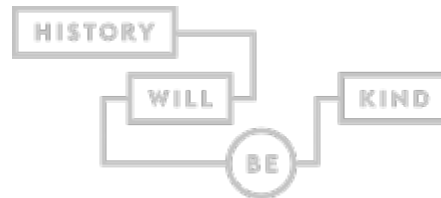




5/ 11/ 2021

MSC Christmas Prawns study 2021

Prepared for:



business.yougov.com

→ Methodology



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Methodology



- This study was conducted online between 1-3 November 2021.
- The sample comprised of a nationally representative sample of 1,038 Australians 18+ years.
- YouGov 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

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Key findings (continued...)

Likelihood of buying/ eating more or less wild-caught lobster this summer/ for Christmas than in previous years (Q1)

- Four in ten (39%) Australians are more likely to buy/ eat wild-caught lobster this summer/ for Christmas compared to previous years, including one in five (20%) that are much more likely.
- While, one in four (23%) say they are just as likely to buy/ eat wild-caught lobster this summer/ for Christmas compared to previous years.
 - Of those that eat lobster/ shellfish, 49% say they are more likely to buy/ eat wild-caught lobster this summer/ for Christmas compared to previous years, including one in four (25%) that are much more likely.
- Men are more likely than women to be more likely to buy/eat wild-caught lobster this summer/Christmas than in previous years (43% compared to 34%).
- Millennials (47%) are more likely than Baby Boomers (32%) and the Silent Generation (26%) to be more likely to buy/eat wild-caught lobster this summer/Christmas than in previous years.
- Aussies residing in NSW (42%) are more likely than Victorians (33%) to say they are more likely to buy/eat wild-caught lobster this summer/Christmas than in previous years.



Key findings (continued...)

Concerning factors when purchasing seafood (Q2)

- Three in four (76%) Australians have concerns when purchasing seafood for Christmas/ Summer.
- Of those that have concerns, the top 3 concerns are price (77%), provenance/ locally sourced (49%) and availability (48%).
 - Other concerns include environmental issues (35%) and health reasons (26%).
- Men are more likely than women to have concerns when purchasing seafood for Christmas/ Summer (80% compared to 72%), and of those that have concerns are more likely to cite health reasons as a concern (30% compared to 32%).
- Of those that have concerns, Millennials and Gen Z are more likely than Baby Boomers to cite Availability (51% and 54% compared to 41%) and health reasons (39% and 30% compared to 17%) as concerns, while Baby Boomers are more likely than Gen X and Millennials (83% compared to 73% and 72%) to cite price as a concern.
 - While provenance/ locally sourced is more likely to be of concern to Baby Boomers (56%) and Millennials (51%) compared to Gen Z (31%).
- Aussies residing in NSW (81%), Queensland (79%) are more likely than Victorians to (69%) to say they have concerns when purchasing seafood for Christmas/ Summer.



Key findings (continued...)

How easy/ difficult is it to buy wild-caught sustainable seafood during the Summer/ at Christmas (Q3)

Australians that buy/ eat seafood:

- Half (50%) of Australians that buy/ eat seafood find it difficult to buy wild-caught sustainable seafood during the Summer/ at Christmas.
 - Of those that find it difficult, 45% say they don't know how to tell if seafood is wild-caught, 40% that they don't know what to look for, 36% that they don't always trust the claims on seafood and a further 12% that the seafood they enjoy is not available as sustainable.
- However, one in three Aussies say they find it easy to buy wild-caught sustainable seafood during the Summer/ at Christmas.
 - Of those that find it easy, 66% say they only buy from a fishmonger that I know sells wild-caught sustainable seafood, 39% use a guide/app and 36%, the equivalent of 2 million Aussies, look for the blue fish tick label.
- Furthermore, as many as 2.6 million people (16%), say they don't know what wild-caught sustainable seafood is/means.
- Men are more likely than women to say they find it easy to buy wild-caught sustainable seafood during the Summer/ at Christmas (37% compared to 30%), as are Millennials (41%) are more likely than Gen Z (24%) and the Silent Generation (22%).



Key findings (continued...)

Australians that buy/ eat seafood:

- While the level of ease/ difficulty differs by state with Aussies residing in NSW (51%) and Victoria (57%) more likely than those in Western Australia (36%) find it difficult to buy wild-caught sustainable seafood during the Summer/ at Christmas, and those residing in Western Australia (47%), South Australia (42%) and Queensland (36%) more likely than Victorians (27%) to say they find it easy.
- Almost half (46%) of Australians that are likely to buy/ eat wild-caught lobster this summer/ for Christmas compared to previous years, find it easy to buy wild-caught sustainable seafood during the Summer/ at Christmas.
- Six in ten (58%) Australians who say they will be buying sustainable prawns this year say that they find it easy to buy wild-caught sustainable seafood, while four in ten (39%), the equivalent of 2.9 million people, say they find it difficult.



Key findings (continued...)

