



The Rise of the Conscious Food Consumer: COVID, Climate, and Conservation; How Will These Affect Consumer Habits?



Asia-Pacific November 2020

Today's Agenda

- 1 Welcome
- 2 Consumer trends – MSC GlobeScan Global Seafood Consumer Insights 2020
- 3 Results from GlobeScan Healthy and Sustainable Living survey
- 4 Q&A
- 5 Close

Join the conversation & share your thoughts about the consumer insights being shared, use the hashtag [#sustainableseafood](#) and handles [@MSCbluefishtick](#) & [@Globescan](#)

Meet the Team



Anne Gabriel
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at MSC



Katie Saunders
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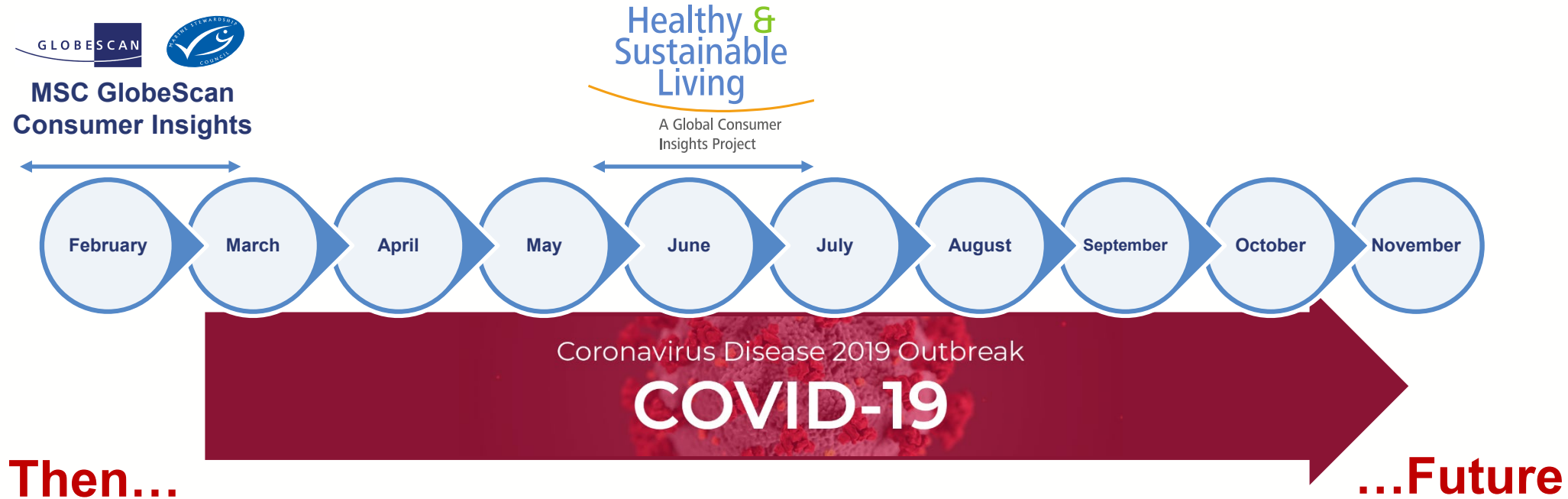


Lucas Glanville
Director of Culinary Operations
Singapore & South East Asia at
Hyatt Hotels



Wander Meijer
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Timeline of 2020



1. Consumer Trends Before COVID-19



MSC GlobeScan Consumer
Insights

Introduction to MSC Consumer Insights for Asia-Pacific 2020

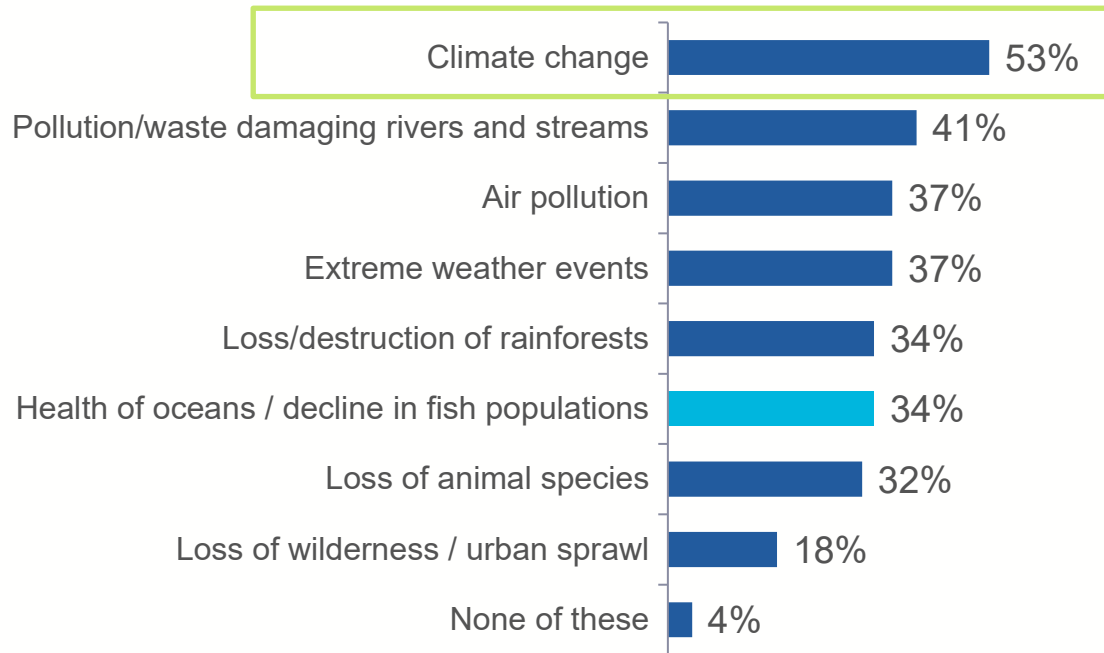


The Marine Stewardship Council partnered with GlobeScan to conduct the third wave of a **global research study** into **consumer perceptions**.

Type of consumer	Sample
General public	<i>n</i> =5,716
Seafood consumers	<i>n</i> =4,578

Climate change is the most concerning environmental issue globally.

