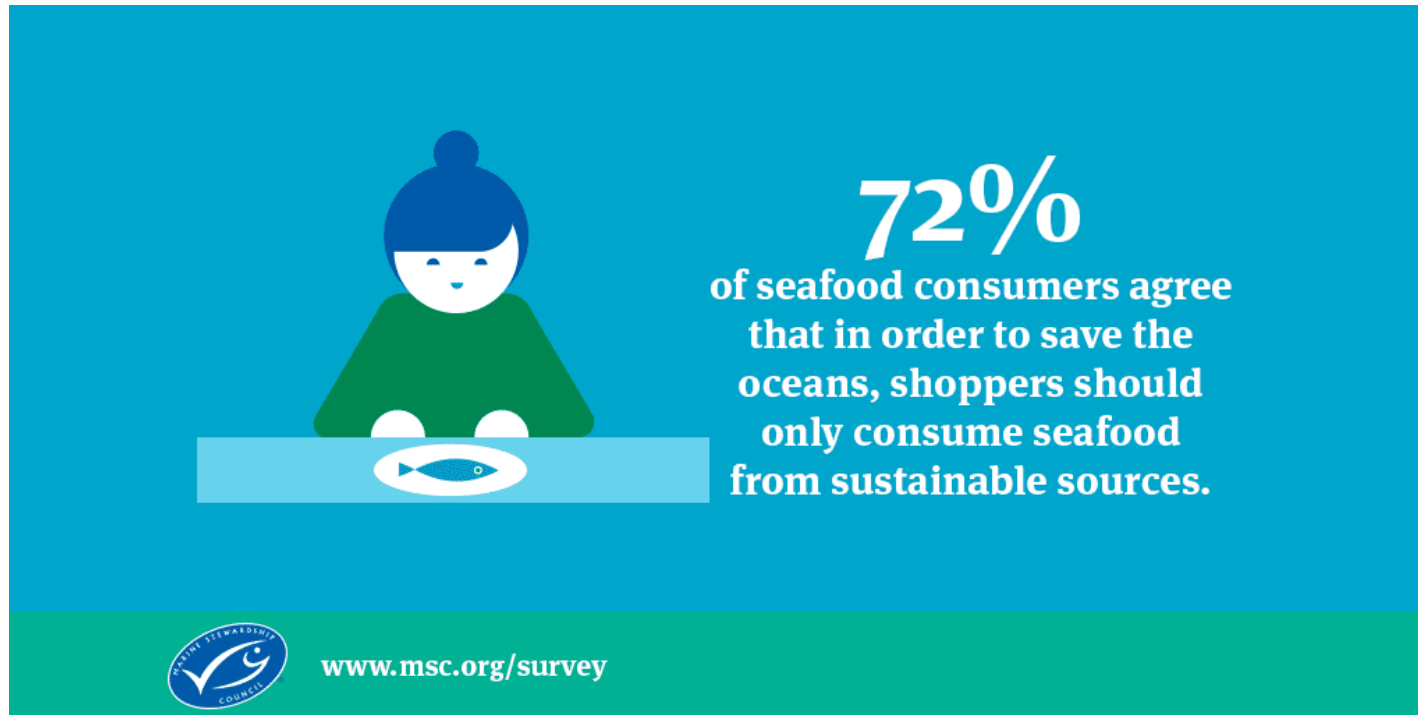




Ocean Sustainability: Do Consumers Care?

