

Changing Food Choices: Consumers' Responses to COVID, Cost of Living, and Climate (APAC)

November 2022



Prepared for



Today's Agenda



1 Welcome

2 Consumer trends –

- *MSC GlobeScan Seafood Consumer Insights 2022*
- *GlobeScan Healthy & Sustainable Living Survey 2022*

3 Q&A



Meet the Team



Victoria Gilbert
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Kiarne Treacy
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Introduction to consumer trends



The Marine Stewardship Council partnered with GlobeScan for their fourth **MSC Seafood Consumer Perceptions study**

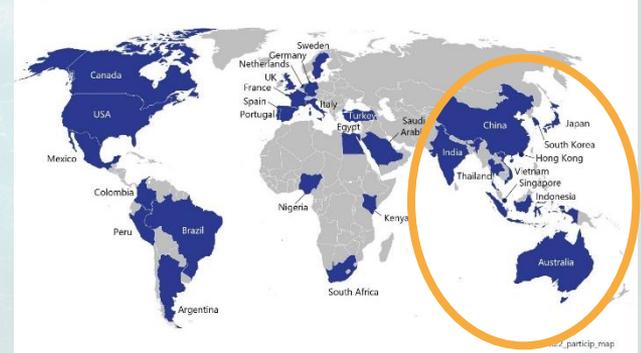


Survey fieldwork dates: End of January – mid March

Type of consumer	Sample
APAC General public	n=5,126
APAC Seafood consumers	n=4,436



GlobeScan's findings from the 2022 **Healthy and Sustainable Living research study**.



Survey fieldwork dates: June – July

Type of consumer	Sample
APAC General public	n=8,981
Global sample	n=29,293

Close to nine in ten agree that current environmental, social, and economic challenges are the largest the world has ever faced, compared to three-quarters one decade ago

Agree the current environmental, social and economic challenges are the largest the world has ever faced



2012



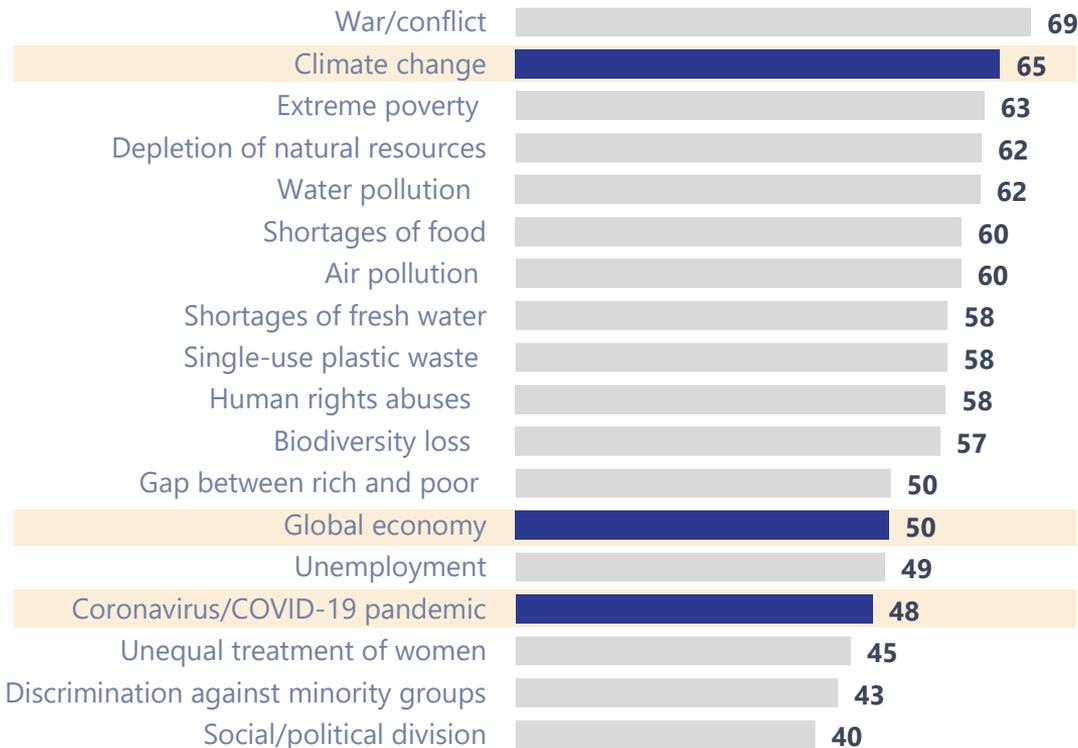
2022

↑ +12%
rise

Concern about climate change follows closely behind concerns about war and conflict; half of global citizens think the global economy and COVID are very serious concerns



