



Unpacking the consumer seafood experience

a 2019 update

June 2019

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background

Seafood consumption is a key focus for the Australian seafood industry. Identifying and then responding to the perceived barriers to the purchase and consumption of fresh seafood among Australian consumers is a priority.

To enable this to happen, a better understanding of the customer seafood journey and their experiences in this seafood journey is vital.

In 2016, FRDC commissioned an initial baseline study to explore and measure consumer experiences with the purchase, preparation and eating of seafood. This research provide valuable insights into consumer attitudes, perceptions and behaviours.

As consumer attitudes towards food (all food including seafood) continues to evolve, a need to update this baseline information was identified.

With that in mind, FRDC commissioned a second research study of Australian adult consumers.

The 2019 research used the same information framework that was used in the 2016 research but looked to expand areas where clear changes in consumer behaviours had been identified. The 2019 research then collected information about what consumers do, what they like and don't like and what information would be useful to help them overcome the challenges they have in buying, cooking and eating seafood.

The results from the 2019 research follow. As part of the analysis of the 2019 data, results from overseas consumer research (particularly that conducted by FMI in the US) has been used to compare where this is possible.

This new dataset provides a refreshed understanding of the challenges facing the seafood industry as it looks to maintain and then grow consumption of seafood among Australian consumers.

about the research

As noted previously, the 2019 research provides an update on the FRDC research undertaken in 2016 – “Unpacking the consumer seafood experience”, November 2016.

This research involved an online survey of n = 2,002 adult Australian main grocery buyers. The research was undertaken over the period 18th April 2019 to 9th May 2019.

The coverage of the research included collecting information on consumers' buying, cooking and eating experiences with seafood, along with their perceptions of the sustainability of the fishing industry.

As there were a number of different pathways through the questionnaire, the length of the questionnaire ranged from 10 to 20 minutes.

Respondents for the survey were sourced from an accredited market research panel.

The sample was nationally represented and consistent with the state | age | gender population structure (as detailed by the ABS).

The key findings from the research now follow.



Context for the
Research

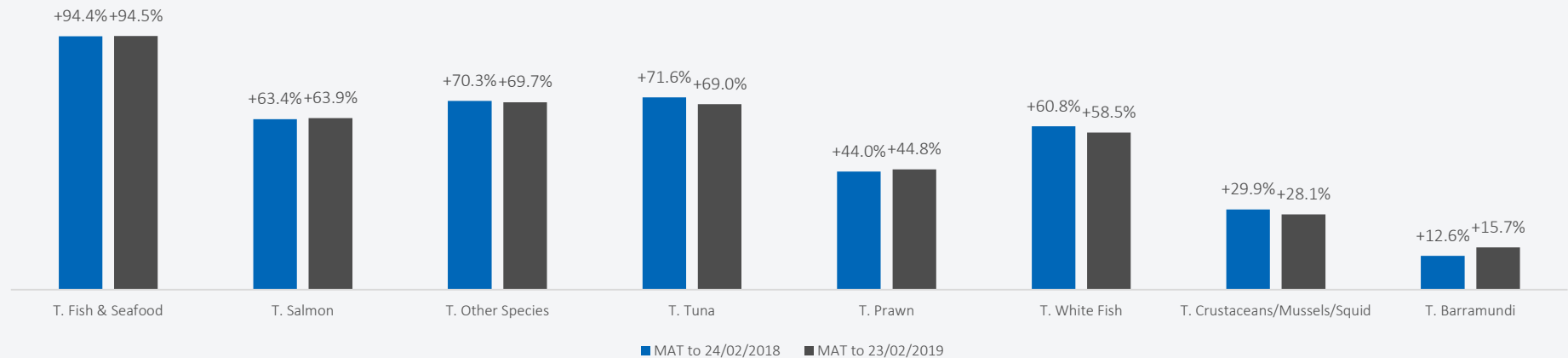
The Nielsen HomeScan™ data provides an overview of sales and volumes of retail products from Australian supermarkets.

This short summary provides a snapshot of the most recent sales data for the 12 month period ending February 2019.

While the results are contained to just supermarket purchases, the results suggest:

- The changes in purchasing patterns change slowly with year on year data largely consistent.
- The overwhelming majority of purchasing householders buy seafood in some form. This result is consistent with the data reported in this research.
- Consumption of specific species varies considerably from salmon down to barramundi. Some species are clearly more popular among purchasing households.

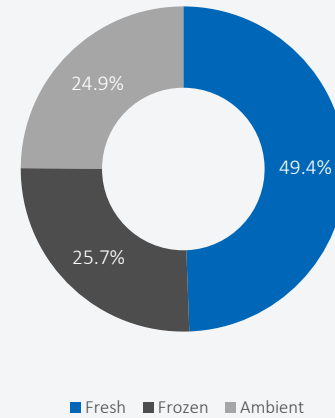
% of Buying Households



Analysis of the Nielsen HomeScan™ data shows changes in the consumption of frozen seafood products with:

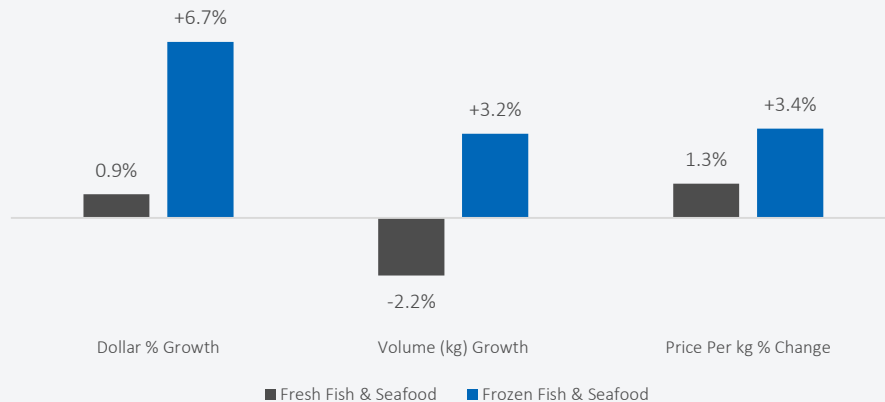
- Frozen product appears to be contributing to driving growth for Total seafood category.
- That said, the fresh category continues to dominate supermarket sales of seafood.
- The data shows some decline in fresh prawns sales with the loss largely attributable to fewer purchasing households.
- By contrast, frozen prawns has seen some increased with this attributable to an increase in households purchasing driving higher sales and volume growth

Fish & Seafood | Value Share | MAT to 23/02/2019

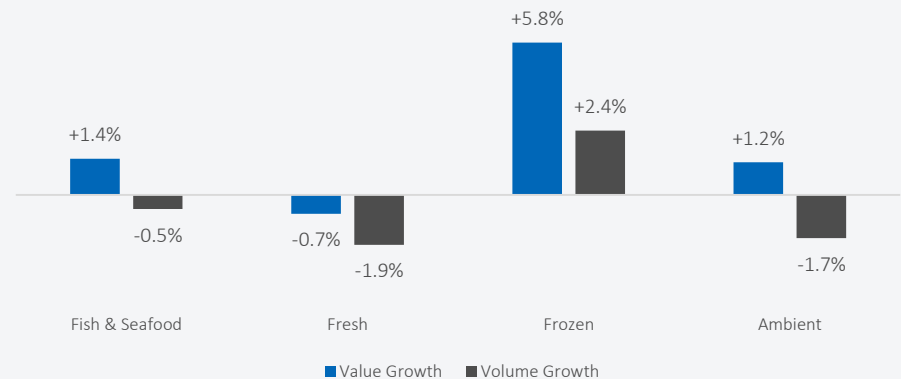


Fresh vs Frozen Fish & Seafood

Dollar Sales, Volume (kg) & Average Price Per kg % Change



Fish | Value & Vol % Growth | MAT to 23/02/2019





Management Summary

This research provides a follow up to a similar program of consumer research undertaken by FRDC in 2016. This report provides an overview of the results from the 2019 research and where appropriate draws comparisons with the 2016 results as well as comparison to results from other international studies.

Australian consumers do buy and eat seafood, and the research has demonstrated:

- Almost all households reported that they had consumed seafood in the last 12 months. This of course doesn't reflect a frequency of consumption nor a volume of consumption but provides an overall incidence of consumption.

The 2019 research has indicated a small uplift in the proportion of people consuming fresh, frozen and tinned seafood (78%, up 1%). The research has also indicated that just 5% of people reported consuming no seafood (fresh, frozen or tinned) at all. The challenge then is to get consumers to buy and eat more seafood, more often.

- The influence of others in the household should not be underestimated in the purchasing decisions. (for example the influence of others is significantly higher among households with kids, influence rating of 6.3, compared to households without kids, rating of 4.9)
- Like the 2016 research, fresh seafood consumers fall into one of three consumption segments (92% reported that they consume fresh seafood), namely:
 - frequent eaters (once a week or more) represent 33% of consumers;
 - regular eaters (once a fortnight to once a month) represent 32% of consumers; while
 - infrequent eaters (no more than once every two months) represent the other 26% of consumers.

The attitudes and behaviours of consumers vary between these consumption segments. The report then focuses on a comparison across these segments for the various measures included in the research.

- Australian consumers report they started eating seafood at a young age (average 8 years of age). This is contrast to the US result which reports that 44% started later in life (teenager or adult)

This early start to consumption points to an opportunity, and arguably a need, for industry to be shaping attitudes and behaviours in the early days of seafood consumption.

what we learnt from the research. . . .

- Supermarkets remain the majority channel for the purchase of seafood.

Changing attitudes and behaviours of consumers in this channel will be necessary to see any shifts in the total market.

- About one in five consumers indicated that they were impulse buyers with price specials or being 'in the mood' the primary triggers for these consumers. Less regular and indeed younger consumers are not surprisingly more likely to be impulse buyers of seafood.

There will likely be growth opportunities for the industry if these consumers can be encouraged to shift their purchases to planned and regular purchases.

- Consumers typically buy and consume a narrow range of seafood.

They look to be reluctant triallers of new or different seafood species, making an extension of the market to a wider range of seafood choices a significant challenge.

- The major obstacles to trialling different species appears to centre around consumer perceptions of the 'taste' of other species and the price considerations.

The industry will need to find a pathway to reset consumer perceptions around the taste (of seafood and of specific species) to entice more consumers to trial different species and alternatives.

- There has been a small but measurable shift in consumer perceptions of the price comparison of seafood to other proteins.

This may be one of the useful tools in helping migrate more consumers towards seafood as a regular and planned purchases (away from an impulse purchase).

- Despite seafood being purchased by most consumers, their confidence in buying and preparing remains moderately weak with:

- 6.4 for preparing and cooking seafood (out of 10); and
- 7.1 confidence in buying seafood (out of 10).



Frequent Eaters

what we know. . . .

- ✓ they represent 33% of fresh seafood consumers
- ✓ it is estimated they account for 77% of all seafood meals eaten
- ✓ they predominantly buy in supermarkets
- ✓ 37% believe seafood offers better value for money than meat
- ✓ they are more likely than the other groups to be married, a baby boomer, a parent, a regular rec fisher and on a higher income
- ✓ 68% buy regularly for meals during the week
- ✓ 72% buy the same types of seafood all the time
- ✓ 63% buy seafood as a planned purchase

what they think. . . .

- ✓ their overall confidence in buying seafood was 7.8
- ✓ their overall confidence in preparing & cooking was 7.2

where to focus. . . .

- ✓ reaffirming their decision to consume seafood regularly
- ✓ leverage their current consumption of seafood to explore and trial other seafood species – this will need to address the perceived ‘taste’ barrier and use price incentives to encourage trial. A consideration of if and how to partner up species for this segment to explore



Regular Eaters

- ✓ they represent 32% of fresh seafood consumers
- ✓ it is estimated they account for 20% of all seafood meals eaten
- ✓ they predominantly buy in supermarkets
- ✓ 27% believe seafood offers better value for money than meat
- ✓ they are more likely than the other groups to be a Millennial and on a higher income
- ✓ 28% buy regularly for meals during the week
- ✓ 74% buy the same types of seafood all the time
- ✓ 22% buy seafood as an impulse purchase

- ✓ their overall confidence in buying seafood was 7.3
- ✓ their overall confidence in preparing & cooking was 6.5

- ✓ the aim is to increase the frequency of purchase for these consumers – this looks to be about encouraging seafood to be seen as a weekday meal option (more so than a weekend or special occasion)
- ✓ there is an appetite among these consumers to learn more about things like – how to determine the freshness of seafood and different ways to prepare and cook seafood



Infrequent Eaters

- ✓ they represent 26% of fresh seafood consumers
- ✓ it is estimated they account for just 3% of all seafood meals eaten
- ✓ they predominantly buy in supermarkets
- ✓ 17% believe seafood offers better value for money than meat
- ✓ they are more likely than the other groups to be a Millennial or Gen X, less likely to be employed FT and on a lower income
- ✓ 9% buy regularly for meals during the week
- ✓ 81% buy the same types of seafood all the time
- ✓ 25% buy seafood as an impulse purchase

- ✓ their overall confidence in buying seafood was 6.4
- ✓ their overall confidence in preparing & cooking was 5.6

- ✓ these consumers are largely special occasion seafood consumers; the challenge will be to migrate them to consuming seafood as a meal of a regular basis
- ✓ they continue to exhibit low levels of confidence in buying and cooking seafood; education remains a priority for these consumers
- ✓ a focus on resetting their price expectations (compared to other proteins) might be an important first step in building greater opportunity amongst these consumers

The detailed results from the research now follows.



Detailed Results
Consumption
Behaviours



Consumption Behaviours

what consumers are saying. . .

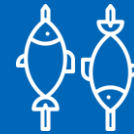
78% (up from 77% in 2016)

Have consumed fresh, frozen and tinned seafood in the past 12 months.



5% (no change from 2016)

Have not consumed fresh, frozen or tinned seafood in the past 12 months.



33% Frequent fresh seafood eaters (at least weekly)

32% Regular fresh seafood eaters (fortnightly/monthly)

26% Occasional fresh seafood eaters (less than monthly)



Taste (perceived or experienced) together with **price** look to be the main inhibitors for people trialling different types of seafood.

2019

63%

Everyone in my household eats seafood

2016

74%






18%

Most in my household eat seafood

13%

Over the past 12 months, how often would you say that you have eaten seafood for a main meal?

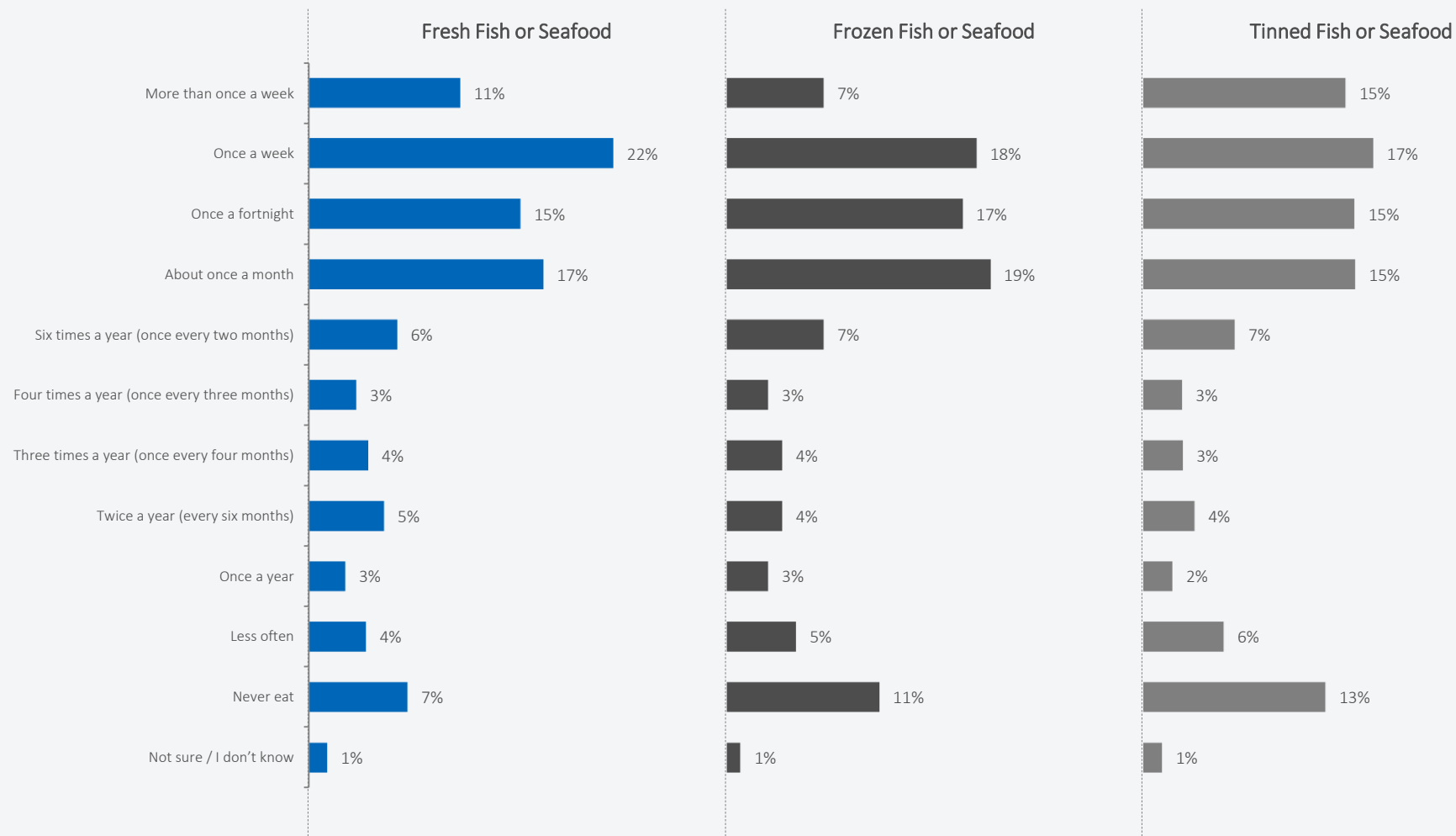
Base: all respondents, n = 2,002

	Fresh Fish or Seafood	Frozen Fish or Seafood	Tinned Fish or Seafood
% who eat seafood	92% 2016: 91%	87% 2016: 86%	86% 2016: 86%
 Frequent Eaters (once a week or more)	33% 2016: 31%	25% 2016: 25%	31% 2016: 30%
 Regular Eaters (once a fortnight to once a month)	32% 2016: 33%	36% 2016: 36%	31% 2016: 33%
 Infrequent Eaters (no more than once every two months)	26% 2016: 27%	27% 2016: 25%	24% 2016: 23%

For the remainder of the report, any mention or use of the **Frequent, Regular or Infrequent Eater categories** refers to the **Fresh Fish or Seafood** results.

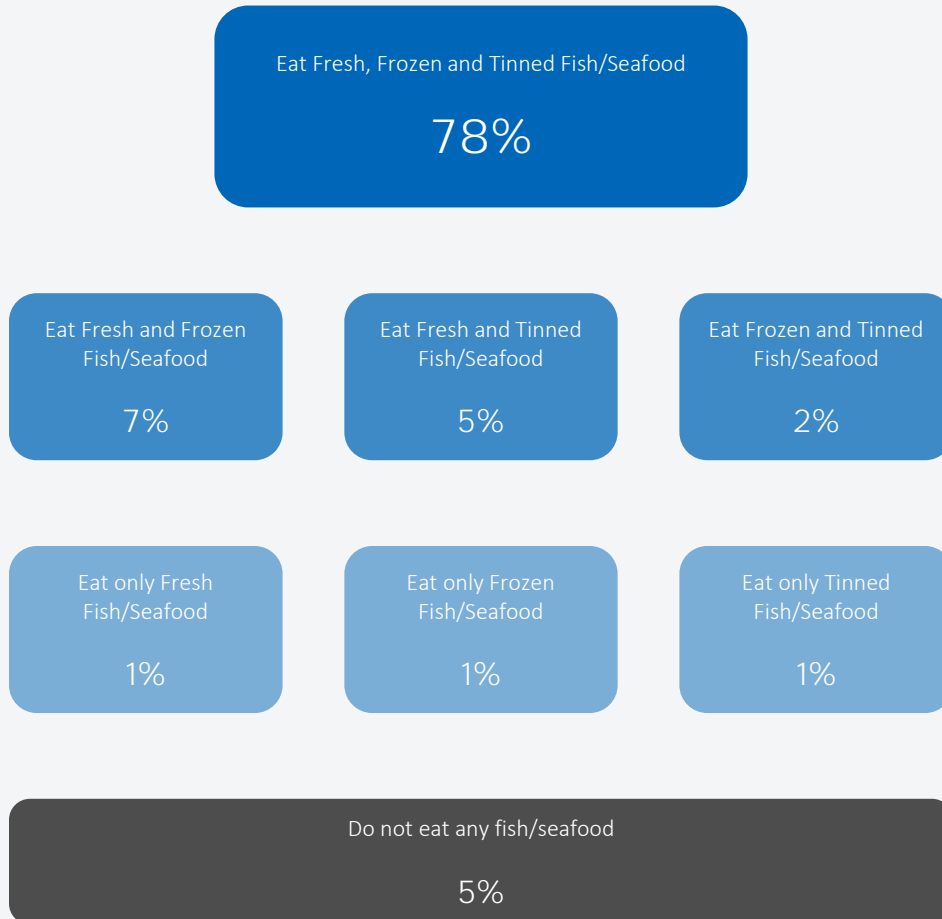
Over the past 12 months, how often would you say that you have eaten seafood for a main meal?

Base: all respondents, n = 2,002



Combinations of consumptions behaviours

Base: all respondents, n = 2,002



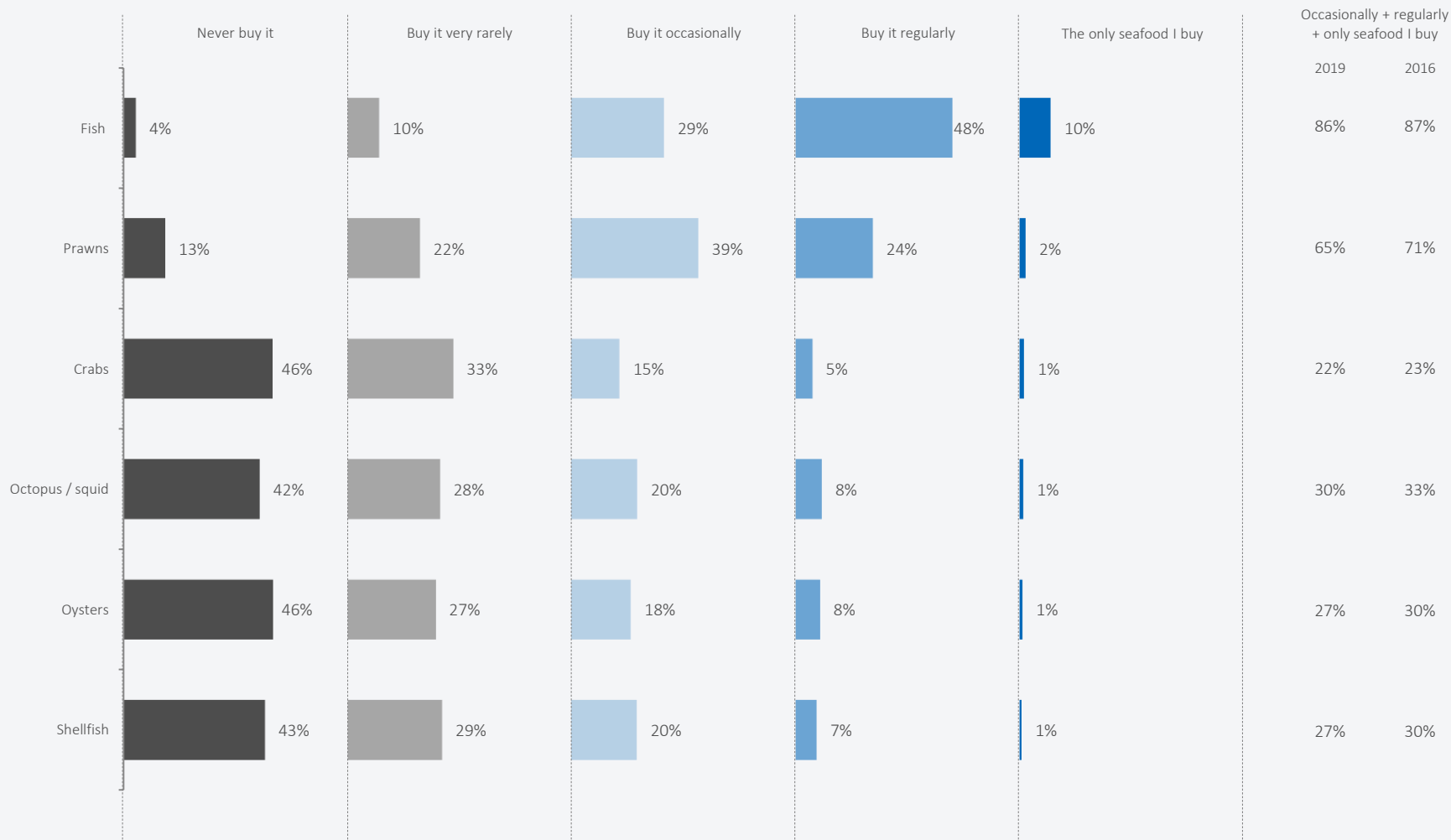
The **majority of Australian consumers** do consumer seafood in most forms – fresh, tinned and frozen. (but obviously in different volumes and with different frequencies).

The uplift in frozen seafood sales (as reported by Nielsen) has also been reflected in this research suggesting a small change in the consumption habits.

Just 5% of Australian consumers reported they did not eat any fish or seafood. This result has remained largely unchanged since the 2016 research.