Consumers on the need to switch to sustainable sources

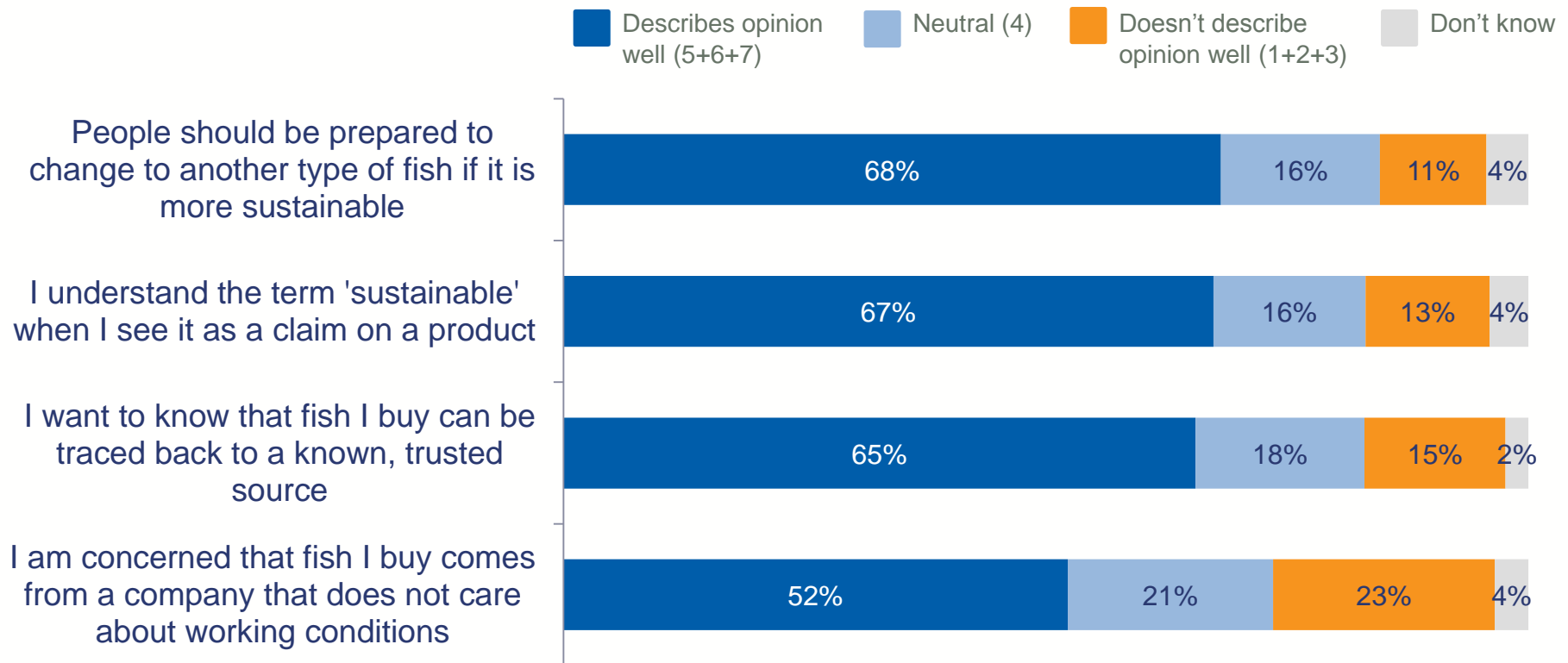
Across the world, seafood consumers generally agree that to save the oceans we need to consume seafood from sustainable sources; support is highest among older consumers



Concern and understanding of ocean sustainability

Reflecting their understanding of the issue, consumers also appreciate the need to switch their eating habits to more sustainable seafood and claim to understand the term “sustainable” on packaging