Purchasing sustainable prawns (Q4)

Australians who eat prawns:

- With the lengthy COVID-19 pandemic and resulting lockdowns taking center stage in terms of topical issues, research suggests that Aussies may not be as environmentally conscious as previous years, as more than four in ten (44%) Australians who eat prawns, the equivalent of 7.6 million people, plan to buy sustainable prawns this year, which is down from 51% in 2020).
- On the other hand, one in three (32%) do not plan to purchase sustainable prawns (up from 24% in 2020), while similar to 2020, 15% admit they do not know what sustainable prawns are (16% in 2020) and one in ten (9% in both years) do not mind if they are sustainable or not.
- Furthermore, less than three in ten (32%), say they would buy sustainable prawns this year because they want to support local fisheries/ fisherman/ fishing communities (down from 34% in 2020), whereas one in five (20%) want to safeguard seafood for future generations (down from 26% in 2020) and one in five (22%) care about the environmental impact they have as an individual (down from 24% in 2020).
- However, for one in ten (8%) 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 11% say sustainable prawns are too expensive.



Key findings (continued...)

Purchasing sustainable prawns (Q4)

Australians who eat prawns:

- Millennials appear to be the most environmentally and ‘local’ conscious, saying that they will be buying sustainable prawns this year because they want to support local fisheries/ fishermen/ fishing communities (35%), as they care about the environmental impact (29%) and as they want to safeguard seafood for future generations (26%).
- While Gen X (14%) and the Silent generation (16%) are more likely than Gen Z (8%) and Millennials (8%) to say they will not be buying sustainable prawns this year because they are too expensive.



Key findings (continued...)

Favourite Christmas foods (Q5)

- The majority (95%) of Australians celebrate Christmas, and of those who do celebrate Christmas the most popular favourite Christmas foods are ham (48%) (51% in 2020), followed closely by prawns (46%) (48% in 2020) and roast pork (44%) (37% in 2020).
- Other favourite Christmas foods of those that celebrate Christmas include potato salad (41%), pavlova (39%) and turkey (36%).
 - Furthermore, one in four respectively say that lobster (27%) and salmon (25%) are their favourite Christmas foods.
- Of those who celebrate Christmas:
 - Men are more likely than women to say their favourite Christmas foods are ham (52% compared to 45%), roast pork (48% compared to 39%), lamb (37% compared to 28%), salmon (29% compared to 22%) and mince pies (25% compared to 18%). Whereas, women are more likely than men to say their favourite Christmas foods are pavlova (44% compared to 35%) and potato salad (44% compared to 37%).
 - Interestingly, older Australians are more likely than their younger counterparts to say prawns are their favourite Christmas food (Silent 56%, Baby Boomers 53% compared to Millennials 40% and Gen Z 40%).
 - As are those residing in NSW (54%) and Queensland (52%) more likely than Victorians (35%) and South Australians (33%) to say prawns are their favourite food.



Key findings (continued...)

Quantity of prawns eaten/ served this Summer (Q6, Q7)

- Two thirds (67%) of Aussies are planning on eating/ serving prawns this Christmas/ Summer.
- Men are more likely than women to say they are planning on eating/ serving prawns this Christmas/ Summer (73% compared to 61%), as are those living in NSW (76%), Queensland (71%) and Western Australia (67%) more likely than those living in Victoria (55%).

Of those that are planning on eating/ serving prawns this Christmas/ Summer:

- Aussies are planning on eating/ serving prawns 4 times on average, with over 2 million Aussies (15%) planning on doing so on 7 or more occasions.
- This equates to over 50 million servings of prawns across the nation this Christmas/ Summer.
- Younger Australians are more likely than their older counterparts to be planning on eating/ serving prawns more frequently on average (Gen Z, Millennials and Gen X 4 times each compared to Baby Boomers and Silent 3 times each).
- As are Western Australians (average of 5 times) and Queenslanders (average of 4 times) are more likely than Victorians (average of 3 times).



Key findings (continued...)

Of those that are planning on eating/ serving prawns this Christmas/ Summer:

- Furthermore, Aussies are planning on eating/ serving 8.6 prawns on average on each occasion, with 4 million Aussies (30%) planning on eating/ serving 11 or more prawns on each occasion.
- This equates to over 430 million prawns being served up across the nation this Christmas/ Summer.
- Men are more likely than women to eat/ serve up more prawns on average on each occasion (9.1 compared to 7.9), as are Millennials (9.8 prawns) and Gen X (8.8 prawns) more likely than Baby Boomers (7.4 prawns).
- While, Western Australians, Queenslanders and those living in New South Wales are more likely than Victorians to eat/ serve up more prawns on average on each occasion (10.4 prawns, 9.1 prawns and 8.8 prawns compared to 6.7 prawns).
- With NSW being the biggest servers/ consumers of prawns this Christmas/ Summer, serving up approximately, a whopping 172 million prawns.



Key findings (continued...)