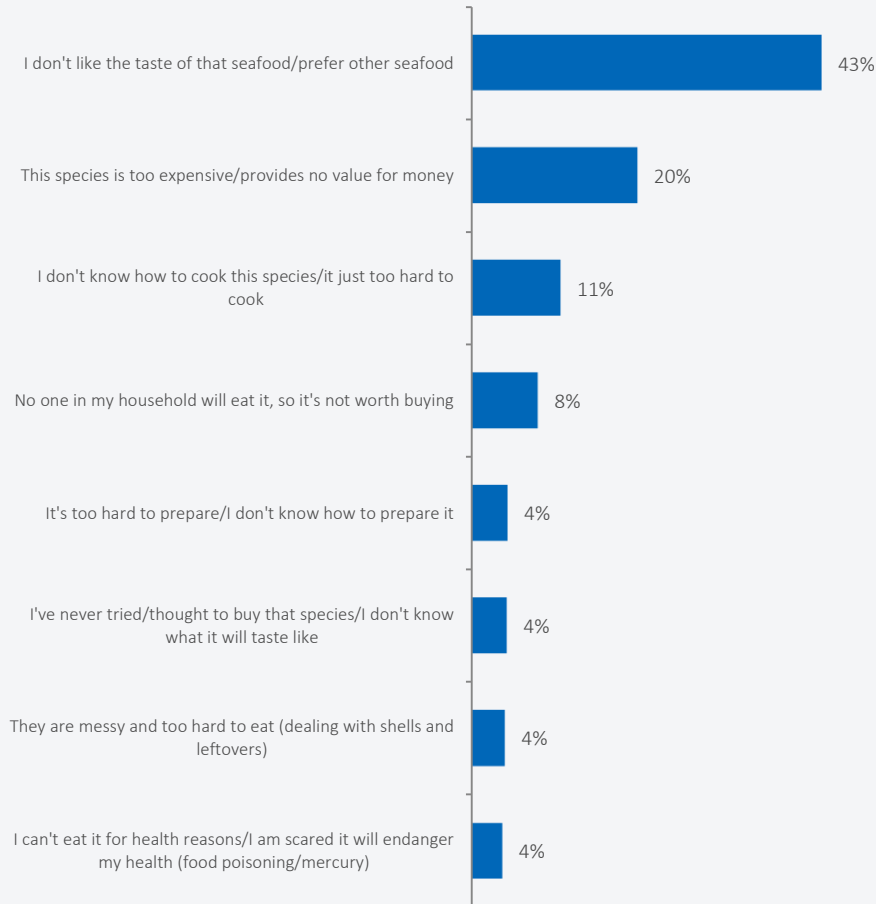
When you buy fresh seafood, what sorts of seafood do you usually buy?

Base: all respondents who eat seafood, n = 1,902



What is it about these species that stops you from buying?

Base: all respondents who eat seafood but don't buy a particular sort of seafood, n = 1,237



Results above exclude responses accounting for <4% of total responses.

Some of what they said...

"These fresh seafood items are on the expensive side and I personally do not eat oysters. We consider these foods as a delicacy because no one in our family would worry too much if we were not eating these expensive foods for dinner or lunch."

"Personally, our family enjoys these foods on occasion and may purchase these types of meals in a restaurant, however they can be quite expensive to buy in the supermarket and I often find it intimidating to cook with these products."

"No real reason, they just don't appeal to me. I'm never sure about the freshness of prawns, crab is 'fiddly' to eat, not really keen on octopus or oysters, and I'm probably too lazy to extract the 'meat' from shellfish!"

"I did not know how to prepare them. I eat them when cooked by friends. My location is not near the coast and the quality of fresh seafood available is significantly inferior than at the coast or in Sydney."

"Price and not being the best cook of octopus or squid. Crabs are hard work to eat and I'm not interested in shellfish apart from Oysters which a friend gives/sells to me from their relations in Ceduna."

"Don't like the taste of oysters. Shellfish don't seem to love me back. Ate too much squid in my 20's and now don't enjoy it. Crab is a lot of expense for very little meat."

"I don't eat Oysters - I don't like them. Crabs - I have only ever eaten fresh caught crabs. Shellfish - not a huge fan so if there is other seafood to choose from I will."

"Oysters is the taste, shellfish I need a recipe for and octopus and crabs are too expensive for our family budget. We only buy prawns occasionally as my son loves them."

"I don't like these foods. My family don't like them enough for me to go to the trouble of preparing them in a meal. They are also too expensive for my budget."

"Crab is too fiddly to eat properly and I only bother with octopus if I order it at a restaurant as I don't really know how to cook it properly at home."

"Excluding Calamari and Crabs which are very expensive and is the main reason I do not buy it. I do not like Octopus or most shellfish."

What is it about these species that stops you from buying?

Base: all respondents who eat seafood but don't buy a particular sort of seafood, n = 1,237

Taste (perceived or experienced) together with **price** look to be the main inhibitors for people trialling different types of seafood.

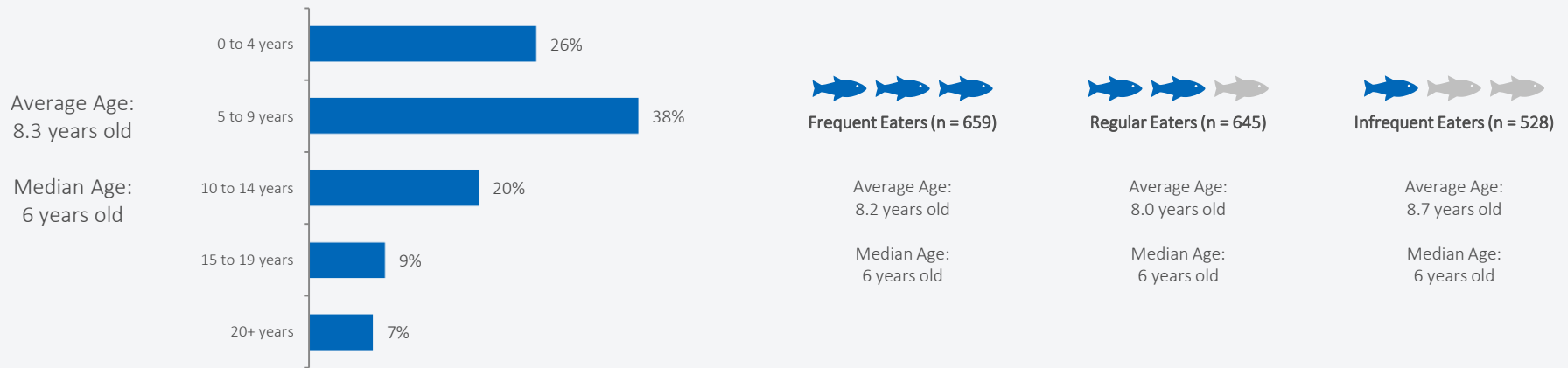
The research also shows consumers are largely conservative when trialling different types of seafood.

Never buy...	At least one of the species	Fish	Prawns	Crabs	Octopus / Squid	Oysters	Shellfish
<i>Base</i>	1237	73	244	870	795	873	826
I don't like the taste of that seafood/prefer other seafood	43%	34%	50%	40%	46%	49%	44%
This species is too expensive/provides no value for money	20%	21%	15%	25%	18%	19%	22%
I don't know how to cook this species/it just too hard to cook	11%	7%	5%	12%	13%	9%	10%
No one in my household will eat it, so it's not worth buying	8%	7%	6%	7%	8%	9%	8%
It's too hard to prepare/I don't know how to prepare it	4%	0%	4%	6%	4%	3%	4%
I've never tried/thought to buy that species/I don't know what it will taste like	4%	3%	4%	4%	5%	5%	5%
They are messy and too hard to eat (dealing with shells and leftovers)	4%	0%	1%	5%	2%	2%	2%
I can't eat it for health reasons/I am scared it will endanger my health (food poisoning/mercury)	4%	5%	9%	5%	4%	4%	4%

Results in the table above reflect those who said they never buy [SPECIES] as well as other species they may possibly buy (e.g. results in the "Fish" column are from those who said they never buy Fish, but may or may not also never buy another species).

You indicated that you were [AGE] years of age. At what age did you first start eating seafood?

Base: all respondents who eat seafood, n = 1,902



When seafood consumers* were asked when they started eating seafood, **18%** started later in life (teenager or adulthood).

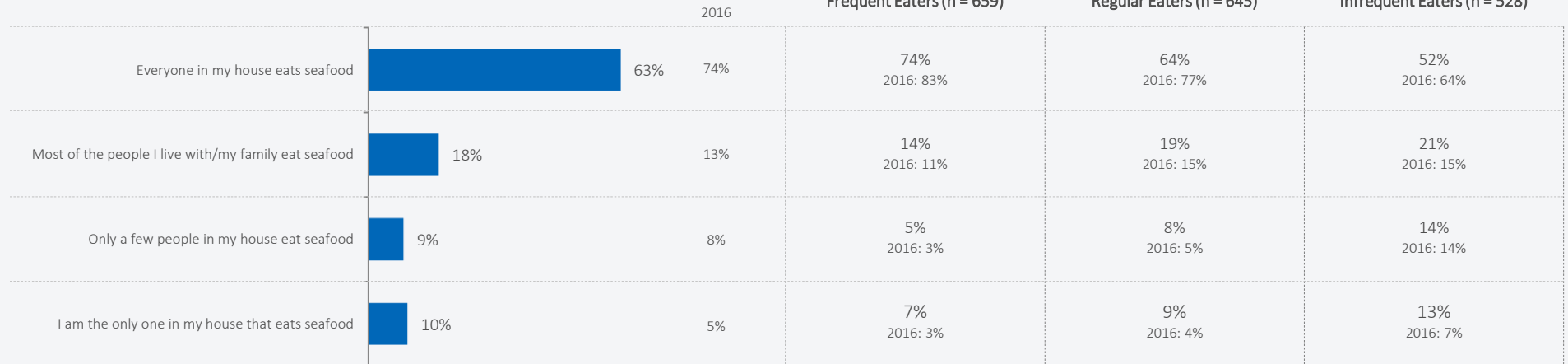
This compares to **44%** as per the FMI's Power of Seafood research†.

*Seafood consumers for the purposes of this result is defined as those who consume fresh, frozen or tinned fish/seafood at least once a month.

†Source: FMI's Power of Seafood 2019, Page 12. Please note that the FMI research is based on US respondents, and also defines the seafood consumer as those who consume at least once a month at home, a restaurant, or elsewhere. This comparison should be treated as indicative only.

In your household, including yourself, how many people would you say eat seafood?

Base: all respondents who eat seafood, n = 1,902



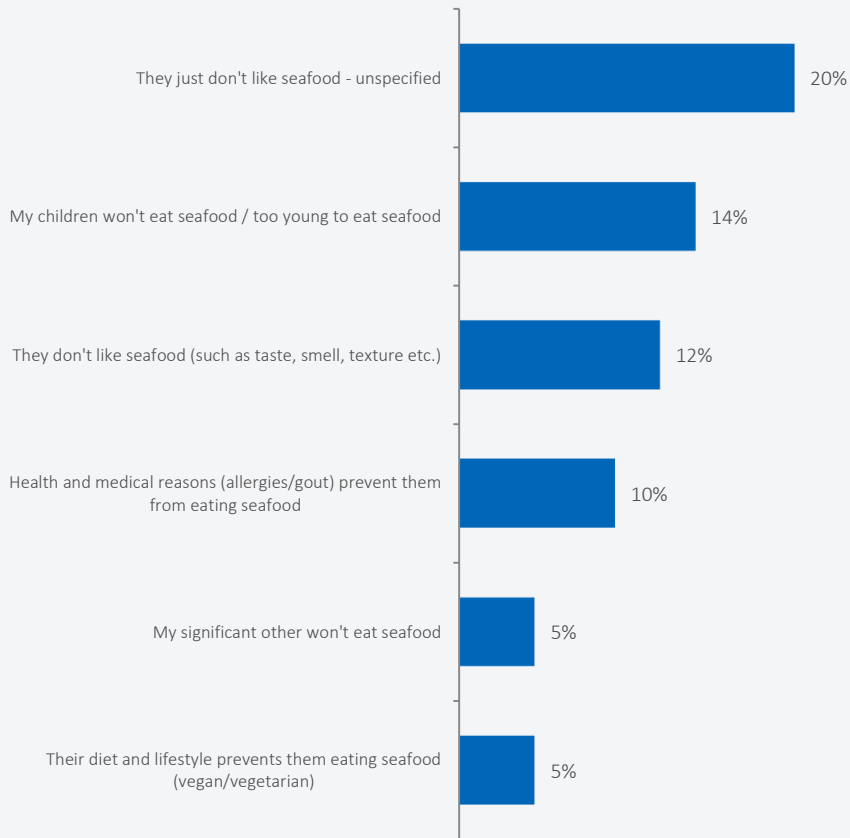
How much would you say the eating habits of others in your household influences your decision to buy seafood?

Base: all respondents who eat seafood, n = 1,902



You mentioned that not everyone in your household eats seafood. Could you please explain to us why this is the case?

Base: all respondents where not everyone in their household eats seafood, n = 696



Results above exclude responses accounting for <4% of total responses.

Some of what they said...

"I have one child that is going vegetarian and I support their choice on the matter. I myself am trying to go that direction, I feel fishing is being over used and we don't have enough supply or fish in the ocean now."

"My kids are not huge fans of seafood unless it comes in batter and chips. My wife and I prefer fresh seafood and seafood that I catch through recreational fishing. We also eat fresh farmed tiger prawns from QLD."

"I have a partner who likes to fish but can't stand to eat it. He says it's too salty and often still has bones. He eats canned tuna but nothing else. Bad experience of choking on fish bones when he was younger."

"This is because one of my children can't eat seafood, as they are allergic, and thus the rest of the family don't consume it so as not to taunt the other."

"For his 21st my husband went to a seafood restaurant here and got food poisoning which he's blamed on the seafood. So he doesn't eat seafood."

"My husband hates seafood of any kind and does not eat it. I only eat fish (usually white-fleshed) and I do not like shellfish of any kind."

"I have a very fussy teenager who wouldn't dare even try it, smells like cat food, all of it apparently. The rest of us like it."

"My husband does not like seafood which is why it is not cooked very often as it makes it difficult cooking separate meals."

"I eat seafood, my partner will only eat fish (no prawns, mussels, etc) and my 1 year old does not eat seafood."

"One of the people in my household doesn't like seafood, the other only likes certain types of seafood."

"Husband doesn't like seafood at all. My son is just learning to eat them. I enjoy seafood very much."

"I never know what to buy and it's got to have no bones and the smell of it sometimes is too much."

"Young daughter refuses to eat seafood and picks at food but does the same with other food groups."



Detailed Results
The Purchasing
Experience



The Purchasing Experience

what consumers are saying. . .



60% (up from 57% in 2016)

Said supermarkets as the location they purchase seafood from most often.



76%

Usually buy the same types of seafood every trip, or buy a few different types of seafood and don't tend to try anything new or different. The results reflect that consumers are very conservative and narrow in their choice of seafood options.



2019

27%

Get better value for money buying seafood compared to buying meat

2016

24%



1 in 5

Were typically impulse purchasers -----> **56%**

Of these impulse purchasers are influenced if the seafood is a good price.



7.1 (out of 10) - Overall confidence in buying seafood

- 7.4 – Buying fresh seafood from main shopping location
- 7.3 – Nutritional benefits of seafood
- 6.9 – How to know the freshness/quality of seafood

If you went looking for information about how and where to buy seafood, which of the following have you or would you use?

Base: all respondents who eat seafood, n = 1,902



Frequent Eaters (n = 659)



Regular Eaters (n = 645)



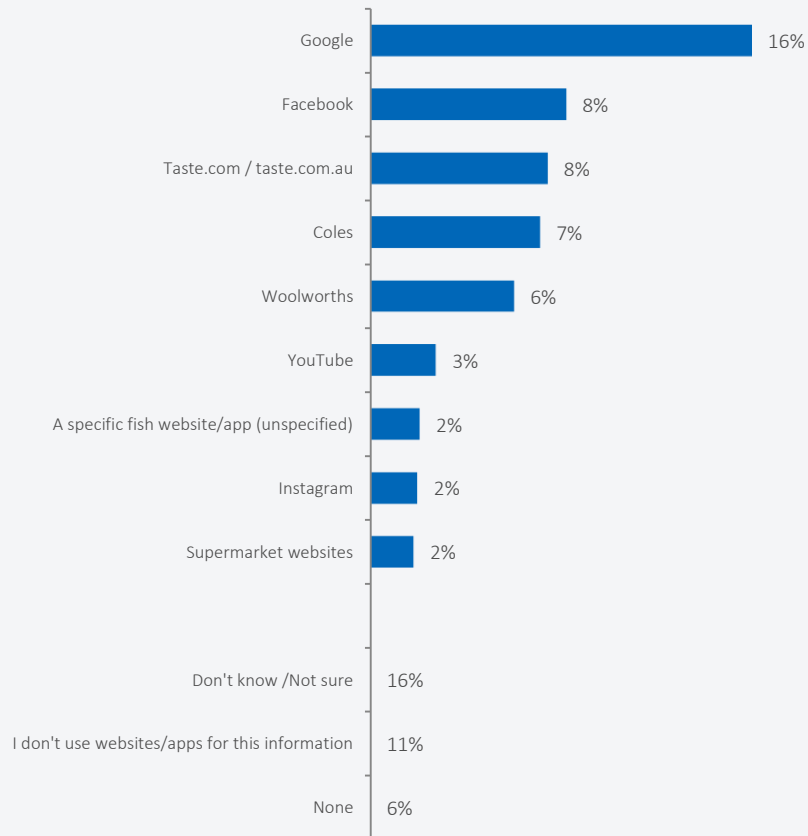
Infrequent Eaters (n = 528)

		Frequent Eaters (n = 659)	Regular Eaters (n = 645)	Infrequent Eaters (n = 528)
Friends	46%	46%	48%	44%
Supermarket websites / apps	34%	34%	37%	31%
Cooking websites / apps	32%	34%	33%	29%
Seafood market websites / apps	26%	30%	27%	21%
Seafood specific or fishing websites / apps	21%	25%	21%	16%
Cooking shows (Masterchef, My Kitchen Rules) – their shows, websites and apps	17%	21%	19%	11%
Well known chefs and cooks (websites, apps, or social media)	14%	16%	16%	9%
Websites with information from people in the fishing industry	14%	18%	12%	11%
Well known influencers/celebrities/personalities (websites, apps, or social media)	6%	7%	5%	4%
Other (please specify)	12%	13%	11%	13%

*Multiple choice question. Results may not add to 100%.

If there were one or two websites, apps, or social media feeds you use most often when looking for information on how and where to buy seafood what would they be?

Base: all respondents who eat seafood, n = 1,902



Some of what they said...

"General google search. If there was a seafood market finder etc. that had info on where to but fresh seafood to buy off boats or at jetty/port markets I would def use it and go as a weekend outing."

"Just through Coles & Woolworths catalogues, which I receive via email. I'm not really aware of a fishmonger in my town, and the Woolworths purchase I made for Good Friday made a terrific meal!"

"Wouldn't use any websites seafood or food in general is not something I'd spend ridiculous amounts of time on, I usually purchase all my groceries and other items at the local plaza."

"I'd use an app from the Fishing Industry and a website for everyday people like me can find out about how, were and what is done to the seafood we buy, procedures etc."

"Any feed on sustainable fishing, there are heaps of accounts out there in Instagram I follow that are about sustainable fishing among other types of sustainable living."

"Food blogging from local food critics, Facebook and local council / recreational sites for reviews and current food rating statuses."

"Facebook have a local fishing company that sells it locally and go to the page for daily specials. Taste.com always good for recipes."

"I simply go to Google and click on the search button to see what is being talked about on various sites."

"I would never look for seafood information including where to buy it. Not sure why anyone would?"

"I usually just use Woolworths and Coles, the websites provide recipes for using their seafood."

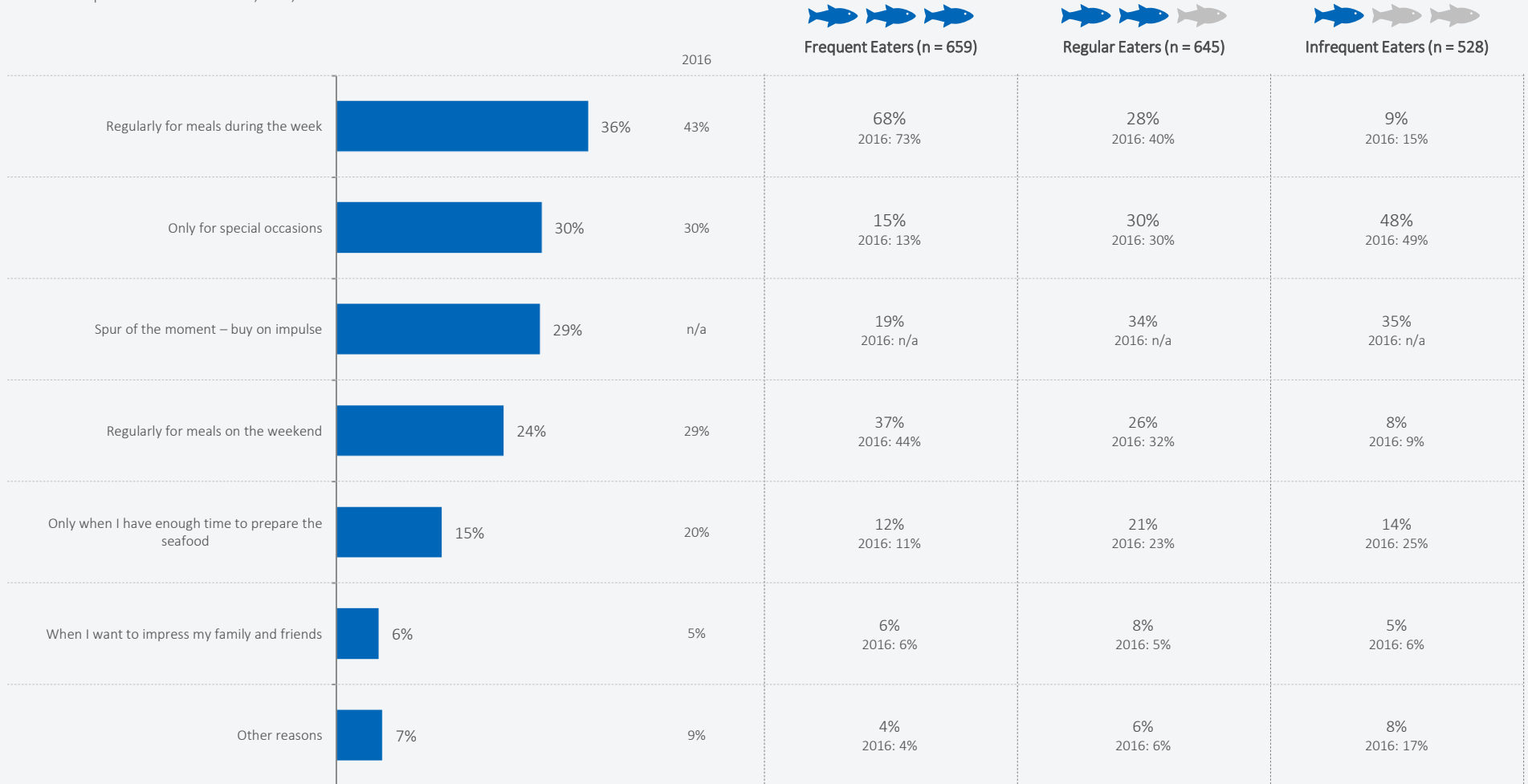
"Ones that appeared genuinely concerned with the sustainability of the industry as a whole."

"I only use Google search engine to look of any and every kind of food that I want to buy."

Results above exclude responses accounting for <2% of total responses.

Which of the following best describes when you buy fresh seafood?

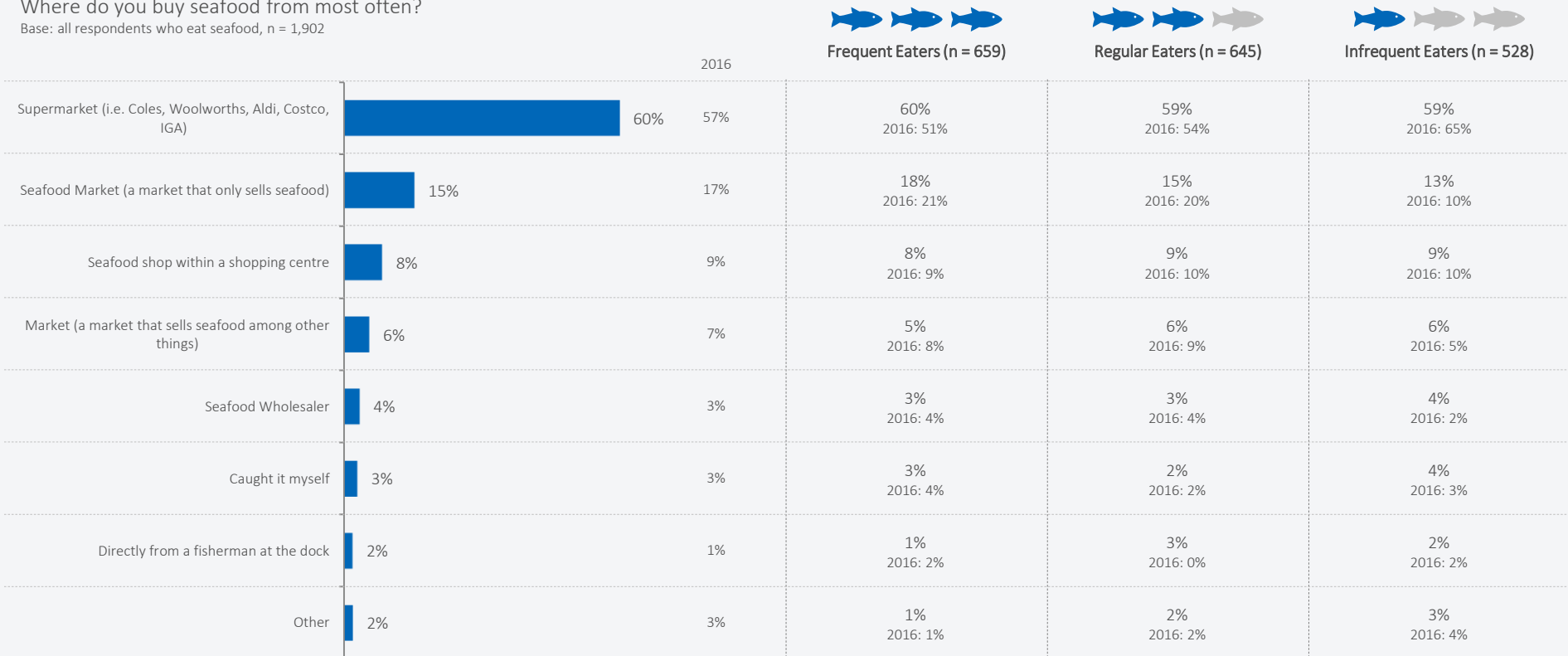
Base: all respondents who eat seafood, n = 1,902



*Multiple choice question. Results may not add to 100%.