Most concerning environmental issues; percentage choosing issue in top 3, Global (23-country) average

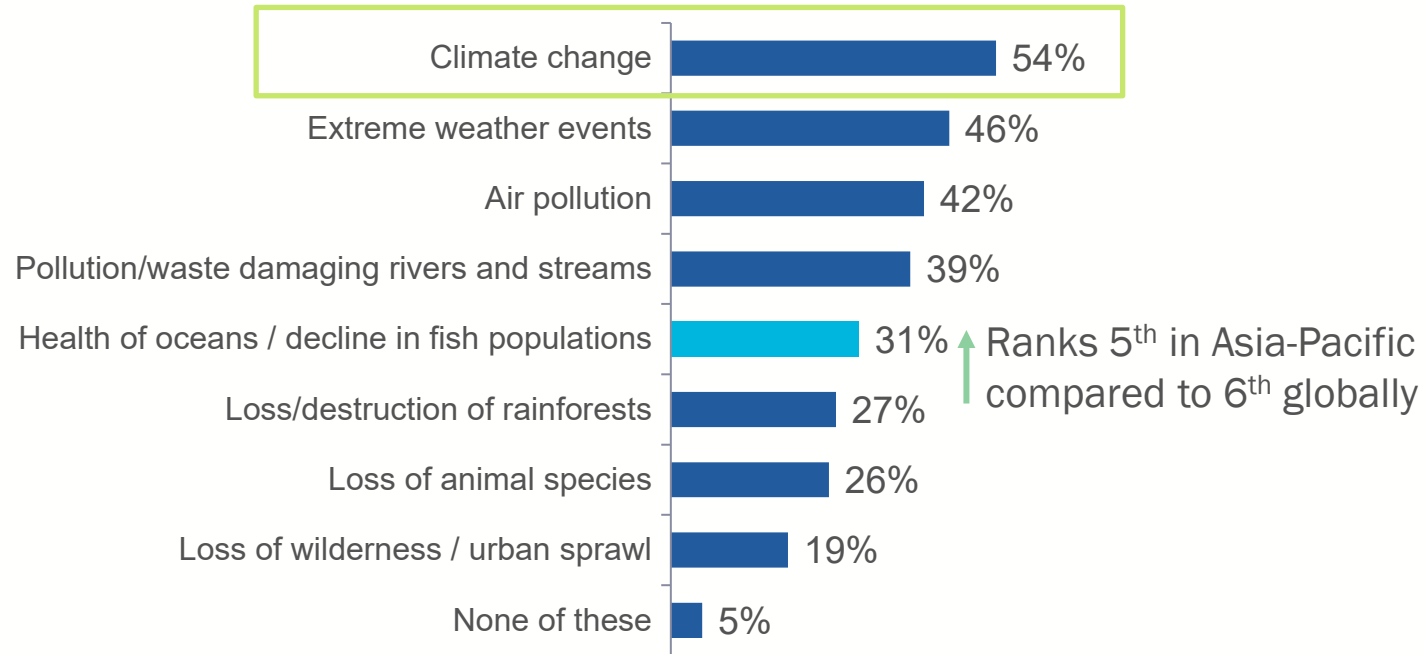


Base: General population, global, n=26,535

Q1.2: Which, if any, of the potential environmental issues are you most worried about?

Extreme weather is considered more concerning by Asia-Pacific consumers than those globally. Health of the oceans is also higher on the agenda.

Most concerning environmental issues; percentage choosing issue in top 3, Asia-Pacific

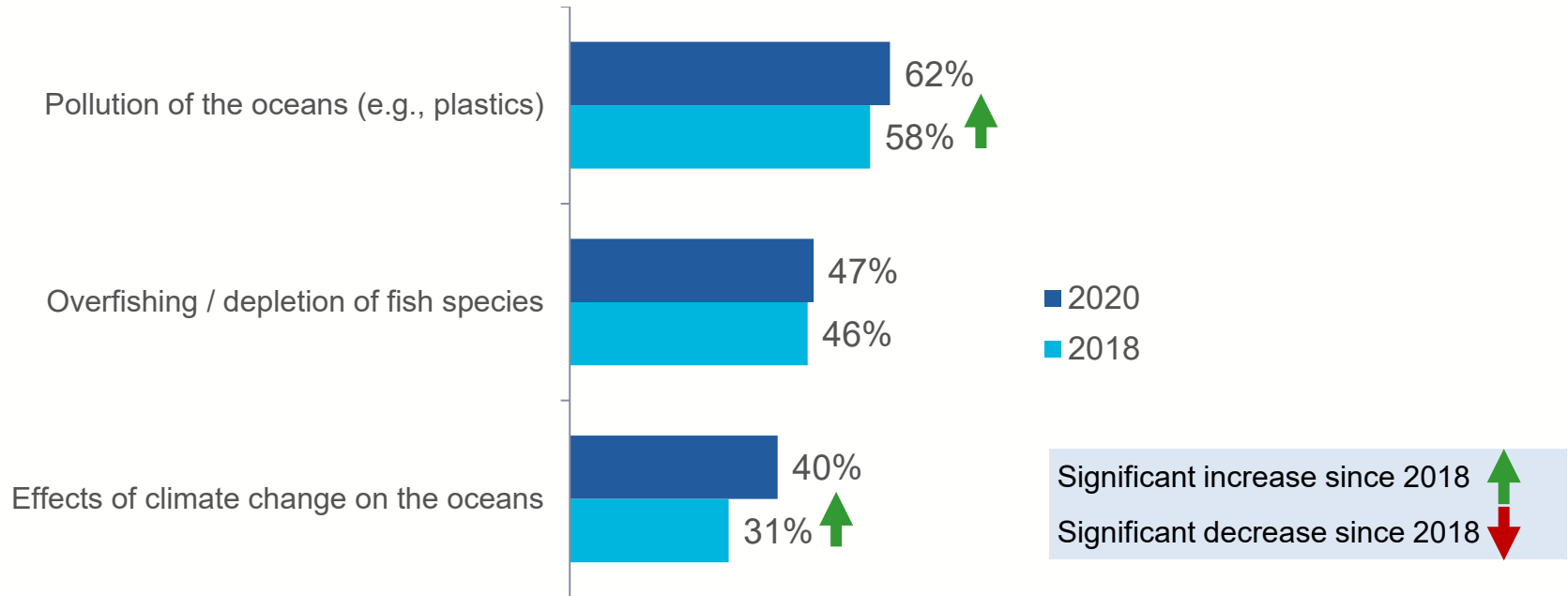


Base: General population, Asia-Pacific, n=5,716

Q1.2: Which, if any, of the potential environmental issues are you most worried about?

