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

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Program Director Oceania at MSC

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Director at GlobeScan
Timeline of 2020

MSC GlobeScan Consumer Insights

healthy & sustainable living
A Global Consumer Insights Project

February March April May June July August September October November

Coronavirus Disease 2019 Outbreak
COVID-19

Then...

...Future
1. Consumer Trends Before COVID-19
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.

<table>
<thead>
<tr>
<th>Type of consumer</th>
<th>Sample</th>
</tr>
</thead>
<tbody>
<tr>
<td>General public</td>
<td>$n=5,716$</td>
</tr>
<tr>
<td>Seafood consumers</td>
<td>$n=4,578$</td>
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</tbody>
</table>
Climate change is the most concerning environmental issue globally.

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

- Climate change: 53%
- Pollution/waste damaging rivers and streams: 41%
- Air pollution: 37%
- Extreme weather events: 37%
- Loss/destruction of rainforests: 34%
- Health of oceans / decline in fish populations: 34%
- Loss of animal species: 32%
- Loss of wilderness / urban sprawl: 18%
- None of these: 4%

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

<table>
<thead>
<tr>
<th>Environmental Issue</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Climate change</td>
<td>54%</td>
</tr>
<tr>
<td>Extreme weather events</td>
<td>46%</td>
</tr>
<tr>
<td>Air pollution</td>
<td>42%</td>
</tr>
<tr>
<td>Pollution/waste damaging rivers and streams</td>
<td>39%</td>
</tr>
<tr>
<td>Health of oceans / decline in fish populations</td>
<td>31%</td>
</tr>
<tr>
<td>Loss/destruction of rainforests</td>
<td>27%</td>
</tr>
<tr>
<td>Loss of animal species</td>
<td>26%</td>
</tr>
<tr>
<td>Loss of wilderness / urban sprawl</td>
<td>19%</td>
</tr>
<tr>
<td>None of these</td>
<td>5%</td>
</tr>
</tbody>
</table>

Ranks 5th in Asia-Pacific compared to 6th globally

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

- Pollution of the oceans (e.g., plastics): 62% in 2020, 58% in 2018
- Overfishing / depletion of fish species: 47% in 2020, 46% in 2018
- Effects of climate change on the oceans: 40% in 2020, 31% in 2018

Significant increase since 2018: Pollution of the oceans

Significant decrease since 2018: Effects of climate change on the oceans

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

- **30%** Agree (strongly agree + agree)
- **22%** Disagree (strongly disagree + disagree)
- **48%** Don't know

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

22% 18% 21% 33% 18% 26% 13% 23% 5% 8%
Reduced the amount of fish/seafood I eat
Switched to a brand/product that says it helps protect oceans/fish
Changed the species/type of fish I buy
Used a guide/website/app to help choose which fish to buy
Stopped eating fish or seafood completely

Q11.4a: Which, if any, of the following actions have you taken in the last year to help protect the fish and seafood in our oceans?
Q11.4b: And which other actions would you also be willing to take in the future to protect the fish and seafood in our oceans?
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

Aged 18–34

66% 32% 41%

Base: Seafood consumers, Asia-Pacific, n=4,578
Q5.1: How well does each of the following statements describe your opinions?
Q8.1: How well does each of the following statements describe your opinions about ecolabels?
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

- Safe to eat: 7.5
- Fresh: 6.9
- Good for my health / my family: 6.2
- Taste: 5.3
- Price: 4.0
- Sustainably sourced / enviro. friendly: 3.3 (Up from 8th to 6th)
- Knowing where the product comes from: 2.8
- A type of fish I always eat: 2.8
- Non GMO: 2.5
- Clearly marked country of origin: 2.5
- Easy to cook: 2.3
- Sourced locally: 1.9
- Dolphin/turtle friendly: 1.8
- Independently certified/verified: 1.7
- Preferred brand: 1.5
- Caught in the wild: 1.5
- Fairly traded: 1.4
- Organic: 1.4
- Fishing method: 0.7

▲ Ranked higher in 2020 compared to 2018
▼ Ranked lower in 2020 compared to 2018

Base: Seafood consumers, Asia-Pacific n=4,578
Q4.2: Thinking about your recent purchase of [fish type], which of the following five considerations was the most important and which was the least important?
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

76% of those aware of the MSC say they trust the label up from 69% 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?
Q8.2: 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?