Where do you buy seafood from most often?

Base: all respondents who eat seafood, n = 1,902



When seafood consumers were asked where they buy seafood from most often, **60%** mentioned the supermarket with a further **15%** mentioning a seafood market.

This compares to **60%** for supermarket and **20%** for supercenter as per the FMI's Power of Seafood research†.

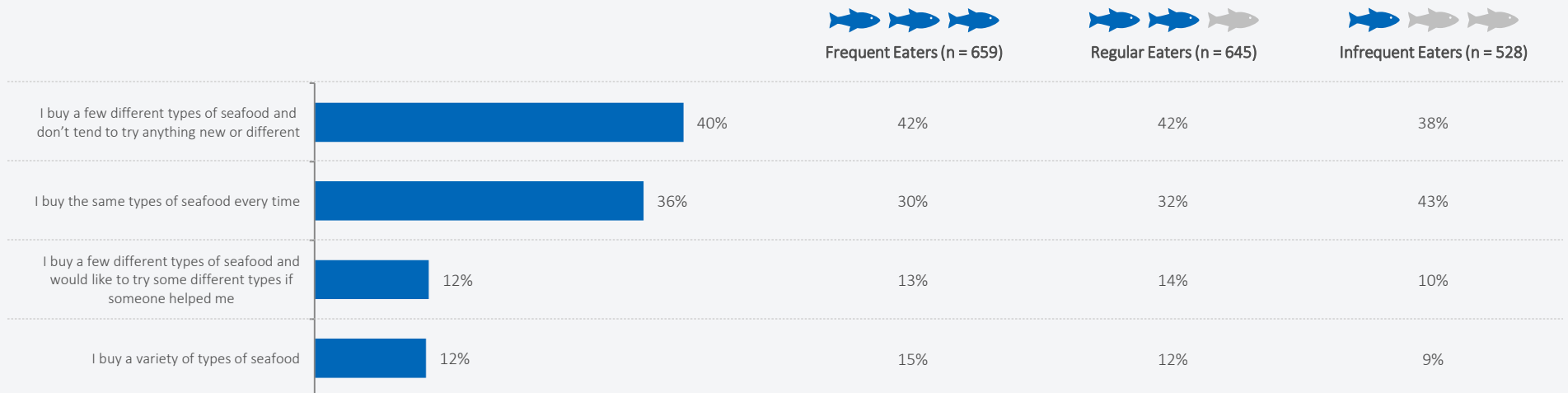
†Source: FMI's Power of Seafood 2019, Page 16. Please note that the FMI research is based on US respondents, and also defines the seafood consumer as those who consume at least once a month at home, a restaurant, or elsewhere. This comparison should be treated as indicative only.

Which of the following best describes what you do when buying seafood to prepare at home?

Base: all respondents who eat seafood, n = 1,902

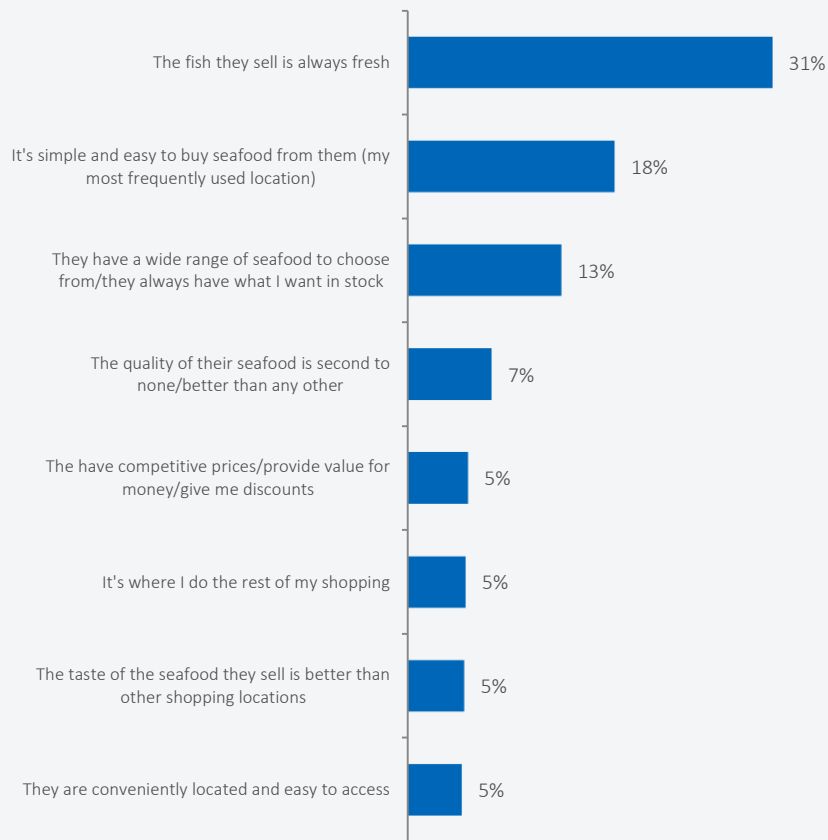
The results reflect that consumers are very **conservative and narrow** in their choice of seafood options.

Opportunities to encourage and assist consumers to explore and trial different seafood options should be explored further.



Other than for the price, what do you like **most** about buying fresh seafood from [LOCATION]?

Base: all respondents who eat seafood, n = 1,902



A random sample of 50% of answers was selected for this analysis. Results above exclude responses accounting for <4% of total responses.

Some of what they said...

"I like buying fresh seafood because I feel like it cooks a lot more nicely than frozen seafood. I also like that I can choose the size of fillet that I want instead of just getting what I'm given in the packet."

"The primary reason is that it is so convenient. Often times I don't have time to go to a completely different store, especially since our local fish store is quite far from the local supermarket."

"You can't get any fresher than when it is caught, cleaned and cooked all on the same day. also it usually involves 3 generations of my family standing on a beach fishing together. Now that is bonding!"

"Different types, sizes, varieties etc. For example when you buy prawns you can get cooked, peeled, deveined, tail on, just meat, fresh and marinated, in a sauce, frozen, refrigerated etc."

"It is a trustworthy source. The fish are local and clean (not imported from dodgy fish farms). They are also provided to me in a form of my choosing, usually boned and filleted."

"You can see clearly what you are buying and staff usually are quite good when you ask I don't go to fish markets I have medical reasons as well and don't eat much seafood."

"I like that seafood is a healthy option instead of red meat, also seafood has a different flavour when eating, it's healthy, easy to cook, good for special occasions."

"Don't always love it, when I have time I prefer to go a specialty store but mainly go to the big supermarkets because they're convenient for after work shopping."

"The fact that it's fresh and has not been handled by a number of different parties, where I would not know how it has been handled and stored, and for how long."

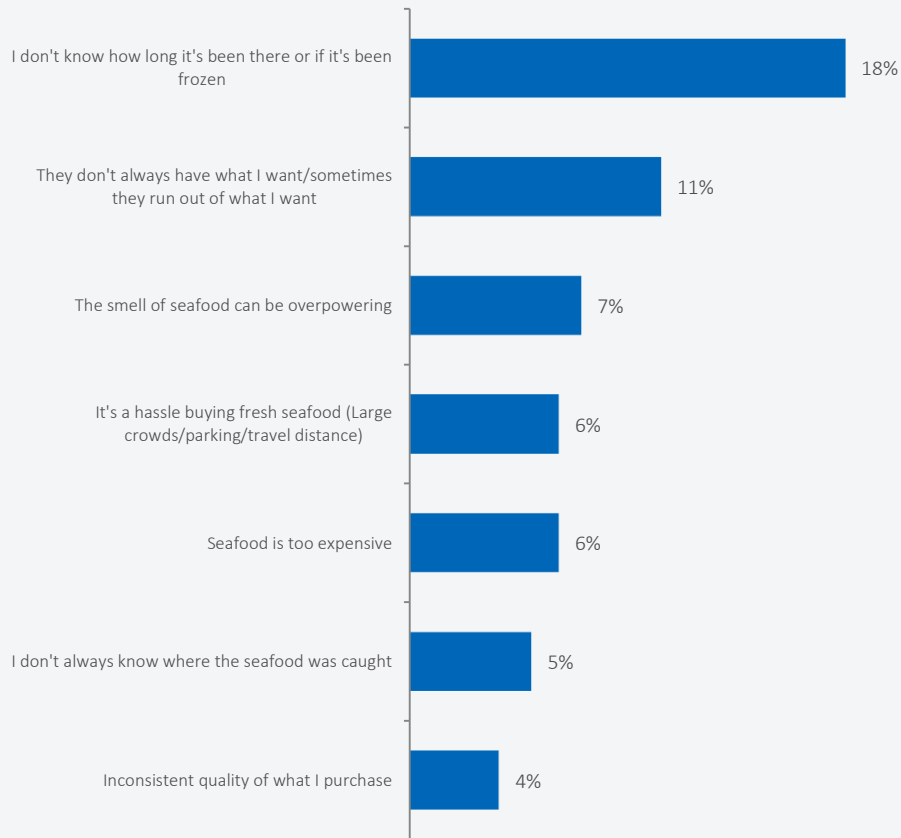
"Ease of buying, am at supermarkets several times a week which are 5 to 10 minutes away. Also consistent quality and reasonable variety of types of fish we buy."

"There is usually plenty of choice in the type of seafood I like to buy, which is something that is reasonably mild in flavour, and is from Australian waters."

"Store is convenient to home, I can check the quality of the seafood in the delicatessen, origin labelling of product, look for Australian seafood!"

Other than for the price, what do you like **least** about buying fresh seafood from [LOCATION]?

Base: all respondents who eat seafood, n = 1,902



A random sample of 50% of answers was selected for this analysis. Results above exclude responses accounting for <4% of total responses.

Some of what they said...

"I think it is the way it is presented in the supermarket the seafood is packed on top of each item so it always looks like the one underneath is the oldest or squashed. And they always take the one from underneath, why they do that I am not sure."

"Not as much information on where the produce comes from etc. Used to live in an area where there was a great seafood supplier who could provide a lot of information on the produce, what was seasonal, local etc."

"For the most part, there is nothing I don't like about buying from a supermarket, however sometimes I may second guess the quality of the produce and occasionally there may be lack of product available."

"Sometimes the smell is a bit overwhelming, can be crowded and not everything is available at times particularly around Christmas, everything is wet and dripping especially the floor."

"It is becoming very expensive to buy fish. We are told we should eat fish regularly but sometimes it gets too expensive so I can only buy the cheapest available."

"Much of what they sell is technically not fresh but rather is frozen fish that has been thawed. They generally do not mark them as one or the other."

"Too much imported seafood - BASA (!!!!) from Vietnam, barramundi from Africa or Blue Grenadier from New Zealand and other seafood from Taiwan???"

"Fresh value for money seafood are not available regularly, when supermarket jacked up the price to coincide with Easter or Xmas periods."

"There's a lack of variety, particularly of fish, so you have to just settle for the limited choices available at the deli counter."

"Never really sure where the product originated from - never confident it hasn't been defrosted previously - how old is it?"

"I find that seafood is getting very expensive but if you like to put variety in your diet then you must include seafood."

"Can they really be trusted to provide fresh product? (We know the fruit and veg is never as fresh as they claim . . .)"

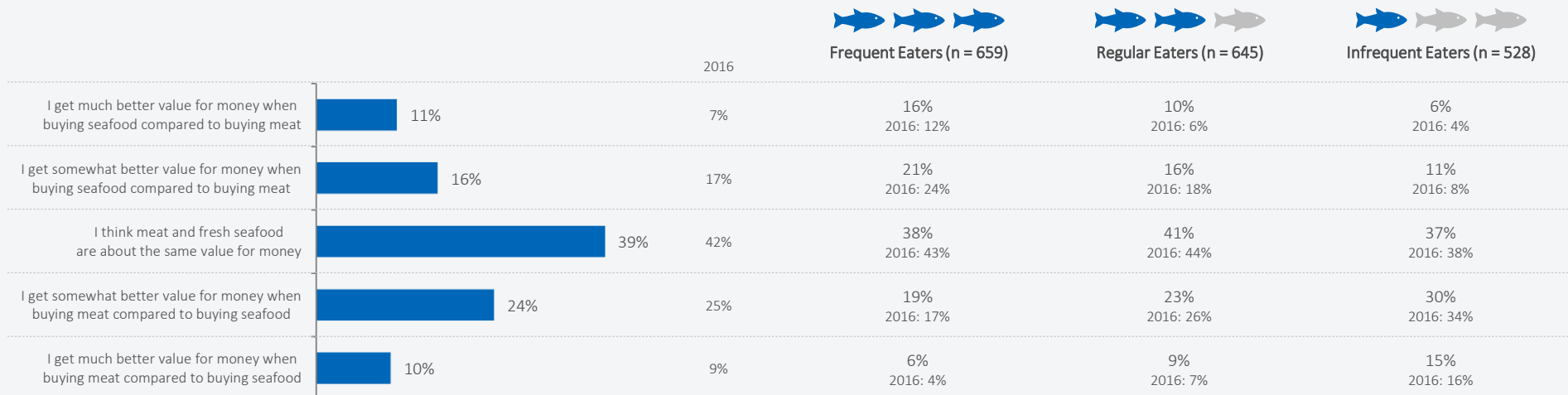
Thinking about the value for money you get when purchasing fresh seafood vs meat (beef, chicken, pork, etc.), how would you rate the value for money of buying fresh seafood vs meat?

Base: all respondents who eat seafood, n = 1,902

The 2019 results suggest a **small shift** on consumer attitudes around the comparative (and favourable) pricing of seafood to other proteins.

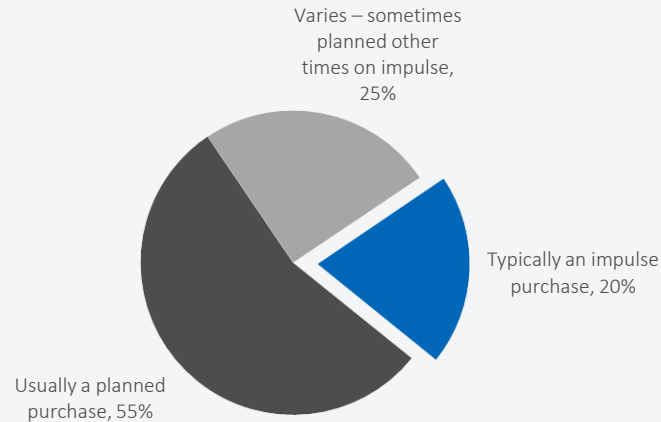
The shifts are likely to continue to take time to re-set the consumer perceptions.

The changes do however indicate a **more positive disposition** to the pricing of seafood compared to other proteins.



Are your seafood purchases typically an impulse or a planned purchase?

Base: all respondents who eat seafood, n = 1,902



15%
Typically an impulse purchase



22%
Typically an impulse purchase



25%
Typically an impulse purchase

One in five seafood consumers are typically an impulse buyer of seafood. Not surprisingly, this is more prevalent among the less regular seafood eaters.

The challenge for industry is to **leverage** the impulse nature of many purchases while at the same time shifting consumers purchasing behaviours to a more **planned** basis.

Over half (**55%**) were planned purchasers – this compares to **62%** as per the FMI's Power of Seafood research†.



63%
Usually a planned purchase

22%
Varies – sometimes planned other times on impulse



49%
Usually a planned purchase

29%
Varies – sometimes planned other times on impulse



51%
Usually a planned purchase

25%
Varies – sometimes planned other times on impulse

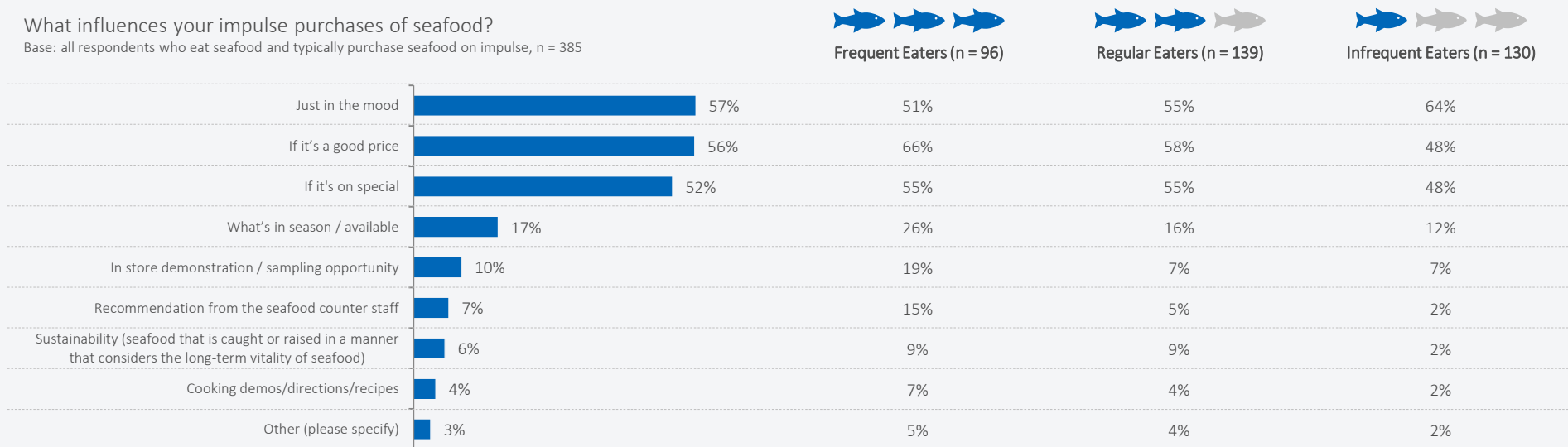
†Source: FMI's Power of Seafood 2019, Page 20. Please note that the FMI research is based on US respondents, and also defines the seafood consumer as those who consume at least once a month at home, a restaurant, or elsewhere. This comparison should be treated as indicative only.

20%

were typically impulse purchasers

What influences your impulse purchases of seafood?

Base: all respondents who eat seafood and typically purchase seafood on impulse, n = 385



*Multiple choice question. Results may not add to 100%.

When seafood consumers who are impulse purchasers were asked what influences their purchases of seafood, **57%** said it was just because they were “in the mood”, whilst **56%** mentioned if it was a good price.

This compares to **68%** for “in the mood” and **65%** for a good price as per the FMI’s Power of Seafood research†.

†Source: FMI’s Power of Seafood 2019, Page 20. Please note that the FMI research is based on US respondents, and also defines the seafood consumer as those who consume at least once a month at home, a restaurant, or elsewhere. This comparison should be treated as indicative only.

80%

were either planned purchasers or varied between impulse and planned

What, if anything, would influence your impulse purchase of seafood?

Base: all respondents who eat seafood and do not typically purchase seafood on impulse, n = 1,517



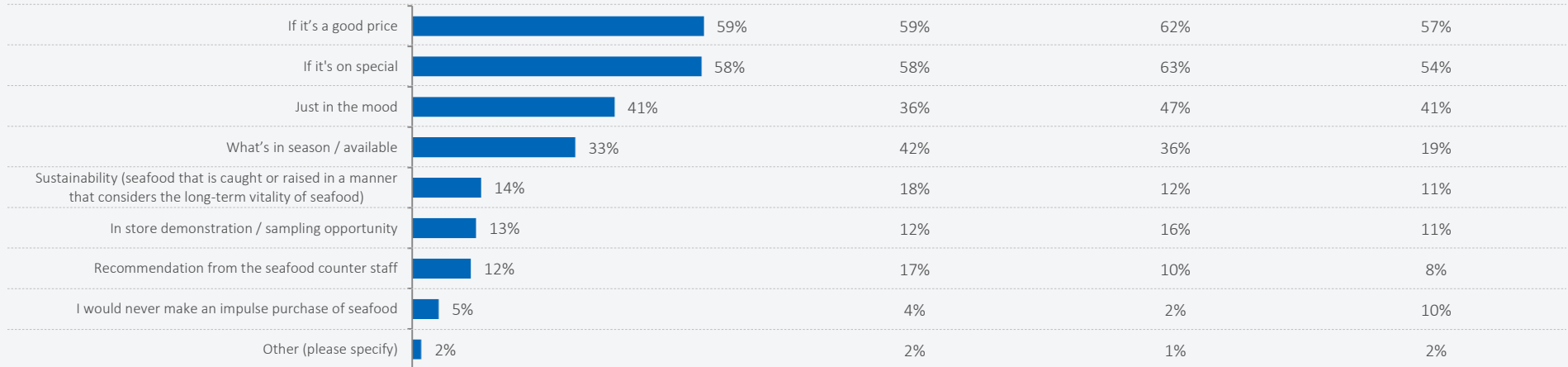
Frequent Eaters (n = 563)



Regular Eaters (n = 506)



Infrequent Eaters (n = 398)



*Multiple choice question. Results may not add to 100%.

Other people have identified things that are important to them when they consider buying seafood. How important are each of the following factors for you?

Base: all respondents who eat seafood, n = 1,902



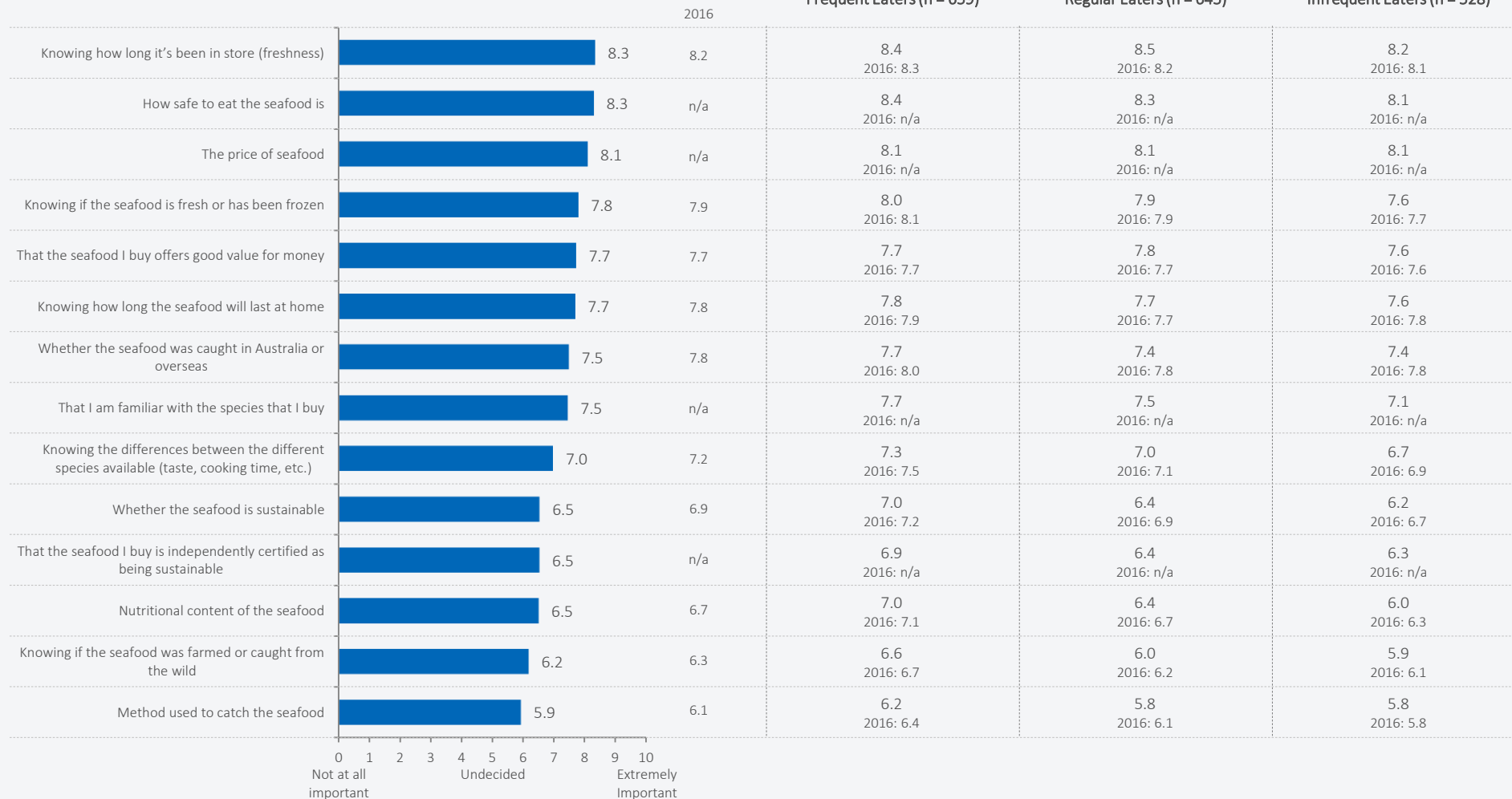
Frequent Eaters (n = 659)



Regular Eaters (n = 645)

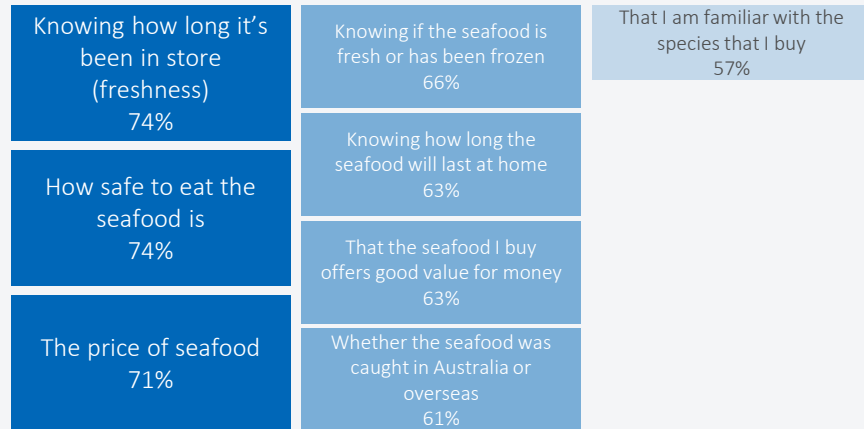


Infrequent Eaters (n = 528)



% rating 8-10 on importance of factors when considering buying seafood

Base: all respondents who eat seafood, n = 1,902

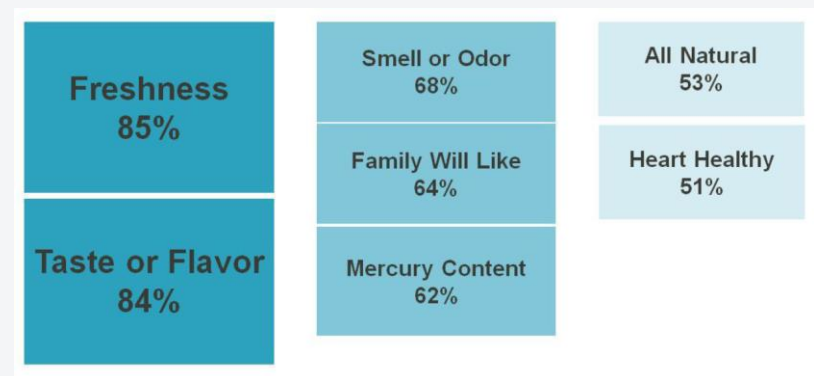
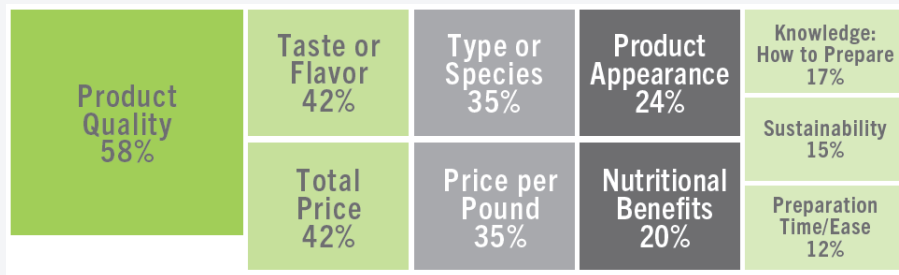


The key purchasing influences of Australian seafood consumers are largely **consistent** with those reported in the US FMI research.