There has been a large increase in concern regarding pollution of the oceans and the impact of climate change on the oceans.

Top three most concerning ocean issues; percentage choosing each issue in top three, Asia-Pacific



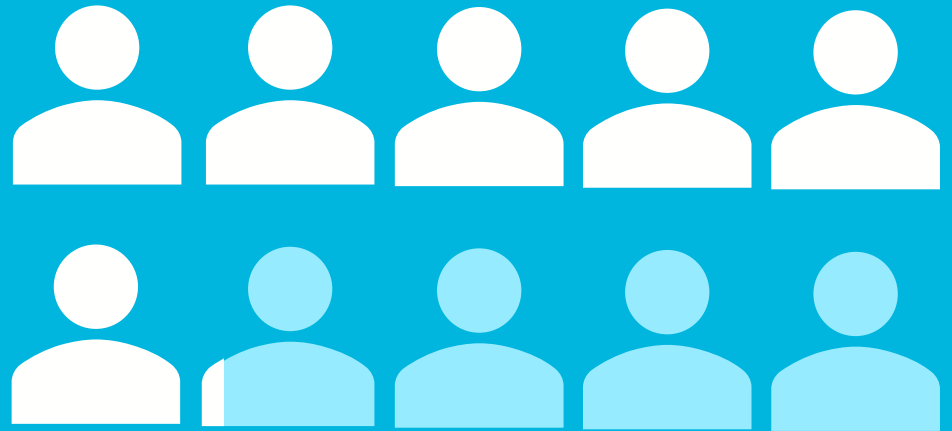
Base: Seafood consumers, Asia-Pacific, $n=4,578$

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?

Over six in ten agree that in order to save the ocean, we have to consume fish only from sustainable sources.

“Describes opinion well,” top three (5+6+7 on 7-pt scale), Asia-Pacific

61%
believe that in order to
save the ocean, we have
to consume fish/
seafood only from
sustainable sources



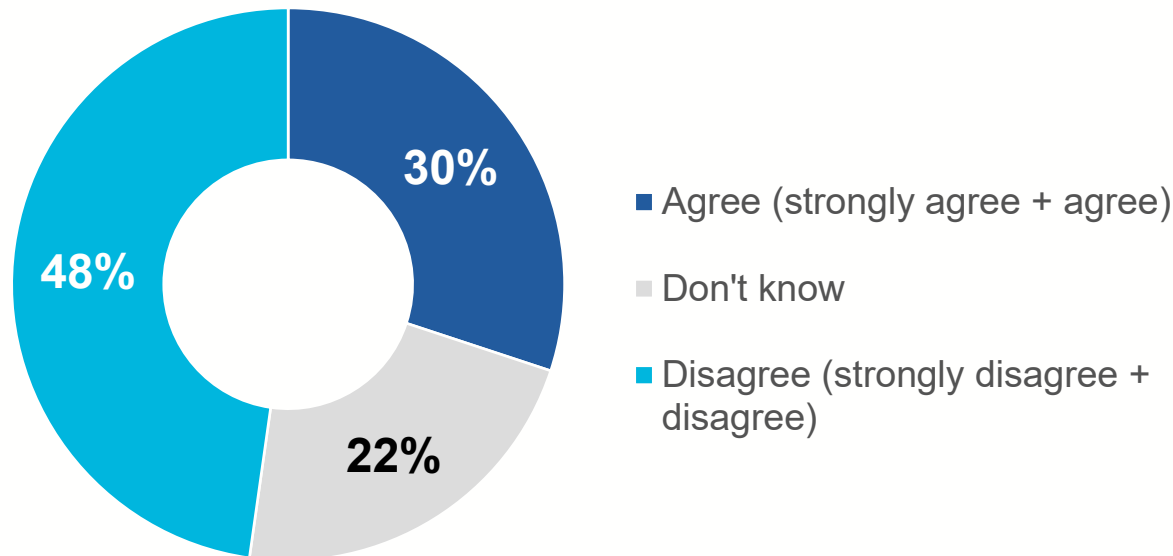
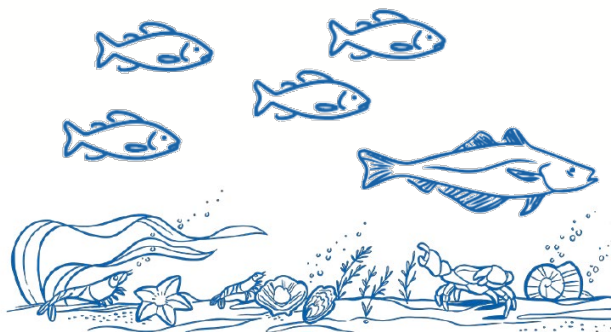
Base: Seafood consumers, Asia-Pacific $n=4,578$

Q5.1: How well does each of the following statements describe your opinions?

Three in ten seafood consumers in Asia-Pacific think that their favourite fish species will not be available to eat 20 years from now.

Perceptions of fish availability over time, Asia-Pacific

I don't think [favourite fish species]* will be available to eat 20 years from now



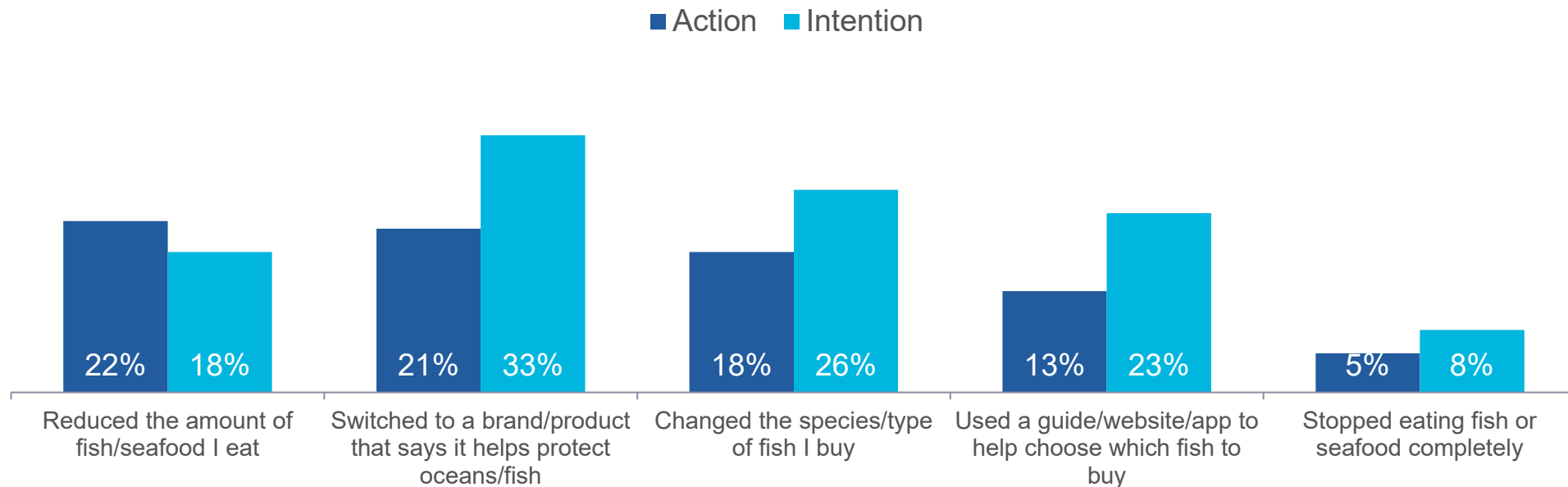
Base: Seafood consumers, Asia-Pacific, n=4,578

