

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
Director, Asia Pacific at
GlobeScan



Tom Peek
Marketing Manager for Seafood
at Simplot Australia



Kiarne Treacy
CEO of Sustainable Choice

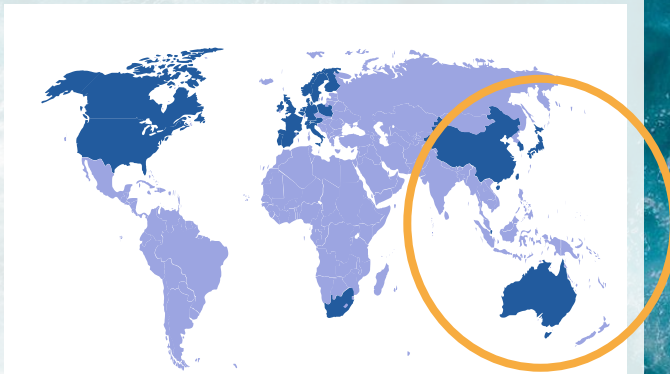


Patrick Caleo
Regional Director for Asia
Pacific at MSC

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

Healthy & Sustainable Living

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

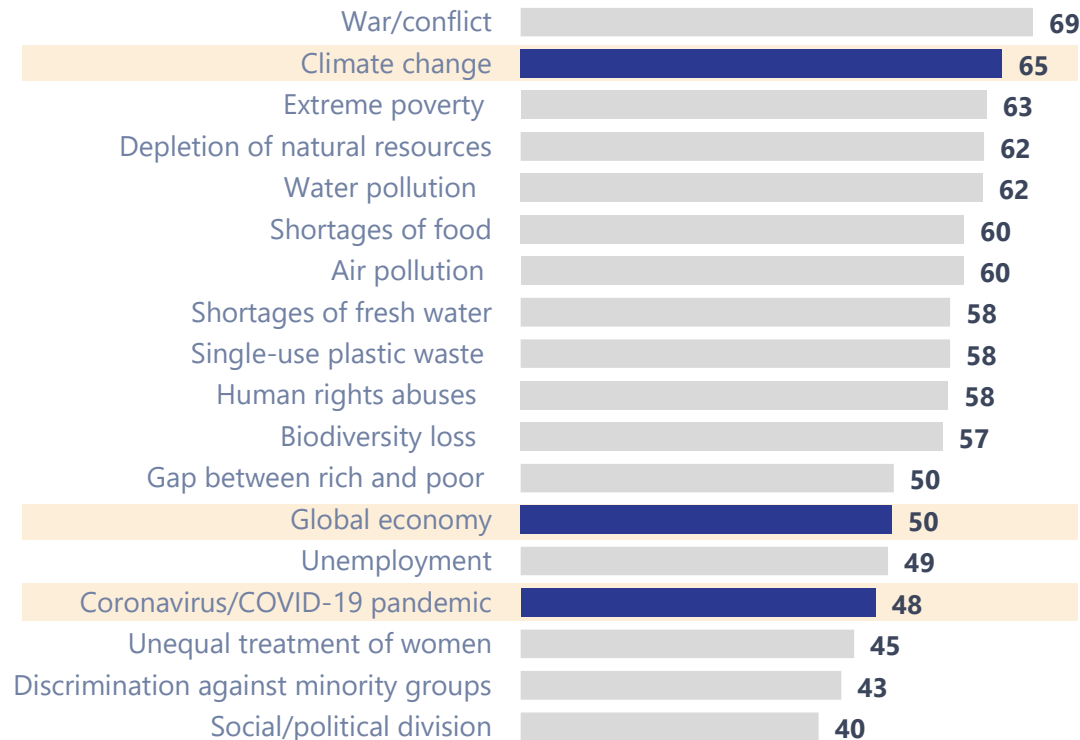
↑ +12%
rise

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

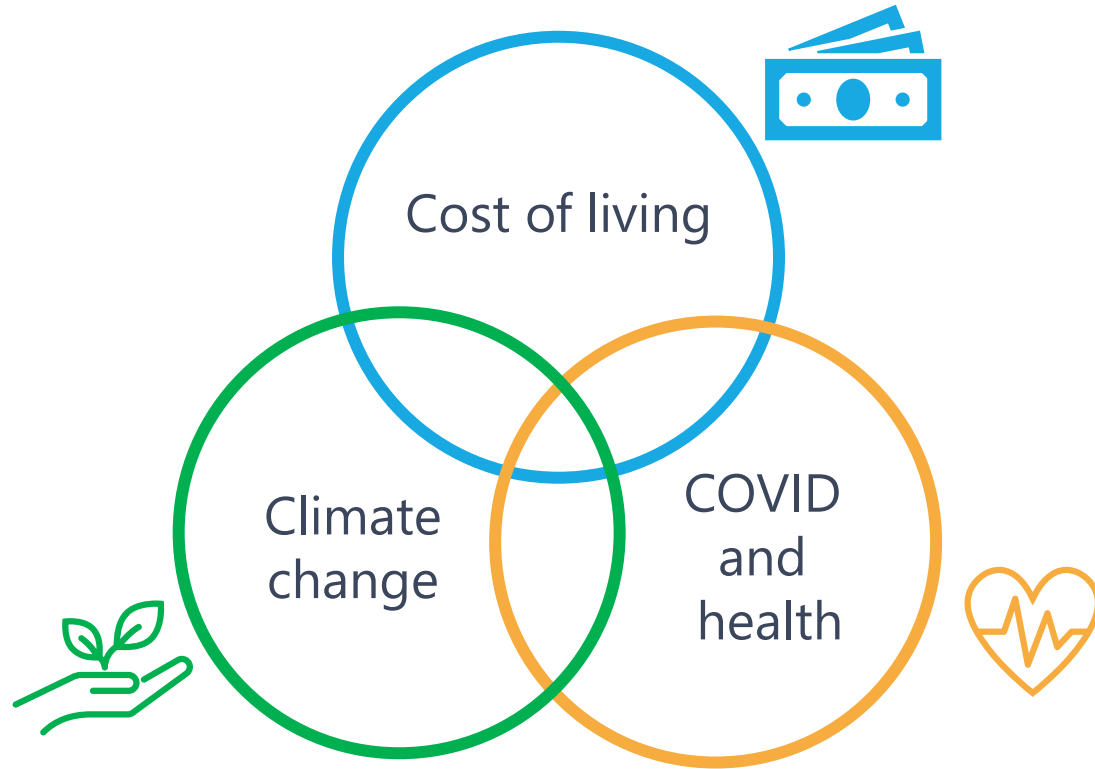
 = Issues we are addressing in this webinar



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.