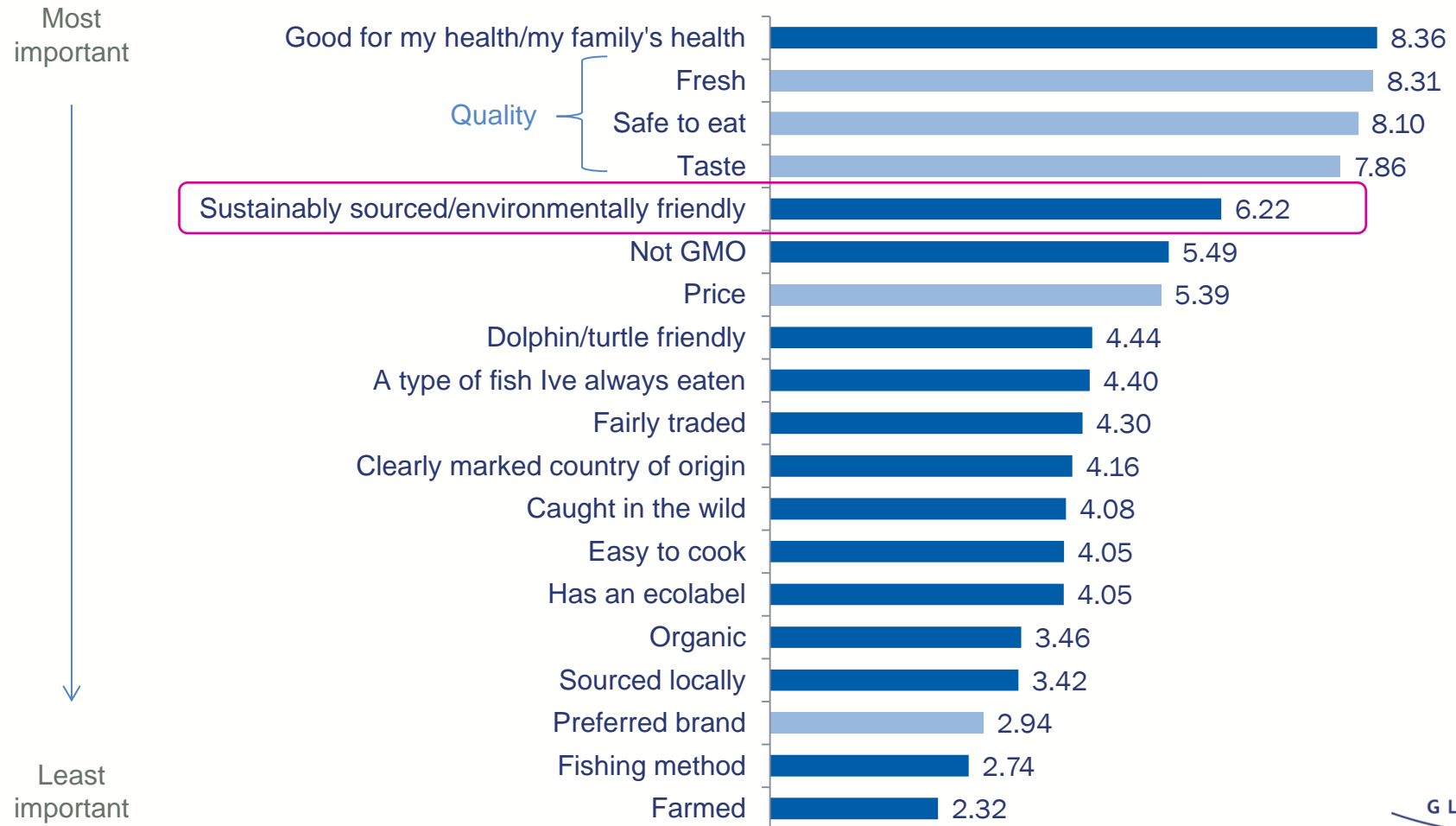
However, consumers are more split about working conditions



What motivates people when buying fish?

Health, freshness, safe to eat and taste (quality); sustainability is also a strong motivator, ranking above price and brand

Importance score (out of ten)



Conclusion: Ocean sustainability is a topic with global relevance, ranking relatively highly in consumers' seafood purchase decisions

Implication: Generally the results suggest that brands do not need to focus on educating consumers about seafood sustainability – consumers are already aware of the issue. The opportunity is for brands and ecolabels to focus on activating and enabling consumers to act on their values during the shopping experience