*Fish species shown was the preferred species of each respondent

Q4.5: Please indicate how much you agree or disagree with the following statement: I don't think [fish species] will be available to eat 20 years from now.

There is a gap between the actions taken to protect fish and seafood (action), and those that people are willing to take in the future (intention).

Actions taken in the last year to protect fish and seafood and actions willing to take in the future, total mentions, Asia-Pacific



There is a thirst for more information on sustainability and traceability of fish and seafood products.

Attitudes toward ocean sustainability issues, “describes opinion well,” top three (5+6+7 on 7-pt scale), Asia-Pacific

88%

want **better information**
so they can be confident
that they are **not buying**
unsustainable fish or
seafood products*



67%

would like to **hear more**
from companies
about the
sustainability of their
fish and seafood products



60%

want to know that the fish
they buy can be **traced**
back to a known and
trusted source



Base: Seafood consumers, Asia-Pacific, $n=4,578$

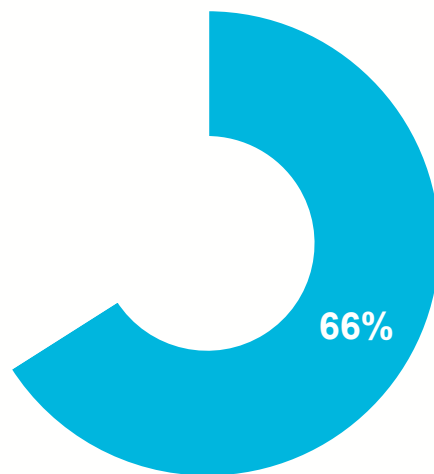
*Q11.3: Please indicate how much you agree or disagree with the following statements; “agree” (3+4 on a 4-pt scale)

Q5.1: How well does each of the following statements describe your opinions?

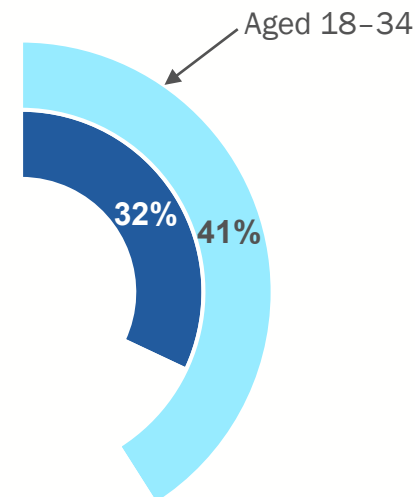
Two-thirds agree that claims about sustainability should be labelled by an independent organisation, but only a third say they notice ecolabels.

Attitudes toward ecolabels, “describes opinion well,” top three (5+6+7 on 7-pt scale), Asia-Pacific