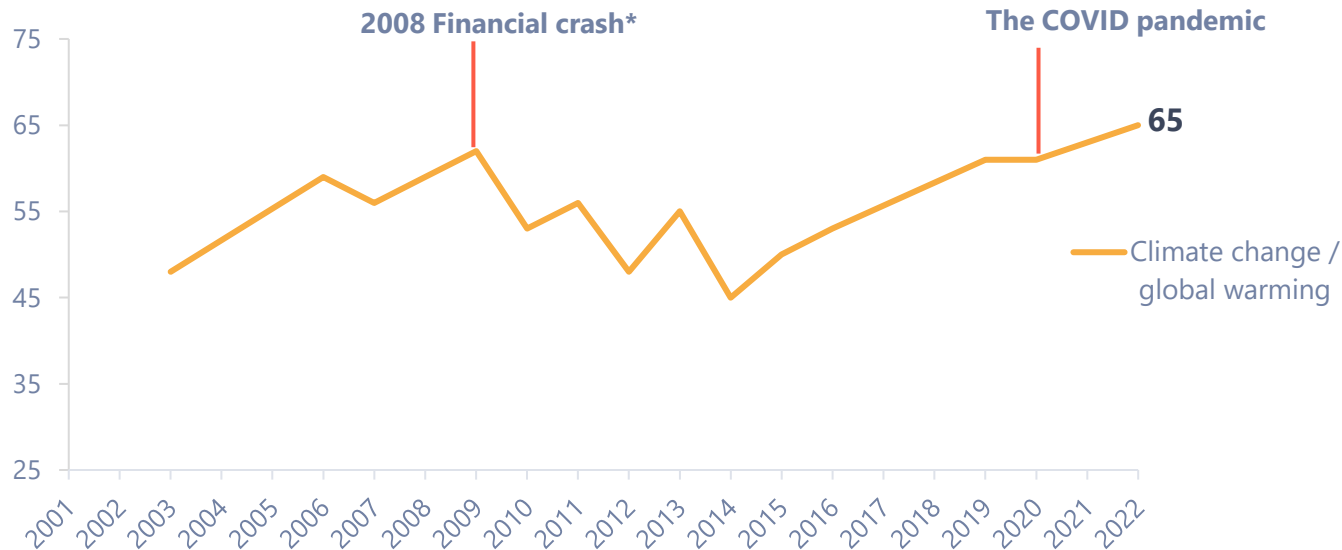




Climate change and the environment

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

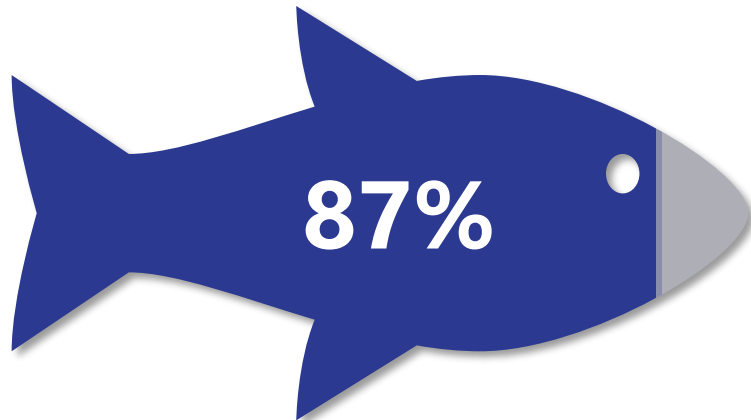
57%

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

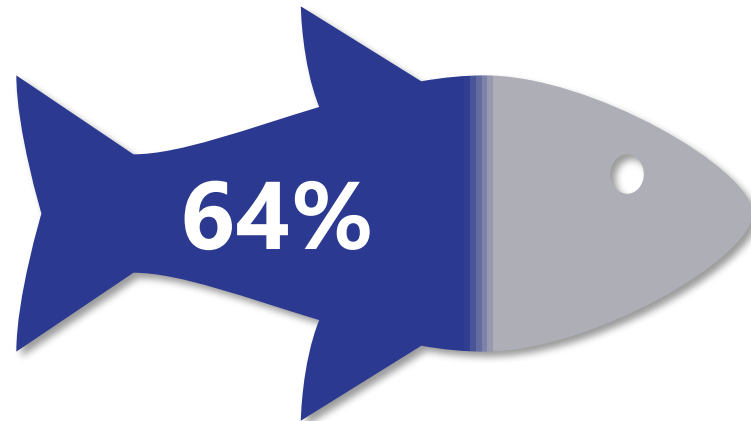
