



# Healthy and Sustainable Living

Consumer and Expert Perspectives from Asia

Webinar

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# Introduction



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Country Sustainability  
Manager  
**IKEA China**

# Methodology

## Participating Markets, 2019



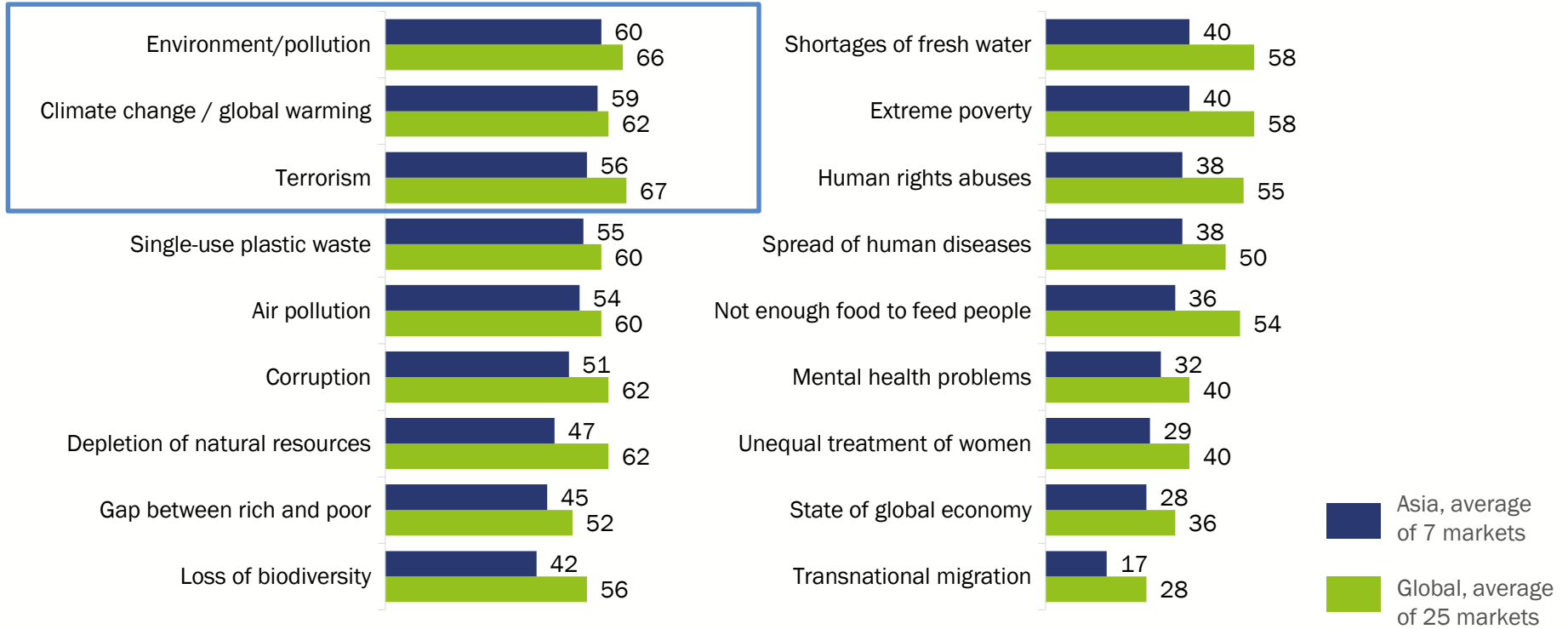
- Representative online samples of approximately 1,000 adults per market in each of 25 markets
- 7,000 people in Asia: Japan, China, Hong Kong, S Korea, India, Philippines and Indonesia
- Samples representative of online population, weighted to gen-pop census
- Online surveying between April and May 2019



# Why Now?

# Top concerns for Asian consumers

Seriousness of Global Problems, “Very Serious,” Asia\* vs Average of 25 Markets, 2019