Quantity of prawns eaten/ served this Summer (Q6, Q7) Summary

	Australia	NSW	VIC	QLD	SA	WA
Plan of eating/ serving prawns this Christmas/ Summer	67%	76%	55%	71%	62%	67%
Average number of occasion planning on eating/ serving prawns this Christmas/ Summer	2.6	3.1	1.9	2.6	2.2	3.3
<i>Of those that are planning on eating/ serving prawns this Christmas/ Summer:</i>						
Average number of occasion planning on eating/ serving prawns this Christmas/ Summer	3.8	4.1	3.4	3.6	3.5	4.9
Total approximate number of occasions planning on eating/ serving prawns this Christmas/ Summer	50.4 million	19.5 million	9.8 million	10 million	3 million	6.6 million
Average number of prawns planning on eating/ serving on each occasion	8.6	8.8	6.9	9.1	7.9	10.4
Total approximate number of prawns served up this Christmas/ Summer	430 million	172 million	67 million	92 million	24 million	68 million

→ Questionnaire



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OM_GXY25923963_HWBK_MSCChristmasPrawns_AU_Oct2021

Version: 30

Base: All Australians 18+

Question type: **Single**

[Varlabel - Q1. Likelihood to buy/eat wild-caught sustainable lobster this year]

[KHP_Q1] Given the lower price and increased availability of wild-caught sustainable lobster last Christmas (2020), if the same is available this year are you more or less likely to buy/eat wild-caught sustainable lobster?

Please select one option only

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

Base: All Australians 18+

Question type: **Multiple**

#row order: randomize

[Varlabel - Q2. Concerns when purchasing seafood]

[KHP_Q2] When considering purchasing seafood (i.e. prawns, lobster, etc.) for Christmas/ Summer, which of the following, if any, are of concern to you?

Please select all that apply

- <1> Price
- <2> Environmental issues
- <3> Availability
- <4> Health reasons
- <5> Provenance/ locally sourced
- <955 fixed> Other (open [KHP_Q2_open1]) [open] please specify
- <966 fixed xor> None, I have no concerns
- <944 fixed xor> Not applicable, I do not buy/ eat seafood

Question type: **Text**

Answers contradict, please review your answers

Base: All Australians 18+ that eat/ buy seafood

Question type: **Multiple**

#row order: reverse

[Varlabel - Q3. Ease/ difficulty in buying wild-caught sustainable seafood]

[KHP_Q3] How easy or difficult is it to buy wild-caught sustainable seafood during the Summer/ at Christmas?

Please select all that apply

- <1> Easy, I just look for the blue fish tick label
- <2> Easy, I use a guide/app
- <3> Easy, I only buy from a fishmonger that I know sells wild-caught sustainable seafood
- <4> Difficult, I don't know what to look for
- <5> Difficult, I don't always trust the claims on seafood
- <6> Difficult, the seafood I enjoy isn't available as sustainable
- <7> Difficult, I don't know how to tell if seafood is wild-caught
- <8 fixed xor> Not applicable, I don't know what wild-caught sustainable seafood is/ means

Question type: **Text**

Answers contradict, please review your answers

Base: All Australians 18+

Question type: **Multiple**

#row order: reverse

[Varlabel - Q4. Buying wild-caught sustainable prawns this year]

[KHP_Q4] Will you be buying wild-caught 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/ fishers/ 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 mind if they are sustainable or not
- <9 fixed xor> I don't know what wild-caught sustainable prawns are

Base: All Australians 18+

Question type: **Multiple**

#row order: randomize

[Varlabel - Q5. Favourite Christmas foods]

[KHP_Q5] Which of the following would you say are your favourite Christmas foods?

Please select all that apply

- <1 fixed> Prawns
- <8> Lamb

- | | | | |
|-----|------------|--------------------|---|
| <2> | Lobster | <9> | Christmas Pudding |
| <3> | Salmon | <10> | Mince pies |
| <4> | Turkey | <11> | Potato Salad |
| <5> | Roast Pork | <12> | Trifle |
| <6> | Ham | <955
fixed> | Other (open
[KHP_Q5_open1]) [open]
please specify |
| <7> | Pavlova | <944
fixed xor> | Not applicable, I don't
celebrate Christmas |

Base: All Australians 18+

Question type: **Single**

[Varlabel - Q6. Frequency of eating/ serving prawns this Christmas/ Summer]

[KHP_Q6] How often are you planning on eating/serving prawns this Christmas/ Summer?

Please select one option only. If unsure, please give us your best estimate.

- | | |
|-----|--------------------|
| <1> | Never |
| <2> | 1 to 3 times |
| <3> | 4 to 6 times |
| <4> | 7 to 10 times |
| <5> | 11 to 15 times |
| <6> | 16 to 20 times |
| <7> | More than 20 times |

Base: All Australians 18+ that plan on eating/ serving prawns this Christmas/ Summer

Question type: **Single**

[Varlabel - Q7. Number of prawns eaten/ served on each single occasion]

[KHP_Q7] And approximately how many prawns will you eat/ serve on each single occasion?

If serving, please think of the approximate number you would serve to **one** person on each occasion.

Please select one option only. If unsure, please give us your best estimate

- | | |
|-----|--------------|
| <1> | 1 to 5 |
| <2> | 6 to 10 |
| <3> | 11 to 15 |
| <4> | 16 to 20 |
| <5> | 20 to 25 |
| <6> | 26 to 30 |
| <7> | More than 30 |

→ Thank you

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