... let's discuss

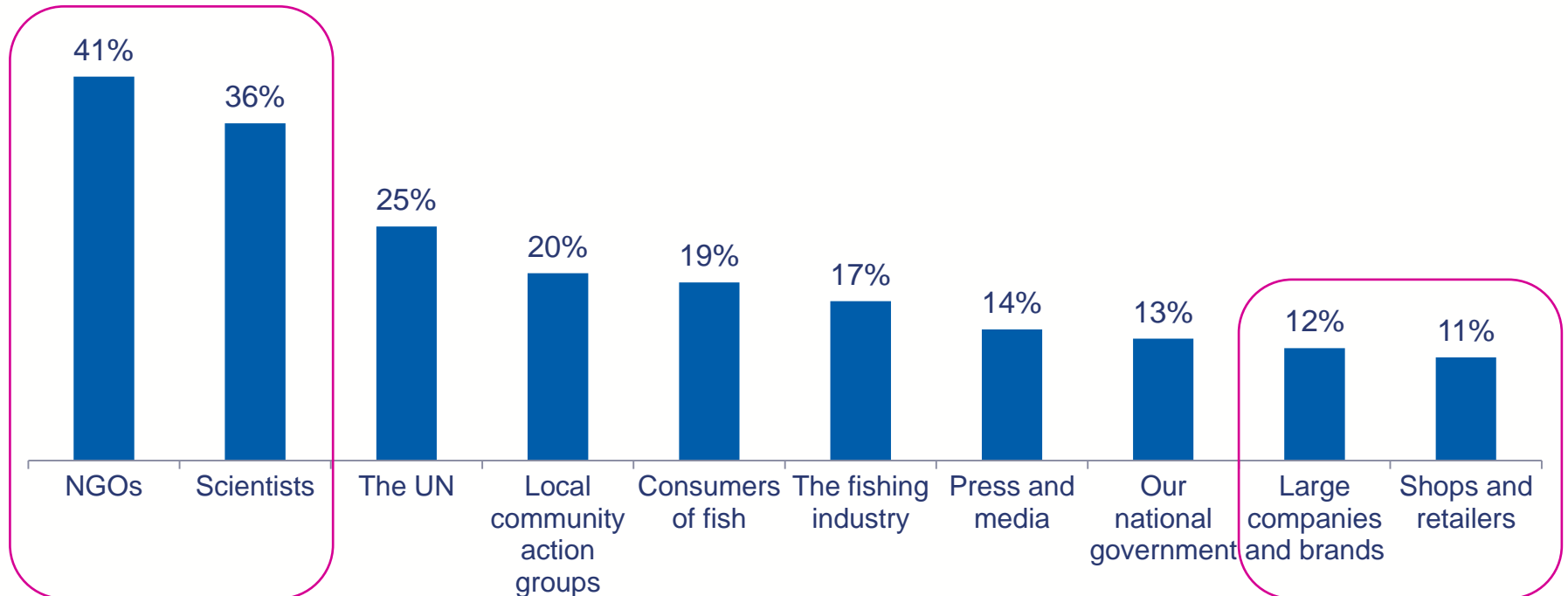


How Can Ecolabels Empower Consumers and Enhance Trust In Brands?

Perceived contribution of different actors to protecting oceans

Overall, NGOs are perceived to be contributing the most to protection of the oceans; retailers, large companies and government lag behind

Contributing well (6+7 on 7-pt scale)