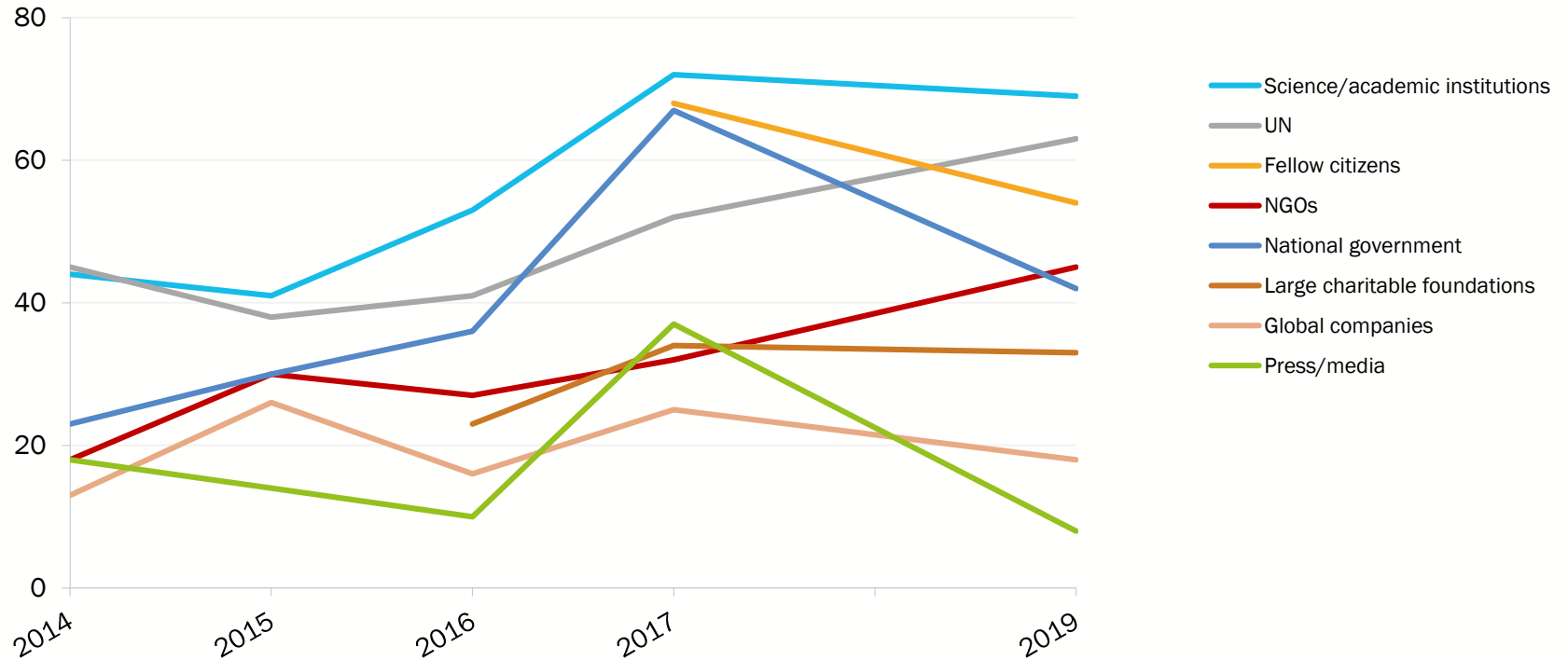


\*Includes China, Hong Kong, India, Indonesia, Japan, Philippines, and South Korea

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.

# Declining levels of trust across many institutions

Trust in Institutions, Net Trust\*, Asia\*\*, 2014-2019



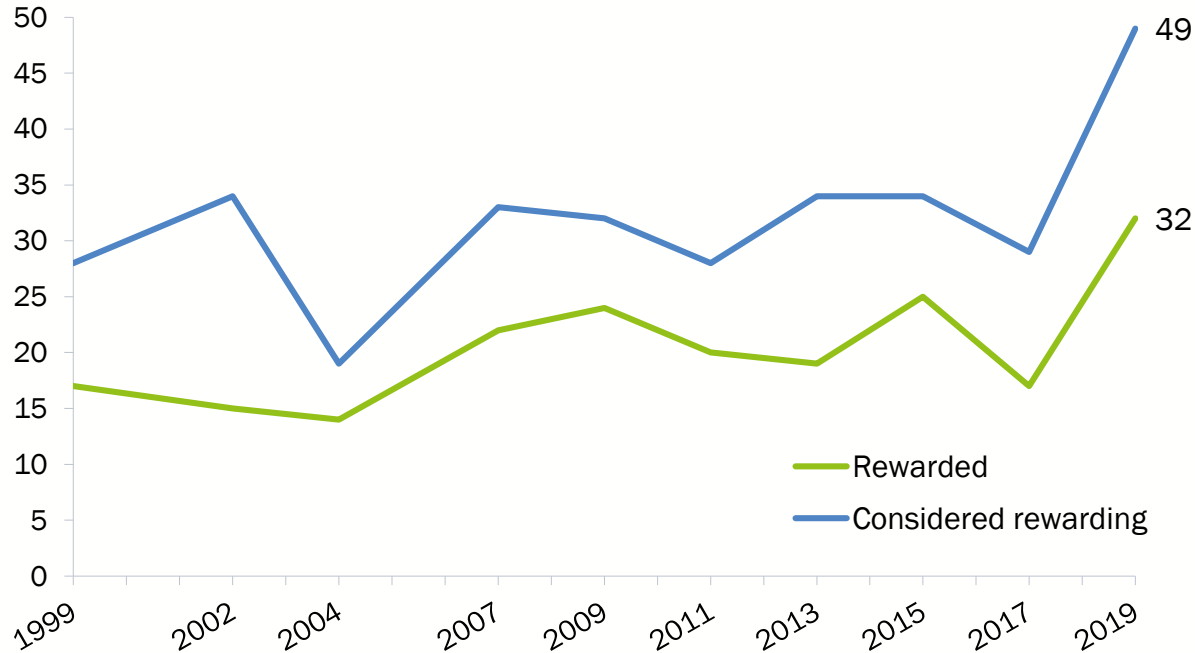
\*"A lot of trust" and "Some trust" minus "Not much trust" and "No trust at all"

\*\*Includes China, India, Indonesia, and South Korea.

Not all markets were asked in all years.

# Inclination to reward companies is increasing in Asia

Rewarding of Companies Seen as Socially Responsible, Asia\*, 1999–2019



\*Includes China, India, Indonesia, and South Korea. Not all markets were asked in all years. This question was previously asked using an in-person and telephone methodology.

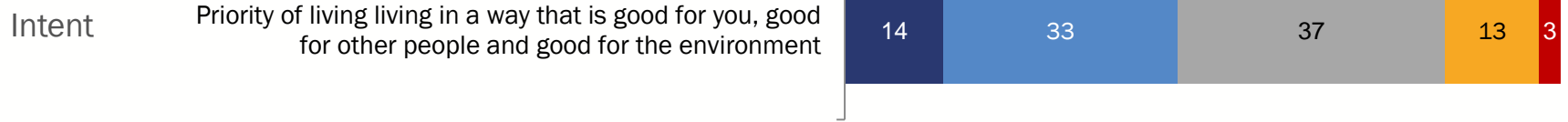
T7. Over the past year, have you considered rewarding a socially responsible company by either buying their products or speaking positively about the company to others? Would you say you have...?