That said, Australian consumers exhibit some cautiousness around issues of **freshness and food safety**.

FMI's Power of Seafood research† - % of those ranking factor as top three in importance (out of 10 factors listed)

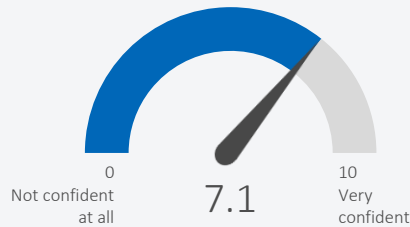
FMI's Power of Seafood research† - % of those reporting factor would have a major impact on their likelihood of purchasing and/or eating seafood



†Source: FMI's Power of Seafood 2019, Pages 21 and 23. Please note that the FMI research is based on US respondents, and also defines the seafood consumer as those who consume at least once a month at home, a restaurant, or elsewhere. This comparison should be treated as indicative only.

Overall, how confident are you in buying seafood?

Base: all respondents who eat seafood, n = 1,902



7.8



7.3



6.4

How confident are you around the following aspects of buying seafood?

Base: all respondents who eat seafood, n = 1,902

2016



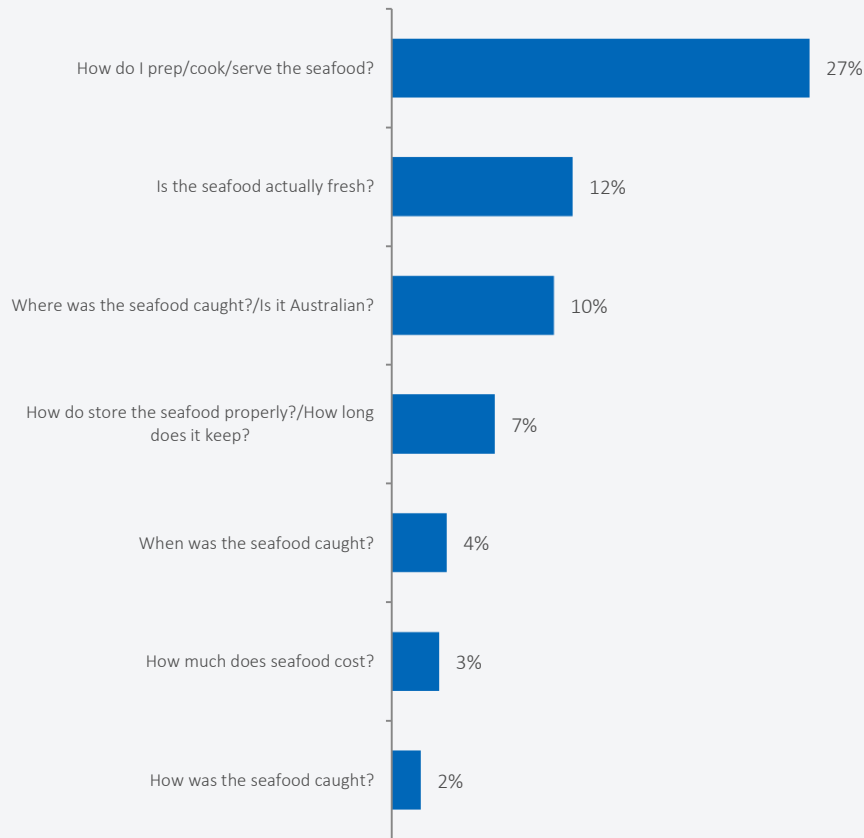
Aspect	2019 Score	2016 Score	Frequent Eaters (n = 659) Score	Regular Eaters (n = 645) Score	Infrequent Eaters (n = 528) Score
Buying fresh seafood from [MAIN LOCATION]	7.4	6.9	7.8 2016: 7.5	7.6 2016: 7.1	6.9 2016: 6.2
Nutritional benefits of seafood	7.3		7.8	7.5	6.7
How to know the freshness/quality of seafood	6.9		7.5	7.1	6.1
Different types/species of seafood	6.6		7.1	6.7	5.9
That staff where you buy seafood are knowledgeable about different types of seafood available	6.4		6.8	6.5	6.0
That staff where you buy seafood are knowledgeable about how to prepare/cook seafood you buy	6.1		6.4	6.1	5.8

The FMI's Power of Seafood research[†] stated that **45%** of seafood consumers thought the seafood counter staff were very knowledgeable, with a further **45%** reporting they were somewhat knowledgeable.

[†]Source: FMI's Power of Seafood 2019, Page 16. Please note that the FMI research is based on US respondents, and also defines the seafood consumer as those who consume at least once a month at home, a restaurant, or elsewhere. This comparison should be treated as indicative only.

What information would help you in buying seafood?

Base: all respondents who eat seafood and rated less than '6' for confidence in buying seafood, n = 424



Results above exclude responses accounting for <2% of total responses.

Some of what they said...

"It is not always stated where it is from, how fresh it is or whether its sustainable. This information would help, I feel nervous asking staff questions, I am more comfortable with written information."

"If the staff at the counter were specialists in that area or was trained to be so as though the staff were fishmongers themselves and had the knowledge you get when you go to the local fishmongers."

"Electric screen showing information on how to buy fish, recipes and how to cook it or flyers or brochures, tasting booths, staff having cooking knowledge."

"Information on whether it is has been frozen or is fresh, what country it has come from and some basic information on the ways in which it can be cooked."

"If I had my parents or brother with me as they love all sorts of seafoods and know all about the industry and would be able to really help me out."

"How to cook, how long can you store it before it loses its freshness, how long do you cook it and what is the best way to cook."

"How to prepare it, how to keep it, how long does it last in the fridge before cooking, recipes and what fish goes best."

"Posters showing different seafood species and where they come from as in country of origin and sustainability i.e. farmed."

"How to know when it isn't fresh anymore, how to fillet a whole fish, how to prepare so it's tasty and not overcooked."

"A chart or system which shows how seafood should look when buying compared to what to what they shouldn't look like."

"How long it can keep in the fridge. How long I can freeze it before use. Simple easy recipes and cooking tips."

"About how to cook the seafood and how price impacts on quality - why certain types of prawns are more expensive."

Would you like to have a better knowledge about...?

Base: all respondents who eat seafood and rated less than '6' for confidence in buying seafood, n = 426



Frequent Eaters (n = 78)



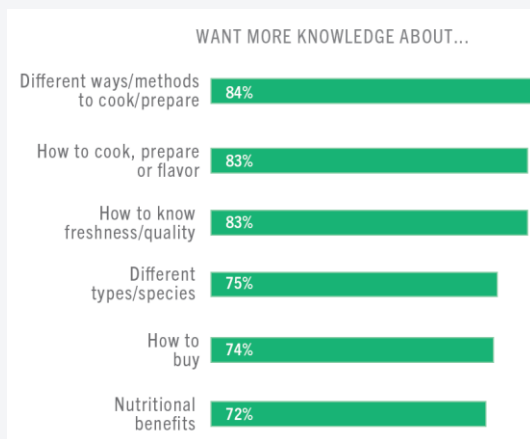
Regular Eaters (n = 126)



Infrequent Eaters (n = 183)

Topic	Overall	Frequent Eaters (n = 78)	Regular Eaters (n = 126)	Infrequent Eaters (n = 183)
How to know the freshness and quality of seafood	80%	82%	88%	79%
How to cook/prepare or flavour seafood	77%	78%	84%	75%
Different ways or methods to cook/prepare seafood	75%	76%	81%	74%
Different types/species of seafood	68%	72%	74%	67%
How to buy seafood	63%	81%	63%	61%
The nutritional benefits of seafood	60%	65%	65%	58%

FMI's Power of Seafood research† - % of seafood consumers wanting to know more knowledge about the following:



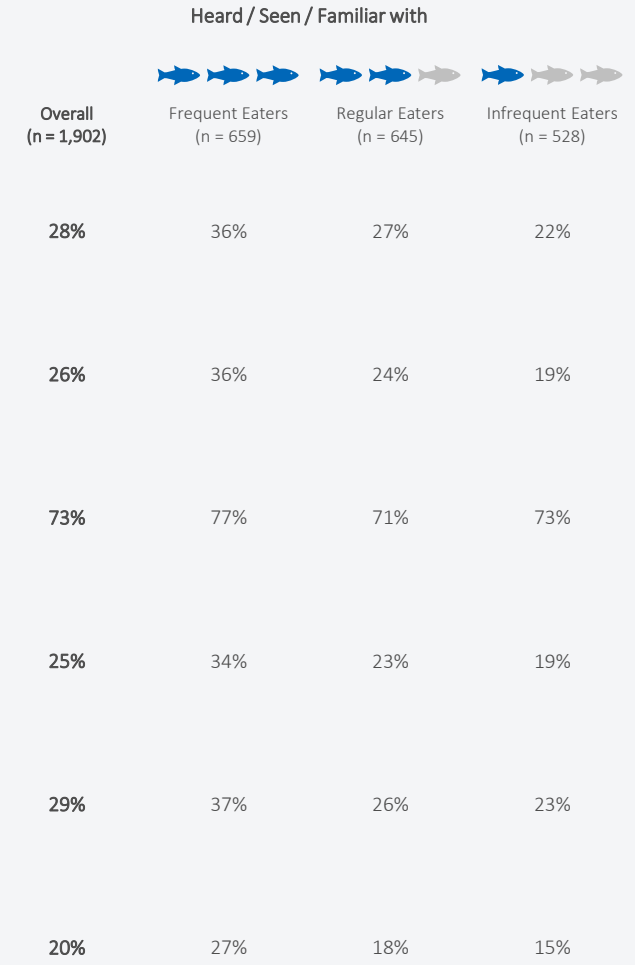
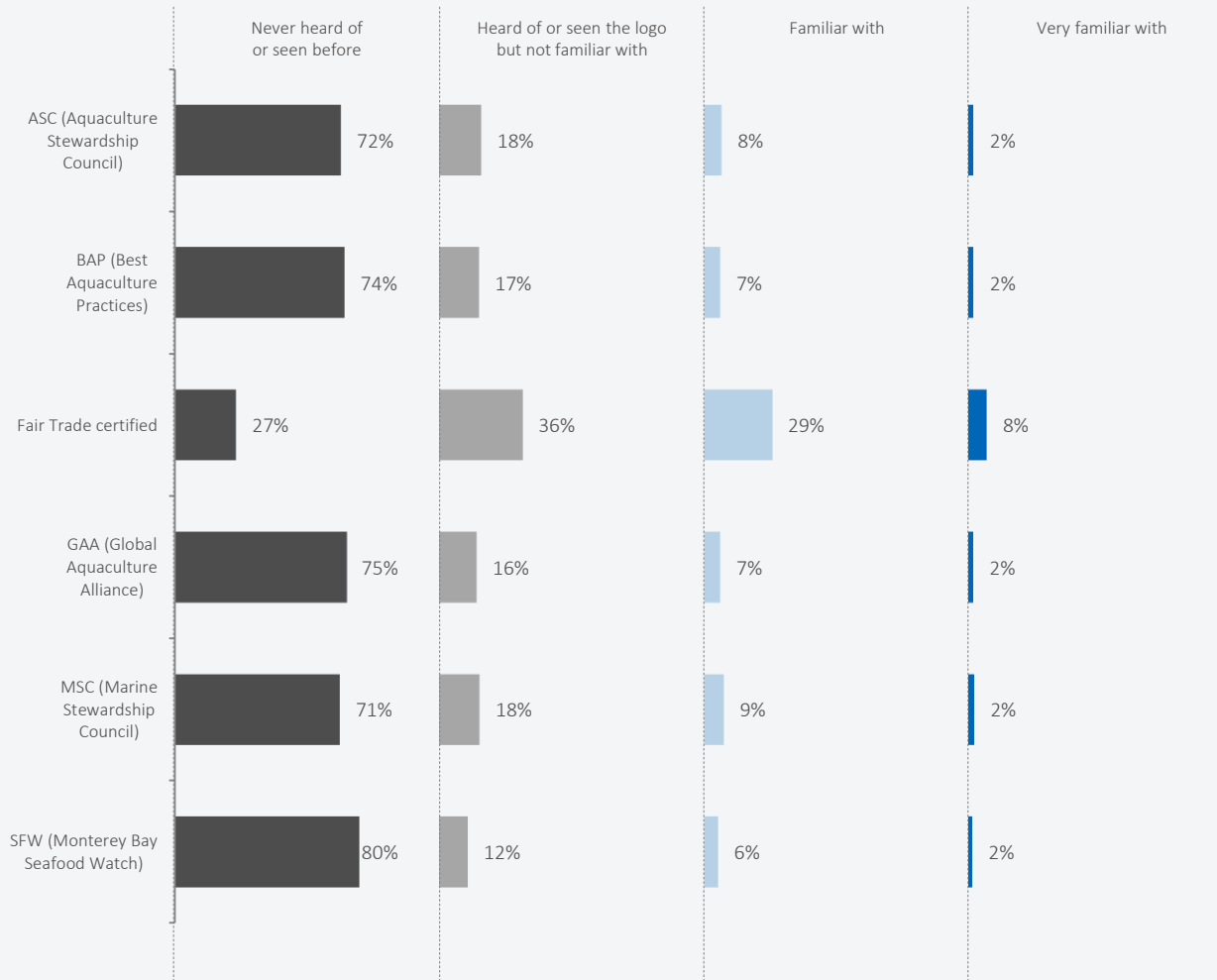
There is a strong 'appetite' among those consumers who indicate they are not confident about buying seafood for more information.

The 'call out' is centred around empowering these consumers to be confident in **knowing the freshness** and quality of seafood and in the different ways of preparing and cooking.

†Source: FMI's Power of Seafood 2019, Page 16. Please note that the FMI research is based on US respondents, and also defines the seafood consumer as those who consume at least once a month at home, a restaurant, or elsewhere. This comparison should be treated as indicative only.

How familiar are you with the following seafood certifications of standards?

Base: all respondents who eat seafood, n = 1,902





Detailed Results
The Consumption
Experience



The Consumption Experience

what consumers are saying. . .



6.4 (out of 10) – Confidence in cooking/preparing seafood

6.0 – How to cook, prepare or flavor seafood

5.9 – Different ways/methods to cook/prepare seafood



What consumers like **MOST** about eating fresh seafood:

55% – Seafood tastes delicious/amazing

22% – Liking all the health and nutritional benefits of eating seafood



What's stopping infrequent eaters from eating **MORE**

OFTEN (scale of 0 – not a problem to 10 – always a problem):

4.8 – The lingering smell of seafood

4.5 – Being careful about eating undercooked seafood

4.1 – The mess it creates when eating



Where consumers go looking for info about how to prepare or cook seafood:

59% – Cooking websites / apps

42% – Friends



What consumers like **MOST**/least about preparing fresh seafood at home:

MOST: 18% – Being in control of what they are eating and knowing the fish is fresh and safe to eat

LEAST: 26% – The smell on fingers and hands, in the waste, and throughout the house

If you went looking for information about how to prepare or cook seafood, which of the following locations would you actually use?

Base: all respondents who eat seafood, n = 1,902



Frequent Eaters (n = 659)



Regular Eaters (n = 645)



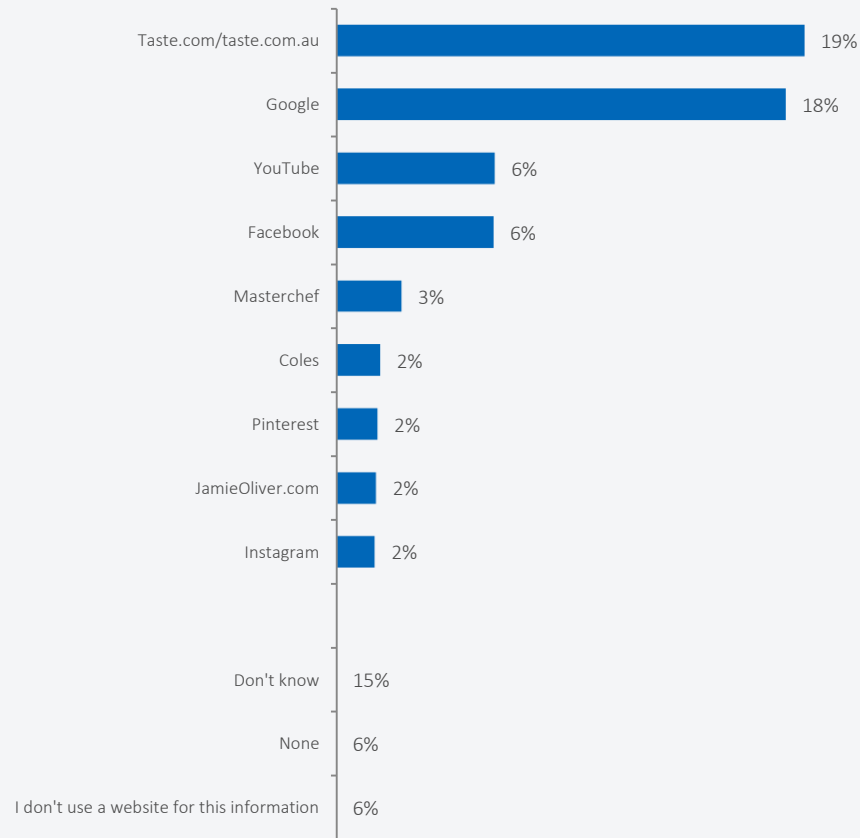
Infrequent Eaters (n = 528)

	Overall	Frequent Eaters (n = 659)	Regular Eaters (n = 645)	Infrequent Eaters (n = 528)
Cooking websites / apps	59%	56%	62%	59%
Friends	42%	41%	46%	41%
Cooking shows (Masterchef, My Kitchen Rules) – their shows, websites and apps	21%	25%	23%	15%
Seafood specific or fishing websites / apps	19%	25%	18%	15%
Well known chefs and cooks (websites, apps, or social media)	17%	19%	17%	14%
Review sites on buying, preparing and cooking seafood	16%	18%	17%	11%
Websites with information from people in the fishing industry	10%	13%	9%	8%
Bloggers	7%	9%	7%	5%
Well known influencers/celebrities/personalities (websites, apps, or social media)	6%	7%	6%	5%
Other (please specify)	14%	14%	13%	16%

*Multiple choice question. Results may not add to 100%.

If there were one or two websites, apps, or social media feeds you use most often when looking for information on how to prepare or cook seafood what would they be?

Base: all respondents who eat seafood, n = 1,902



Some of what they said...

"Don't use websites and/or apps. They just trying to get you to become dependent on them and try to get your business. I prefer to use a cookbook by a chef who knows what they are talking about."

"I have on one or two occasions looked up a site but it is not something I do routinely nor very often. I rely on my lifetime of cooking and my tried and true methods. And my Cook Books."

"I most commonly use Facebook and Pinterest when I am looking for recipes, so also having information about how to prepare and cook seafood on the same page/app would be very useful."

"Don't have any, I would just Google and see what comes up. But have never looked online for information on how to prepare or cook seafood. And probably never will."

"I know how to make seafood have been doing it for years, if I want to try something different then I would check with friends or cooking websites or even YouTube."

"Whatever the search results provide. I look at several different ones and choose what I like best at the time. No idea which site it might be though."

"I would never rely on a computer to choose my meal. I would not look at any websites. I do not need technology to tell what I feel like or will eat."

"Again, not being specific here, but would use Google or Bing to type in 'how to prepare or cook (whatever type of fish or seafood I had purchased).'"

"Sites which provide simple recipes with a limited number of ingredients with very clear instructions on how to cook them carefully with success."

"I wouldn't use them. I know what I like and I know how to prepare my seafood. Other people want my recipes after they taste my food."

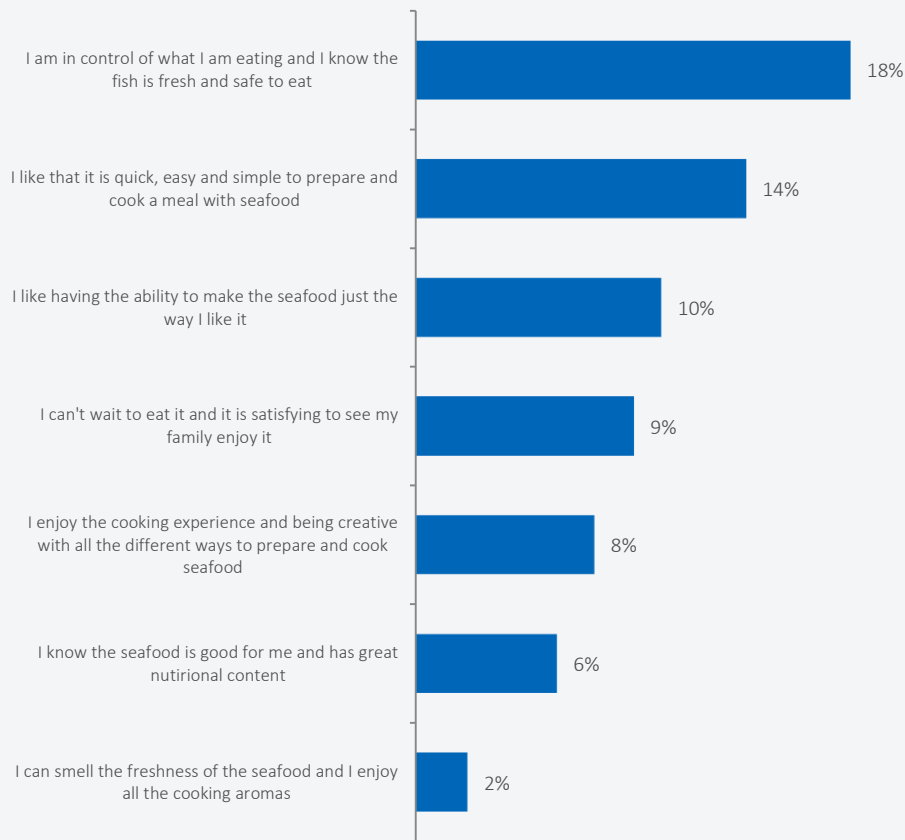
"I would likely look at a YouTube video or whatever top Google search text and image based website I could find for cooking the dish."

"Not too sure. We do look at the store bases recipes and so on e.g. Coles or Woolworths. Also mags such as Women's Weekly are useful."

Results above exclude responses accounting for <2% of total responses.