Global problems perceived as very serious

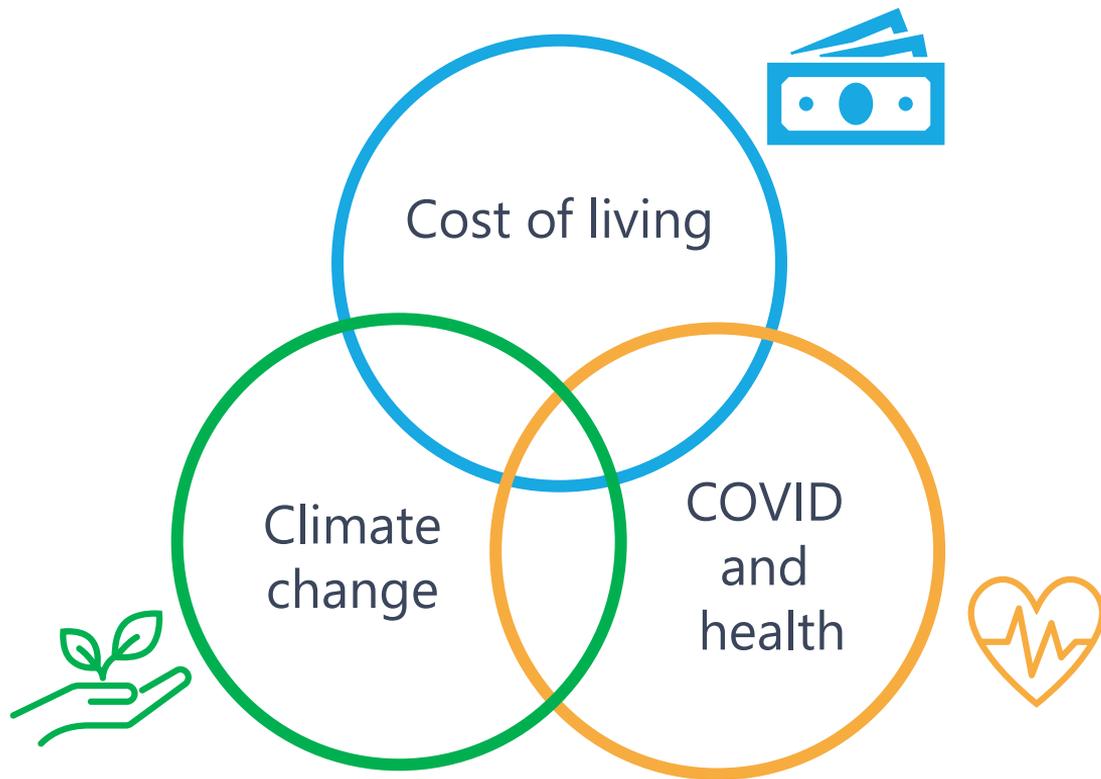


 = Issues we are addressing in this webinar

Base: Global
T1. For each of the following possible global problems, please indicate if you see it as a very serious, somewhat serious, not very serious, or not at all serious problem.



This webinar covers the intersection of three challenges – greater health concerns since COVID, climate change, and the growing cost-of-living crisis – and the effects on consumers.

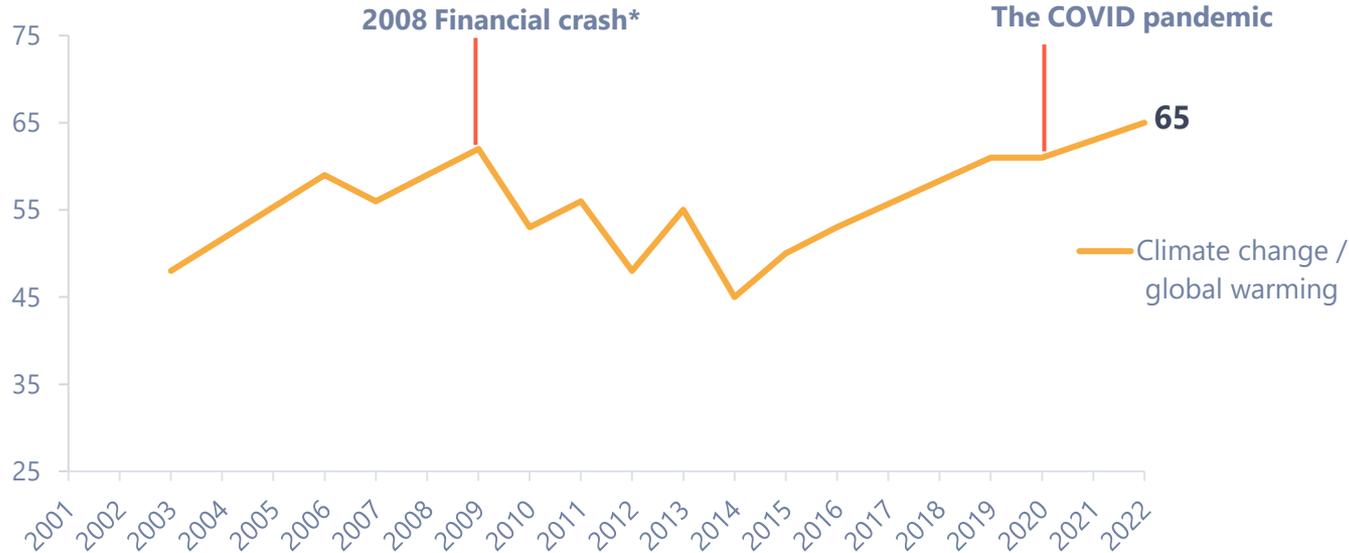




Climate change and the environment

Climate change continues to rise even with economic pressure; during the last financial crisis there was a decrease in concern about climate change