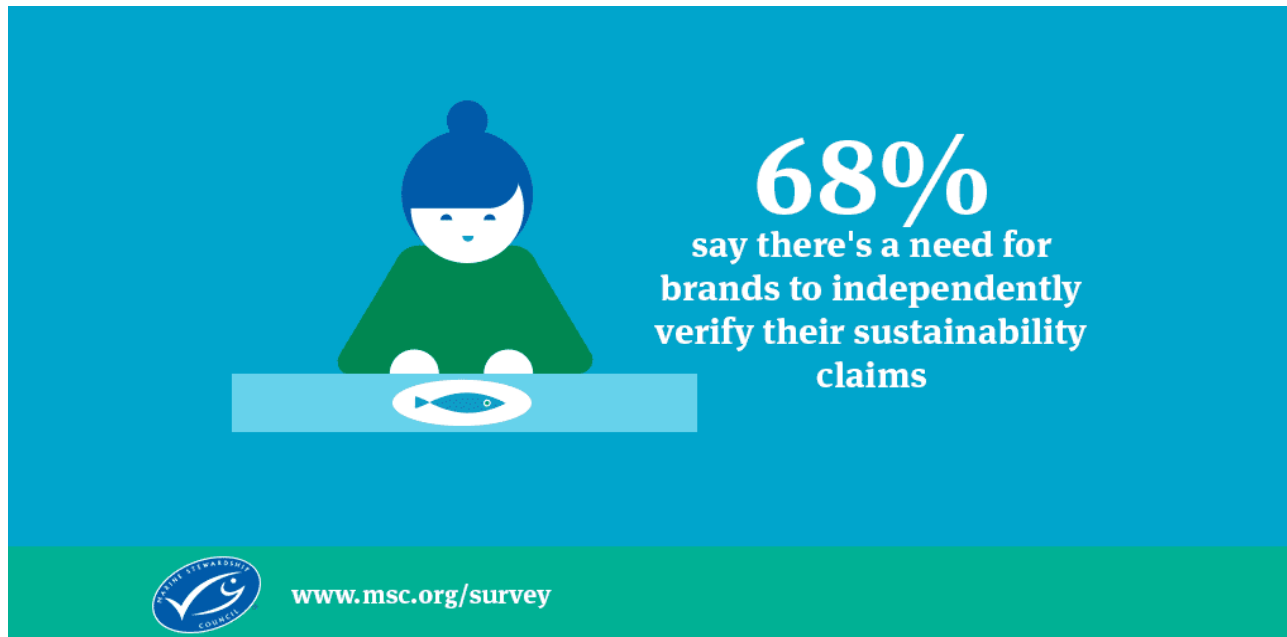
Base: Seafood consumers globally, n=16,876

Question: 3. How well do you think the following institutions are contributing to protecting the ocean environment? Please use a scale from 1-7 where 1 is "not very well" and 7 is "very well"

Demand for independent labelling

A large majority of seafood consumers agree that brands' claims about sustainability should be independently labelled

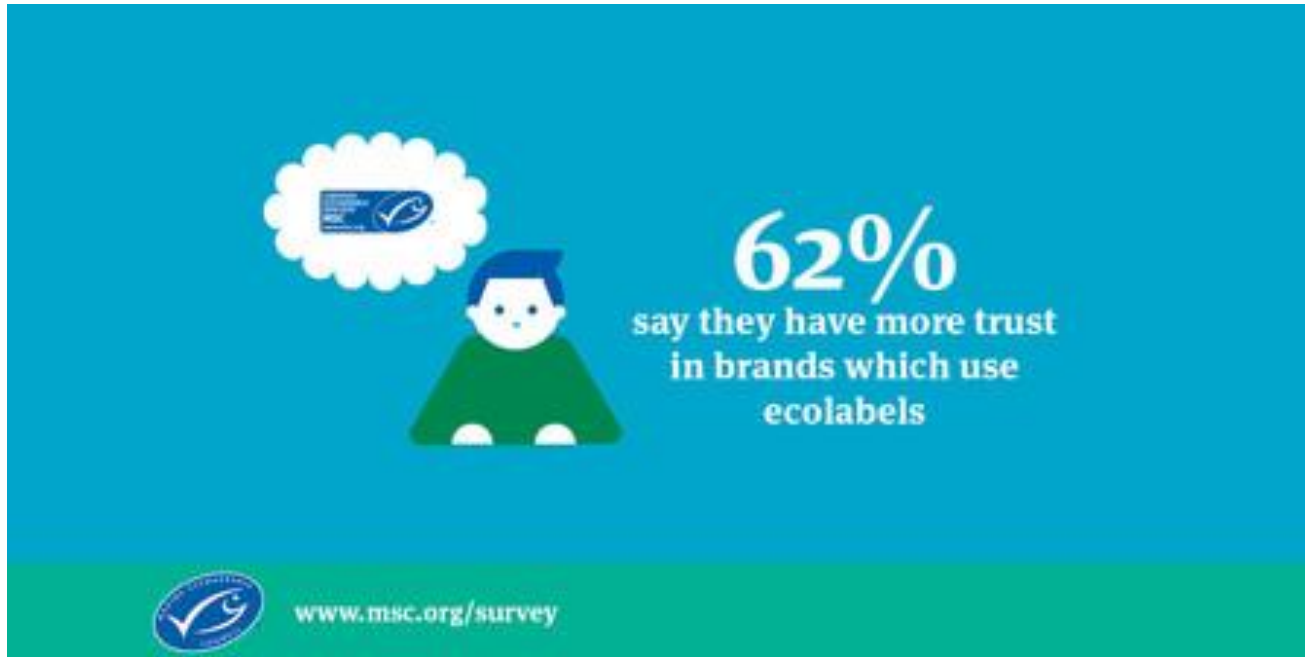
Supermarkets and brands' claims about sustainability and the environment need to be clearly labelled by an independent organisation