A very large majority in APAC feel worried about the state of the world's oceans



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

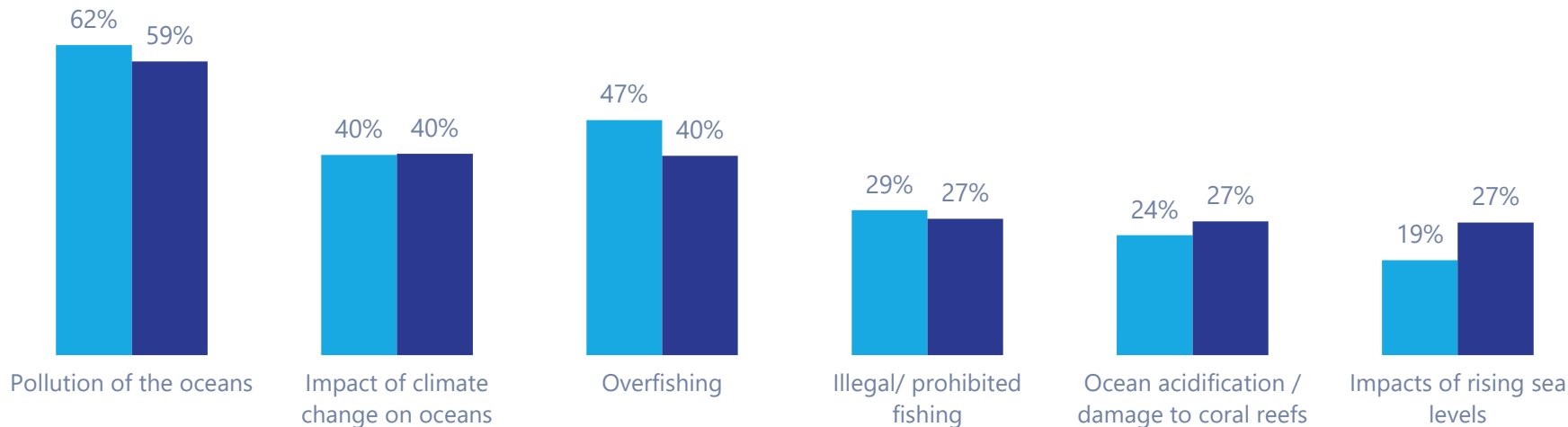


Pollution and impact of climate change on oceans are the two biggest concerns; people are increasingly worried about rising sea levels and ocean acidification