Climate change is very serious



APAC specific data

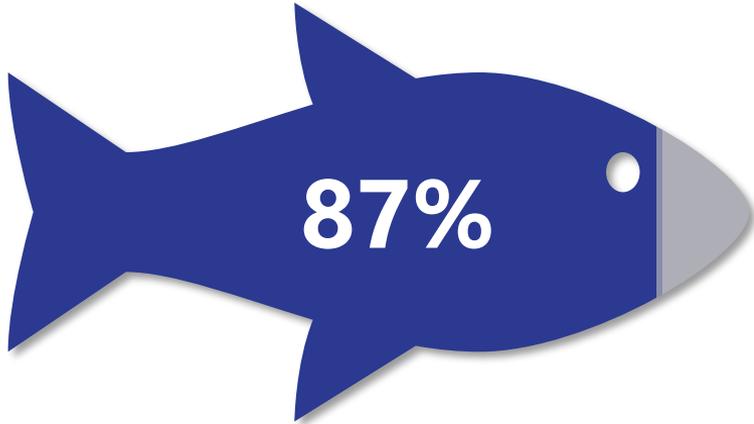
57%

of APAC general public say climate change is very serious. This is a similar score to 2021.

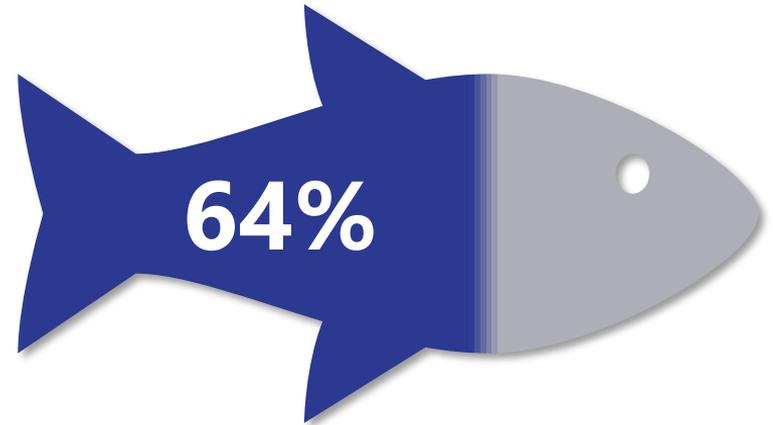
A very large majority in APAC feel worried about the state of the world's oceans



I feel worried about the state of the world's oceans



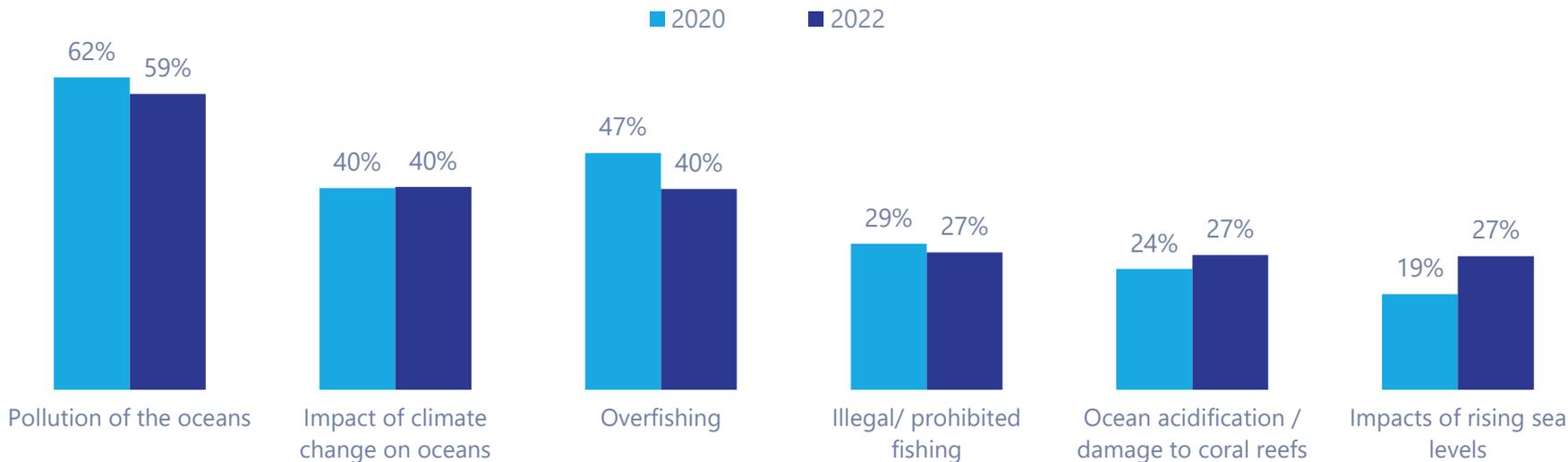
I feel more worried about the state of the oceans compared to two years ago



Pollution and impact of climate change on oceans are the two biggest concerns; people are increasingly worried about rising sea levels and ocean acidification



