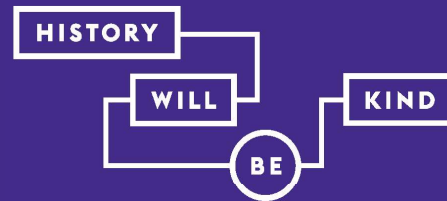


MSC Christmas Prawns

Prepared for:



10 November, 2020

YouGov[®]

Methodology

Methodology

- This study was conducted online between 5th – 9th November 2020.
- The sample comprised a nationally representative sample 1,017 Australians aged 18 years and older.
- YouGov Galaxy designed the questionnaire, a copy of which has been included in this report.
- Following the completion of interviewing, the data was weighted by age, gender and region to reflect the latest ABS population estimates.

Key findings

Key findings

Likelihood of buying/ eating more or less prawns this summer/ for Christmas than in previous years (Q1)

- One in five (19%) Australians are more likely to buy/ eat prawns this summer/ for Christmas compared to previous years, whereas one in ten (11%) are less likely to buy prawns this Christmas than in previous years.
- One in two (50%) Australians say they are just as likely to buy/eat prawns this year as they would have been in any other year.
- Unfortunately, for one in five (21%) Australians they do not eat/ are allergic to prawns and/or other shellfish.
- Men are more likely than women to be more likely to buy/eat prawns this summer/Christmas than in previous years (24% compared to 14%).
- Millennials (26%) are more likely than their older counterparts, Gen X (19%), Baby Boomers (14%) and the Silent Generation (11%) to be more likely to buy/eat prawns this summer/Christmas than in previous years.
- Aussies residing in NSW (52%), Queensland (54%) and Western Australia (58%) are more likely than Victorians to (39%) to say they are just as likely to buy/eat prawns this year as they would have been in any other year.

Key findings

Reasons for being likely to buy/eat prawns this summer/Christmas (Q2)

- Amongst those Australians who are more or just as likely to buy/eat prawns this Christmas than in previous years, four in ten (40%) say they are likely to buy/eat prawns because prawns are an important part of their summer/ Christmas celebrations.
- Other common reasons among these Aussies include believing prawns an essential part of an Australian summer/Christmas (38%), planning to spend the summer/celebrating Christmas at home this year (37%) and that it is important to support Australian suppliers (33%).
- Men are more likely than women to say they are likely to buy/eat prawns this Christmas is because prawns are an essential part of an Australian summer/Christmas (43% compared to 32%) and they have saved money this year so are happy to spend on prawns (12% compared to 5%).
- Baby Boomers are more likely than Millennials to say they are likely buy/eat prawns this summer/Christmas because they believe it is important to support Australian suppliers (40% compared to 29%).

Key findings

Reasons for being less likely to buy/eat prawns this summer/Christmas (Q3)

- Amongst those Australians who are less likely to buy/eat prawns this Christmas than in previous years, four in ten (43%) say their reason for being less likely to purchase or eat prawns is because their budget does not stretch to them this year.
- Other reasons are that prawns are not considered one of people's favourite summer/ Christmas foods (34%), prawns are something Aussies don't like (18%) and for more than one in ten (16%) Aussies, they hate having to deal with the shells of prawns.

Purchasing sustainable prawns (Q4)

- One in two (51%) Australians who eat prawns, the equivalent of 8.1 million people, plan to buy sustainable prawns this year.
- On the other hand, one in four (24%) Australians who eat prawns do not plan to purchase sustainable prawns, while 16% admit they do not know what sustainable prawns are and one in ten (9%) do not mind if they are sustainable or not.
- One in three (34%) Aussies who eat prawns, say they would buy sustainable prawns this year because they want to support local fisheries/ fisherman/ fishing communities, whereas one in four (26%) wants to safeguard seafood for future generations and 24% care about the environmental impact they have as an individual.

Key findings (continued...)