Ecolabel impact on trust in brands

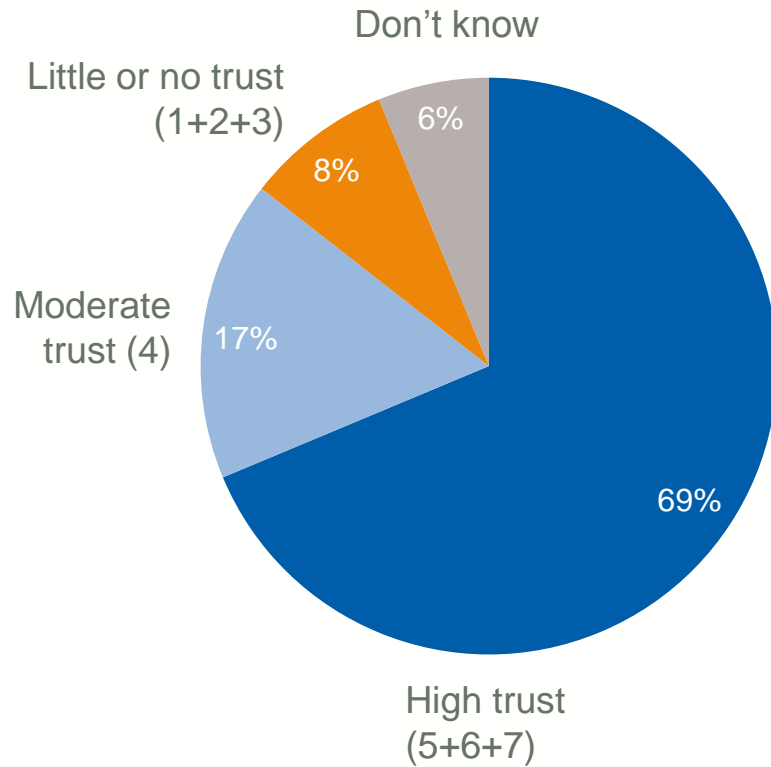
Consumers are positive about the impact of ecolabels on their trust in product brands; this impact is highest among females, younger consumers and those with children

Ecolabels on seafood products raise my trust and confidence in the brand




Trust in MSC

Consumers who have seen the MSC label typically trust it and agree that it helps them recognise and reward sustainable fishing