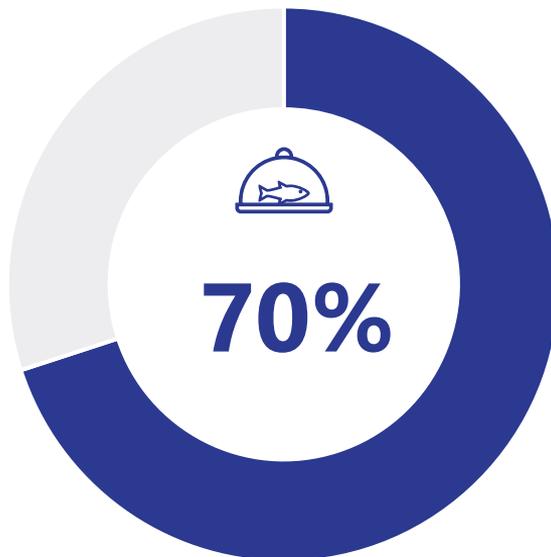
Most concerning ocean issues

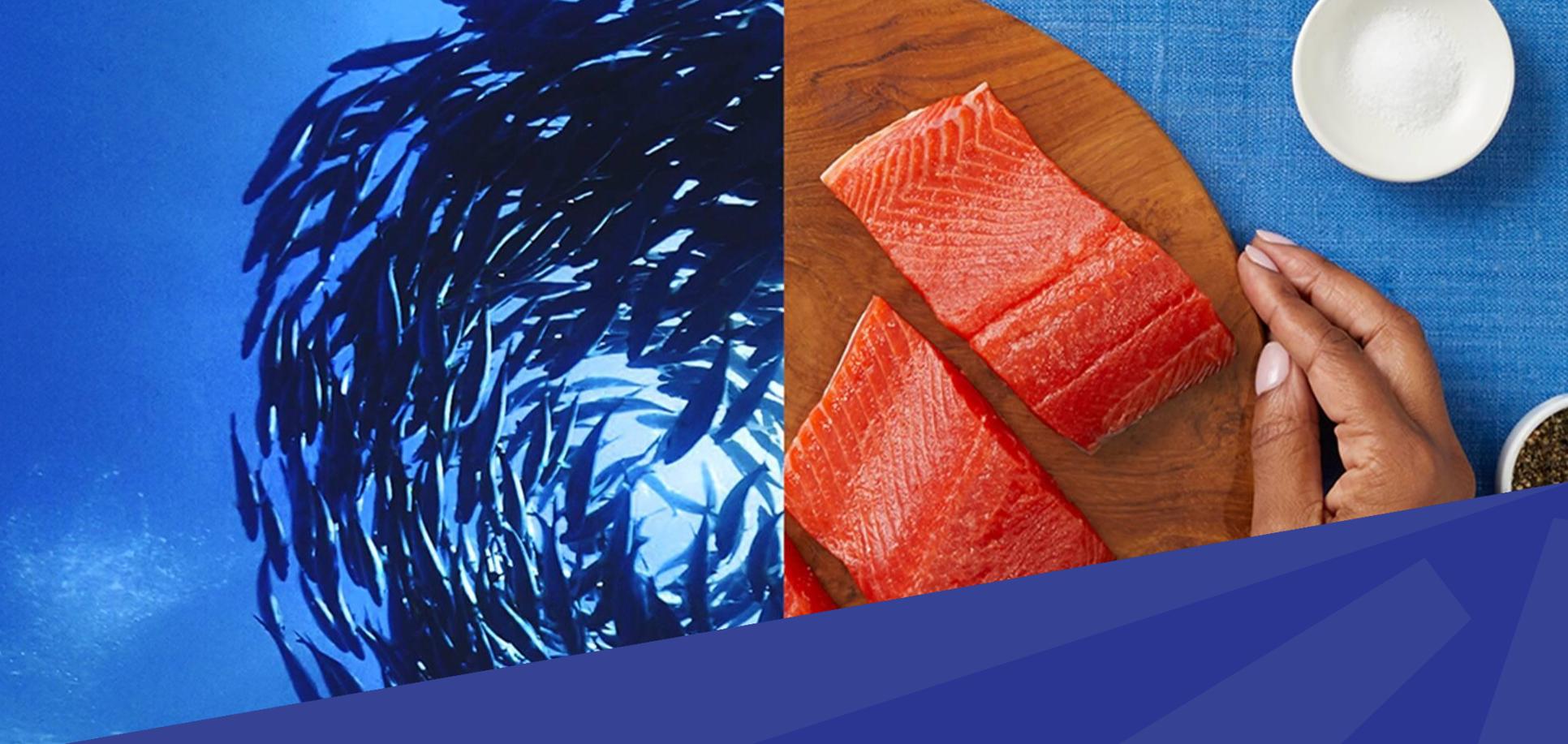


Seven in ten APAC consumers are aware they will need to eat seafood from a sustainable source in order to save the ocean



In order to save the ocean, we have to consume seafood only from sustainable sources





COVID, health, and changes in diet

Compared to before the pandemic, people are now more likely to say they are trying to improve their own health and well-being