# Prioritize Healthy and Sustainable Living

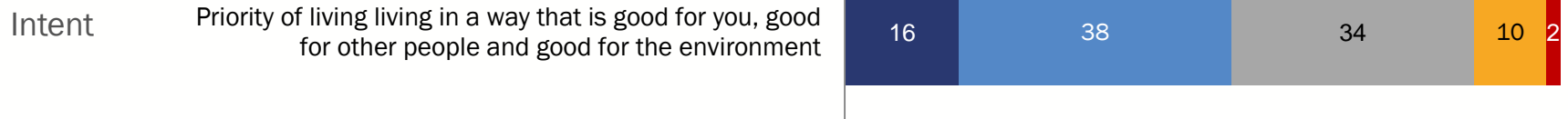
Asia\* vs Average of 25 Markets, 2019

**Asia**

■ A major priority    ■ A large priority    ■ A moderate priority    ■ A small priority    ■ Not a priority



## Average of 25 Markets



\*Includes China, Hong Kong, India, Indonesia, Japan, Philippines, and South Korea

Q12c. Compared with everything else that is happening in your life, how much of a priority is it for you to live in a way that is good for you, good for other people, and good for the environment?



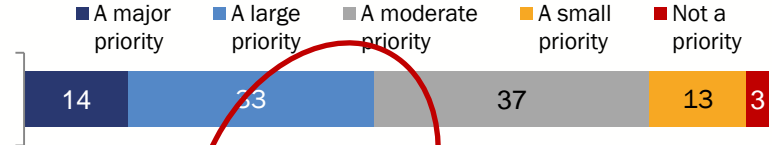
# Broad gap between intent and action in Asia and globally

Asia\* vs Average of 25 Markets, 2019

## Asia

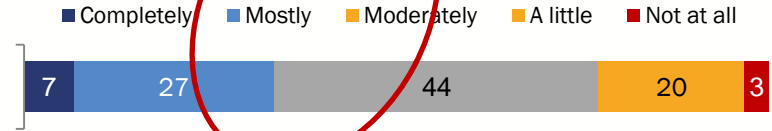
Intent

Priority of living living in a way that is good for you, good for other people and good for the environment



Action

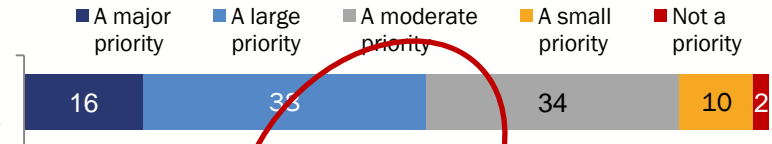
Living in a way that is good for you, good for other people, and good for the environment, all at the same time



## Average of 25 Markets

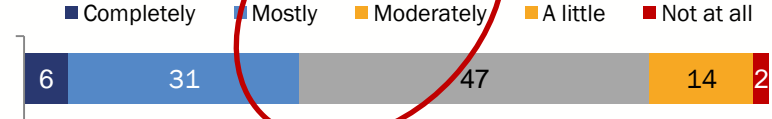
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Living in a way that is good for you, good for other people, and good for the environment, all at the same time



\*Includes China, Hong Kong, India, Indonesia, Japan, Philippines, and South Korea

Q12a. Thinking of your life overall (especially what you eat, what you buy, how you go from place to place and how you consume energy), to what extent do you think you are living in a way that is good for you, good for others, and good for the environment, all at the same time?; Q12c. Compared with everything else that is happening in your life, how much of a priority is it for you to live in a way that is good for you, good for other people, and good for the environment?

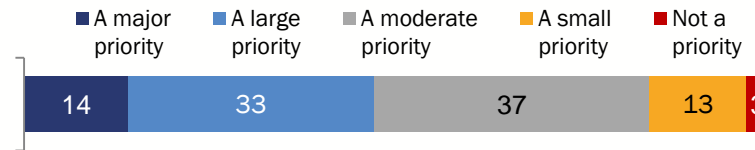
# Fewer than one in ten respondents in Asia are fully enabled

Asia\* vs Average of 25 Markets, 2019

## Asia

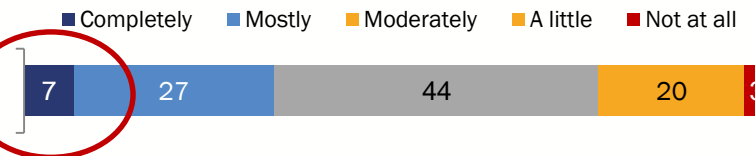
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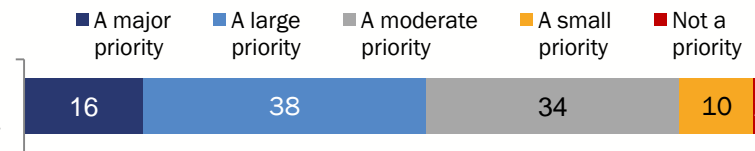
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## Average of 25 Markets

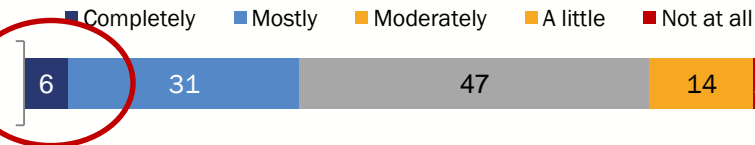
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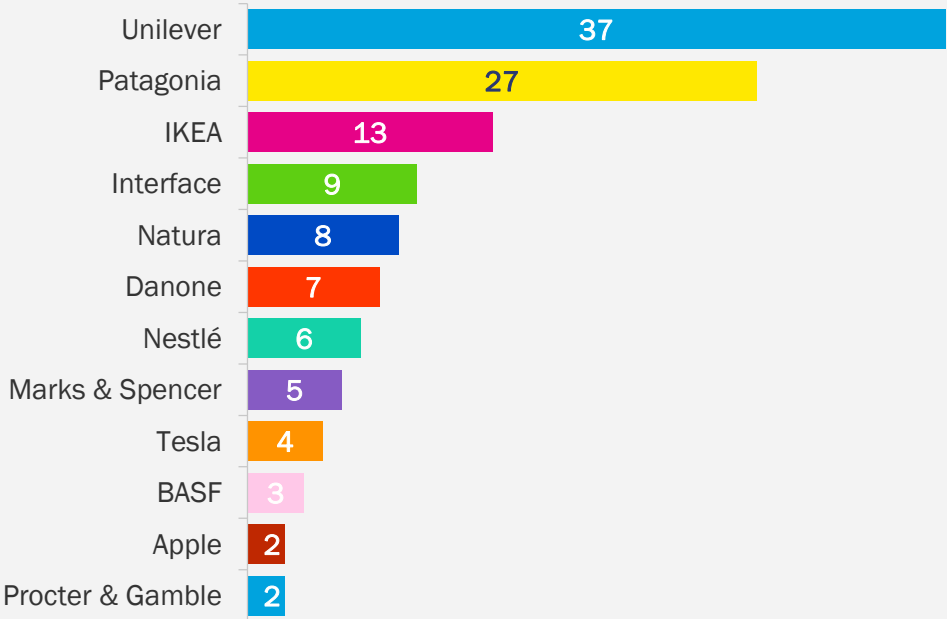