Most concerning ocean issues

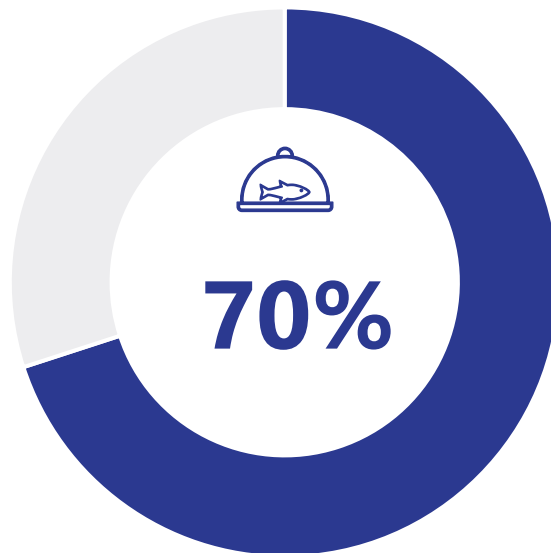
2020 2022



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



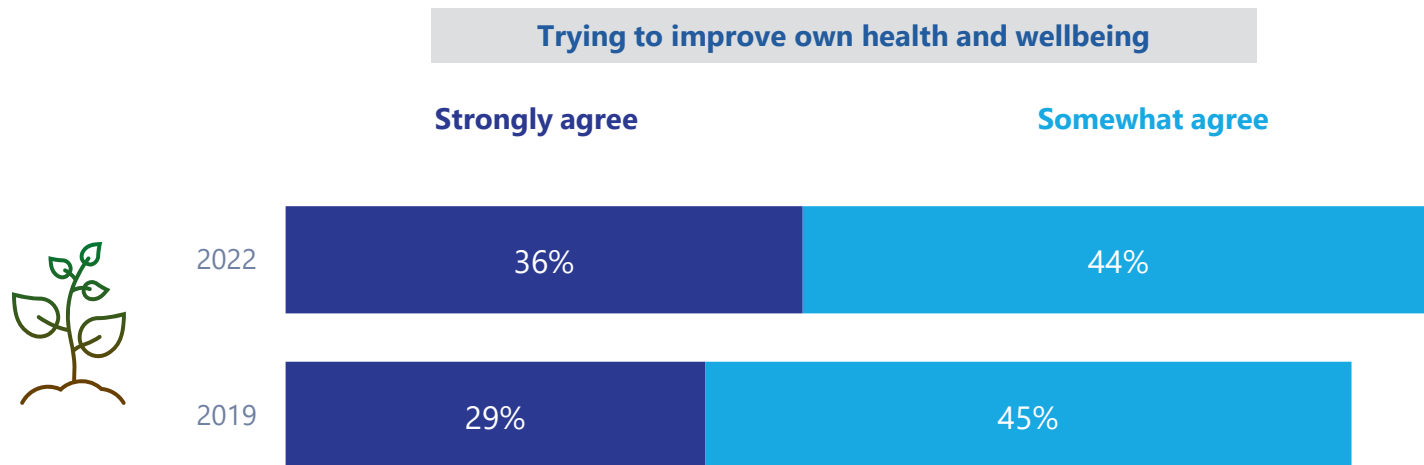
In order to save the ocean, we have to consume seafood only from sustainable sources