Trying to improve own health and wellbeing

Strongly agree

Somewhat agree



2022

36%

44%

2019

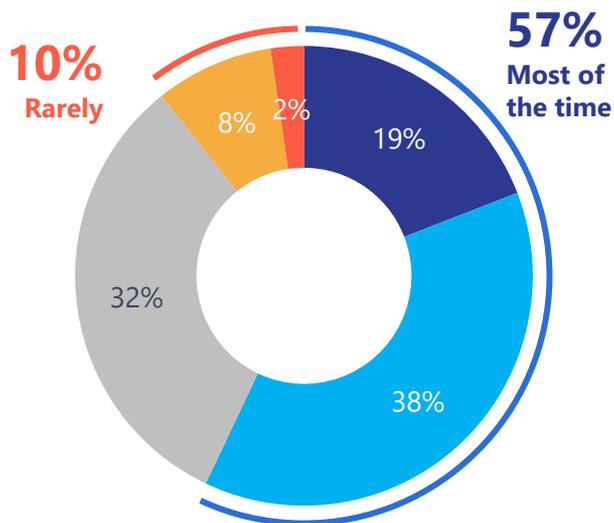
29%

45%

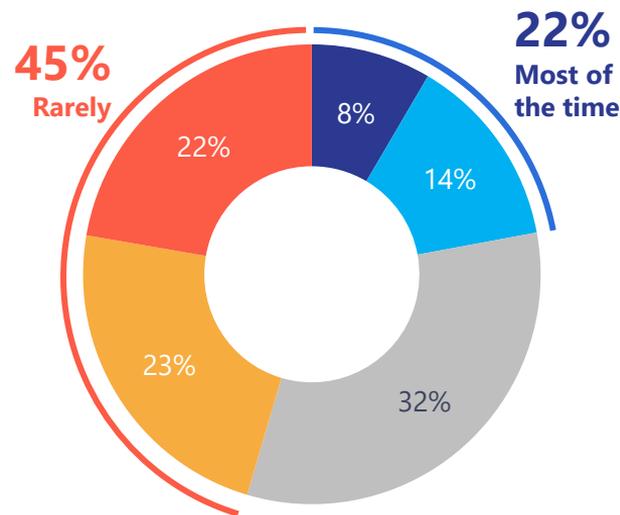
APAC consumers often say they eat healthy food; however, this does not mean they are turning to vegetarian or vegan food



I eat healthy food



I eat vegetarian and vegan food

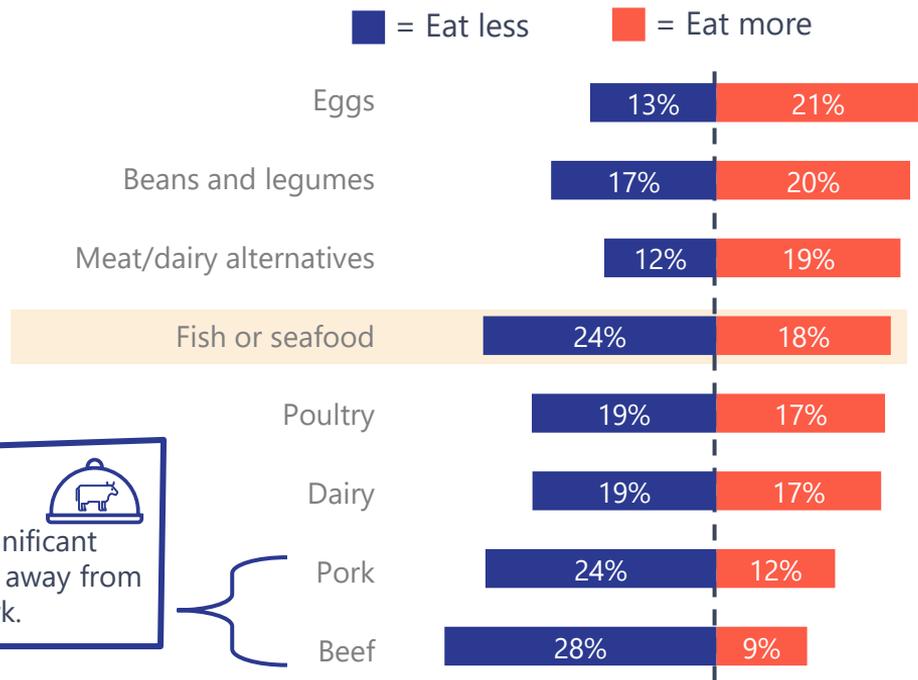


- All of the time
- Most of the time
- Sometimes
- Rarely
- Never

Actual diet changes made show that eggs have seen the largest increase while pork, seafood, and beef have seen the largest decreases



Changes in food consumption compared to two years ago



There is a significant claimed shift away from beef and pork.



Health is the greatest reason APAC consumers have changed their diet in the past two years while four in ten say they changed their diet because of an environmental reason



Reasons for changing diet

60%

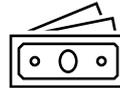
change their diet to be **healthier**



Consumers aged **55–64 (69%)** are more inclined to change their diet due to health reasons.

29%

change their diet to save **money**



People tend to make diet changes for a mixture of reasons

40%

change their diet for **environmental** reasons



Consumers aged **25–34 (46%)** are more inclined to change their diet due to environmental reasons.



Cod, Fillet
 Wild, previously frozen
 Canada, West Coast
 Mild flavour
 Bake, broil, deep-fry, pan-fry,
 auté, grill



CERTIFIED SUSTAINABLE SEAFOOD MSC
www.msc.org



Sockeye Salmon, Fillet
 Wild, fresh
 USA, West Coast
 Medium mild flavour
 Bake, broil, grill, steam

CERTIFIED SUSTAINABLE SEAFOOD MSC
www.msc.org



Haddock, Fillet
 Wild, previously frozen
 Canada, East Coast
 Delicate, mild flavour
 Bake, broil, deep-fry, pan-fry