**How?**

# Experts: Corporate Sustainability Leaders 2019

## Unilever, Patagonia, and IKEA Are Most Recognized Global Leaders

% of Experts, Total Mentions, Unprompted, 2019

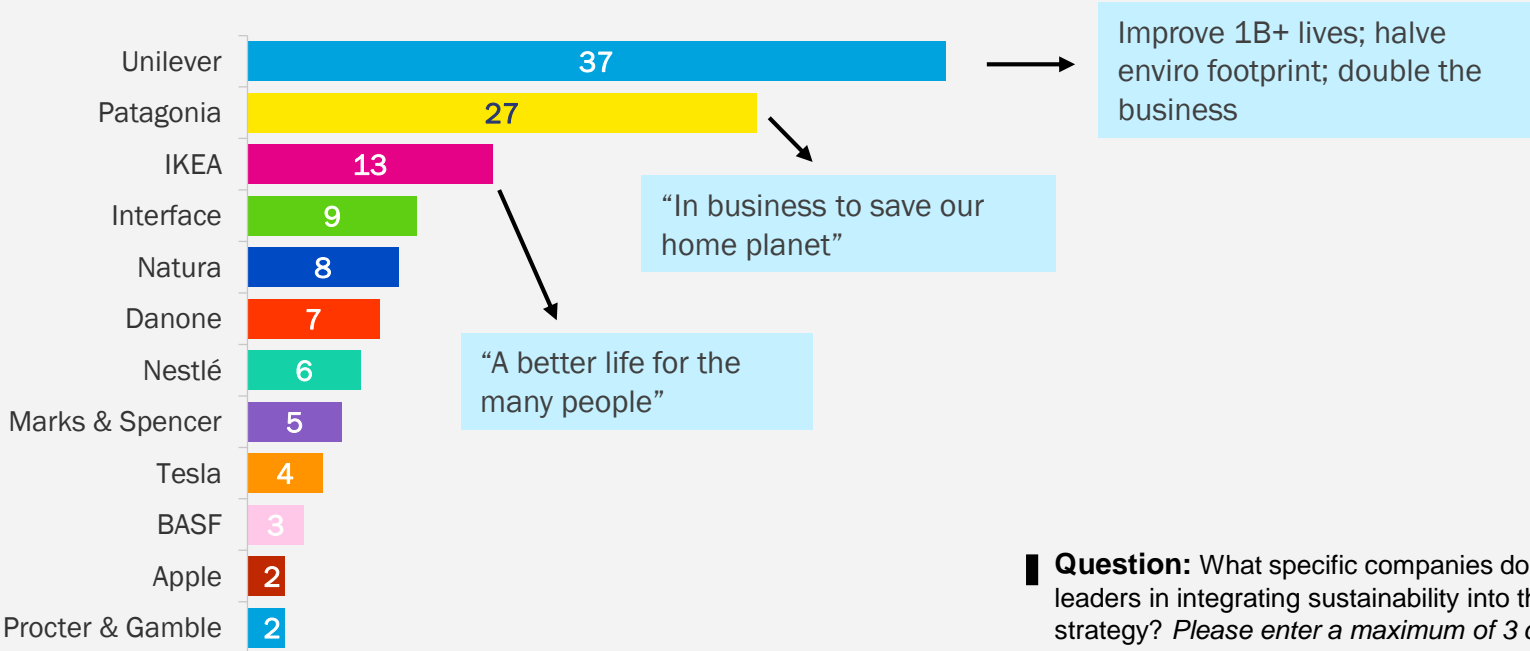


**Question:** What specific companies do you think are leaders in integrating sustainability into their business strategy? *Please enter a maximum of 3 companies in the spaces provided.*