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

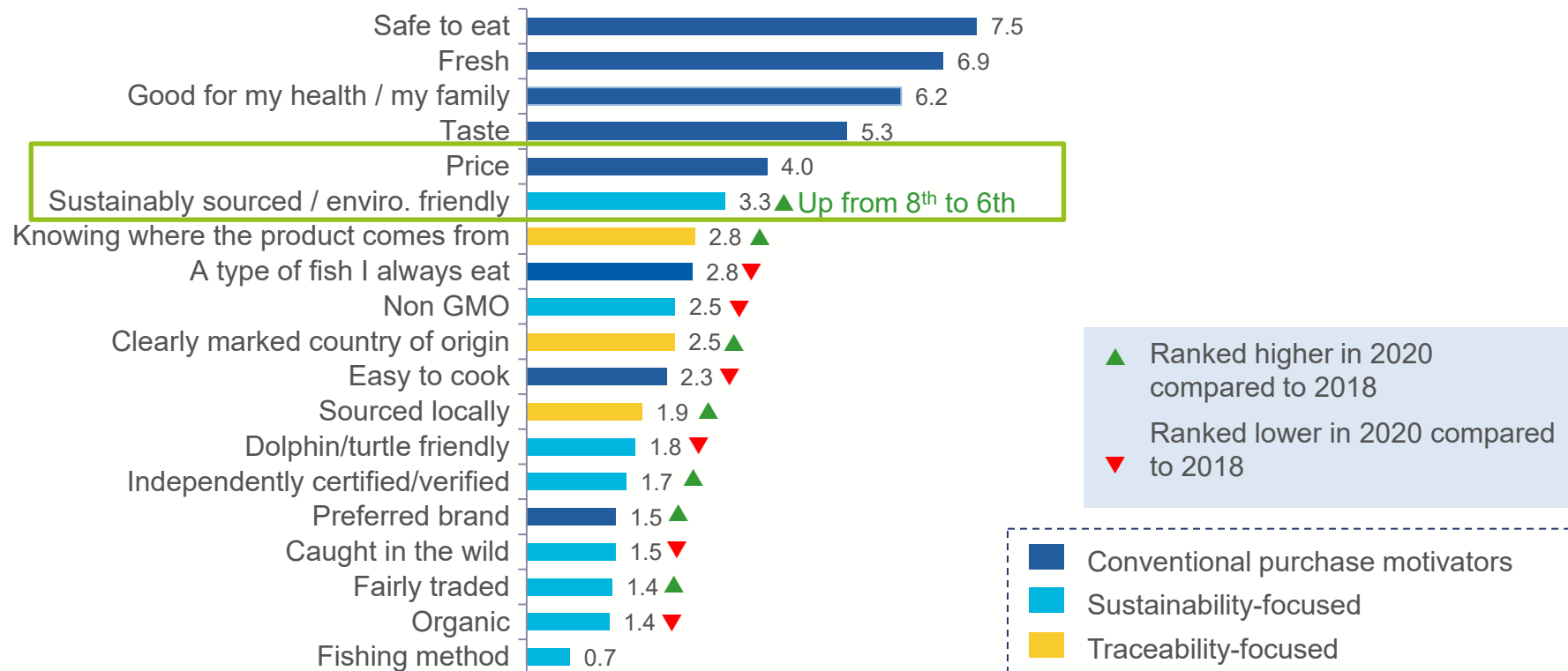


I notice ecolabelled products when I'm shopping



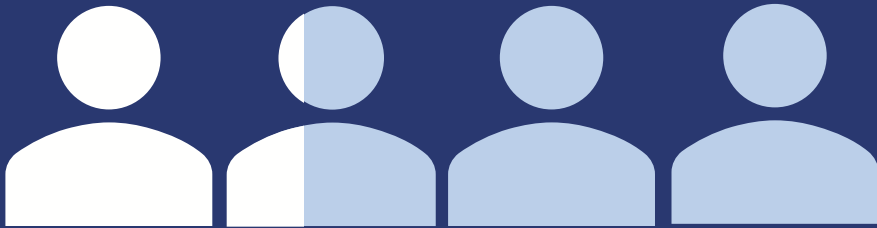
Top drivers of purchase remain the same but sustainability and traceability focused motivators have risen since 2018.

Motivators: max diff analysis, Importance score, Asia-Pacific



Recognition of the MSC label has risen significantly in 2020, as has trust.

Awareness and trust in the MSC label, Asia-Pacific



**33% of consumers
recall seeing the
MSC label
up from 25% in 2018**



Base: General population, Asia-Pacific, $n=5,716$; MSC Aware seafood consumers, Asia-Pacific, $n=1,970$

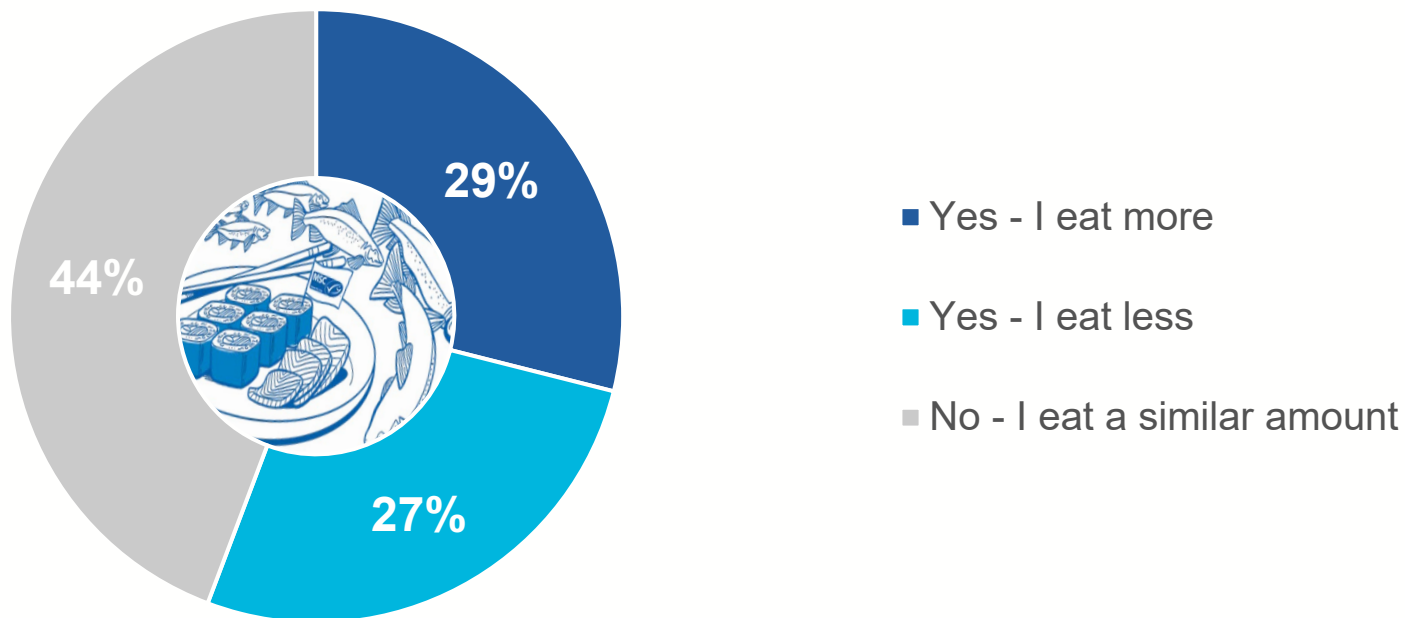
Q1.1: Have you ever seen the following logos?

Q9.2: How much trust do you have in the claims of the following initiatives/organisations ?

Among seafood consumers, just under three in ten say they are eating more fish now than five years ago.

Changes in seafood consumption and reasons for change, Asia-Pacific

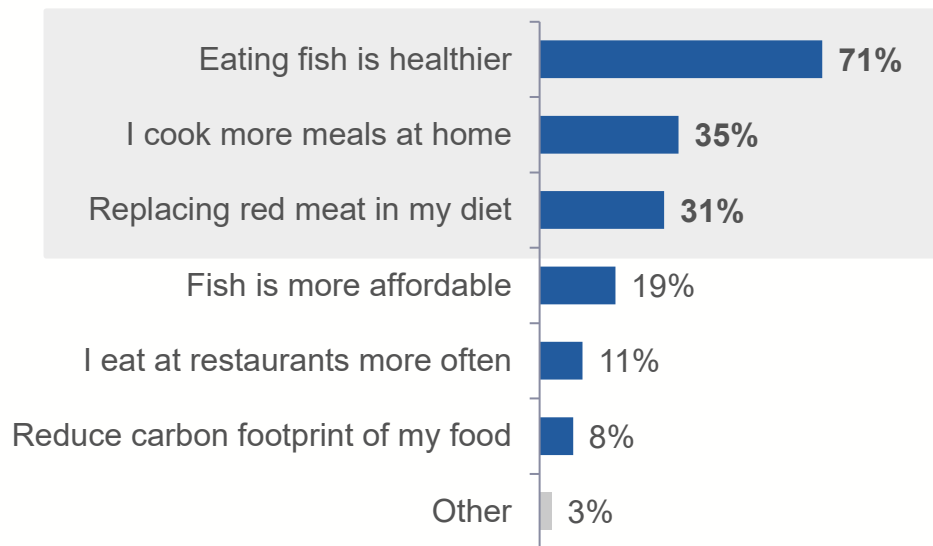
Compared to five years ago, has the amount of fish and seafood you eat changed?