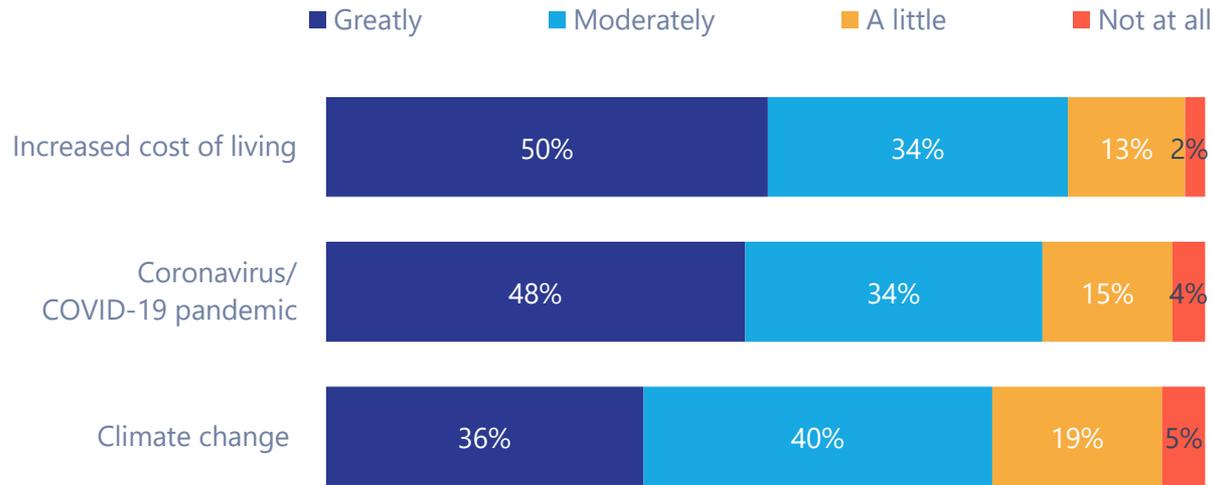


Cost-of-living crisis

Half of APAC consumers are greatly personally affected by the increased cost of living; they are less affected by COVID and climate change compared to other regions



Affected by personal issues



Global data

Global results show cost of living at 60%, COVID-19 (42%), and climate change (38%)

What motivates consumers when purchasing seafood?

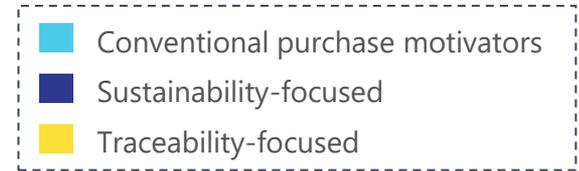
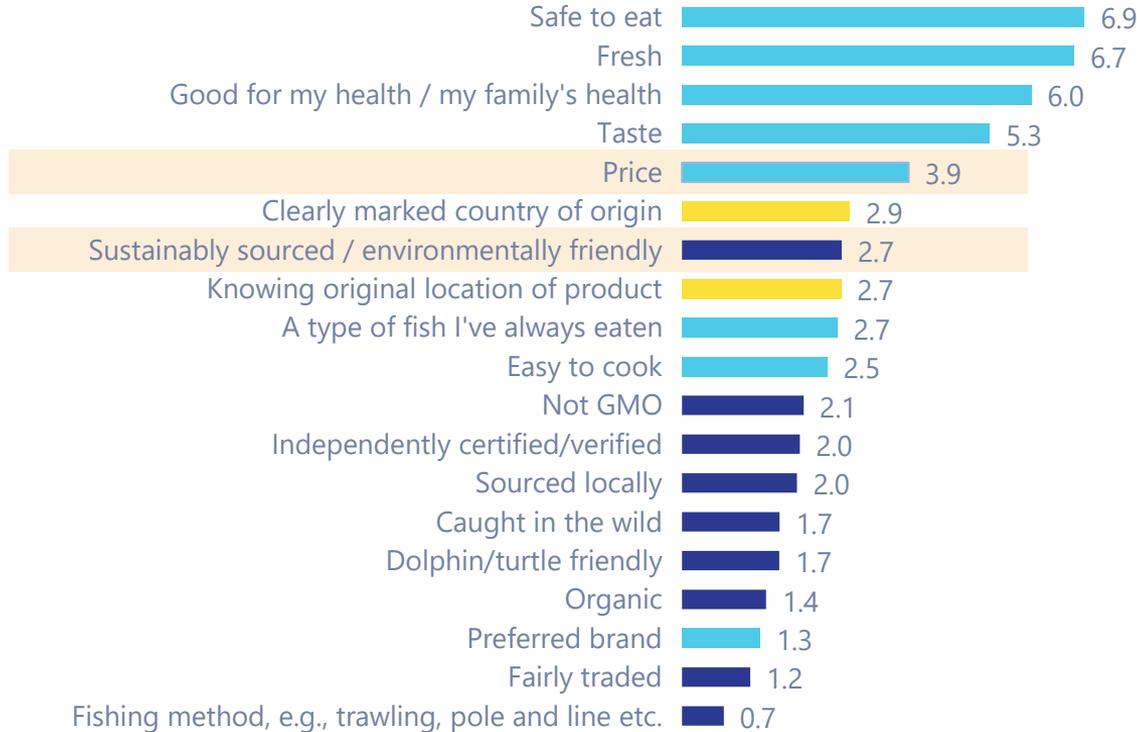


Fresh
Preferred brand
Price
Safe to eat
Taste
Easy to cook
Good for health
A type of fish I've always eaten
Caught in the wild
Dolphin/turtle friendly
Organic
Fairly traded
Fishing method
Sustainably sourced
Independently certified/verified
Is not GMO
Clearly marked country of origin
Sourced locally
Knowing where the product originally comes from