What do you like **most** about preparing fresh seafood at home

Base: all respondents who eat seafood, n = 1,902



A random sample of 50% of answers was selected for this analysis. Results above exclude responses accounting for <2% of total responses.

Some of what they said...

"I like being able to cook it as much as I prefer. I like fish to be cooked more, it seems, than when it is cooked on TV shows where it only seems to be half-cooked, and therefore if I was going to buy fresh seafood at a restaurant I probably wouldn't be happy with it, but at home I could cook it to the point where I'm happy with it."

"Very versatile - lots you can do with fish to make interesting meals. Healthy. I find it's often too expensive to order at restaurants or I'm otherwise hesitant about whether it will be cooked well so I prefer to cook it myself so I know."

"I get to play with recipes I've seen or have used before I'm a kiwi chef we grew up on seafood from a young age, digging shell fish at the beach, fishing off the rocks & diving for mussels."

"Seafood is tasty and nutritious, quick to prepare and cook, while our family consider it a weekly delicacy. The Seafood we enjoy is versatile with other sides like salad or veggies."

"Brings back memories of fish and chip days on Manly Beach with all the seagulls diving for your chips And frightening the grandchildren. I also know what goes into the meals."

"I like the thought of the nutritional / health benefits. The taste. The specialness. That it's light - a light meal. Great with salad and fruit. Quick to cook."

"I can cook it the way I like it, I can serve it the way I like, I can serve fish (e.g. very large whole fish) which I could not afford to buy in a restaurant."

"Being able to show off my culinary skills and presenting my family and friends with a professionally prepared meal that gives them the wowwww factor lol."

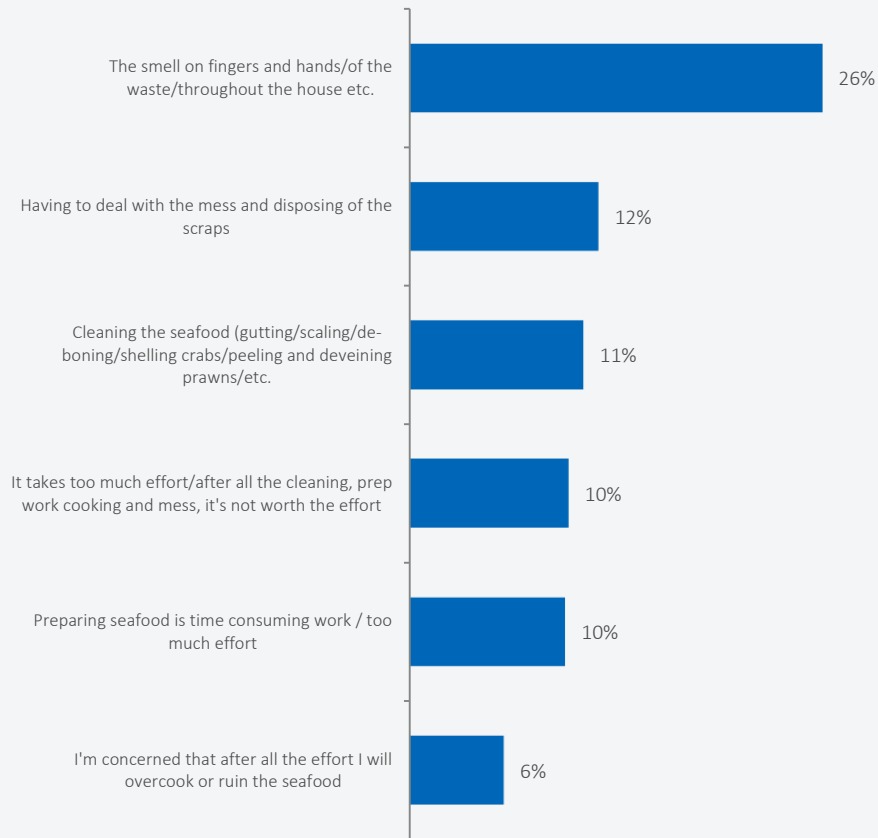
"Knowing what ingredients go into the meal as opposed to buying a prepared meal. Also preparing fresh seafood allows me to be creative with recipe."

"I like being able to barbecue it for a smoky flavour or using fish or seafood in a spicy curry. I like the control I have over the preparation."

"I love cooking and working with fresh, tasty ingredients; it is usually quick and easy to cook seafood and make a delicious recipe."

What do you like **least** about preparing fresh seafood at home

Base: all respondents who eat seafood, n = 1,902



A random sample of 50% of answers was selected for this analysis. Results above exclude responses accounting for <2% of total responses.

Some of what they said...

"Cleaning the guts out of fish and squid; Taking off the fish scales; the seafood shells e.g. prawn shells, fish scales, fish guts etc. stink out my bin; Seafood can be quite messy to cook sometimes and makes my kitchen kind of dirty."

"It is a bit oily and splattery when cooked on the grill or stovetop - it makes more of a mess as I don't have a lot of pans and pots suitable for cooking fish, and it is important to clean up as it smells strongly."

"There is a fine line between under and overcooked fish, and this is where I tend to struggle the most. Also, I get very paranoid about bones in the fish."

"The smell of the fish through the kitchen/house - raw and the cooking smells. We usually cook fish outside on the BBQ or if inside, in the oven."

"Some things take a very long time to prepare e.g. shelling and deveining prawns, sometime preparing squid takes too long. Deboning some fish."

"Time required to prep for the meal which includes cleaning, cutting and marinating the seafood for our meal. Takes a lot of time."

"The amount of mess it makes. And the smell lingering in the air/surfaces when you are filleting the fish. Cleaning up."

"Some need a big clean up like cockles, mussels, crabs, prawns and they can make your bin smell in summer."

"It is time-consuming with all the preparation like the scaling and the deboning of the fish."

"The smell of the prawns, or fish, and all the bones you have to remove from fish sometimes."

"The smell that lingers after cooking and the lack of confidence in cooking it effectively."

"Little knowledge on proper methods. Fear of dangerously cooking the food incorrectly."

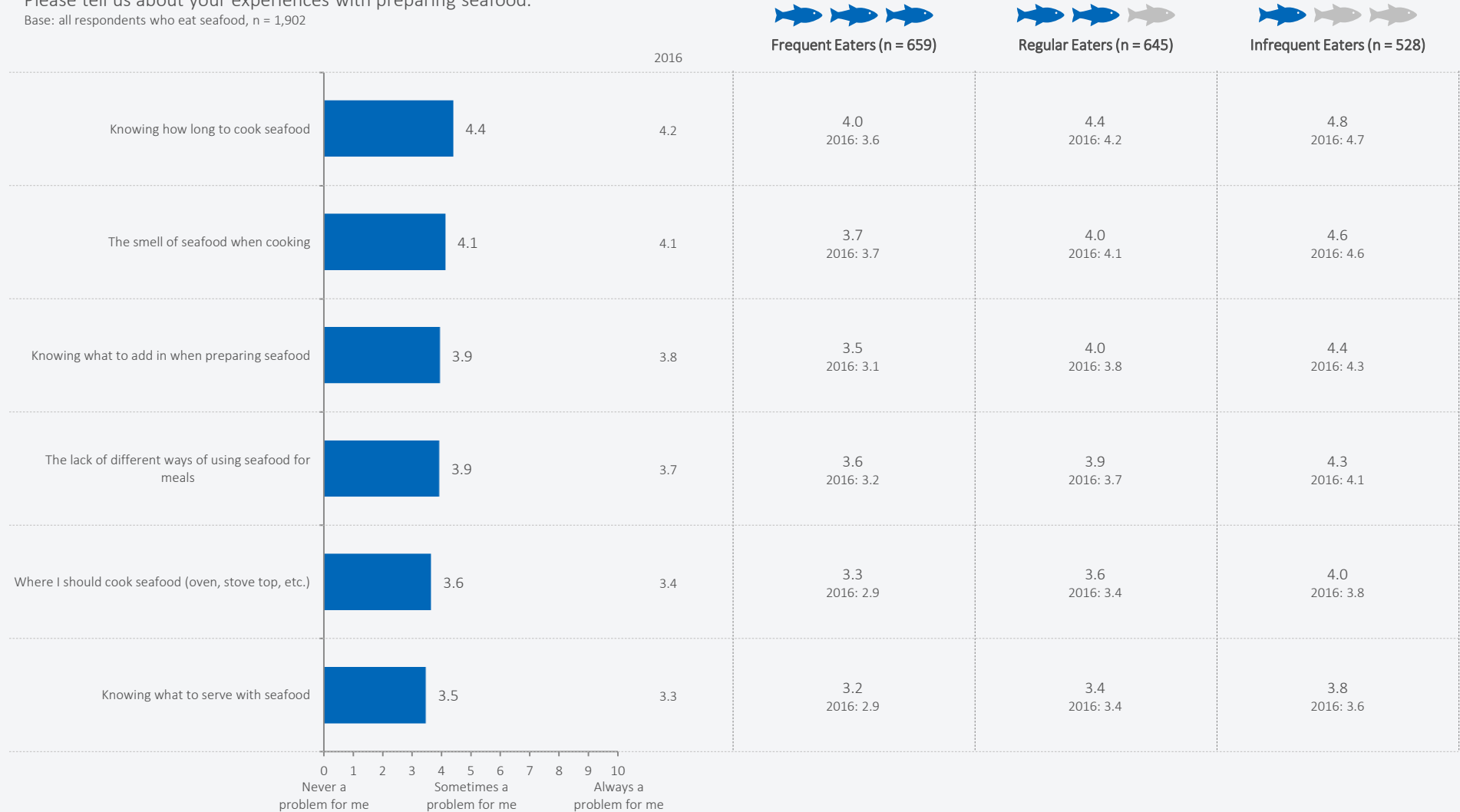
"The off cuts/discards and then left overs can smell out the bins. Easy to overcook."

"Can be a bit messy at times which is why we tend to buy pre-prepared seafood."

THE CONSUMPTION EXPERIENCE

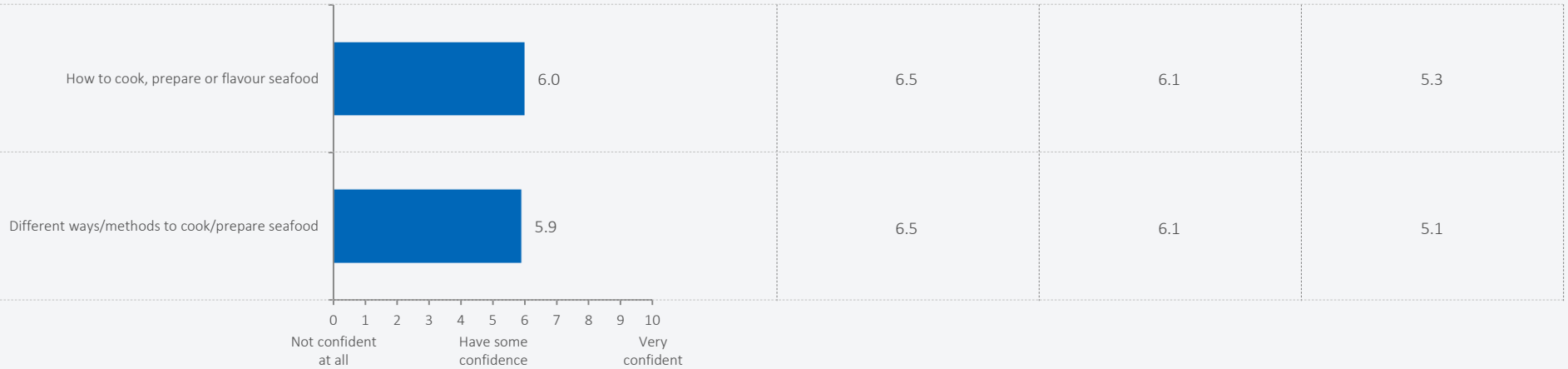
We've listed below the experiences of other people when **preparing** seafood.
Please tell us about your experiences with preparing seafood.

Base: all respondents who eat seafood, n = 1,902



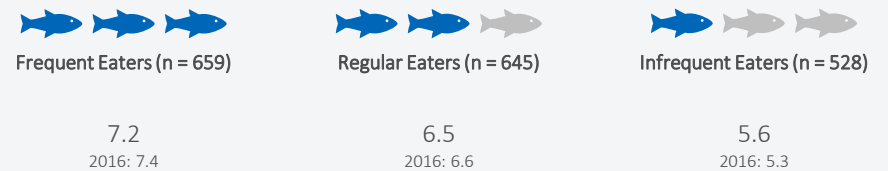
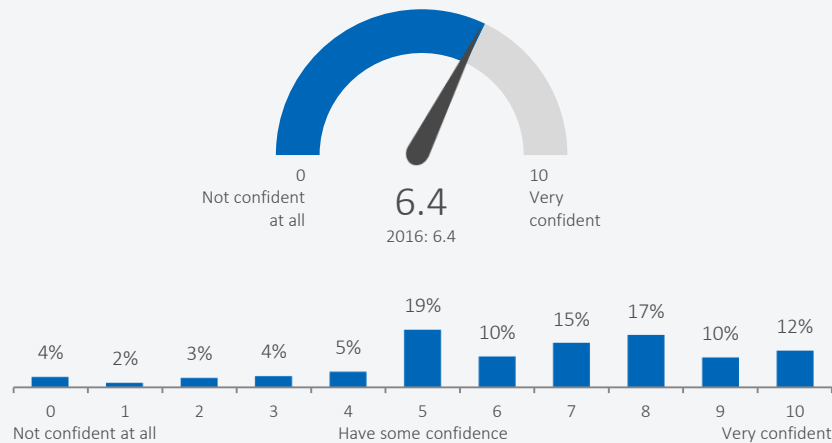
How confident are you around the following aspects of preparing and cooking seafood?

Base: all respondents who eat seafood, n = 1,902



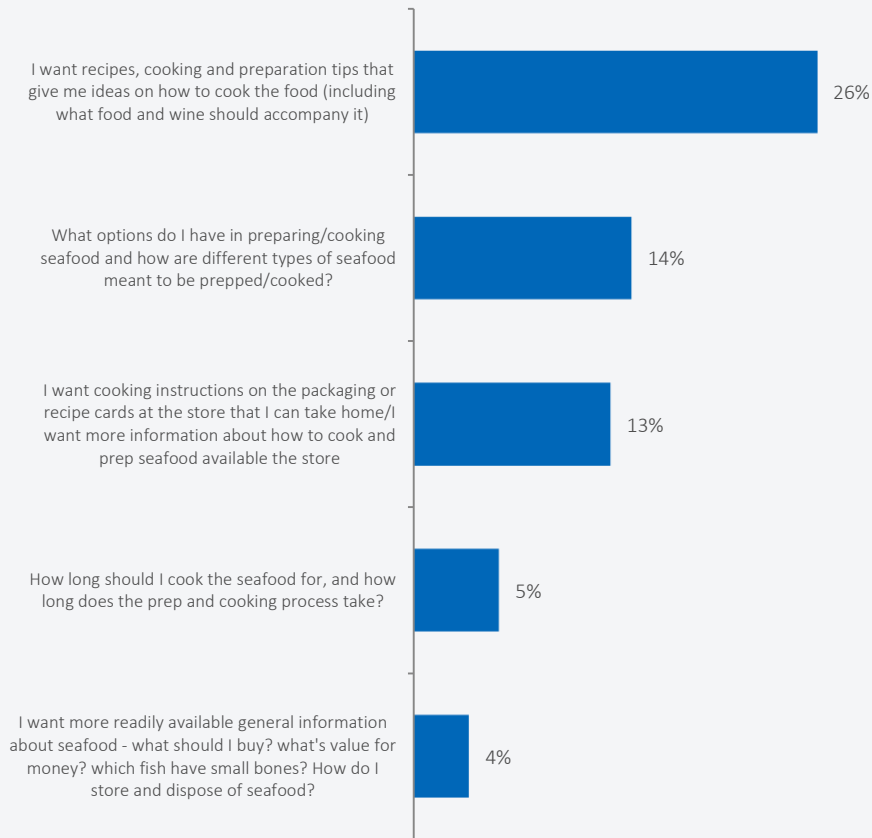
Overall, how confident are you in preparing and cooking seafood?

Base: all respondents who eat seafood, n = 1,902



What information would help you in preparing and cooking seafood and encourage you to use it more often than you do now?

Base: all respondents who eat seafood and rated less than '6' for confidence in preparing and cooking seafood, n = 677



Results above exclude responses accounting for <2% of total responses.

Some of what they said...

"Seeing experts on TV cook a similar seafood dish or a YouTube clip showing you how to cook a certain fish or other seafood item. What they recommend are the best flavours to add to your meal. Also, advice from my parents or other first generation Greeks would go a long way in giving me confidence to cook seafood meals."

"Newsletter recipes from the seafood shops at the markets advising specials, what's in season and providing free recipes using fish available locally. So many recipes ask for fish that is not available locally! Fish cookery classes and demonstrations sponsored by the fish shops at the markets."

"More free in-store guides or recipe books/magazines with explanations of different seafood types, how to prep and recognise freshness. more cuisine styles, what the difference is in fish types e.g. salmon vs ling or snapper etc as I feel fish is fish."

"Maybe information at the supermarket that is not from the supermarket itself. I.e pamphlet or mini-magazine. I have picked these up from Woolies before and actually used them."

"More information on the do's and don'ts of seafood all round really. Preparation, Seasonings, complementary side dishes and true accurate nutritional values."

"Tips on how to prepare/clean and cook, and tips on how to choose what type of seafood and how to cook which varieties, and how fresh they look."

"The taste of different species, how long to cook them for, how to cook them. Pretty much everything to do with preparing and cooking it."

"Step by step recipes on how to cook seafood; suggestions for the best flavours to add to the seafood to get the best dish out of it."

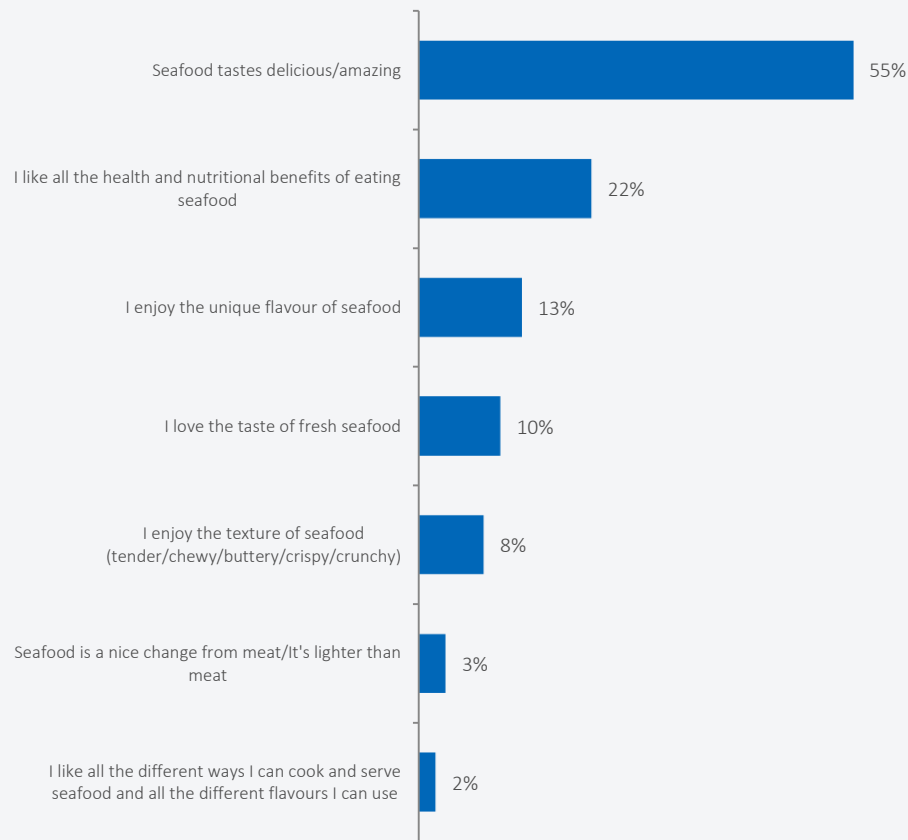
"Chart or list giving info about type of seafood, options to prepare, how to add flavour how to cook and what goes well with it."

"Small instruction cards (or other format info) on how to prepare, cook and what to serve with each type of seafood."

"What sea food is best to cook in which way (stove, oven etc.) and what flavours are best added. How long to cook for."

What do you like **most** about eating fresh seafood?

Base: all respondents who eat seafood, n = 1,902



A random sample of 50% of answers was selected for this analysis. Results above exclude responses accounting for <2% of total responses.

Some of what they said...

"The taste! There is nothing quite like the taste of Fresh and Freshly cooked seafood. The exception is Smoked Cod which we all love and have, usually, as Kedgerree. Unfortunately there does not seem to be any Naturally Smoked Cod nowadays - or, at least, it is not imported into Australia."

"The taste, easily digested, does not sit so heavily in the gut like meat. Can be accompanied by either salads or hot vegetables. It is easy to be complemented with a nice wine if you or your guests are that way inclined. Can be served as an appetiser or a main."

"The flavour is incredible if cooked well and it is something that nice and clean tasting and often light where as red meat for example is heavy and sits like a lead weight in your stomach."

"The flavour of the fish especially if added particular dressings, herbs and spices to the cooking side of things and the added sauces to enhance the flavour when eating."

"The nutritional value of it and the taste. My family like fish, I love it and as the rest of the family like meat it is a personal choice of mine to go with fish."

"The sweetness of the fish, freshness, knowing how much Omega 3 you are getting, how it has been made sustainable, sharing good times with families and friends."

"The great taste of fresh seafood meat in crab and other fish varieties that I love eating. Mixing the fresh fish in fish soup is great as well."

"Some of my favourite things in the world is fresh, beautifully cooked seafood especially king george whiting, scollops, oysters, mussels."

"Fresh taste of seafood/ tangy 'ocean' flavour/ Light flavour of fresh seafood/ GREAT with white wine - both as a drink or as a sauce."

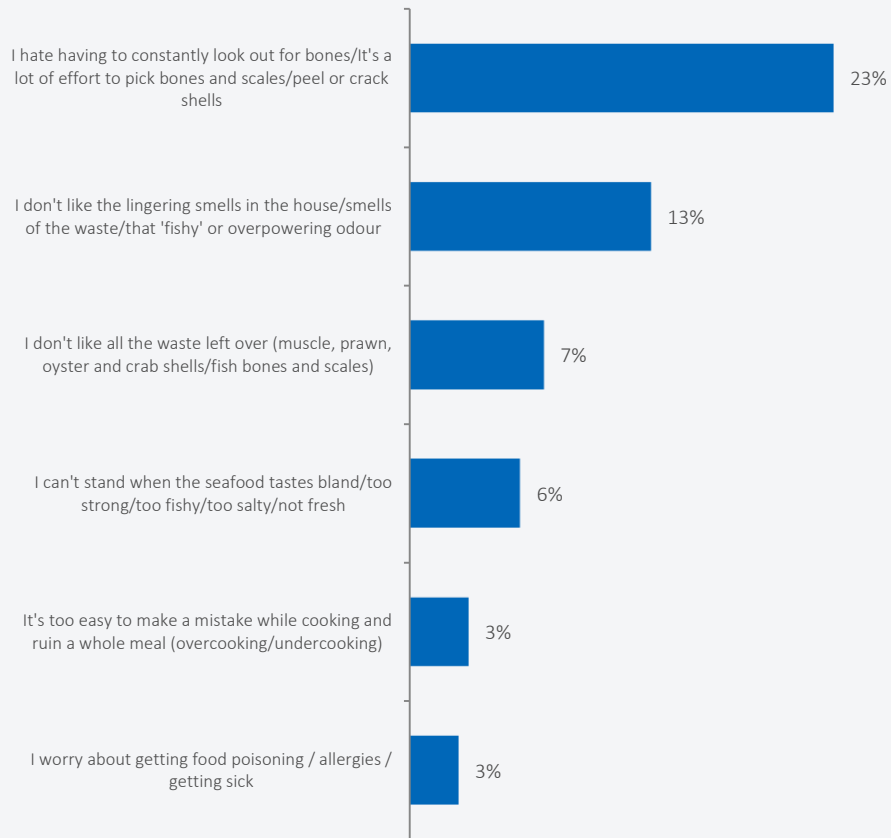
"I know it's good for me and I love the flavour and texture. There are so many great dishes you can prepare using fish and seafood."

"Love it all. Trout, Cod, Salmon, Prawns. Simple to prepare and so many variations and flavours to employ if required."

"It makes a great meal ; its nutritious ; its welcoming ; makes a good party time meal ; to celebrate all festive times ..."

What do you like **least** about eating fresh seafood?

Base: all respondents who eat seafood, n = 1,902



A random sample of 50% of answers was selected for this analysis. Results above exclude responses accounting for <2% of total responses.