- However, for one in ten (11%) prawn eaters, they are not planning to buy sustainable prawns this year because they simply do not know how to identify them/ purchase them, whereas 8% of Aussie prawn eaters say sustainable prawns are too expensive.
- Baby Boomers (44%) are more likely than Millennials (28%) to say they will be buying sustainable prawns this year because they want to support local fisheries/ fishermen/ fishing communities.
- Australians who are more likely or just as likely to eat prawns this summer/Christmas than in previous years are more likely than those who are less likely to say they will be buying sustainable prawns this year (More likely 72% and Just as likely 50% compared to Less likely 17%).

Favourite Christmas foods (Q6)

- The majority (95%) of Australians celebrate Christmas, and of those who do celebrate Christmas the most popular favourite Christmas foods are ham (51%), followed closely by prawns (48%) and Christmas pudding (43%).
- Other favourite Christmas foods include potato salad (40%), pavlova (40%) and roast pork (40%).
- Only 17% of Aussies who celebrate Christmas say their favourite Christmas food are oysters.

Key findings (continued...)

- Of those who celebrate Christmas:
 - Men are more likely than women to say their favourite Christmas foods are Christmas pudding (47% compared to 39%), roast pork (44% compared to 36%), turkey (36% compared to 28%) and oysters (21% compared to 14%). Whereas, women are more likely than men to say their favourite Christmas foods are pavlova (47% compared to 32%) and potato salad (43% compared to 36%).
 - Older Australians are more likely than younger Australians to say prawns are their favourite Christmas food (Silent 60%, Baby Boomers 59% and Gen X 51% compared to Millennials 38% and Gen Z 28%).
 - Western Australians are more likely than Victorians to say prawns are their favourite food (57% compared to 40%), as well as ham (55% compared to 39%), potato salad (50% compared to 37%) and pavlova (46% compared to 32%).

Key findings (continued...)

Christmas rituals Australians are willing to sacrifice (Q7)

- Four in ten (42%) Australians who celebrate Christmas, the equivalent of 8 million people, would happily sacrifice wearing Christmas hats/ accessories.
- This is closely followed by starting the morning with a glass of champagne (40%), taking a trip away or international trip (39%) and listening to Christmas music/ singing carols (31%).
- One in four (27%) Australians who celebrate Christmas however, the equivalent of 5.2 million people, say they would be willing to sacrifice the Christmas ritual of enjoying prawns.
- Men are more likely than women to be willing to sacrifice a trip tot the beach and a dip in the ocean (35% compared to 26%), while women are more likely than men to sacrifice ice cold beers (33% compared to 23%).
- Gen X (37%) and Millennials (34%) are more likely than their older counterparts, Gen X (20%) and Baby Boomers (23%) to be willing to sacrifice the Christmas ritual of enjoying prawns. Whereas, Baby Boomers are more likely than Gen Z and Millennials to be willing to give up wearing Christmas hats/ accessories (Baby Boomers 49% compared to Gen Z 34% and Millennials 38%) and playing games (Baby Boomers 31% compared to Gen Z 13% and Millennials 18%).
- Victorians are more likely than residents of NSW to be willing to sacrifice their Christmas ritual of enjoying prawns (33% compared to 24%).

Key findings (continued...)

Changes in 2020 Christmas celebrations (Q8)

- Seven in ten (71%) Australians who celebrate Christmas believe Christmas will be different this year in comparison to previous years given the major events that have occurred in 2020 such as the bushfires, COVID-19 and border closures.
- Four in ten (43%) Aussies who celebrate Christmas say they will have smaller, more intimate Christmas gatherings with friends/family that live nearby, whereas one in four (27%) say they will have less Christmas celebrations.
- Given the current circumstance, it is unsurprising that more than one in ten (15%) Aussies are having celebrations/ seeing family and friends via Zoom.
- On the other hand, three in ten (29%) Aussies who celebrate Christmas will be celebrating as they have in previous years despite the current climate.
- Men are more likely than women to admit that they will have even bigger Christmas to celebrate the end of 2020 (6% compared to 2%).
- Millennials are the most likely to say that Christmas will be different this year (83%), and are also the most likely to have celebrations/ see family and friends via Zoom (23%).
- Interestingly, Victorians are the most likely out of any state to say they will be wearing face masks not hats during this year's Christmas celebrations (31%).