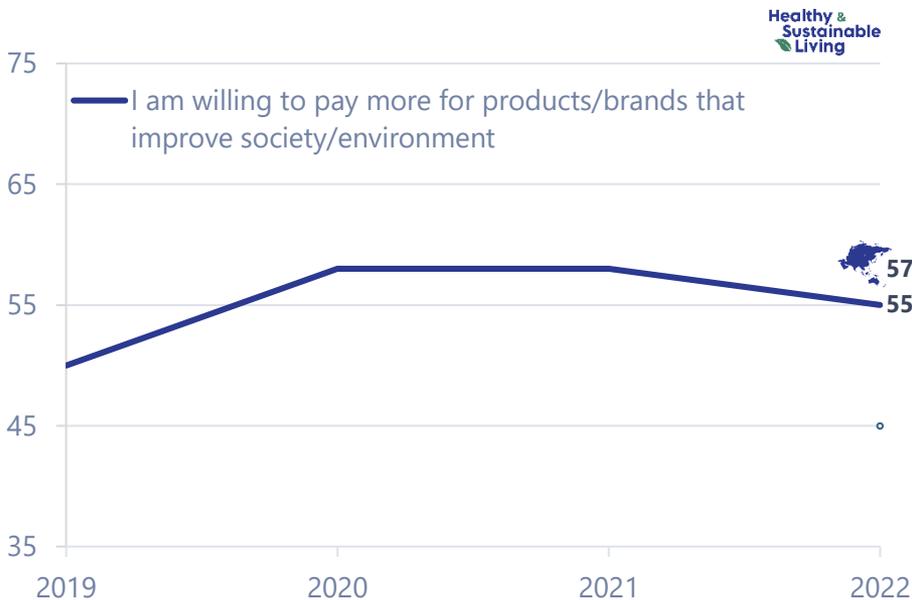
Price is a strong consideration for people buying seafood, ahead of sustainable sourcing in APAC



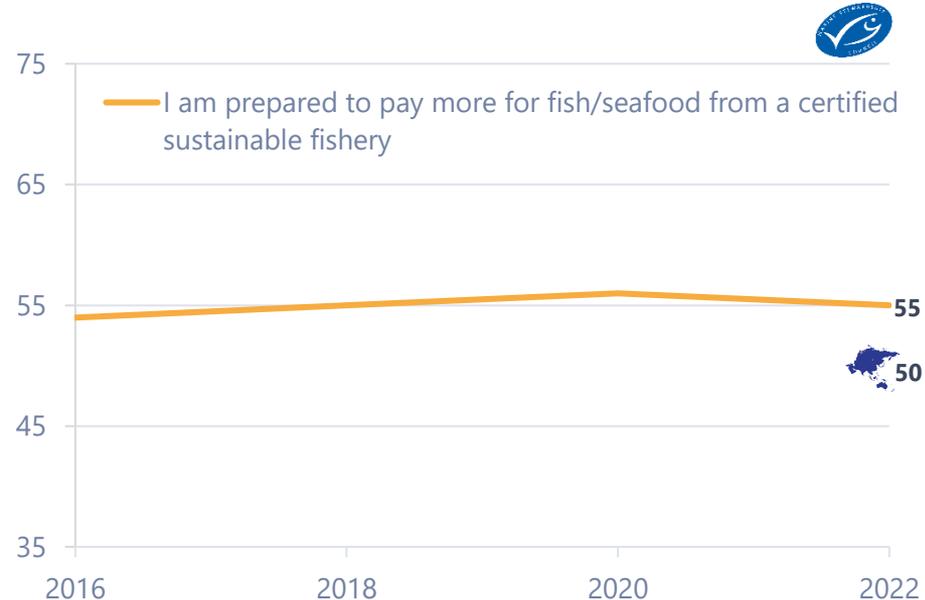
Motivators in seafood purchase



People's willingness to pay more for sustainability has increased slightly for APAC – and half of consumers still say they will pay more



“Strongly” and “Somewhat Agree,” global



“describes opinion well,” top three (5+6+7 on 7-pt scale), global

Base: Global
 Q6. Please indicate whether you strongly agree, somewhat agree, neither agree nor disagree, somewhat disagree, or strongly disagree with each of the following statements.
 Base: Seafood consumers, global
 Q8.1. How well does each of the following statements describe your opinions about ecolabels?





Certifications and future intent

Certifications are a major reason that APAC consumers consider a product to be environmentally responsible