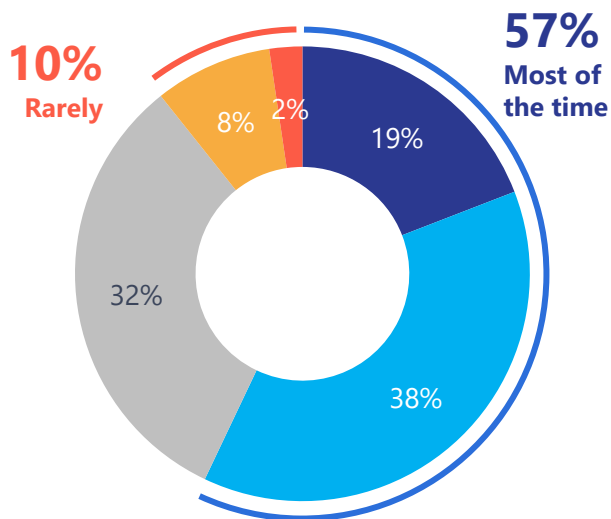
COVID, health, and changes in diet

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

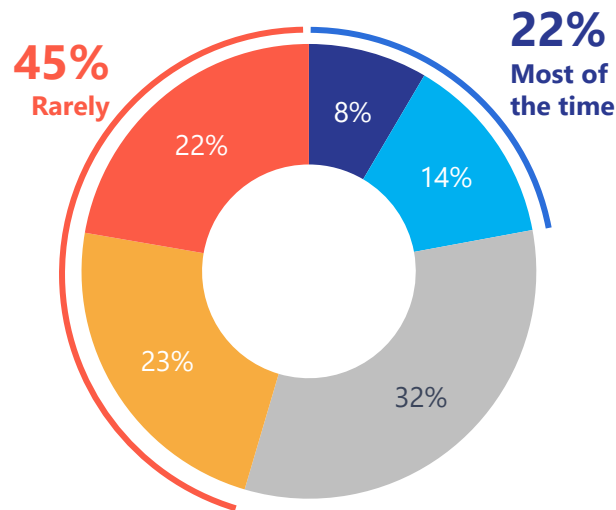


APAC consumers often say they eat healthy food; however, this does not mean they are turning to vegetarian or vegan food

I eat healthy food



I eat vegetarian and vegan food

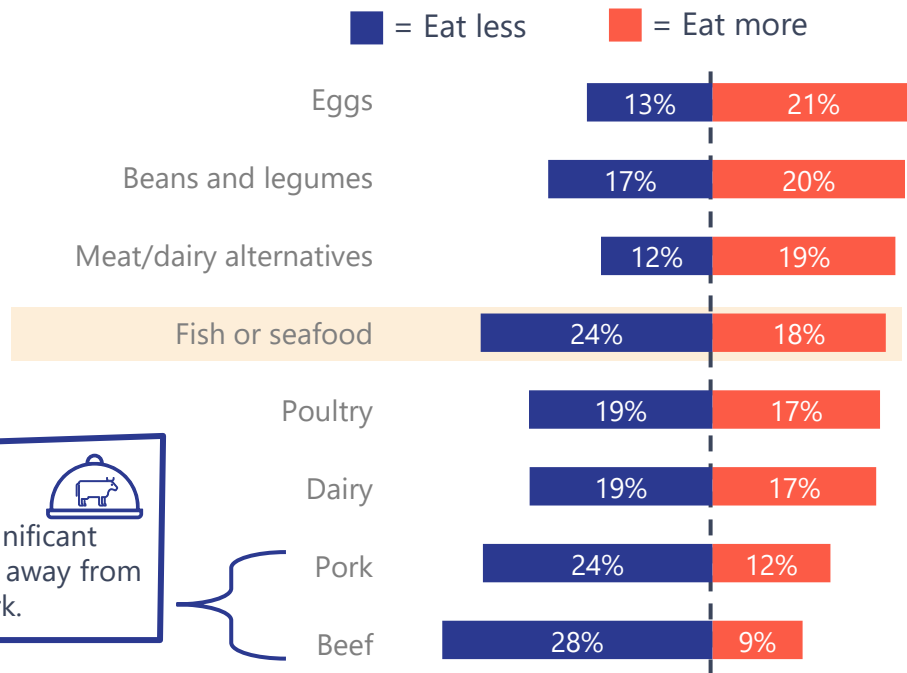


- All of the time
- Most of the time
- Sometimes
- Rarely
- Never

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%

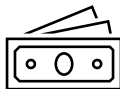
change their diet to
be **healthier**



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

29%

change their diet to
save **money**



40%

change their diet for
environmental reasons



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

People tend to make diet changes for a mixture of 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

■ Greatly ■ Moderately ■ A little ■ Not at all

Increased cost of living



Coronavirus/
COVID-19 pandemic



Climate change



Global data

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

What motivates consumers when purchasing seafood?