Key findings (continued...)

Effort made during this year's festive season feast (Q9)

- Three in ten (29%) Australians will be putting in more effort into their festive season feast this year, with one in five (20%) saying their family/ friends deserve an even better festive season/ Christmas than normal.
- However, one in two (50%) Australians say they will not be putting in more effort, as their festive season/ Christmas meal will be the same as in previous years.
- Women are more likely than men to say they will not be putting more effort into their festive season feast this year (62% compared to 54%) and specifically, that their festive season/ Christmas meal will be the same as in previous years (54% compared to 47%).
- Younger Australians are more likely than older Australians to say they will be putting in more effort into their festive season feast this year (Gen Z 40% and Millennials 44% compared to Gen X 26%, Baby Boomers 17% and Silent 11%), and partly because they are a better cook this year (Gen Z 26% and Millennials 24% compared to Gen X 13%, Baby Boomers 6% and Silent 2%).
- Victorians (26%) are more likely than residents of NSW (18%) and QLD (17%) to say they will be putting more effort into their festive season feast this year as their family/ friends deserve an even better festive season/ Christmas than normal.

Key findings (continued...)

Sources of information for festive season recipes (Q10)

- Amongst Australians who will be involved in festive season cooking, almost one in two (48%) get their recipes from their family for their festive season meals.
- This is followed by finding quick and easy recipes online (39%), creating their own recipes (30%), cookbooks (25%) and magazines/ newspapers (15%).
- Women are more likely than men to resort to quick and easy recipes they can find online for their festive season meals (43% compared to 35%).
- Gen Z (53%) and Millennials (52%) are more likely than their older counterparts, Gen X (34%), Baby Boomers (27%) and Silent Generation (31%) to find quick and easy recipes that are available online for their festive season meals. Whereas, Baby Boomers are more likely than Millennials to create their own festive meal recipes (35% compared to 26%).
- Aussies who are more or just as likely to eat prawns this Christmas than in previous years are more likely than those who are less likely to eat prawns to get their recipes for their festive season meals from family recipes (More likely 49% and Just as likely 52% compared to Less Likely 35%).
- Those who will be buying sustainable prawns are more likely than those who are not to get their recipes for their festive season meals from family recipes (56% compared to 38%) or resort to being creative by coming up with their own recipes (35% compared to 25%).

Key findings (continued...)

Ways of serving/ eating prawns this summer/ Christmas (Q11)

- Six in ten (60%) Aussies would consider serving or eating prawns the 'retro way', such as chilled and peeled (36%), as a prawn cocktail (25%) or as a seafood dip (18%).
- On the other hand, more than one in three (37%) Australians would consider serving or eating prawns the traditional way this Christmas, either barbecued (24%), grilled (19%) or butterfly with the tail on (12%).
- However, some Australians will be serving or eating their prawns this summer/ Christmas in both retro or traditional options, with seven in ten (73%) Aussies who are planning to serve/ eat prawns this summer in the traditional way also considering to serve prawns in one of the listed retro options.
- Men are more likely than women to serve and eat prawns this Christmas in a traditional way (42% compared to 33%), specifically grilling the prawns (23% compared to 16%). Whereas, women are more likely to prefer the retro option of serving and eating prawns chilled and peeled (39% compared to 33%).
- Baby Boomers are more likely than Gen Z and Millennials to serve/ eat prawns this Christmas chilled and peeled (48% compared to 17% and 25% respectively), seafood dip (22% compared to 10% and 13%) and butterfly with tail on (17% compared to 7% and 10%).
- Victorians (25%) are more likely than residents of NSW (17%), QLD (14%) and SA (13%) to serve/ eat their prawns this Christmas grilled.

Questionnaire

Question type: *Text*

The next few questions are about the summer holidays and Christmas period this year.

Base: All respondents

Question type: *Single*

[Varlabel - Q1. Likely to eat prawns]

[KHC_Q1] Are you more or less likely to buy/eat prawns this summer/ Christmas than in previous years?