# Experts: Corporate Sustainability Leaders 2019

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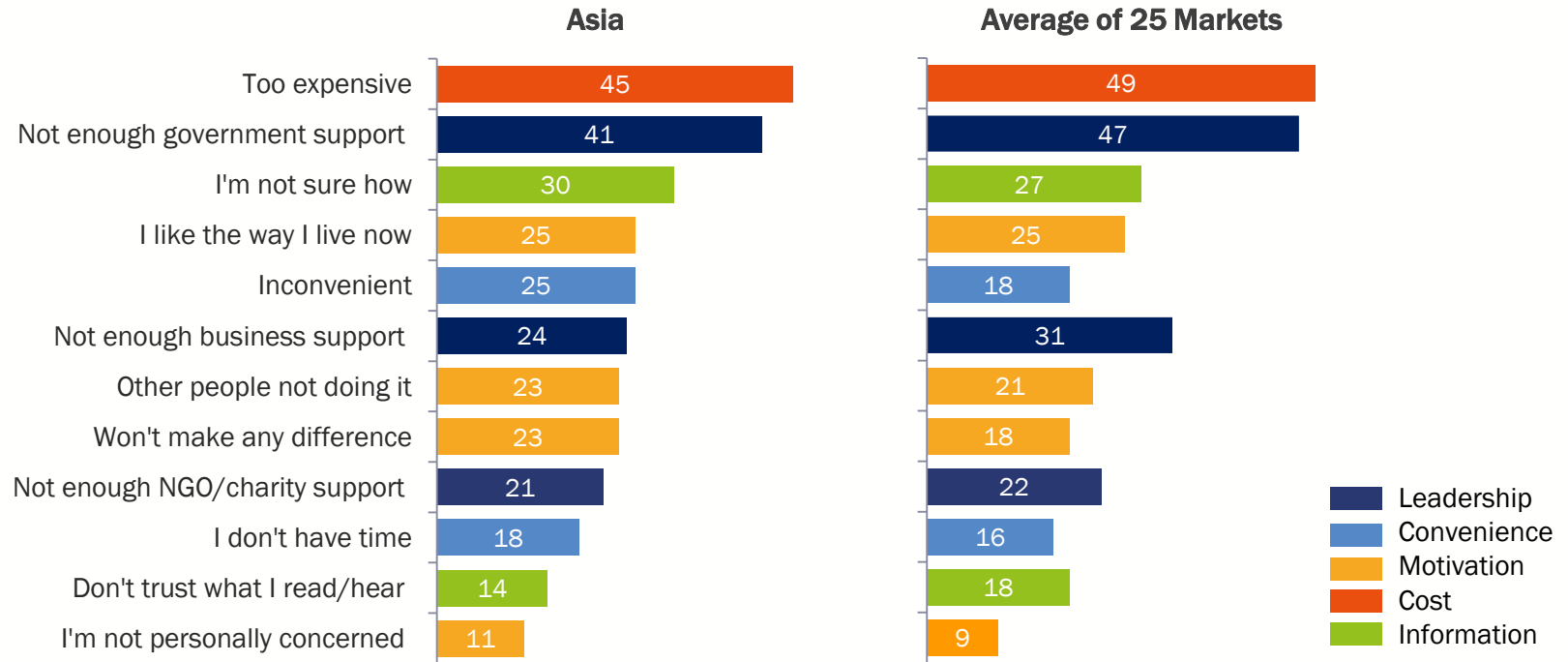
% of Experts, Total Mentions, Unprompted, 2019



**Question:** What specific companies do you think are leaders in integrating sustainability into their business strategy? *Please enter a maximum of 3 companies in the spaces provided.*

# Main barriers both in Asia and globally

Barriers to Improving Lifestyle to Be More Healthy and Sustainable, Total Mentions, Asia\* vs Average of 25 Markets, 2019

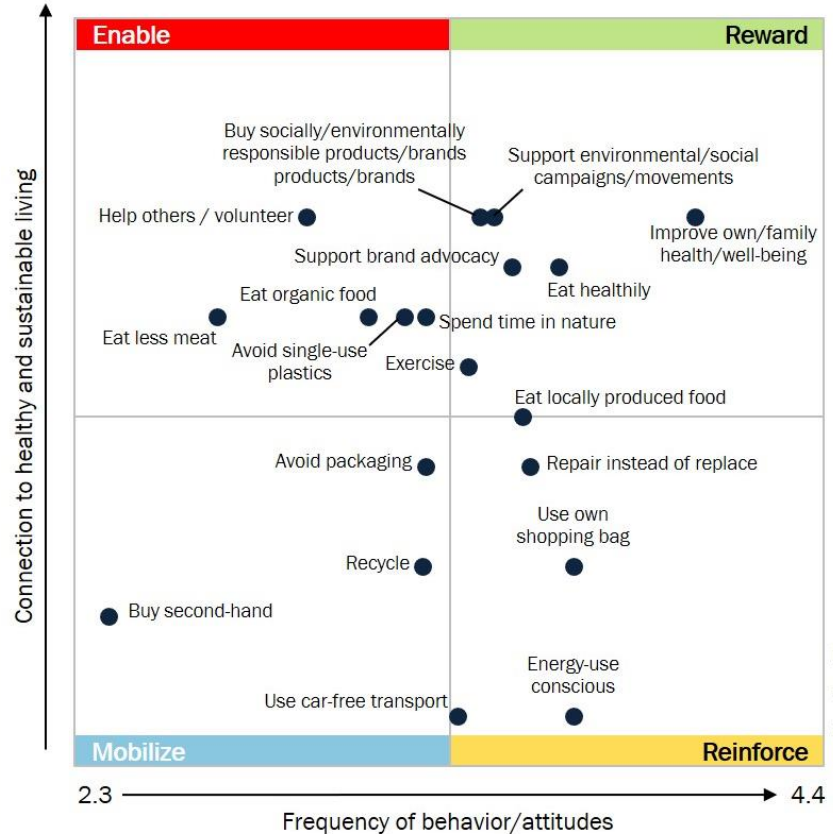


\*Includes China, Hong Kong, India, Indonesia, Japan, Philippines, and South Korea.

Q13. What is preventing you from living in a way that is good for you, good for other people, and good for the environment? Please select 3 things from the following list in order of importance, with 1 being the most important, 2 the second most important, and 3 the third most important.