- Yes - I eat more: 29%
- Yes - I eat less: 27%
- No - I eat a similar amount: 44%

Base: Seafood consumers, Asia-Pacific, n=4,578
Q4.6: 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

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eating fish is healthier</td>
<td>71%</td>
</tr>
<tr>
<td>I cook more meals at home</td>
<td>35%</td>
</tr>
<tr>
<td>Replacing red meat in my diet</td>
<td>31%</td>
</tr>
<tr>
<td>Fish is more affordable</td>
<td>19%</td>
</tr>
<tr>
<td>I eat at restaurants more often</td>
<td>11%</td>
</tr>
<tr>
<td>Reduce carbon footprint of my food</td>
<td>8%</td>
</tr>
<tr>
<td>Other</td>
<td>3%</td>
</tr>
</tbody>
</table>

### Reasons for decrease

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fish is more expensive</td>
<td>54%</td>
</tr>
<tr>
<td>Concern about declining fish populations</td>
<td>25%</td>
</tr>
<tr>
<td>Concern about effects of fishing on the ocean</td>
<td>24%</td>
</tr>
<tr>
<td>I cook fewer meals at home</td>
<td>21%</td>
</tr>
<tr>
<td>I eat at restaurants less often</td>
<td>13%</td>
</tr>
<tr>
<td>Watching &quot;The Blue Planet&quot;</td>
<td>7%</td>
</tr>
<tr>
<td>Other</td>
<td>7%</td>
</tr>
</tbody>
</table>

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]
On consumer trends...

Q & A
2. Results from Healthy and Sustainable Living 2020
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

The coronavirus/COVID-19 pandemic
- Greatly: 4%
- Moderately: 32%
- A little: 49%
- Not at all: 15%

The economic recession
- Greatly: 5%
- Moderately: 38%
- A little: 37%
- Not at all: 20%

Climate change or global warming
- Greatly: 6%
- Moderately: 41%
- A little: 29%
- Not at all: 24%

Base: Asia-Pacific, n=10,227
T2: How much are you personally affected by each of the following problems?
COVID-19 is the most serious issue for consumers in Asia-Pacific; climate change and plastic waste are the top environmental concerns.

<table>
<thead>
<tr>
<th>Global Problem</th>
<th>Very Serious (%)</th>
<th>Serious (%)</th>
<th>Not Very Serious (%)</th>
<th>Not at All Serious (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Coronavirus/COVID-19</td>
<td>70</td>
<td></td>
<td></td>
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<tr>
<td>Spread of human diseases</td>
<td>58</td>
<td></td>
<td></td>
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<tr>
<td>Climate change</td>
<td>55</td>
<td></td>
<td></td>
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<tr>
<td>Single-use plastic waste</td>
<td>48</td>
<td></td>
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<tr>
<td>Depletion of natural resources</td>
<td>47</td>
<td></td>
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<tr>
<td>Air pollution</td>
<td>47</td>
<td></td>
<td></td>
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<tr>
<td>State of the global economy</td>
<td>43</td>
<td></td>
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<tr>
<td>Unemployment</td>
<td>42</td>
<td></td>
<td></td>
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<tr>
<td>Extreme poverty</td>
<td>41</td>
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<tr>
<td>Online data security/privacy</td>
<td>40</td>
<td></td>
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<tr>
<td>Gap between rich and poor</td>
<td>40</td>
<td></td>
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<tr>
<td>Loss of biodiversity</td>
<td>39</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Shortages of fresh water</td>
<td>38</td>
<td></td>
<td></td>
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<tr>
<td>Social/political division</td>
<td>31</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Mental health problems</td>
<td>30</td>
<td></td>
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<tr>
<td>Unequal treatment of women</td>
<td>29</td>
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</table>

Base: Asia-Pacific, n=10,227; T1: For each of the following global problems, please indicate if you see it as a very serious, somewhat serious, not very serious, or not at all serious problem?
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

- 81% in 2019
- 74% in 2019
- 58% in 2019
- 46% in 2019
- 46%

Q11: Please indicate whether you strongly agree, somewhat agree, neither agree nor disagree, somewhat disagree, or strongly disagree with each of the following statements.
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.

T24: Over the past year, have you considered rewarding a socially responsible company by either buying their products or speaking positively about the company to others? Would you say you have…?
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

- **Taste**: 80%
- **Price**: 77%
- **Health / nutritional value**: 72%
- **Information about ingredients/recyclability**: 58%
- **Hormones/antibiotics/chemicals**: 56%
- **Amount of packaging**: 54%
- **Recyclability of packaging**: 52%
- **Responsible brand**: 52%
- **GM ingredients**: 51%
- **Organic**: 49%
- **Environmental impacts**: 49%
- **Treatment of animals**: 46%
- **Treatment of producers/farmers**: 46%
- **Environmental impacts of transport**: 44%

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.
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