Please select one option only

- <1> Much more likely
- <2> Somewhat more likely
- <3> I am just as likely to buy/eat prawns this year as I would have been in any other year
- <4> Not at all likely
- <5> I do not eat / am allergic to prawns and/or other shellfish

Base: All who are likely to buy/ eat prawns

Question type: *Multiple*

#row order: *randomize*

#Question display logic:

If [KHC_Q1] - Much more likely or Somewhat more likely or I am just as likely to buy/eat prawns this year as I would have been in any other year, is selected [if KHC_Q1 in [1,2,3]]

[Varlabel - Q2. Reasons for buying/ eating prawns]

[KHC_Q2] You said that you are likely to buy/ eat prawns this summer/ Christmas...

For what reasons are you likely to buy/ eat prawns this summer/ Christmas?

Please select all that apply

- <1> I will be spending the summer/ celebrating Christmas at home this year
- <2> I saved money this year so happy to spend on prawns
- <3> Prawns are an important part of my summer/ Christmas celebrations
- <4> It is an essential part of an Australian summer/ Christmas
- <5> Important to support Australian suppliers
- <6 fixed> Other (open [KHC_Q2_open1]) [open] please specify

Base: All who are not at all likely to buy/ eat prawns

Question type: *Multiple*

#row order: *randomize*

#Question display logic:

If [KHC_Q1] - Not at all likely, is selected [if KHC_Q1 in [4]]

[Varlabel - Q3. Reasons for not buying/ eating prawns]

[KHC_Q3] You said that you are not at all likely to buy/ eat prawns this summer/ Christmas...

For what reasons are you not at all likely to buy/ eat prawns this summer/ Christmas?

Please select all that apply

- <1> I don't like prawns
- <2> I hate having to deal with the shells
- <3> My budget doesn't stretch to them this year
- <4> They aren't one of my favourite summer/ Christmas foods
- <5 fixed> Other (open [KHC_Q3_open1]) [open] please specify

Question type: *Text*
#Question display logic:
if error_KHC_Q4_0

Your answers contradict, please check your answers

Base: All respondents

Question type: *Multiple*
[Vlabel - Q4. Buying sustainable prawns]

[KHC_Q4] Will you be buying sustainable prawns this year?

Please select all that apply

- <1> Yes, because I want to safeguard seafood for future generations
- <2> Yes, because I want to support local fisheries / fishermen / fishing communities
- <3> Yes, because I care about my environmental impact
- <4> No, they are too expensive
- <5> No, I never buy them
- <6> No, I don't know how to identify them / purchase them
- <7> No, I'm allergic / don't eat them
- <8 fixed xor> I don't know what sustainable prawns are
- <9 fixed xor> I don't mind if they are sustainable or not

Question type: *Text*

```
{  
error_KHC_Q4_0 = False  
if KHC_Q4.has_any([1,3,2]) and KHC_Q4.has_any([4,5,6,7,8,9]) : error_KHC_Q4_0 = True  
}
```

#skip logic:
goto page P_KHC_Q4 if error_KHC_Q4_0

Base: All respondents

Question type: *Multiple*

#row order: randomize
[Varlabel - Q6. Favourite Christmas foods]

[KHC_Q6] Which of the following would you say are your favourite Christmas foods?

Please select all that apply

- | | | | |
|-----|-------------------|-----------|-------------------------|
| <1> | Prawns | <8> | Mince pies |
| <2> | Turkey | <9> | Oysters |
| <3> | Roast Pork | <10> | Potato Salad |
| <4> | Ham | <11> | Trifle |
| <5> | Pavlova | <12 | Other (open |
| | | fixed> | [KHC_Q6_open1]) [open] |
| | | | please specify |
| <6> | Lamb | <13 fixed | Not applicable, I don't |
| | | xor> | celebrate Christmas |
| <7> | Christmas Pudding | | |

Base: All who celebrate Christmas

Question type: **Multiple**
#row order: randomize #max number of choices: 5
#Question display logic:
if KHC_Q6.has_any([1,2,3,4,5,6,7,8,9,10,11,12])
[Varlabel - Q7. Christmas rituals willing to sacrifice]

[KHC_Q7] Thinking about Christmas specifically, which of the following Christmas rituals would you be willing to sacrifice?