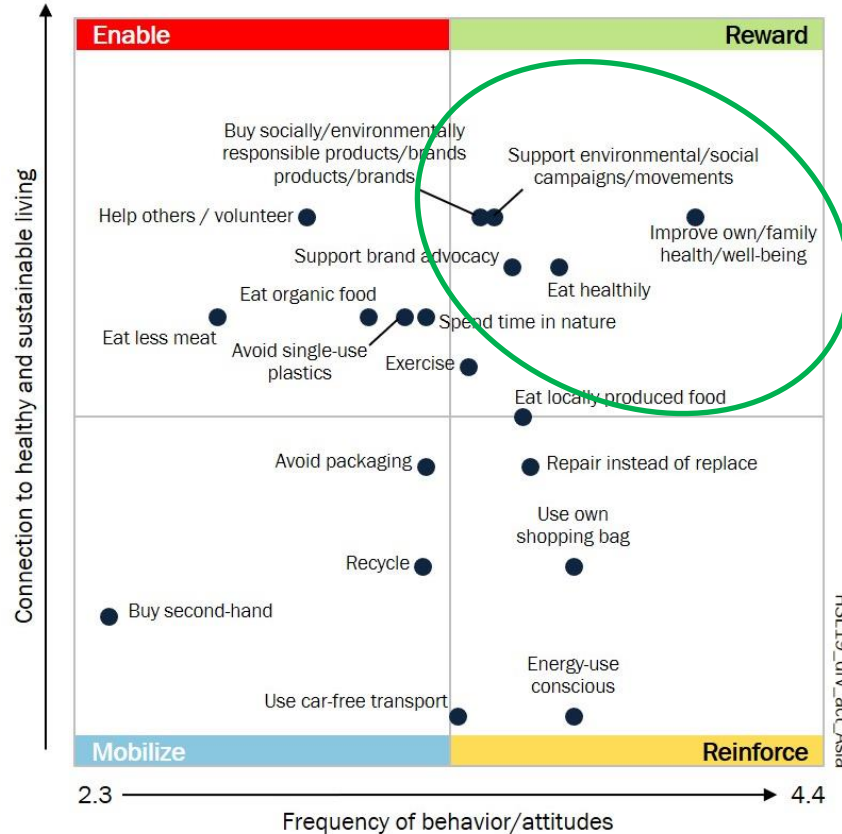
# Main Drivers - Analysis

Drivers of a Healthy and Sustainable Lifestyle, Individual Actions/Attitudes,



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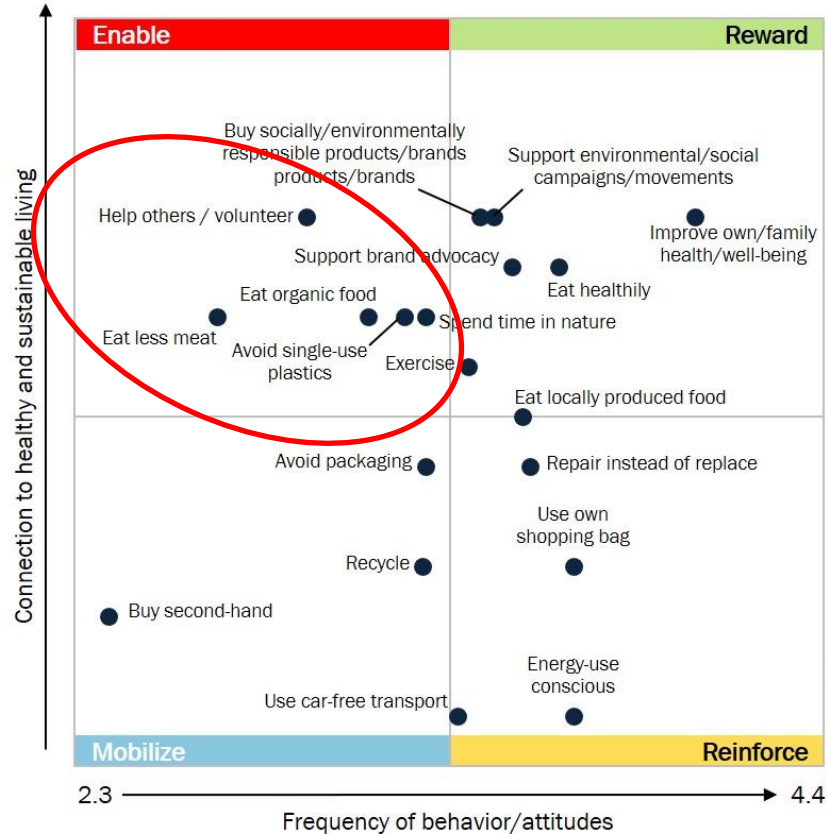
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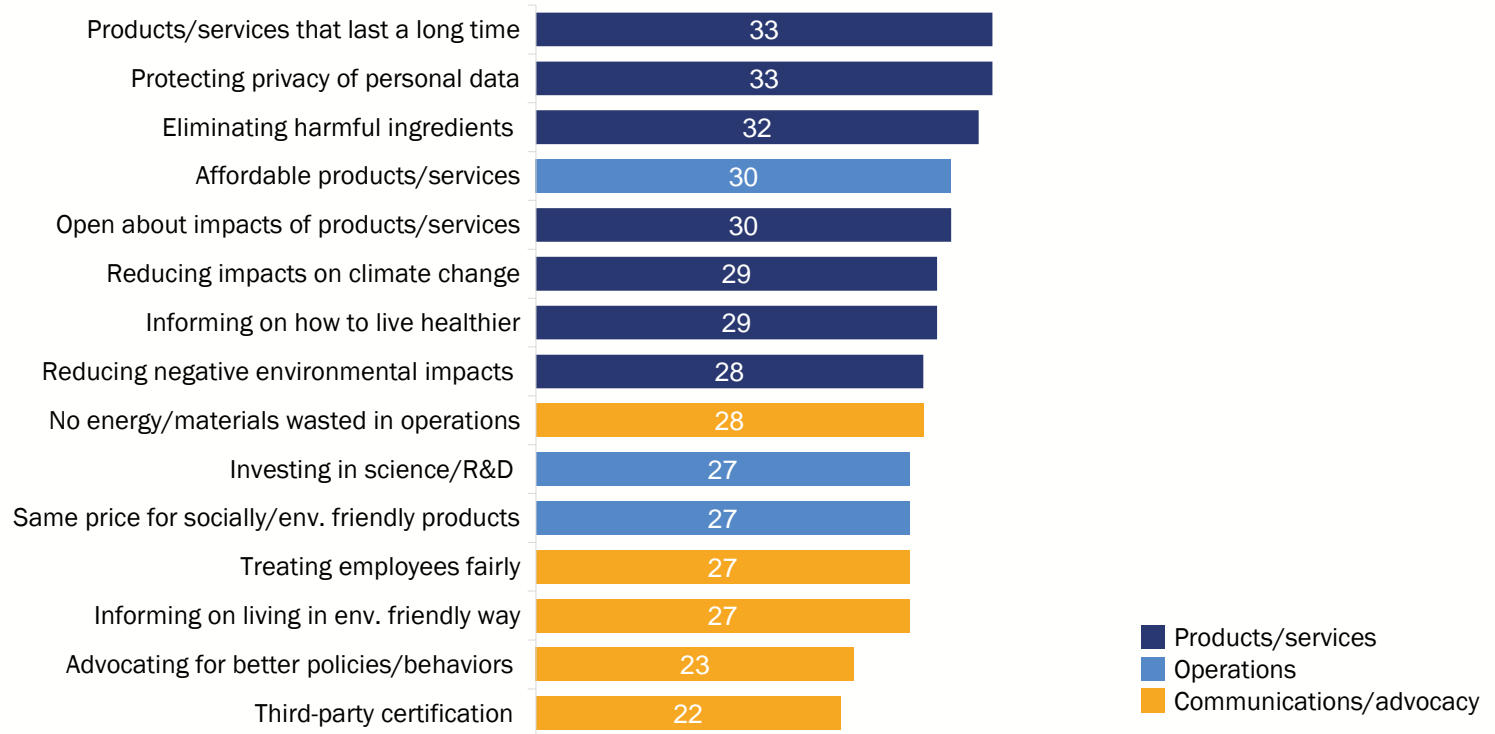
# Where to help Asian consumers