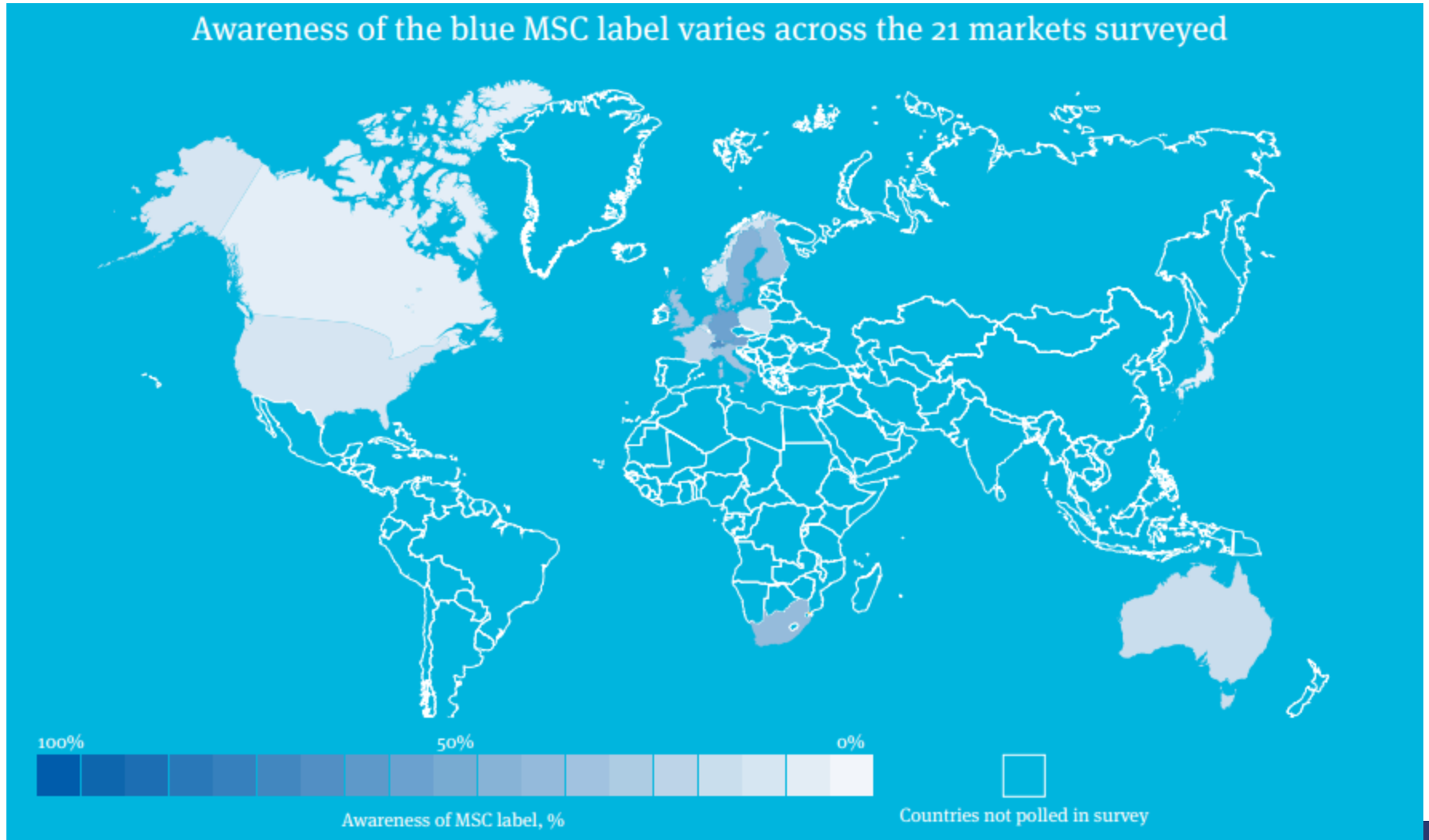
81%
rate the MSC highly
for helping to
recognise and reward
sustainable fishing



www.msc.org/survey

Awareness of MSC label among general public

The challenge is further building consumer awareness of ecolabels globally



Conclusion: Consumers do not see leadership from many brands or retailers on ocean sustainability; they support and trust ecolabels, which can have a 'halo effect' on brands, but awareness of labels remains a challenge

Implication: This challenge presents opportunities for partnership; there are benefits for brands and retailers to be seen partnering with NGOs and scientific organisations, and to use ecolabels to boost trust in their claims about ocean sustainability

... let's discuss

Discussion and questions

Thank you