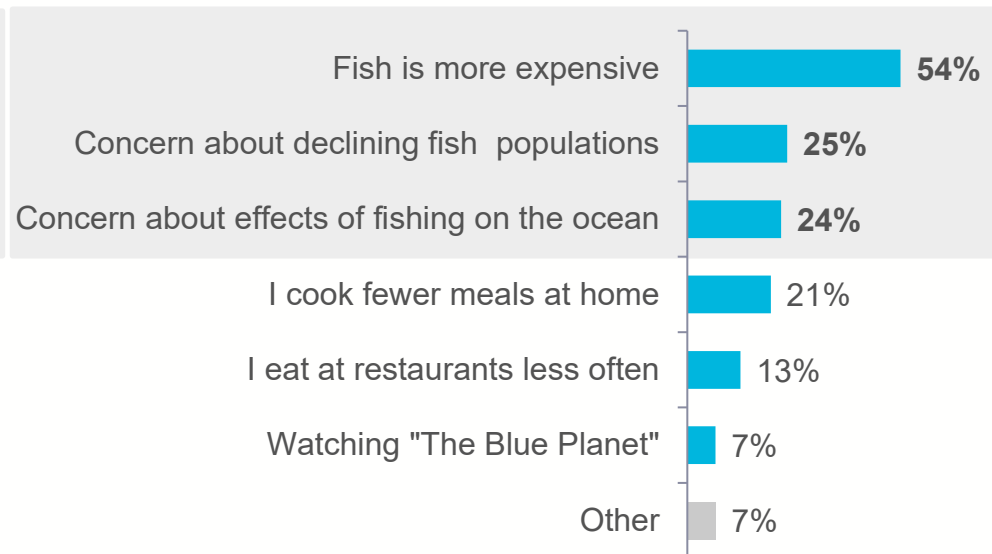
Health is the most cited reason for increase in seafood consumption, followed by cooking more meals at home and replacing red meat.

Reasons for change, Asia-Pacific

Reasons for increase



Reasons for decrease



Base: Seafood consumers who say they have increased their consumption, Asia-Pacific, $n=1,516$; Seafood consumers who say they have decreased their consumption, Asia-Pacific, $n=1,197$

Q4.6: Compared to five years ago, has the amount of fish and seafood you eat changed?

Q4.7a: What are the reasons for this change? [Increase] / Q4.7b: What are the reasons for this change? [Decrease]



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On consumer trends...

Q & A

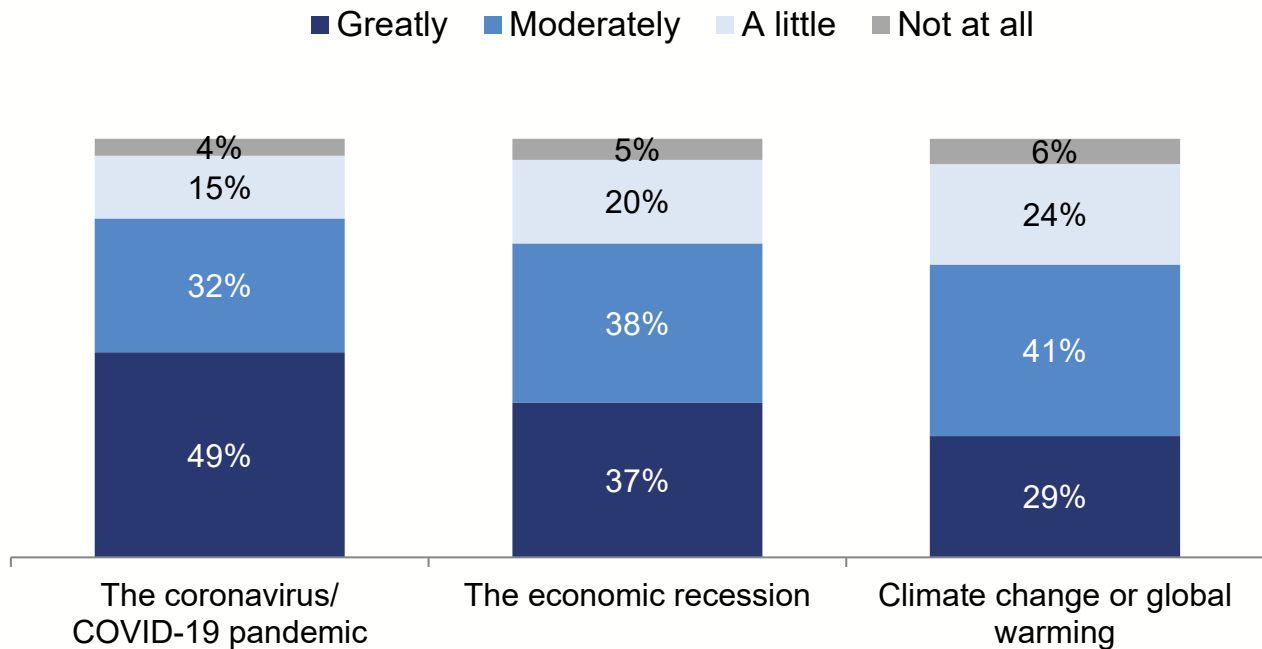
2. Results from Healthy and Sustainable Living 2020