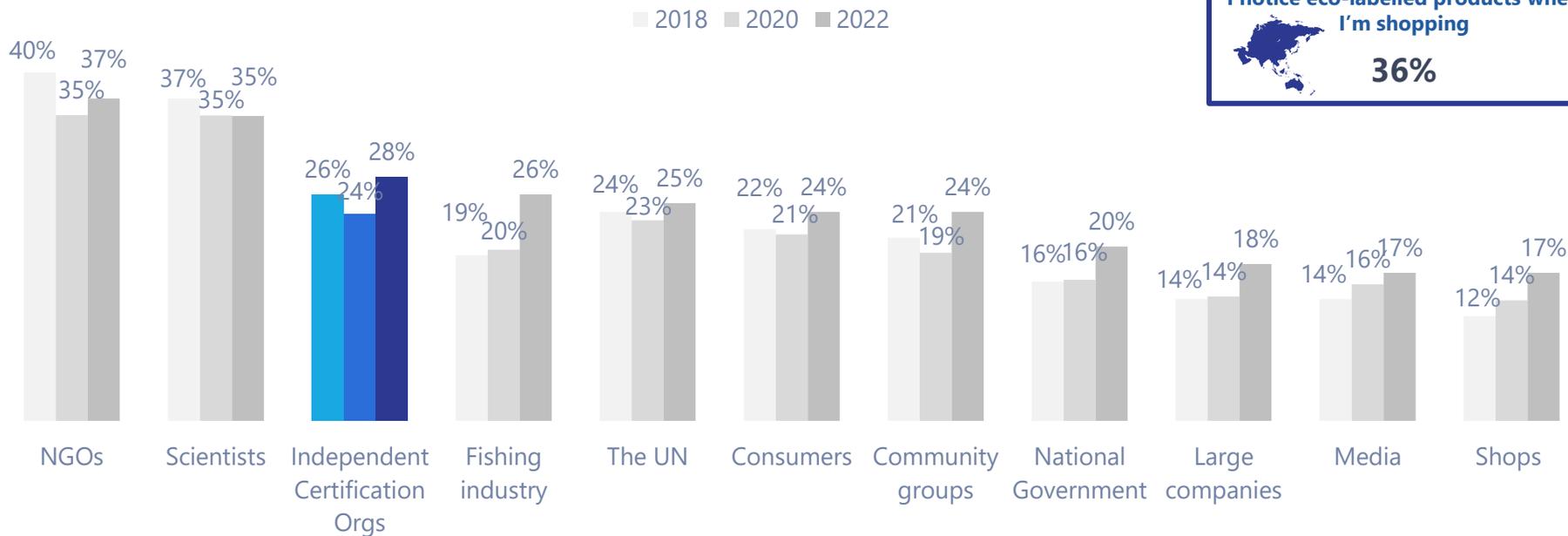
Reasons consumers knew that the product was environmentally responsible



Independent certification organisations are becoming more important as they are increasingly more trusted in protecting the ocean



Actors perceived to be contributing very well to protecting the ocean environment



I notice eco-labelled products when I'm shopping

36%

Younger audiences are more likely to buy ecolabelled fish and seafood products



I like to stand out from the crowd by buying products with ecolabels



Total
18-34 year olds

35%

42%

I notice ecolabelled products when I'm shopping



Total
18-34 year olds

36%

45%

I buy ecolabelled fish or seafood products often or occasionally



Total
18-34 year olds

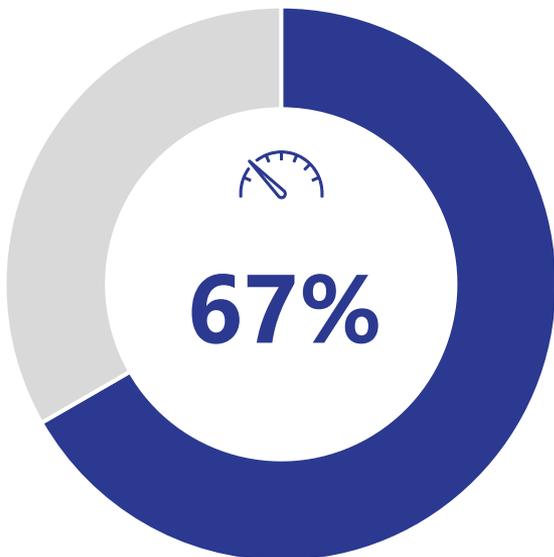
36%

44%

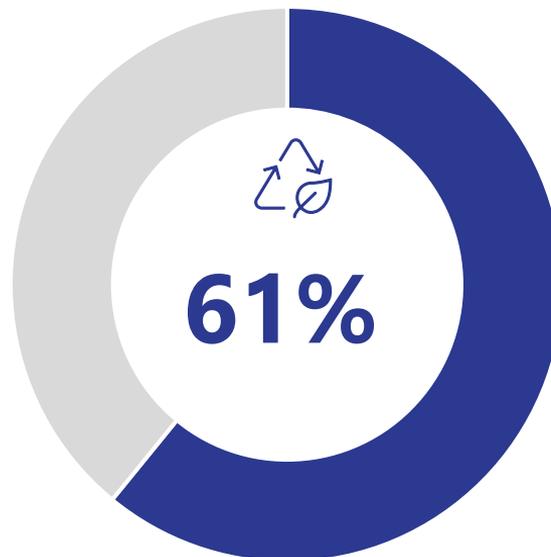
APAC consumers are willing to reduce their consumption, and they are optimistic on whether other people will be living in an environmentally friendly way



I would be willing to reduce my consumption by half to avoid environmental damage and climate change



Most people will be living environmentally friendly lifestyle in the next decade



Global data

Global results show 54% think people will be living a more environmentally friendly lifestyle

Base: APAC

Q6. Please indicate whether you strongly agree, somewhat agree, neither agree or disagree, somewhat disagree, or strongly disagree with the following statements. – I would be willing to reduce consumption by half to avoid environmental damage / climate change

Q40. How likely do you do you think it is that each of the following will happen in the next ten years? "Most people will be living environmentally friendly lifestyles"

Q&A



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How to support consumers in making sustainable and healthy food choices affordable