Please select up to 5 options only

- | | | | |
|-----|--|-----------|---|
| <1> | Starting the morning with a glass of champagne | <7> | Christmas quickie with my partner |
| <2> | A trip to the beach and a dip in the ocean | <8> | Enjoying prawns |
| <3> | Wearing Christmas hats/ accessories | <9> | Having the Mother-in-law/ father-in-law/ sister-in-law over |
| <4> | Listening to Christmas music/ singing carols | <10> | Ice cold beers |
| <5> | Taking a trip away or international trip | <11> | Having the extended family over for Christmas lunch/ dinner |
| <6> | Playing games | <12 fixed | None of the above |
| | | xor> | |

Base: All who celebrate Christmas

Question type: **Multiple**
#Question display logic:
if KHC_Q6.has_any([1,2,3,4,5,6,7,8,9,10,11,12])
[Varlabel - Q8. How Christmas will be different in 2020]

[KHC_Q8] Given the events of 2020 (i.e. Bushfire, COVID-19, border closures), how will your Christmas celebrations be different this year?

Please select all that apply

- | | |
|---------------|--|
| <1> | We'll be wearing face masks not hats |
| <2> | Having celebrations / seeing family and friends via Zoom |
| <3> | Less Christmas celebrations |
| <4> | Smaller, more intimate Christmas gatherings with friends/family that live nearby |
| <6> | Even bigger Christmas to celebrate the end of 2020 |
| <7> | I will be spending more on my Christmas feast |
| <8 fixed> | Other (open [KHC_Q8_open1]) [open] please specify |
| <5 fixed xor> | I won't be celebrating Christmas this year |
| <9 fixed xor> | None, I will be celebrating Christmas as I have in previous years |

Base: All respondents

Question type: Multiple

[Varlabel - Q9. Putting more effort into festive feast this year]

[KHC_Q9] Given the events of 2020 (i.e. Bushfire, COVID-19, border closures) will you be putting more effort into your festive season feast this year?

Please select all that apply

- | | |
|---------------|---|
| <1> | Yes, I am such a better cook this year |
| <2> | Yes, my family/friends deserve an even better festive season/ Christmas than normal |
| <3> | No, my festive season/ Christmas meal will be the same as in previous years |
| <4> | No, I don't like cooking |
| <5 fixed xor> | Not applicable, I don't get involved with the cooking |

Base: All who will be involved in festive season cooking

Question type: **Multiple**

#row order: randomize

#Question display logic:

if KHC_Q9.has_any([1,2,3,4])

[Varlabel - Q10. Where recipes will be sourced]

[KHC_Q10] Where will you be getting your recipes from for your festive season meals?

Please select all that apply

- <1> Family recipes
- <2> I like to create my own recipes
- <3> Quick and easy recipes I can find online
- <4> Cookbooks
- <5> Magazines / newspapers
- <6 fixed> Other (open [KHC_Q10_open1]) [open] please specify

Base: All respondents

Question type: **Multiple**

#row order: randomize

[Varlabel - Q11. Ways in which may consider serving/ eating prawns]

[KHC_Q11] In what ways might you consider serving/ eating prawns this summer/ Christmas?

Please select all that apply

- | | | | |
|-----|------------------------|----------------|--|
| <1> | Barbecued | <8> | Prawn vol au vents |
| <2> | Grilled | <9> | Prawn/ Shrimp Christmas Tree |
| <3> | Butterfly with tail on | <10> | Seafood dip |
| <4> | Prawn cocktail | <11> | Goi cuon (prawn rice paper rolls) |
| <5> | Cooked/ boiled on ice | <12 fixed> | Other (open [KHC_Q11_open1]) [open] please specify |
| <6> | Chilled and peeled | <13 fixed xor> | Not applicable, I do not eat/ buy prawns |
| <7> | Mousse | | |

Thank you for your attention!

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