Healthy &
Sustainable
Living

A Global Consumer
Insights Project

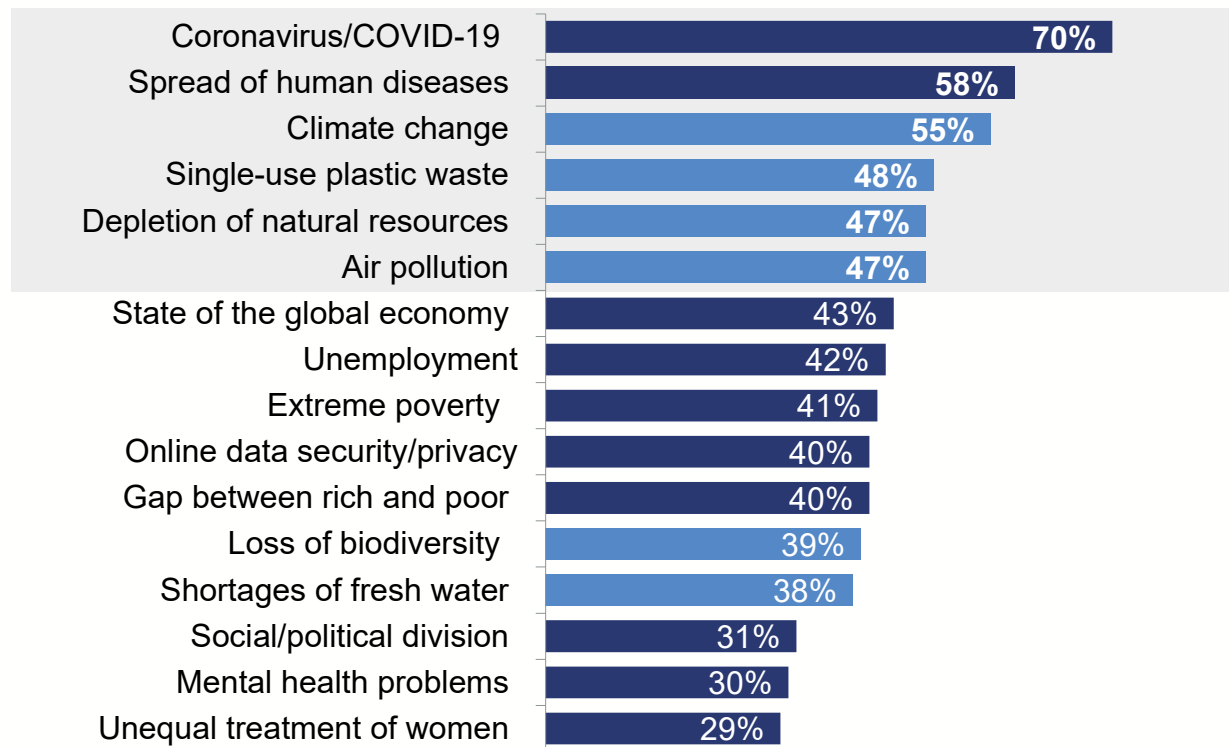
About half of consumers in Asia-Pacific say they have been greatly affected by the COVID-19 pandemic.

Extent personally affected by issues, Asia-Pacific



COVID-19 is the most serious issue for consumers in Asia-Pacific; climate change and plastic waste are the top environmental concerns.

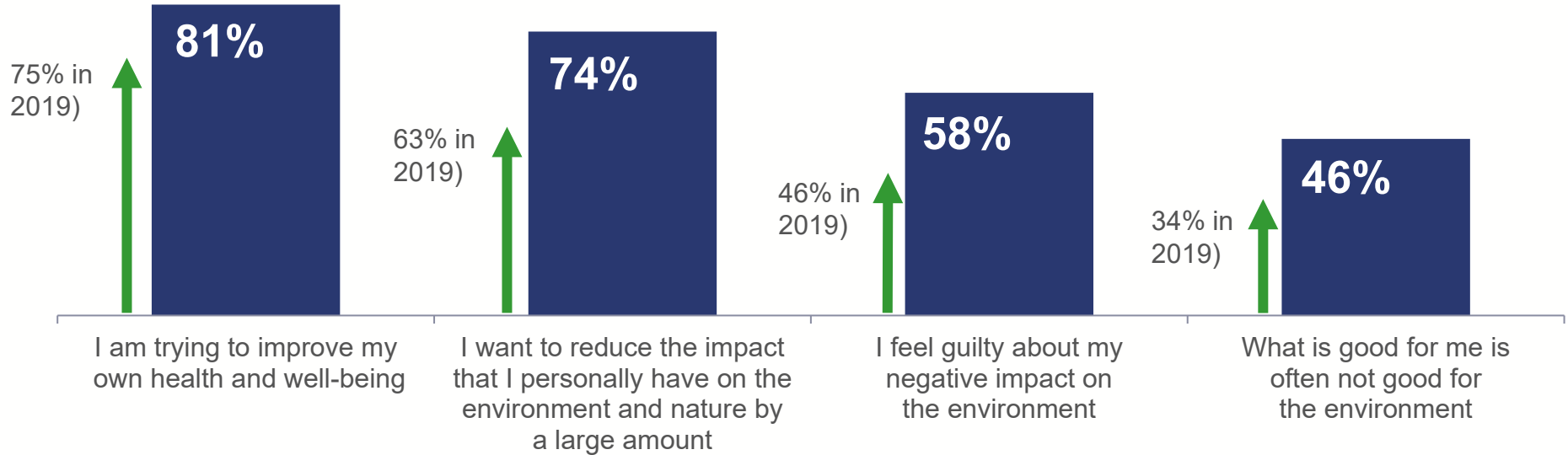
Seriousness of global problems, “very serious,” Asia-Pacific