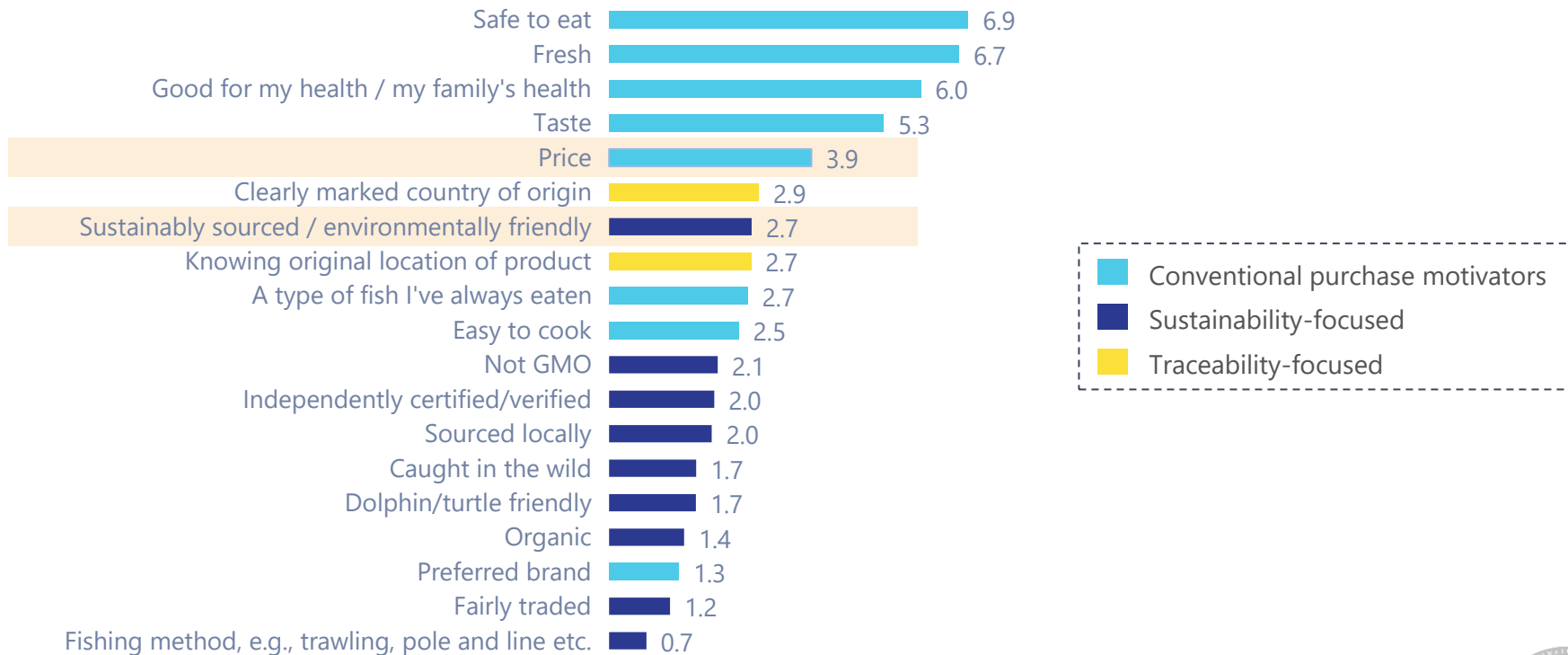


Fresh
Preferred brand
Price
Safe to eat
Taste
Easy to cook
Good for health
A type of fish I've always eaten
Caught in the wild
Dolphin/turtle friendly
Organic
Fairly traded
Fishing method
Sustainably sourced
Independently certified/verified
Is not GMO
Clearly marked country of origin
Sourced locally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

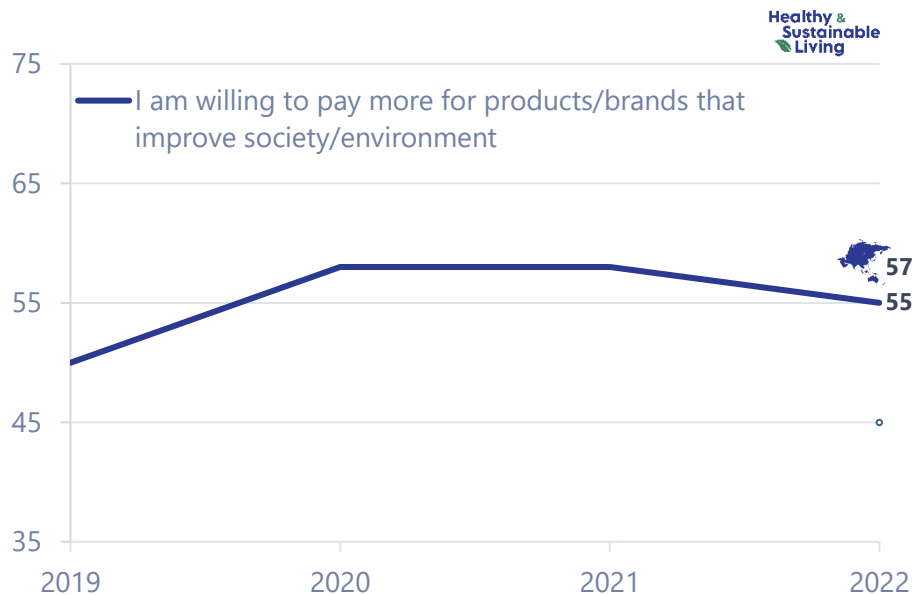
Price is a strong consideration for people buying seafood, ahead of sustainable sourcing in APAC