Drivers of a Healthy and Sustainable Lifestyle, Individual Actions/Attitudes,



# Actions and Enablers

Helpfulness of Actions to Enable Healthy and Sustainable Living, “Very Helpful,” All Sectors, Asia\*, 2019

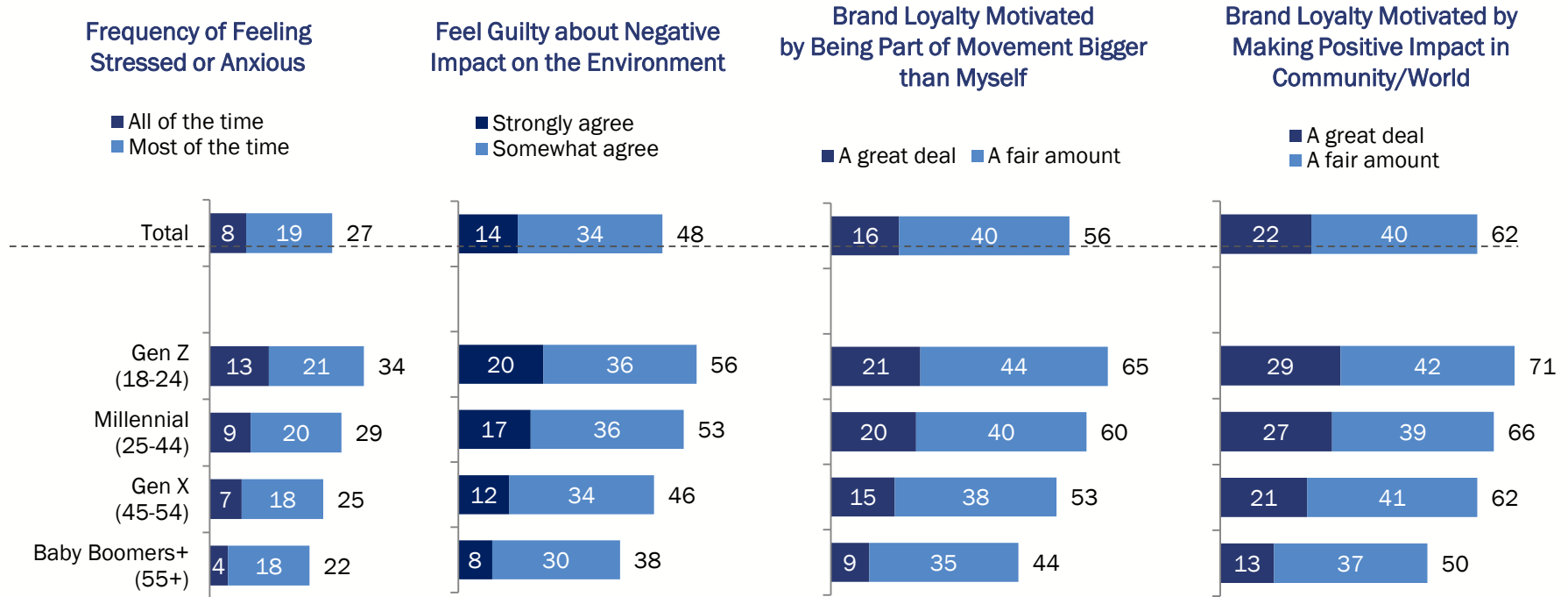


\*Includes China, Hong Kong, India, Indonesia, Japan, Philippines, and South Korea.

Q17. Now I would like to ask you how [INSERT SECTOR] can help you live in ways that are good for you, good for other people, and good for the environment. Please rate each of the following actions as very helpful, somewhat helpful, a little helpful, not very helpful, or not at all helpful...