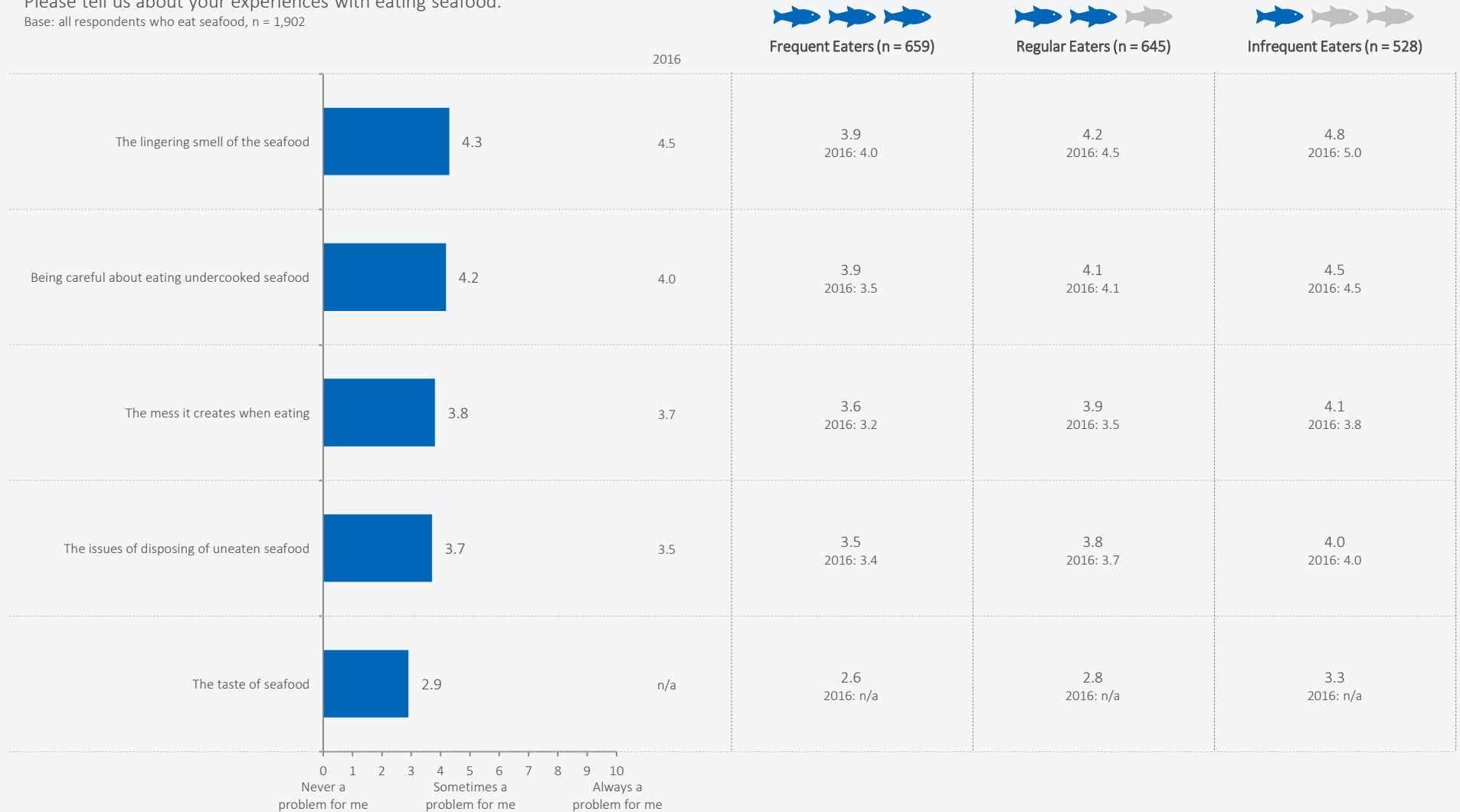
Some of what they said...

- "NOT getting enough meat out of a Lobster/removing shells and veins from Prawns/ Crabs are delicious but the hard shell makes it difficult to get at all of the meat and are harder to judge the cooking time."*
- "Pretty much any flavour put on or near the meat goes straight through it. Has a bigger change of having the flavour of impurities going through the meat."*
- "Often feel like eating something a bit more filling a couple of hours after the meal. Eating crustacea is often cumbersome and messy."*
- "I lack the confidence to vary my recipes for fear of failure as it is an expensive meal unless we catch it ourselves."*
- "Smell mostly, just not my thing, hasn't appealed to me as I got older (I ate it regularly when I was under 5 years old)."*
- "Taking off the shell of prawns and breaking the shell of crab meat but really its half the fun after a wine or two."*
- "How messy it can be sometimes, and the bad smell , and how long it takes to clean up all the mess."*
- "Dealing with bones and if I'm a restaurant, prawns that have not been deveined is pretty bad."*
- "Memories of being poisoned several times which is why I rarely buy it and stick to frozen."*
- "I would not enjoy to filet or remove bones etc. but I have a great fishmonger for that!"*
- "Perhaps in some fish there may be some bones but this is an extreme rarity these days."*
- "The risk of eating bones or storing incorrectly not having the confidence to cook it."*
- "I hate the bones and picking them out, plus the crusty skin sometimes etc."*
- "Removing digestive tract and brown liquid near head. Also smelly remains."*
- "The taste of the ocean in some fish not cooked properly or not cleaned."*

THE CONSUMPTION EXPERIENCE

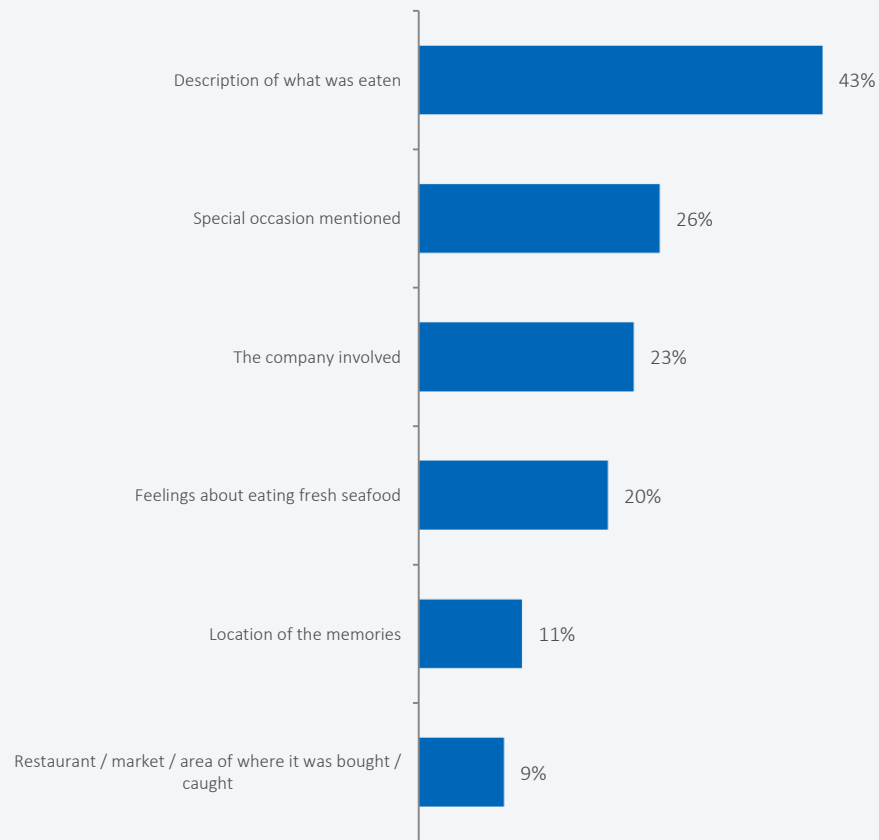
We've listed below the experiences of other people when **eating** seafood.
Please tell us about your experiences with eating seafood.

Base: all respondents who eat seafood, n = 1,902



Thinking about a special time you enjoyed eating fresh seafood, please describe your favourite memories of this time.

Base: all respondents who eat seafood, n = 1,902



A random sample of 50% of answers was selected for this analysis. Results above exclude responses accounting for <5% of total responses.

Some of what they said...

“My family would always eat tiger prawns with lunch on Sundays when my grandma would visit after church. I think most memories with my grandma involve prawns now that I think about it. Even when her dementia got worse and she moved into a home we nearly always kept up the Sunday tradition and it was lovely because it often triggered her memories. I'm not very sentimental about food memories but every time I eat them I think about my grandma and it makes me smile. Whenever the family is together we still joke about her nimble fingers and how particular she was about eating them.”

“Eating crayfish in our then caravan at the McLaren Vale Caravan Park, we had a lovely meal and it was the night my then partner asked me to marry him. Another time we were eating barramundi at the Daly Waters Pub in the NT, it was our first trip in our caravan. I have so many memories of the times we ate seafood on a trips around Australia, too many to list here. We spent 17 years travelling in our van and ate seafood of some sort most weeks. Wonderful memories that I have now of those times.”

“Eating chilli blue swimmer crab dish. I enjoyed the taste of the crab meat, sucking on the parts of the crab like the claws to mop up the sauce. Being able to use my hands to get to the meat. the fact that there were leftovers which I had for lunch the following day. This is one of my favourite meals and takes me back to childhood when my Dad would go crabbing and bring home plenty of crabs which we'd eat as a family.”

“I guess the best memory is my most recent memory. I had decided that we would have oven baked fish in foil for Good Friday instead of the usual frozen fish or the traditional 'fish & chip' meal. it turned out a spectacular success even though I may have been a bit heavy handed with the garlic salt! Really pleased and proud of preparing a good meal, and I'm now encouraged to use seafood more often in future!”

“It was when I was a kid and we would go on our Sunday afternoon drive (uncle, grandmother, great aunt) and we went to Bundeena and my uncle bought me prawns in newspaper and I remember sitting there with him eating and chatting. I don't really know why this memory sticks out to me, maybe it's because it was a time when I really liked prawns and their taste because now I don't like them at all.”

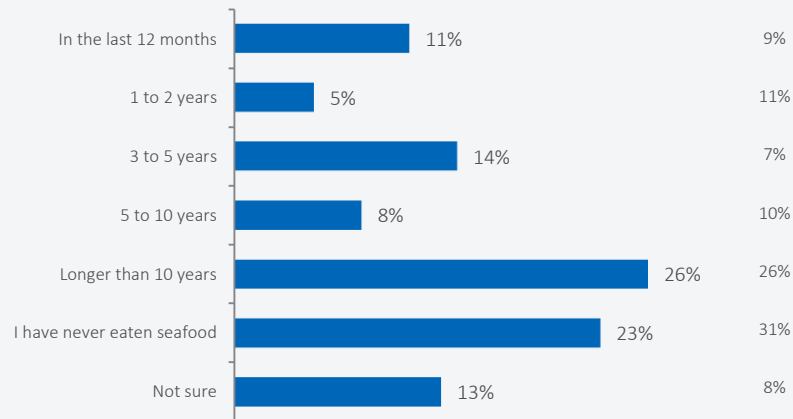
“the first time I ever ate smoked Cod, dear me it was delicious! My friend drizzled some lemon juice over the top and sprinkled a few herbs then wrapped it in some foil then popped it in the oven. 20 mins later served with salad absolutely delicious!!! The smell before it was put in the oven was incredible but then to eat it was so scrumptious! Oh and the company was good too, lol.”



Detailed Results
Non-Eaters of
Seafood

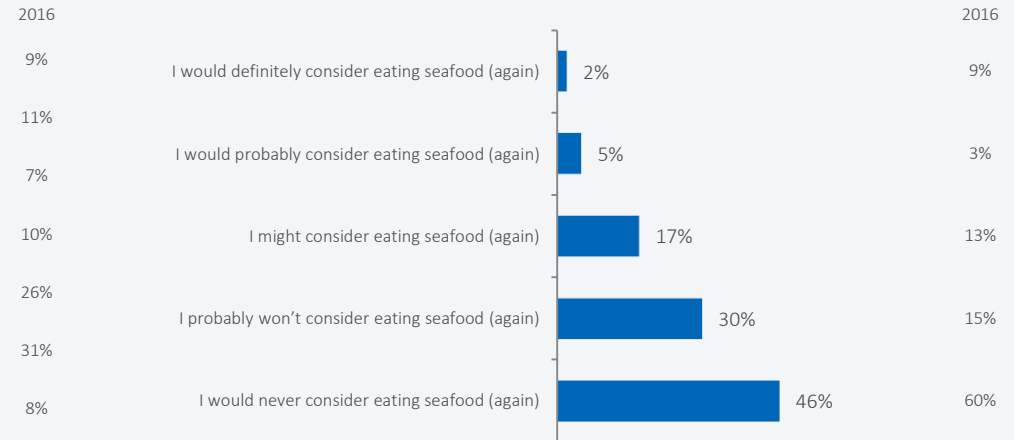
How long has it been since you last ate seafood?

Base: all respondents who do not eat seafood, n = 100



Would you ever consider buying and eating seafood (again)*?

Base: all respondents who do not eat seafood, n = 100



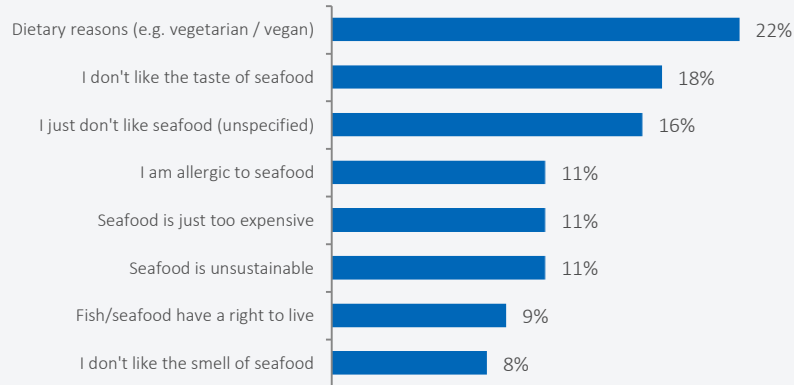
*"again" is asked to those who did not answer "I have never eaten seafood".

Most non-eaters have not eaten seafood for long periods of time. They also show **few indications** of a willingness to consider eating seafood again.

The challenge to 'win-back' the non-eaters will be a significant one.

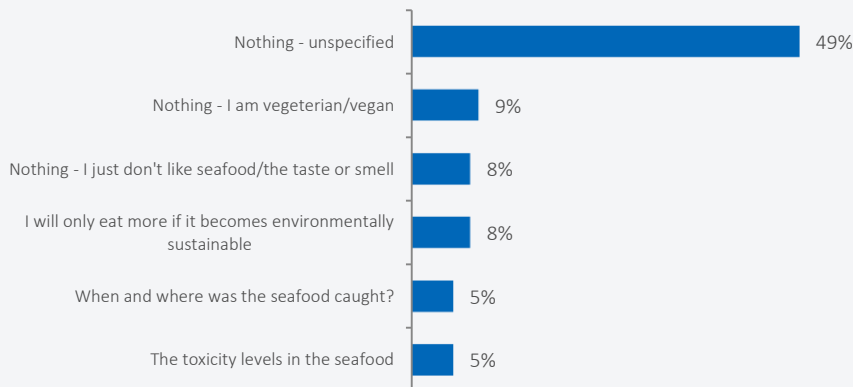
What are the two or three major factors in you not buying and eating seafood?

Base: all respondents who do not eat seafood, n = 100



What information would you like to know that might encourage you to buy, prepare and eat seafood again?

Base: all respondents who do not eat seafood, n = 100



Results for both questions above exclude responses accounting for <5% of total responses.

Some of what they said...

"I'm vegetarian and I work in the fishing industry so know about fish pain research and believe it is the same as other vertebrate animals in regards to pain. Pain in fishing is not considered much. Also a number of species I'd never eat as they are not sustainably fished."

"I never liked seafood but when it was made clear to me how damaging it is for the environment and how close the planet is to losing everything in the ocean I made the decision to stop purchasing and eating seafood."

"The destructive impact eating sea life has on the overall ecosystem. I have never enjoyed the taste of seafood. The lack of empathy the industry has towards sentient beings."

"I chose to become vegetarian, in the time since, I have developed views of refraining from animal cruelty that is meat consumption. Sometimes I purchase seafood for my cat."

"I had to live on fish when I was young when my parents became invalids....I really haven't liked seafood ever since. However, my partner and kids all eat it."

Some of what they said...

"I have disliked the taste of eating seafood for several years now and won't ever be encouraged to eat it. However, putting aside my biased opinion due to the flavour, I believe there evidently is no other argument that can persuade me due to it just not being ethical or environmentally conscious anymore."

"No information would encourage me to eat seafood again while unsustainable fishing practices are being undertaken. Also the levels of mercury in fish concern me as well as micro plastics."

"Don't need to know anything. I know how to fish, how to prepare seafood, I still cook it for the family...just don't want to touch it myself at this point in time."

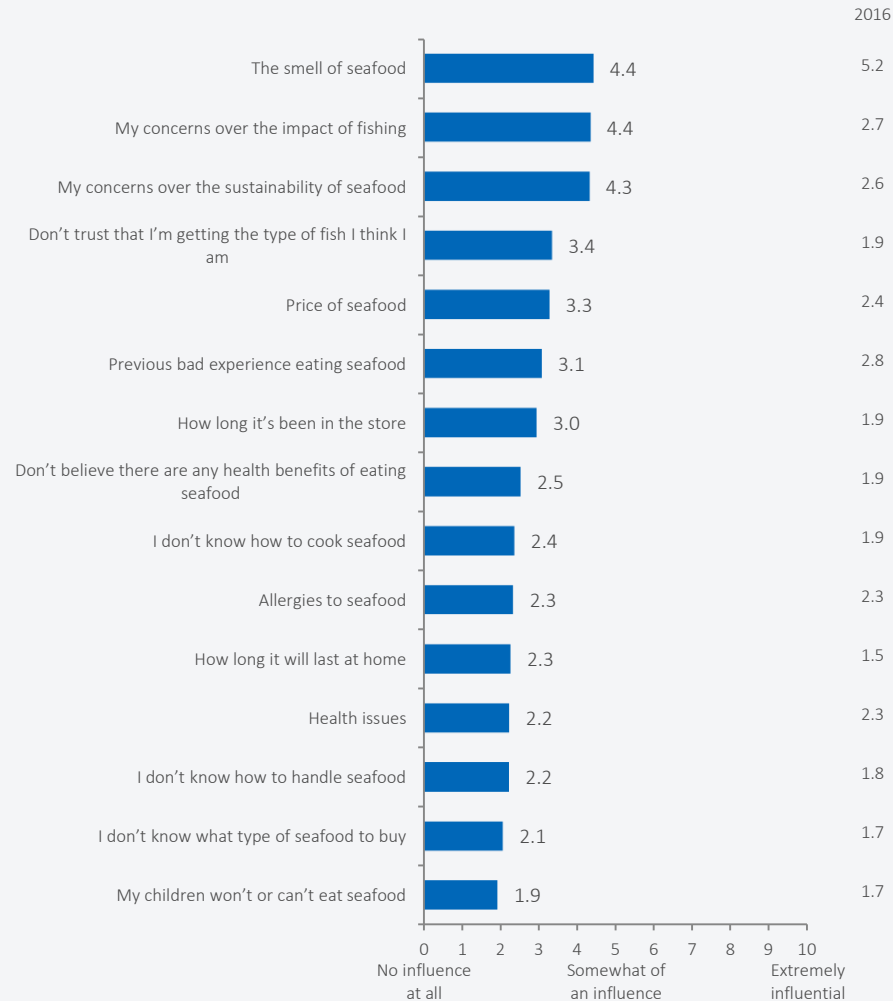
"None, I am a qualified nutritionist, I have read the research and know that the consumption of seafood is detrimental to health and the environment."

"I wouldn't. It is not sustainable to be eating meat/seafood on this planet any more. We need to change our diets."

NON-EATERS OF SEAFOOD

How much of an influence are the following issues in explaining why you don't buy or eat seafood?

Base: all respondents who do not eat seafood, n = 100





Detailed Results
Issues Affecting
Consumer Seafood
Purchasing

ISSUES AFFECTING CONSUMER SEAFOOD PURCHASING

How much of an influence do the following fishing industry issues have on if you buy, how much you buy, and/or how often you buy seafood?

Base: all respondents, n = 2,002



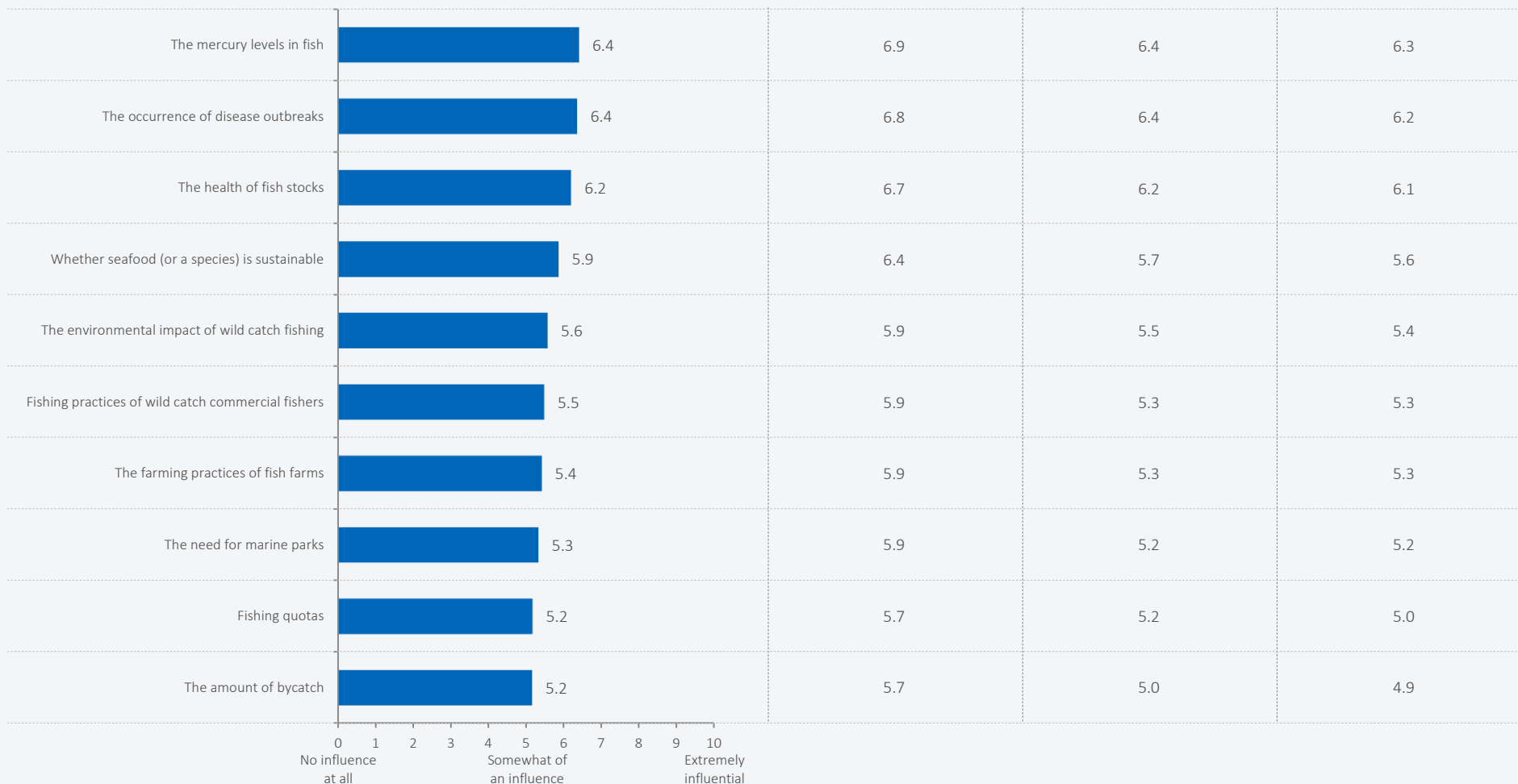
Frequent Eaters (n = 659)



Regular Eaters (n = 645)

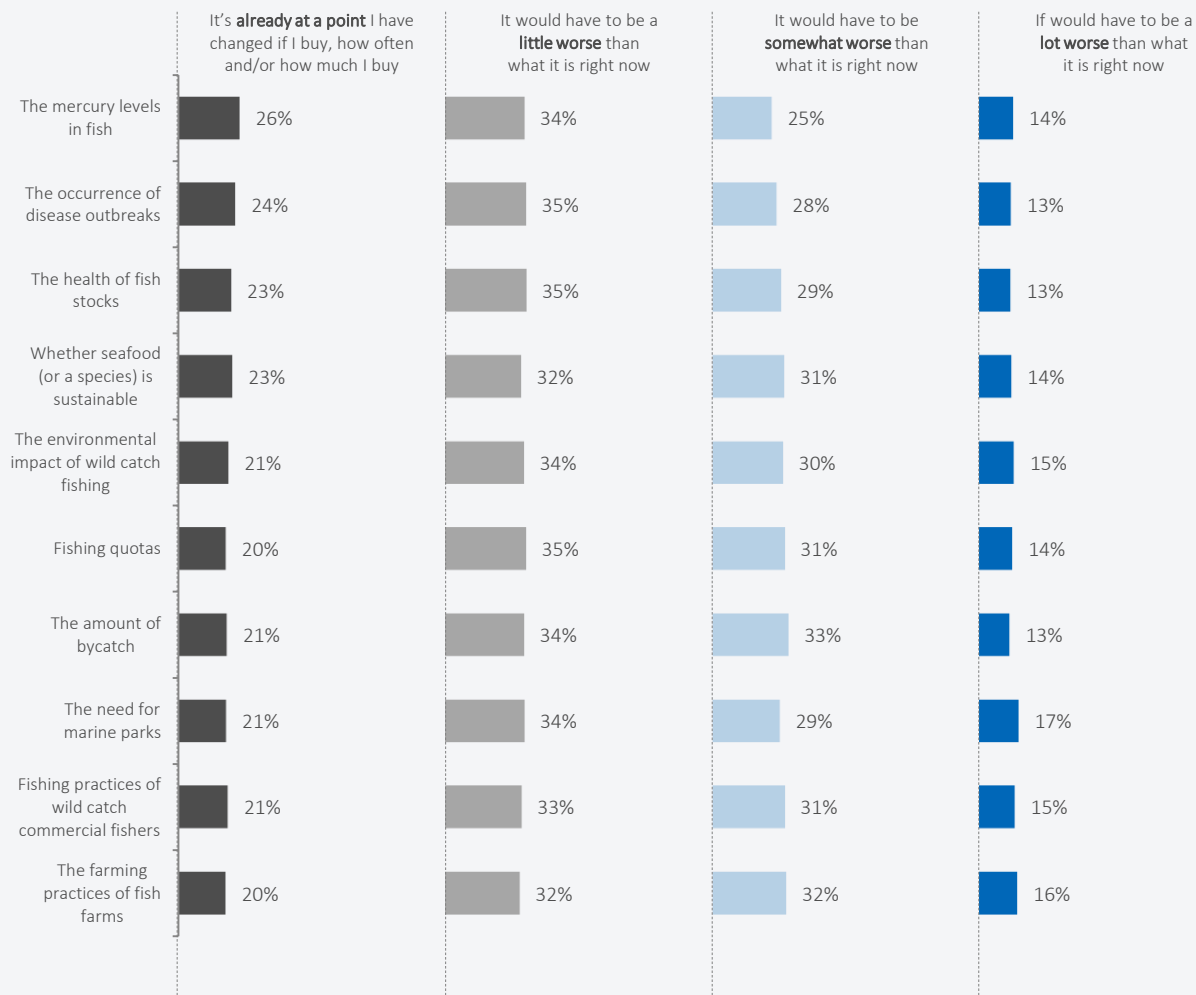


Infrequent Eaters (n = 528)

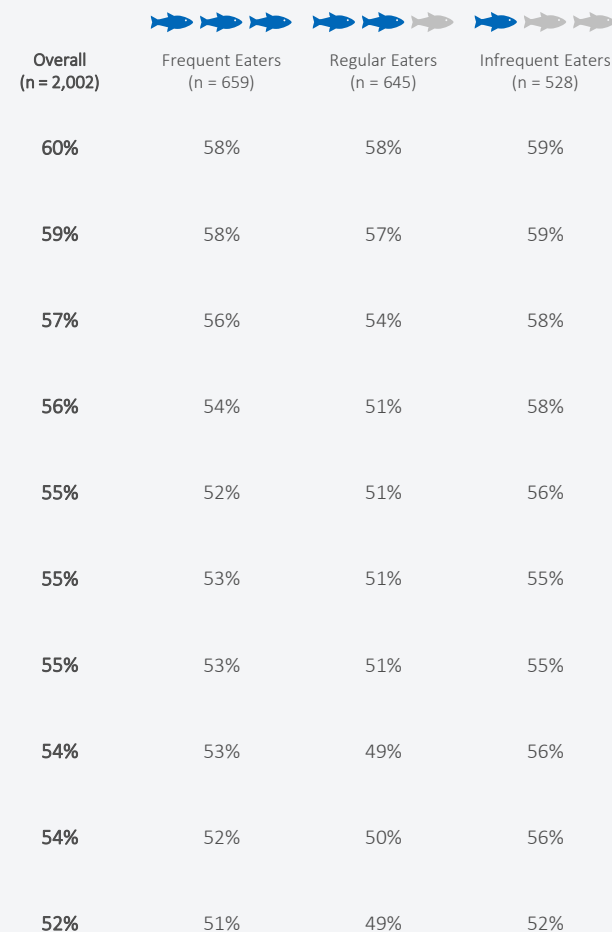


From what you understand of these fishing industry issues today, how much of a change would have to occur to see you stop buying seafood or buy less often or buy smaller amounts of seafood?*

Base: all respondents, n = 2,002



Already changed or would only need to be a little worse to change



*The question was originally asked on a 5-point scale which included "significantly worse" and "extremely worse" in place of the current scale option "a lot worse". Midway through the research period, this was changed to the 4-point scale above – results from the "significantly worse" and "extremely worse" options were merged into the "a lot worse" option. FRDC – unpacking the consumer seafood experience – a 2019 update – June 2019

39% (or about 4 in 10) are highly influenced by at least one industry issue and are at risk* of changing their purchasing habits because of the issue.