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?



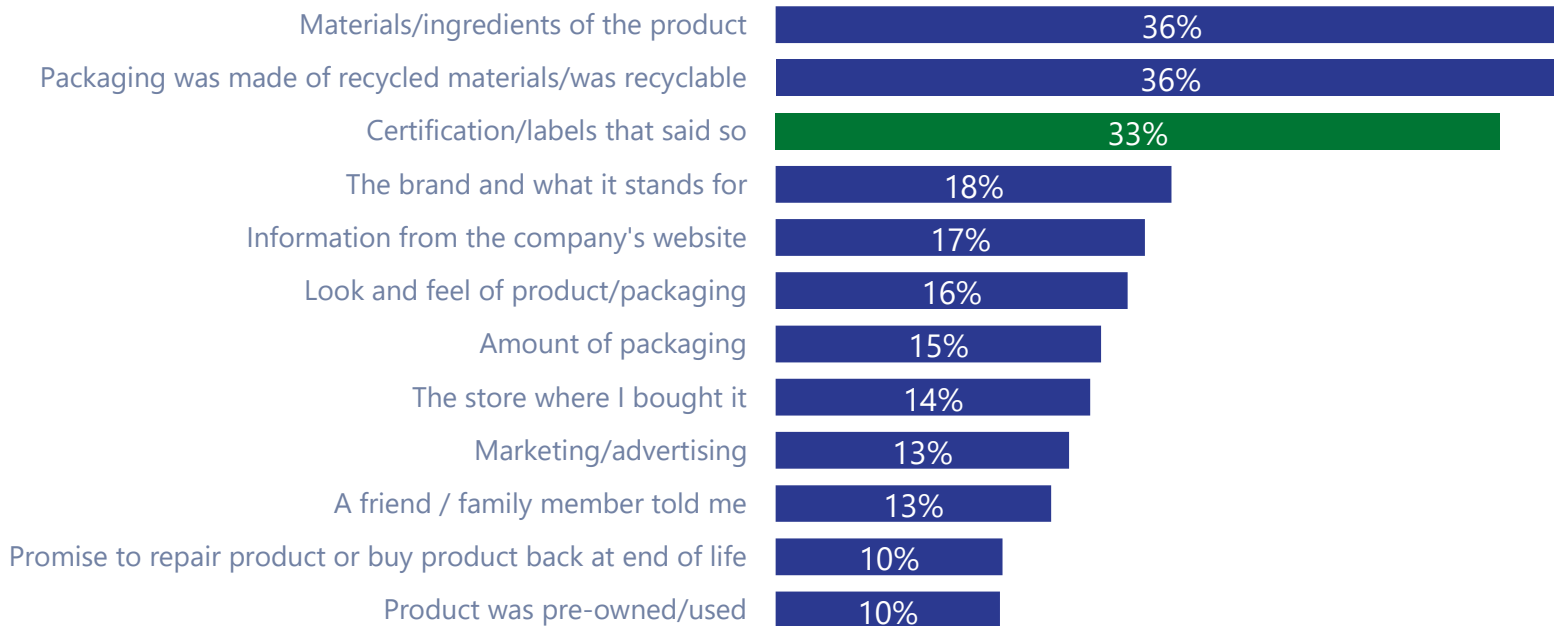


Certifications and future intent

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



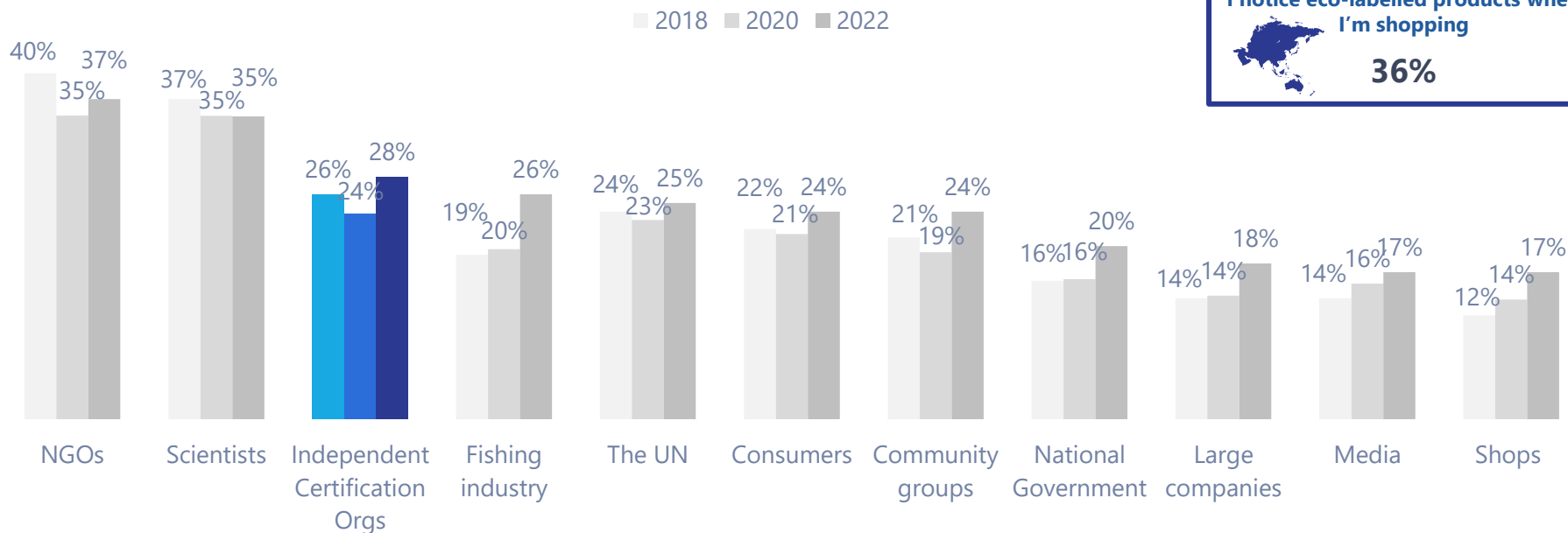
Reasons consumers knew that the product was environmentally responsible