Environmental Issues

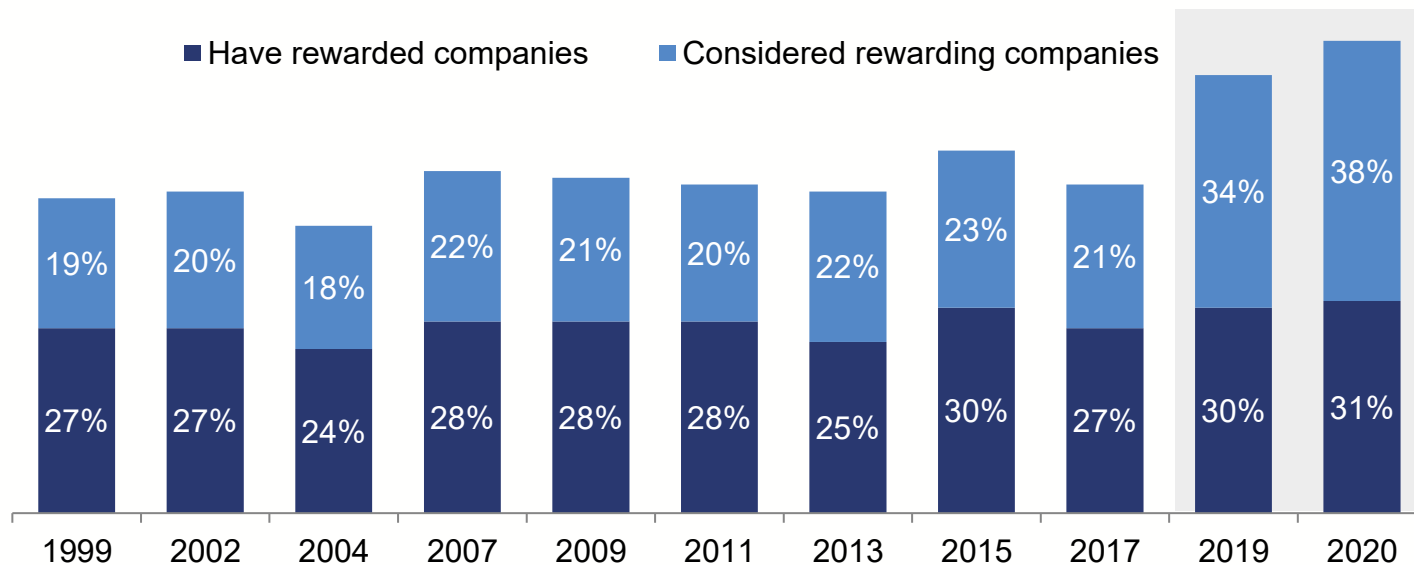
Consumer opinion has intensified in the past year; nearly three-quarters want to reduce their environmental impact by a large amount.

Environmental attitudes, “strongly agree” and “somewhat agree,” Asia-Pacific



Consumers are increasingly likely to consider rewarding socially responsible companies, but the proportion doing so remains stable.

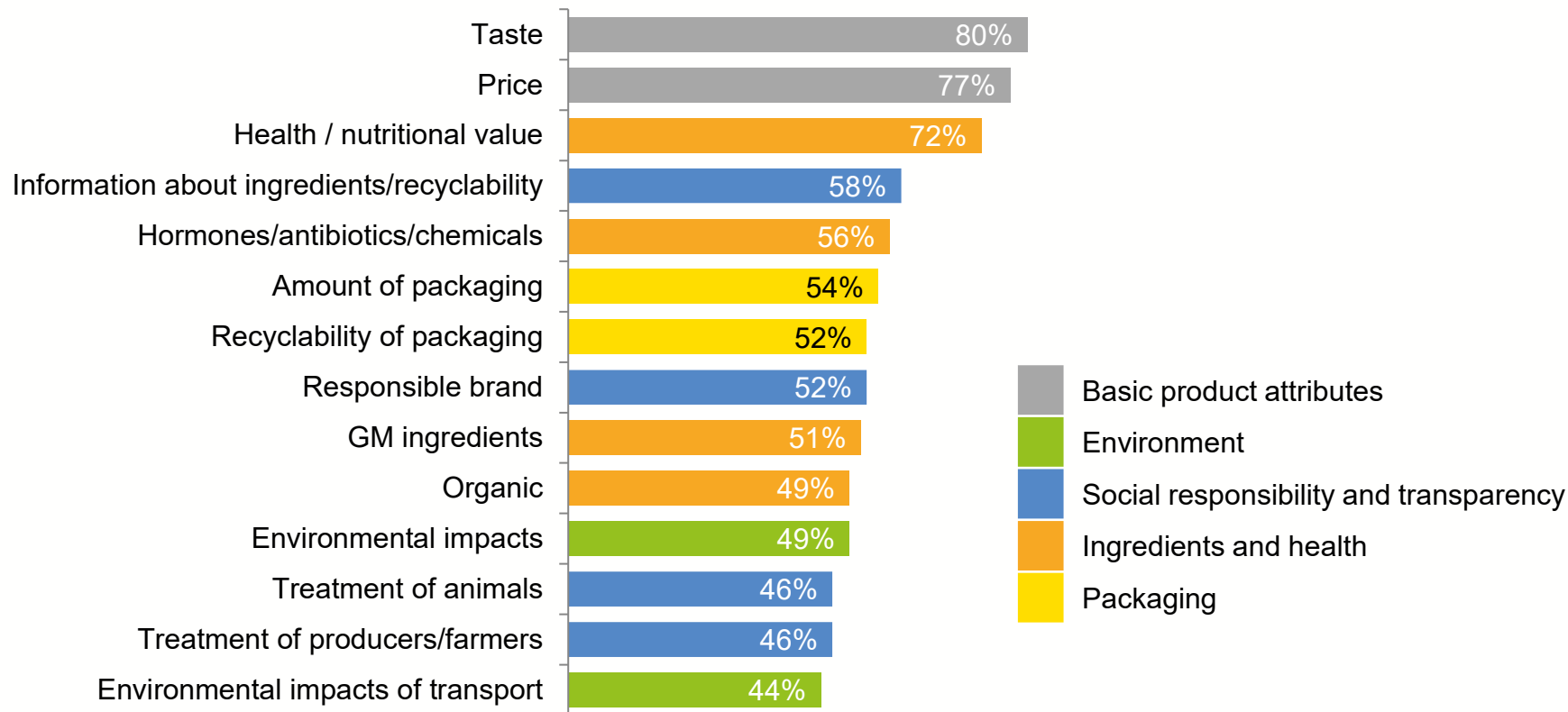
“Have rewarded companies seen as socially responsible” vs “considered this, but did not actually do,”
Average of 16 countries,* 1999–2020



*Includes Argentina, Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Nigeria, Russia, Spain, Turkey, UK, and USA.
Not all countries were asked in all years. Before 2019 this question was asked using an in-person and telephone methodology.

Taste, price and health continue to be determinants for food/drinks purchase choices; environmental impacts are less likely to be top priorities.

Food and drink purchase considerations, “always” and “often,” Asia-Pacific



Base: Asia-Pacific, n=7,299:

Q17. Thinking of the foods and drinks that you choose and how they are produced, distributed and sold, please indicate how often you consider each of the following in your choices.



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The impact of Covid-19 on the conscious food consumer

Q & A

Thank you

For future MSC events, please register at:
msc.org/en-us/about-the-msc/contact-us