- 15% are at risk on one issue only;
- 9% are at risk for two issues;
- 6% are at risk for three issues;
- 4% are at risk for four issues; with
- the remaining 5% are at risk for five or more issues.

Industry Issue	% highly influenced by issue on purchasing habits	Of this % rating 8-10...	% who are at risk – only needs to be a little worse to change purchasing habits	% highly influenced AND at risk across all respondents
The occurrence of disease outbreaks	42%	----->	34%	-----> 14%
The mercury levels in fish	44%	----->	30%	-----> 13%
The health of fish stocks	39%	----->	32%	-----> 13%
Whether seafood (or a species) is sustainable	34%	----->	29%	-----> 10%
Fishing practices of wild catch commercial fishers	29%	----->	32%	-----> 9%
The environmental impact of wild catch fishing	30%	----->	30%	-----> 9%
Fishing quotas	26%	----->	33%	-----> 9%
The need for marine parks	29%	----->	30%	-----> 9%
The farming practices of fish farms	29%	----->	30%	-----> 9%
The amount of bycatch	27%	----->	31%	-----> 8%

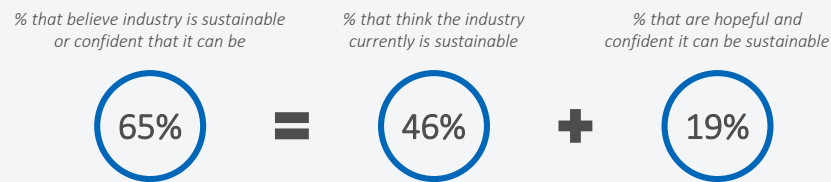
*"At risk" refers to those who would only need the issue to be a little worse to change their purchasing habits.



Detailed Results
Perceptions of
Sustainability

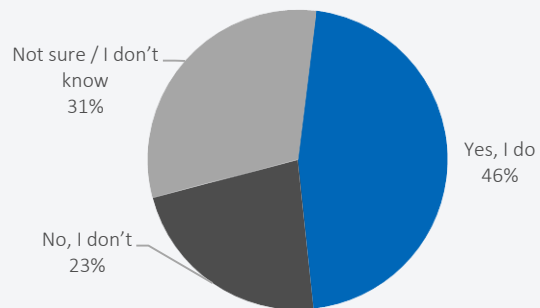
Those who believe sustainability is possible

Base: all respondents, n = 2,002



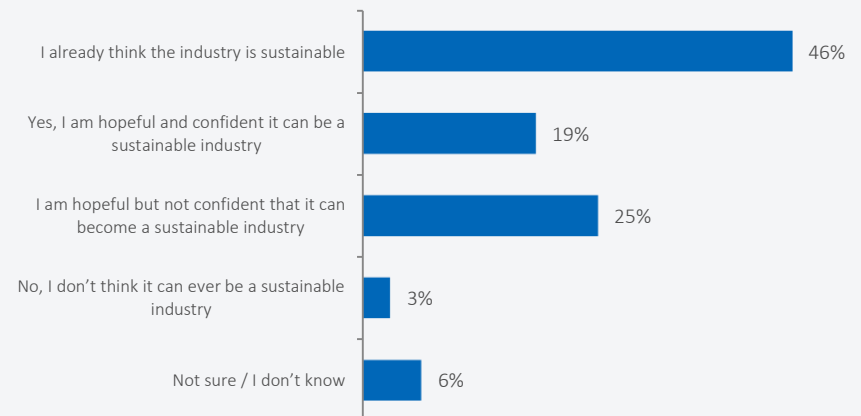
Do you think Australia's fishing industry (that is the industry as a whole) is sustainable?

Base: all respondents, n = 2,002



Do you think Australia's fishing industry can be sustainable?

Base: all respondents, n = 2,002



Those who believe sustainability is possible

Base: all respondents, n = 2,002

Overall (n = 2,002)

% believe it is sustainable
or confident it can be:
65%



Frequent Eaters (n = 659)

% believe it is sustainable
or confident it can be:
73%



Regular Eaters (n = 645)

% believe it is sustainable
or confident it can be:
68%



Infrequent Eaters (n = 528)

% believe it is sustainable
or confident it can be:
59%

Do you think Australia's fishing industry (that is the industry as a whole) is sustainable?

Base: all respondents, n = 2,002

Overall (n = 2,002)

Yes: 46%
No: 23%
Not sure: 31%



Frequent Eaters (n = 659)

Yes: 57%
No: 19%
Not sure: 24%



Regular Eaters (n = 645)

Yes: 48%
No: 21%
Not sure: 31%



Infrequent Eaters (n = 528)

Yes: 39%
No: 25%
Not sure: 36%

Do you think Australia's fishing industry can be sustainable?

Base: all respondents, n = 2,002

Overall (n = 2,002)

Already is: 46%
Hopeful + confident: 19%
Hopeful: 25%
No, never: 3%
Not sure: 6%



Frequent Eaters (n = 659)

Already is: 57%
Hopeful + confident: 17%
Hopeful: 22%
No, never: 1%
Not sure: 3%



Regular Eaters (n = 645)

Already is: 48%
Hopeful + confident: 20%
Hopeful: 25%
No, never: 2%
Not sure: 5%



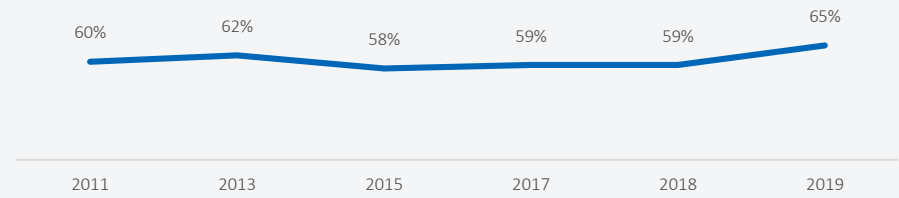
Infrequent Eaters (n = 528)

Already is: 39%
Hopeful + confident: 20%
Hopeful: 28%
No, never: 4%
Not sure: 9%

Those who believe sustainability is possible
 Base: all respondents, n = 2,002

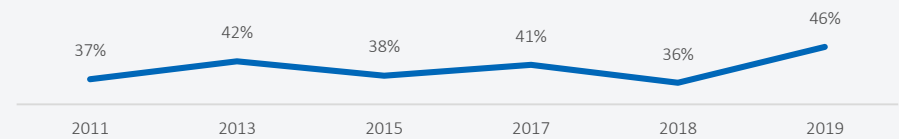
% believe it is sustainable
 or confident it can be:

Results over time



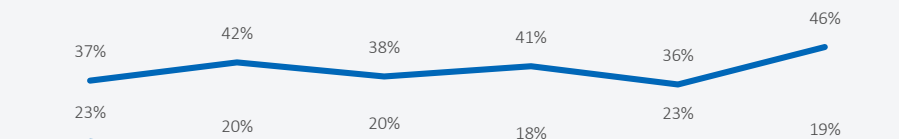
Do you think Australia's fishing industry (that is
 the industry as a whole) is sustainable?
 Base: all respondents, n = 2,002

Yes:

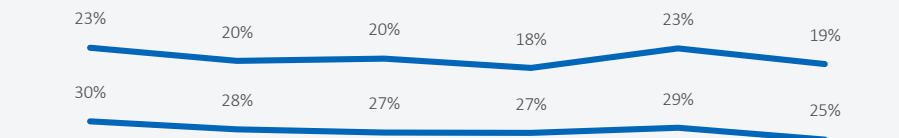


Do you think Australia's fishing industry
 can be sustainable?
 Base: all respondents, n = 2,002

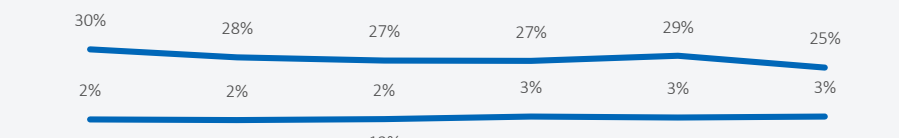
Already is:



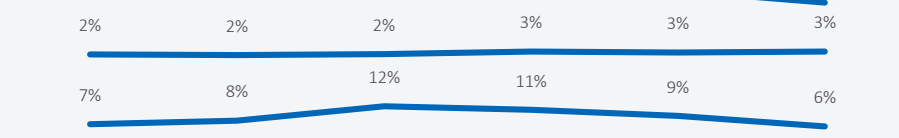
Hopeful + confident:



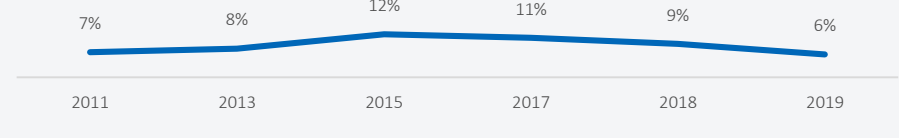
Hopeful:



No, never:



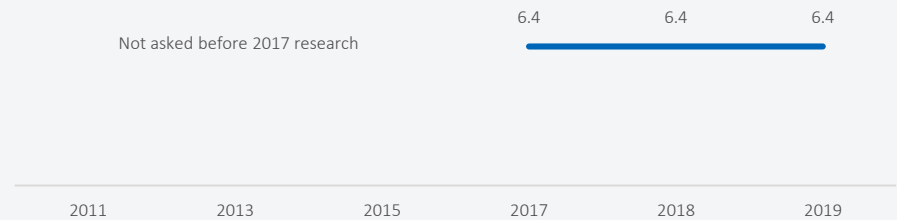
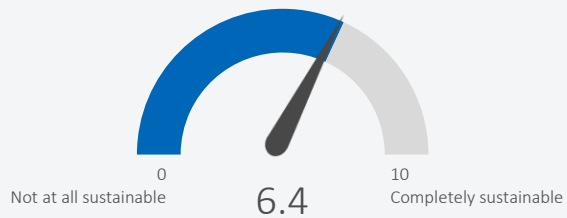
Not sure:



With that in mind, on a scale of 0 to 10, how sustainable do you think the Australian fishing industry is overall?

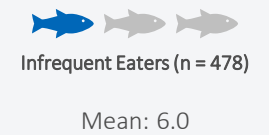
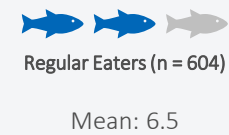
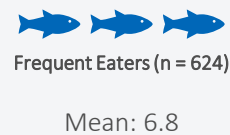
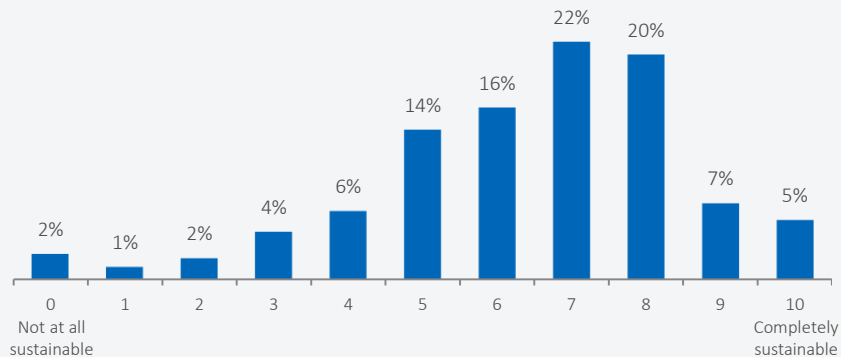
Base: all respondents (excludes 'Not sure' answers), n = 1,849

Results over time



Distribution

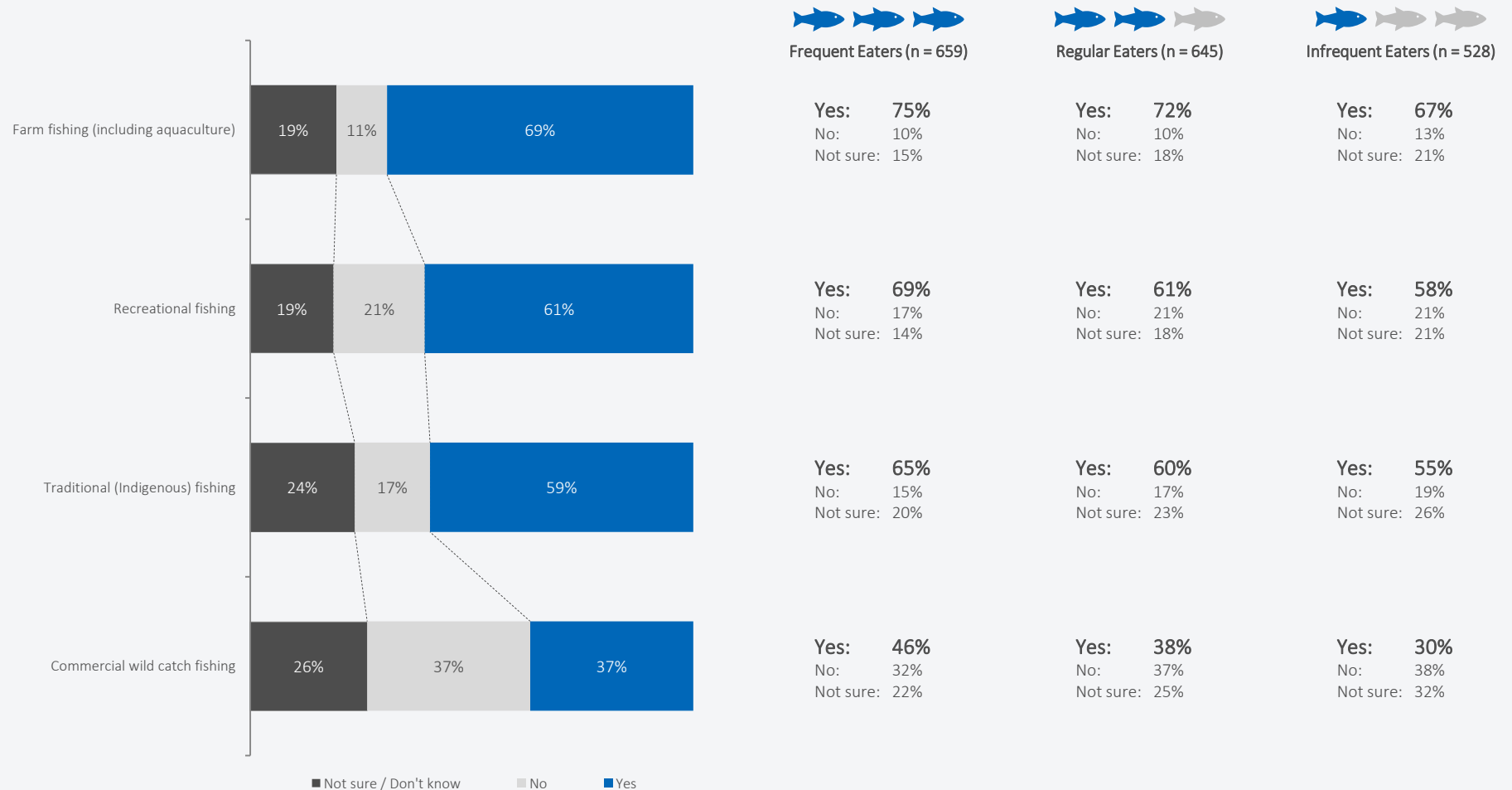
Base: all respondents (excludes 'Not sure' answers), n = 1,849



PERCEPTIONS OF SUSTAINABILITY

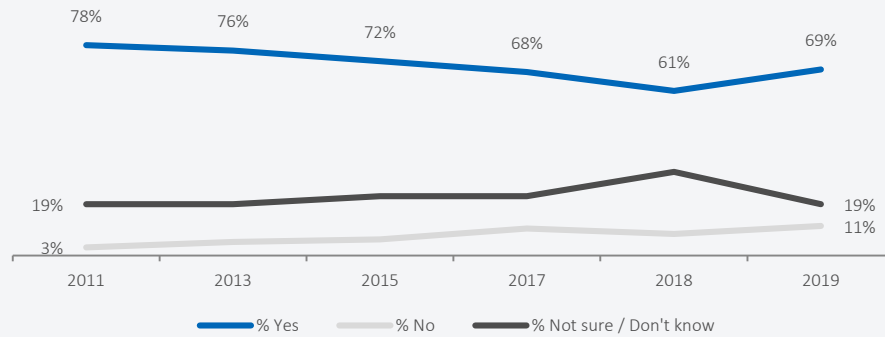
Do you think the following sectors of the Australian fishing industry are sustainable?

Base: all respondents, n = 2,002

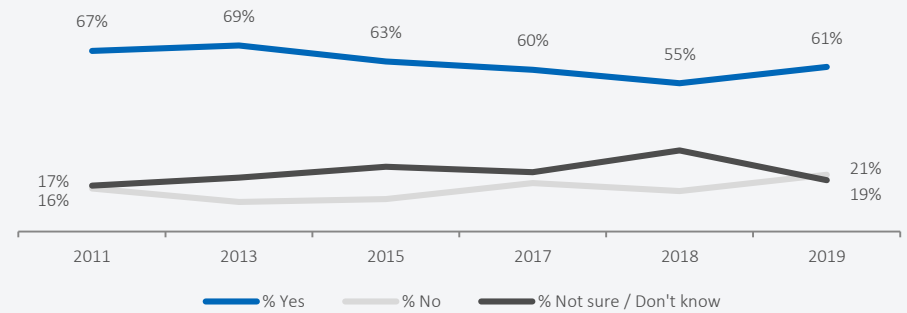


Results over time

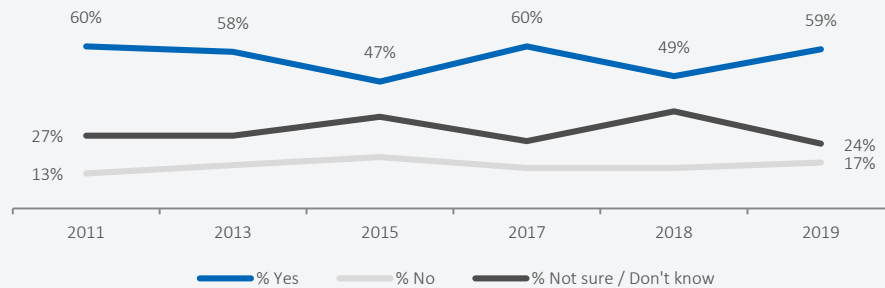
Farm fishing (including aquaculture)



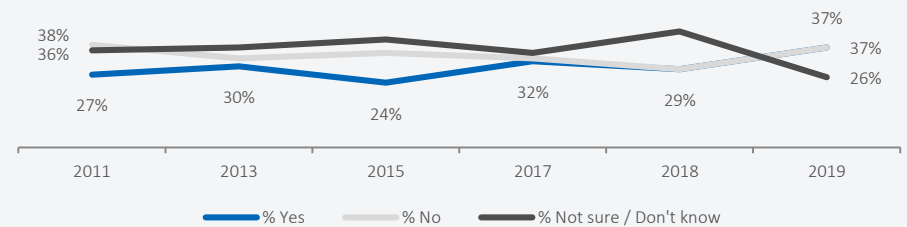
Recreational fishing



Traditional (indigenous) fishing



Commercial wild catch fishing








Appendices

RESPONDENT PROFILES




Key Results by Fresh Fish Eater Segment

Base: all respondents, n = 2,002

	 Frequent Eaters (once a week or more)	 Regular Eaters (once a fortnight to once a month)	 Infrequent Eaters (no more than once every two months)
% of respondents:	33%	32%	26%
Accounts for % of all main fresh seafood meals eaten: (estimate based on freq. of eating fresh fish over last 12 months)	77%	20%	3%
Mainly shop for seafood at:	Supermarket: 60% Seafood Market: 18%	Supermarket: 59% Seafood Market: 15%	Supermarket: 59% Seafood Market: 13%
Best describes when they buy seafood:	Regularly for means during week: 68% Spur of the moment: 19% Only for special occasions: 15%	Spur of the moment: 34% Only for special occasions: 30% Regularly for means during week: 28%	Only for special occasions: 48% Spur of the moment: 35% Regularly for means during week: 9%
% believe better value for money buying seafood over buying meat:	37%	27%	17%
What they do when buying seafood to prepare at home:	72% usually buy the same types, or buy a few different types and don't tend to try anything new	74% usually buy the same types, or buy a few different types and don't tend to try anything new	81% usually buy the same types, or buy a few different types and don't tend to try anything new
Typically purchase seafood:	On impulse - 15% / 85% - planned or varied	On impulse - 22% / 78% - planned or varied	On impulse - 25% / 75% - planned or varied




Key Results by Fresh Fish Eater Segment

Base: all respondents, n = 2,002

	 Frequent Eaters (once a week or more)	 Regular Eaters (once a fortnight to once a month)	 Infrequent Eaters (no more than once every two months)
Mean confidence in buying seafood: (scale of 0 – Not confident at all to 10 – Very confident)	7.8 – overall confidence buying seafood	7.3 – overall confidence buying seafood	6.4 – overall confidence buying seafood
Looking for info on preparing and cooking seafood:	Cooking websites / apps: 56%	Cooking websites / apps: 62%	Cooking websites / apps: 59%
	Friends: 41%	Friends: 46%	Friends: 41%
	Cooking shows (inc. website/app): 25%	Cooking shows (inc. website/app): 23%	Cooking shows (inc. website/app): 15%
Experiences preparing seafood: (scale of 0 – Never a problem for me to 10 – Always a problem for me)	4.0 – knowing how long to cook seafood	4.4 – knowing how long to cook seafood	4.8 – knowing how long to cook seafood
	3.7 – smell of seafood when cooking	4.0 – smell of seafood when cooking	4.6 – smell of seafood when cooking
	3.6 – lack of different ways using seafood in meals	4.0 – knowing what to add when preparing seafood	4.4 – knowing what to add when preparing seafood
Mean confidence in preparing and cooking seafood: (scale of 0 – Not confident at all to 10 – Very confident)	7.2 – overall confidence preparing/cooking seafood	6.5 – overall confidence preparing/cooking seafood	5.6 – overall confidence preparing/cooking seafood
	6.5 – how to cook, prepare, flavor seafood	6.1 – how to cook, prepare, flavour seafood	5.3 – how to cook, prepare, flavour seafood
	6.5 – different ways to cook/prepare seafood	6.1 – different ways to cook/prepare seafood	5.1 – different ways to cook/prepare seafood
Experiences eating seafood: (scale of 0 – Never a problem for me to 10 – Always a problem for me)	3.9 – the lingering smell of the seafood	4.2 – the lingering smell of the seafood	4.8 – the lingering smell of the seafood
	3.9 – being careful about undercooked seafood	4.1 – being careful about undercooked seafood	4.5 – being careful about undercooked seafood
	3.6 – the mess it creates when eating	3.9 – the mess it creates when eating	4.1 – the mess it creates when eating