# The Generation Gap

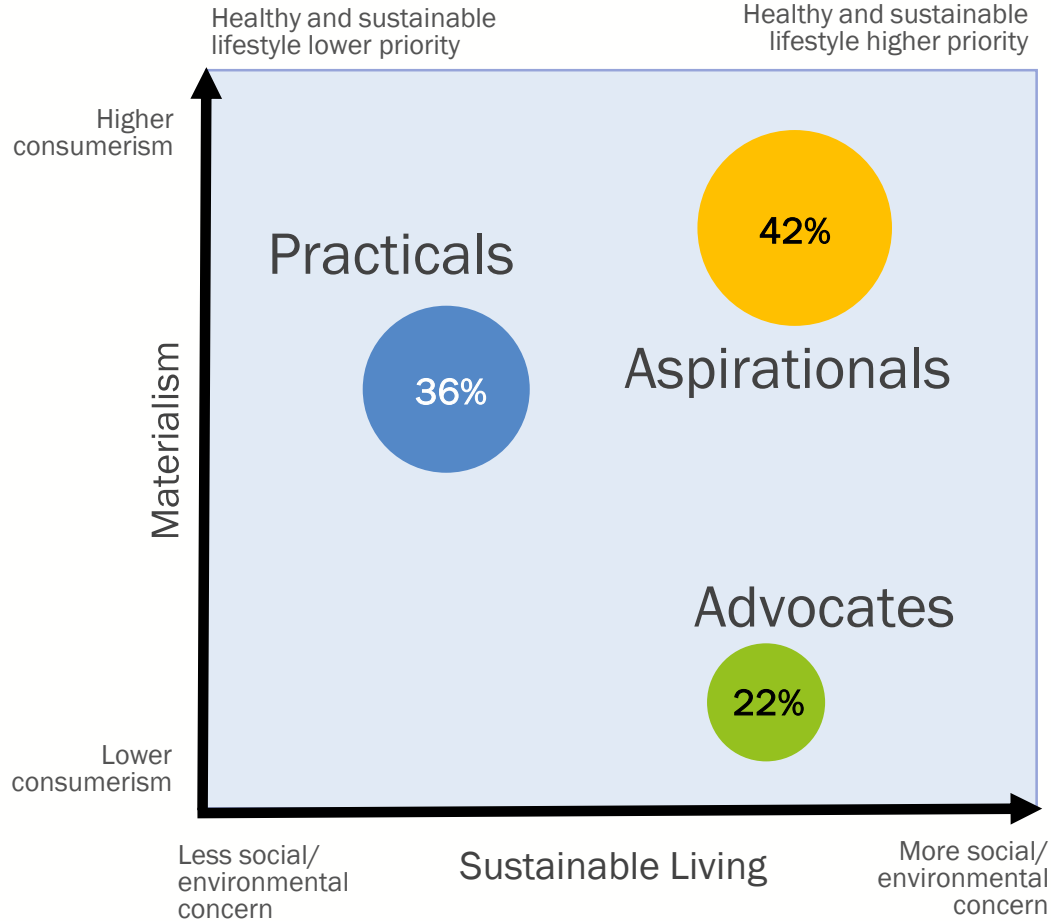
By Age, Asia,\* 2019



\*Includes China, Hong Kong, India, Indonesia, Japan, Philippines, and South Korea.

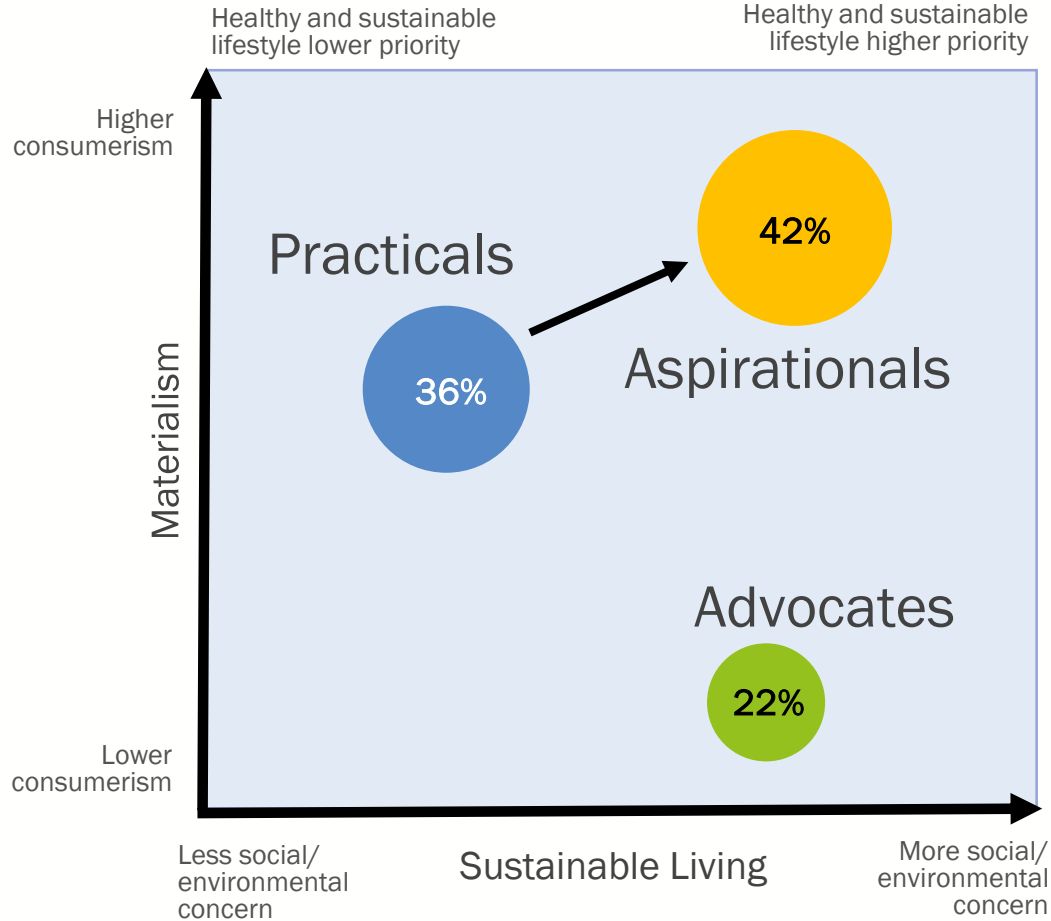
# Consumer Segmentation

Asia, 2019



# Consumer Segmentation

Asia, 2019



# Conclusions

- Increasing concerns on the environment in Asia
- Good level of Intent to live Healthy and Sustainable Lifestyle
- Much less action
- Several barriers
- Desire for a more Healthy and Sustainable Lifestyle – especially strong among younger generations
- What Now? And How?

# Discussion and Q&A



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# Thank You

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