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



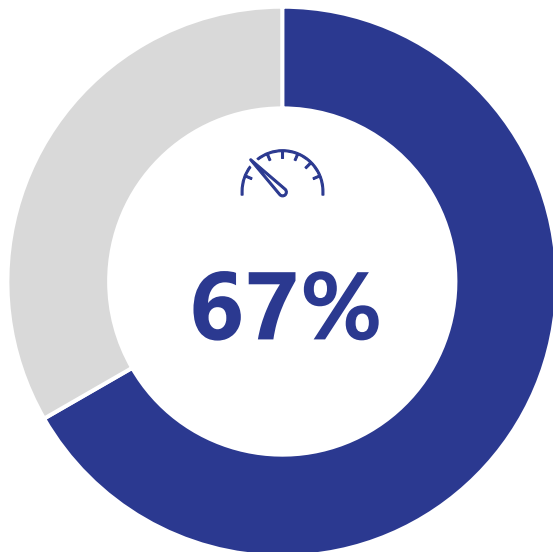
Total
18-34 year olds

36%

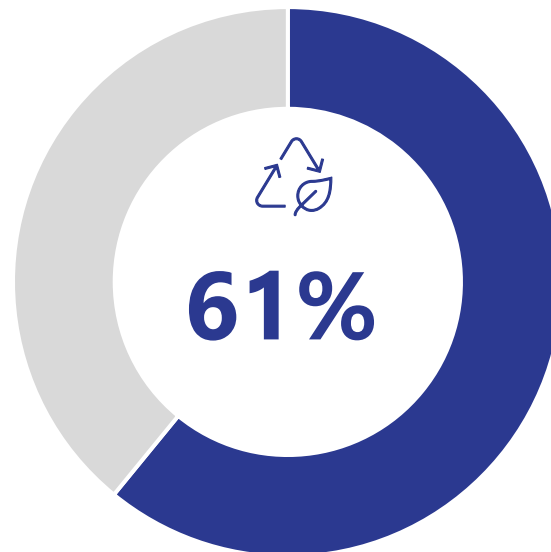
44%

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 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