Key Demographics by Fresh Fish Eater Segment




Base: all respondents, n = 2,002

	 Frequent Eaters (once a week or more)	 Regular Eaters (once a fortnight to once a month)	 Infrequent Eaters (no more than once every two months)
Mean Age:	48.6 years of age	45.4 years of age	44.5 years of age
Generation:	Boomers: 33% Millennials: 30% Gen X: 25%	Millennials: 33% Gen X: 28% Boomers: 28%	Millennials: 33% Gen X: 31% Boomers: 26%
Education:	45% have a postgrad or bachelor degree	37% have a postgrad or bachelor degree	29% have a postgrad or bachelor degree
Employment:	41% are employed full time	40% are employed full time	28% are employed full time
Household:	56% are married	50% are married	38% are married
Parental Status:	70% are a parent to a child or children	62% are a parent to a child or children	60% are a parent to a child or children
Mean Household Income:	29% have a household income of \$100k or more	29% have a household income of \$100k or more	18% have a household income of \$100k or more
Regular Fishers:	29% fish once a month or more	18% fish once a month or more	12% fish once a month or more

RESPONDENT PROFILES




Key Results by Generation Segment

Base: all respondents, n = 2,002

	 Millennials (23-38 years old)	 Gen X (39-54 years old)	 Boomers (55-73 years old)
% of respondents:	32%	28%	28%
Accounts for % of all main fresh seafood meals eaten: (estimate based on freq. of eating fresh fish over last 12 months)	31%	26%	31%
Mainly shop for seafood at:	Supermarket: 63% Seafood Market: 16%	Supermarket: 58% Seafood Market: 17%	Supermarket: 58% Seafood Market: 14%
Best describes when they buy seafood:	Only for special occasions: 37% Regularly for meals during the week: 33% Spur of the moment: 25%	Regularly for meals during the week: 33% Only for special occasions: 30% Spur of the moment: 28%	Regularly for meals during the week: 42% Spur of the moment: 38% Only for special occasions: 22%
% believe better value for money buying seafood over buying meat:	33%	25%	22%
What they do when buying seafood to prepare at home:	83% usually buy the same types, or buy a few different types and don't tend to try anything new	73% usually buy the same types, or buy a few different types and don't tend to try anything new	70% usually buy the same types, or buy a few different types and don't tend to try anything new
Typically purchase seafood:	On impulse - 25% / 75% - planned or varied	On impulse - 18% / 82% - planned or varied	On impulse - 17% / 83% - planned or varied

Key Results by Generation Segment




Base: all respondents, n = 2,002

	 Millennials (23-38 years old)	 Gen X (39-54 years old)	 Boomers (55-73 years old)
Mean confidence in buying seafood: (scale of 0 – Not confident at all to 10 – Very confident)	6.7 – overall confidence buying seafood	7.0 – overall confidence buying seafood	7.7 – overall confidence buying seafood
Looking for info on preparing and cooking seafood:	Cooking websites / apps: 67% Friends: 38% Cooking shows (inc. website/app): 28%	Cooking websites / apps: 58% Friends: 42% Cooking shows (inc. website/app): 22%	Cooking websites / apps: 53% Friends: 48% Seafood specific or fishing websites/apps: 17%
Experiences preparing seafood: (scale of 0 – Never a problem for me to 10 – Always a problem for me)	5.3 – knowing how long to cook seafood 4.8 – smell of seafood when cooking 4.7 – lack of different ways using seafood in meals	4.3 – knowing how long to cook seafood 4.0 – smell of seafood when cooking 3.8 – lack of different ways using seafood in meals	3.7 – knowing how long to cook seafood 3.6 – smell of seafood when cooking 3.3 – knowing what to add when preparing seafood
Mean confidence in preparing and cooking seafood: (scale of 0 – Not confident at all to 10 – Very confident)	5.9 – overall confidence preparing/cooking seafood 5.7 – how to cook, prepare, flavor seafood 5.6 – different ways to cook/prepare seafood	6.5 – overall confidence preparing/cooking seafood 5.9 – how to cook, prepare, flavour seafood 5.8 – different ways to cook/prepare seafood	6.9 – overall confidence preparing/cooking seafood 6.4 – how to cook, prepare, flavour seafood 6.3 – different ways to cook/prepare seafood
Experiences eating seafood: (scale of 0 – Never a problem for me to 10 – Always a problem for me)	5.0 – the lingering smell of the seafood 5.0 – being careful about undercooked seafood 4.4 – the issues of disposing of uneaten seafood	4.3 – the lingering smell of the seafood 4.1 – being careful about undercooked seafood 3.9 – the mess it creates when eating	3.7 – the lingering smell of the seafood 3.5 – being careful about undercooked seafood 3.3 – the mess it creates when eating

RESPONDENT PROFILES

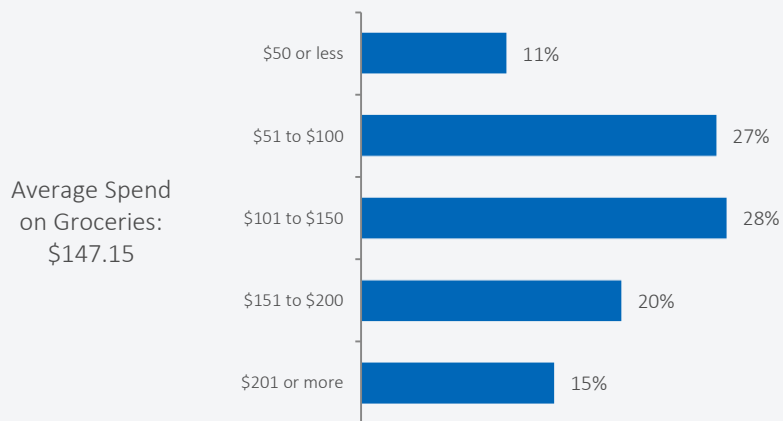
Key Demographics by Generation Segment

Base: all respondents, n = 2,002

	 Millennials (23-38 years old)	 Gen X (39-54 years old)	 Boomers (55-73 years old)
Mean Age:	30.7 years of age	46.6 years of age	63.9 years of age
Fresh Fish Eater:	Frequent Eaters: 30% Regular Eaters: 33% Infrequent Eaters: 27%	Frequent Eaters: 29% Regular Eaters: 32% Infrequent Eaters: 29%	Frequent Eaters: 39% Regular Eaters: 32% Infrequent Eaters: 24%
Education:	50% have a postgrad or bachelor degree	33% have a postgrad or bachelor degree	27% have a postgrad or bachelor degree
Employment:	46% are employed full time	48% are employed full time	22% are employed full time
Household:	42% are married	49% are married	58% are married
Parental Status:	53% are a parent to a child or children	68% are a parent to a child or children	76% are a parent to a child or children
Mean Household Income:	30% have a household income of \$100k or more	31% have a household income of \$100k or more	18% have a household income of \$100k or more
Regular Fishers:	26% fish once a month or more	16% fish once a month or more	11% fish once a month or more

What would you say you spend per week on groceries?

Base: all respondents who provided valid responses (removing outliers), n = 1,961*



Frequent Eaters (n = 645)

Average Spend on Groceries: \$155.35



Regular Eaters (n = 634)

Average Spend on Groceries: \$151.68

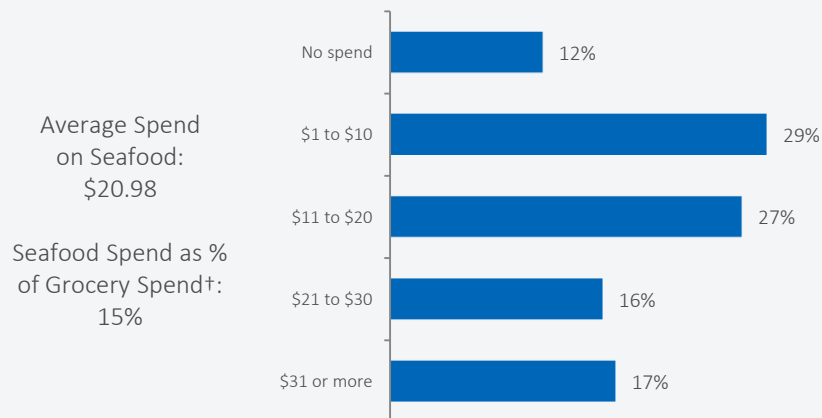


Infrequent Eaters (n = 514)

Average Spend on Groceries: \$135.51

And what would you say you spend per week on seafood in particular?

Base: all respondents who provided valid responses (removing outliers), n = 1,961*



Frequent Eaters (n = 645)

Average Spend on Seafood: \$31.77

Seafood Spend as % of Grocery Spend†: 22%



Regular Eaters (n = 634)

Average Spend on Seafood: \$20.93

Seafood Spend as % of Grocery Spend†: 15%



Infrequent Eaters (n = 514)

Average Spend on Seafood: \$12.90

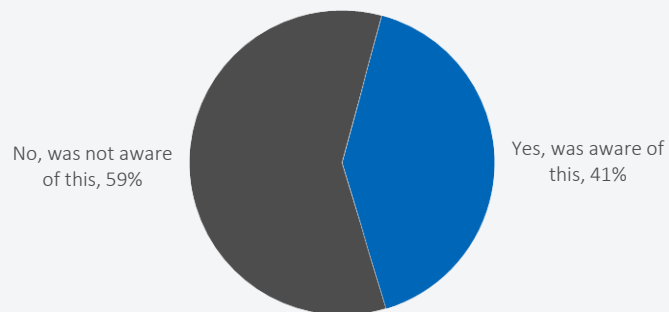
Seafood Spend as % of Grocery Spend†: 11%

*Outliers were deemed as responses that were far and away above all other responses, or those who provided a seafood spend higher than their grocery spend.

†The average seafood spend as % of grocery spend was calculated as an average of each respondents % of seafood spend, as opposed to the % of the respondent means for spend.

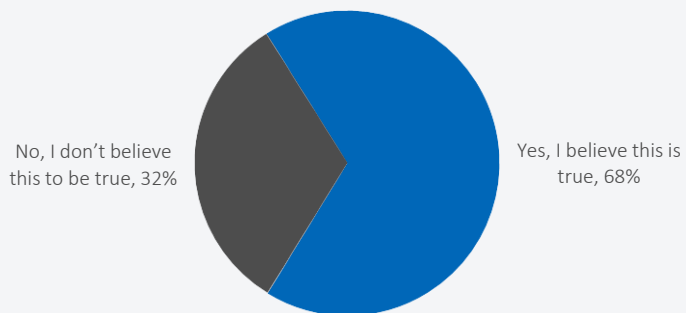
Were you aware that FSANZ (Food Standards Australia New Zealand) recommends that Australians (excluding pregnant women and children under 6) eat 2-3 serves of fish/seafood per week?

Base: all respondents, n = 2,002



Do you believe the statement previously (most Australians should be 2-3 serves of fish/seafood per week)?

Base: all respondents, n = 2,002



Yes, aware:
53%



Yes, aware:
38%



Yes, aware:
34%

The FMI's Power of Seafood research† states the following:

- 59%** aware of USDA's recommendation to eat at least two servings of seafood per week
- 54%** aware of FDA's advisement that seafood is good for children's growth and development
- 51%** aware of FDA/EPA's advisement that seafood contributes to healthy diet before/during pregnancy/while breastfeeding.



Yes, true:
78%



Yes, true:
68%

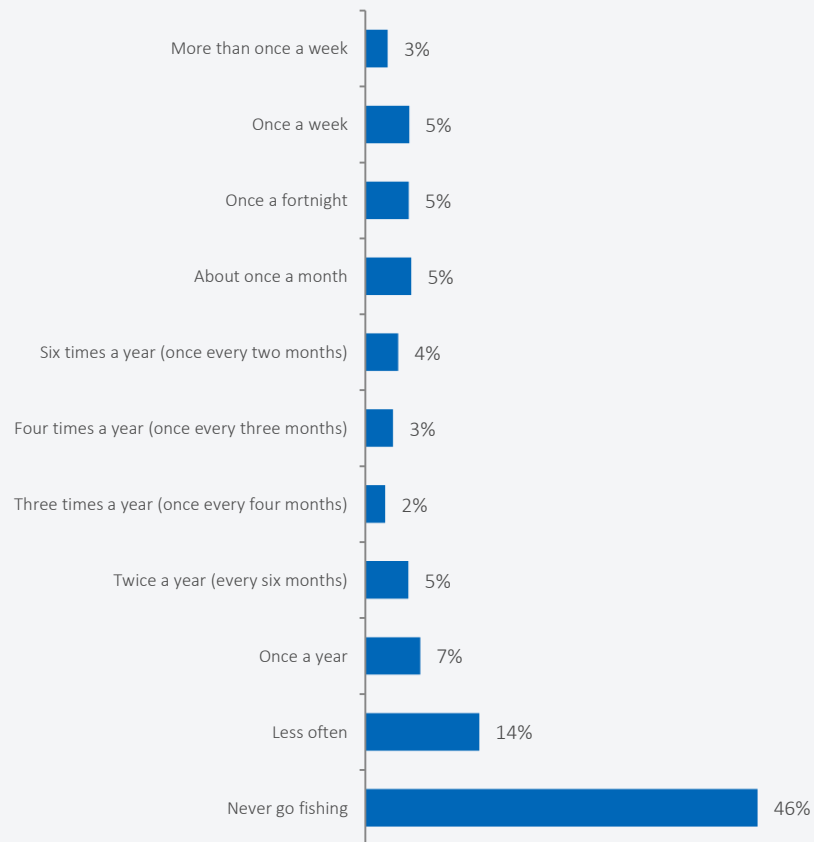


Yes, true:
63%

†Source: FMI's Power of Seafood 2019. Please note that the FMI research is based on US respondents, and also defines the seafood consumer as those who consume at least once a month at home, a restaurant, or elsewhere. This comparison should be treated as indicative only.

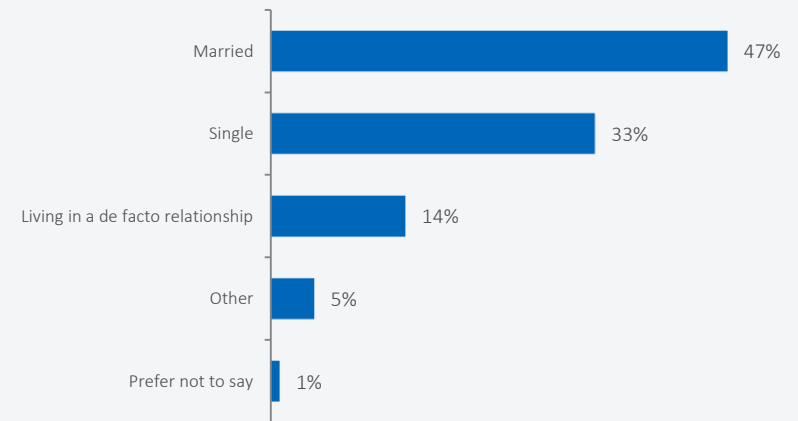
Over the last 12 months, how often have you gone fishing? Include any occasion you have gone recreational fishing – by yourself, with friends or family or with others.

Base: all respondents, n = 2,002



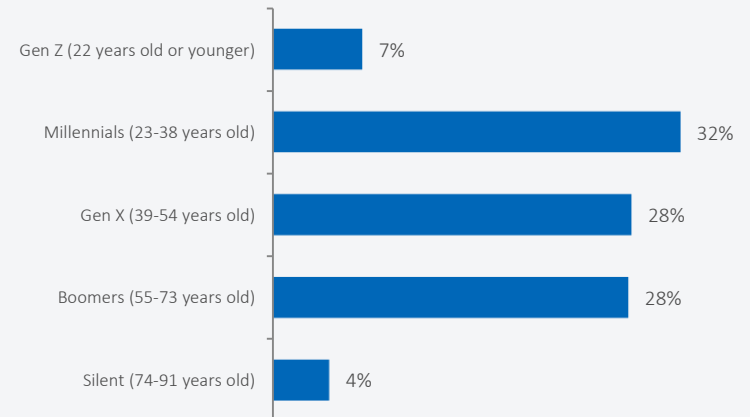
Which one of the following best describes your household situation?

Base: all respondents, n = 2,002



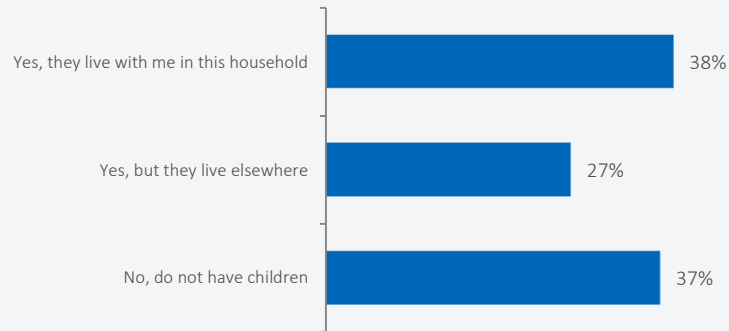
Generation of respondent (based off age of respondent)

Base: all respondents, n = 2,002



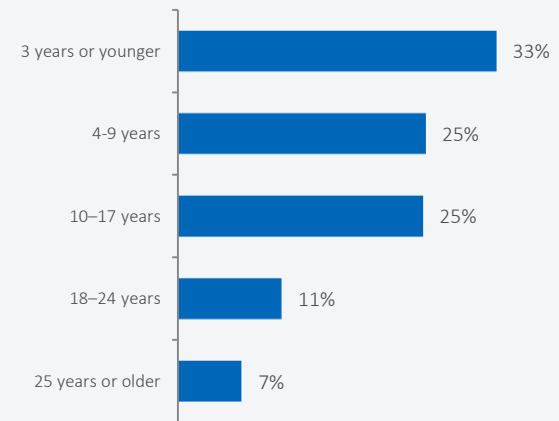
Do you have any children?

Base: all respondents, n = 2,002



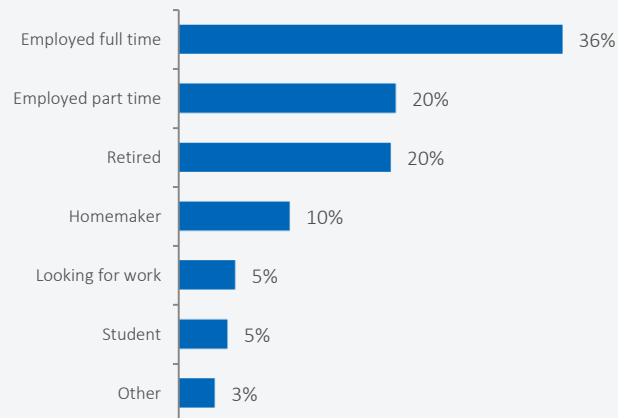
What is the age of the youngest child living with you?

Base: all respondents who has a child or children living with them in the household, n = 763



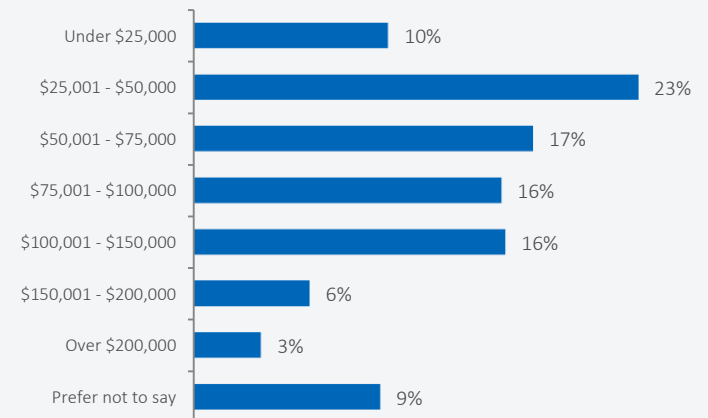
What is your current employment status?

Base: all respondents, n = 2,002



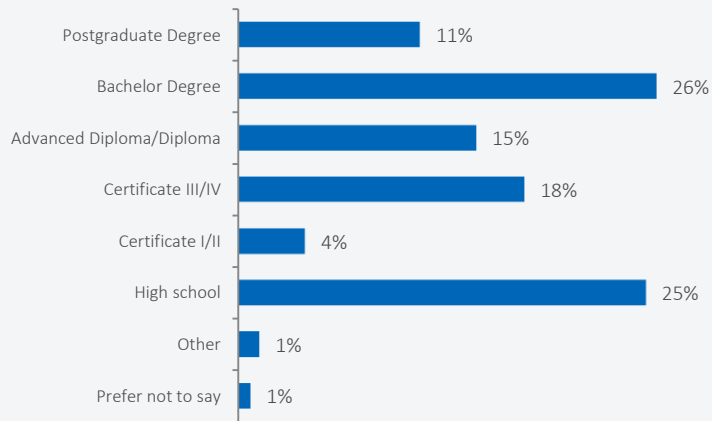
What is your current household income before tax?

Base: all respondents, n = 2,002



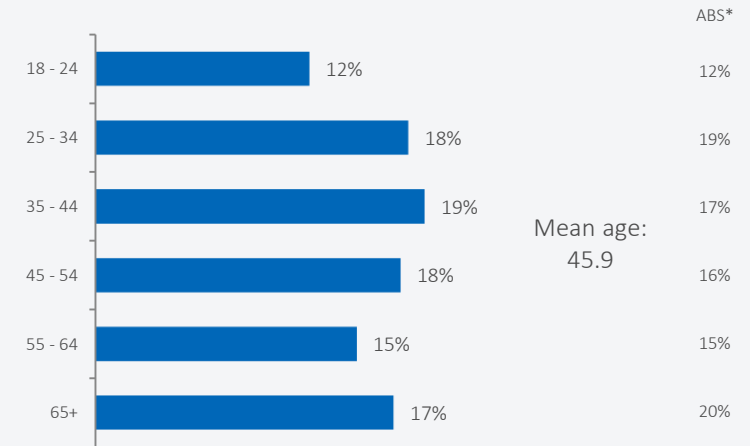
What is the highest level of education you have completed?

Base: all respondents, n = 2,002



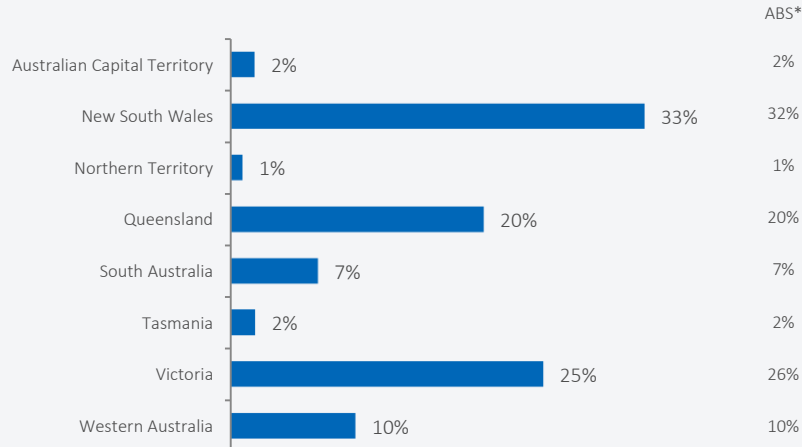
Age Group of respondent

Base: all respondents, n = 2,002



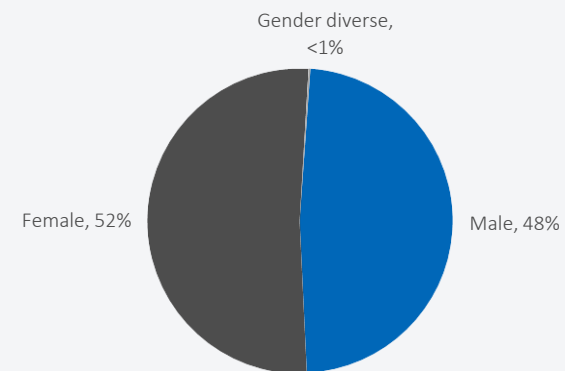
State/Territory of respondent

Base: all respondents, n = 2,002



Gender of respondent

Base: all respondents, n = 2,002



ABS*: Males 49.6%, Females 50.4%

Methodology

The study involved an online survey amongst adults (18+) who fulfilled the position of main grocery buyer (MGB) for their household.

Consumers were sourced via an accredited online market research panel provider; TEG Insights. This methodology provides a random and representative sample of consumers in a highly cost efficient way.

Sample

The final sample size for the market research was n = 2,002 representative of Australia by age, gender and geographical location as matched by ABS estimates:

ACT:	n = 39	QLD:	n = 404	VIC:	n = 499
NSW:	n = 660	SA:	n = 140	WA:	n = 200
NT:	n = 20	TAS:	n = 40		

As final age and gender profile of this sample was matched back to the ABS estimate of the population profile, it was decided that, given the similarity of the profiles, no weighting of the market research data would be required.

Questionnaire

A 15 minute online survey was conducted with respondents. This survey measured, amongst other things:

- o Consumption Behaviours
- o The Purchasing Experience
- o The Consumption Experience
- o Non-Eaters Of Seafood
- o Issues Affecting Consumer Seafood Purchasing
- o Perceptions Of Sustainability
- o Respondent Profiles

A range of Likert rating scale, closed and open-ended questions were used throughout the survey to accomplish this.

Response and Timing

Throughout the survey period, n = 2,002 respondents completed the survey. The survey was open for response on 18th April 2019 and remained open until 9th May 2019.



Unpacking the consumer seafood experience

a 2019 update

June 2019

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