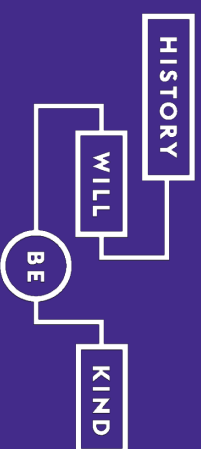


MSC Christmas Prawns

Prepared for:



22 October, 2019

YouGov[®]

Methodology

Methodology

- This study was conducted online between 16-20 October 2019 on the YouGov Galaxy Omnibus.
- The sample comprised a nationally representative sample 1,068 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 prawns this summer/ for Christmas (Q1)

- Two in three (65%) Australians intend to buy/ eat prawns this summer/ for Christmas.
- Queenslanders (71%), and those living in NSW (70%) and Western Australians (65%) are likely to be the bigger consumers of prawns this summer/ for Christmas, with those living VIC (59%) and SA (53%) being the least likely to buy/ eat prawns this summer/ for Christmas.

Prawn types most frequently purchased and identification of prawn types (Q2)

- Australian who buy prawns are most likely to buy King (57%) and Tiger (56%) prawns, followed by Banana prawns (34%), School prawns (16%), Coral prawns (9%) and Endeavour prawns (8%).
- One in four Australians who buy prawns (25%) say they are not really sure what prawns they buy as they just select the ones that look the best at the time or are on special/at a good price.
- Older Australians are more likely than younger Australians to say they have purchased King prawns (Baby Boomers 61% and Gen X 60% compared to Millennials 45%) and Tiger prawns (Baby Boomers 59% and Gen X 61% compared to Millennials 45%).
- Men are more likely than women to say they have purchased Coral (12% compared to 6%) and Endeavour (10% compared to 6%) prawns.

Key findings

Recognition of prawn types (Q3)

- Only one third (32%) of Australians actually know one prawn from another and could correctly identify all images of King, Tiger, Banana, and Endeavour prawns.
- Older Australians are more likely than younger Australians to know their prawns with Baby Boomers (38%) more likely than Millennials 23% to actually be able to identify all images of King, Tiger, Banana, and Endeavour prawns, while one in five (20%) Millennials could not correctly identify any of the prawn types (compared to 10% of Gen X and 8% of Baby Boomers).
- Of those that say that they purchase King Prawns only two thirds (67%) could actually identify what a King prawn looks like and of those that say that they purchase Tiger prawns only six in ten (60%) could actually identify what a Tiger prawn looks like.
- Australians are most confused between Banana and Endeavour prawns with three in ten (30%) thinking that Banana prawns are Endeavour prawns and a one in four (24%) thinking that Endeavour prawns are Banana prawns.

Key findings (continued...)

Where prawns are sourced from (Q4)

- Two in five (42%) Australians who eat prawns, the equivalent of almost 7 million people are not aware of where the prawns that they eat/ have bought are sourced from.
- Six in ten (58%) say that they know where the prawns they eat/ buy are sourced from and of those that are aware, 93% say they are sourced in Australia, 24% in Thailand and 24% in Vietnam.
- Within Australia, Queensland (63%) and NSW (53%) are the areas where prawns are mainly sourced from, followed by WA (39%) and the Northern Territory (29%).
- Younger Australians are most likely to be unaware of where the prawns they buy/ eat are sourced from (Millennials 50% compared to Baby Boomers 38%), while older Australians are more likely to say the prawns they buy/ eat are sourced from Australia (Baby Boomers 60% and Gen X 53% compared to Millennials 42%).
- Aussies are likely to buy local as of those that are aware of where the prawns they buy/ eat are sourced from 79% of those living in NSW are buying/ eating prawns sourced from NSW, 90% of those living in QLD are buying/ eating prawns sourced from QLD and 92% of those living in WA are buying/ eating prawns sourced from WA.

Key findings (continued...)

Sustainable behaviour (Q5, Q6, Q7)

- Amongst Australians who buy prawns, awareness of prawn sustainability is low as only one in two (51%) know what sustainable prawns are and only one in ten (9%) have specifically not bought prawns as they found out that they were not sustainable.
- When queried about how they buy prawns, only three in ten (28%) have bought fresh or frozen prawns with the blue sustainability label and only 16% have actually asked the fishmonger/retailer if the prawns they are buying are sustainable, while one quarter (24%) of Aussies admit to buying prawns without the blue sustainability label.
- Women (13%) are twice as likely as men (6%) to have decided to not buy prawns if they found out that they were not sustainable.
- Sustainability of prawns does not appear to be a key factor for Millennials when deciding on which prawns to buy as while they are most likely to say they know what sustainable prawns are (Millennials 60% compared to Baby Boomers 47%), they are most likely to have bought prawns without the blue sustainability label (Millennials 33% compared to Gen X 24% and Baby Boomers 19%).
- After being advised of what makes a prawn sustainable, eight in ten (82%) Australians say they are likely to buy sustainable prawns in the future, with half (47%) saying they are very likely to buy sustainable prawns in the future.
- Women (53%) are more likely than men (42%) to say they are very likely to buy sustainable prawns in the future, as are those living in QLD (53%) and WA (54%) more likely than those living in VIC (42%).
- Despite these good intentions to buy sustainable prawns, just one in three (33%) Australians overall say that they know where they can buy sustainable prawns.

Key findings (continued...)

Prawns at Christmas (Q8, Q9)

- The majority (56%) of Australians say Christmas would not be the same without prawns on the menu with men (63%) more likely than women (55%) to think this.
- Two in five (42%) Australians say that prawns are a favourite Christmas food of theirs; coming in in third place behind only ham (54%) and Christmas pudding (43%) and coming in ahead of the traditional favourites such as turkey (41%), pavlova (39%), potato salad (39%) and lamb (29%).
- Older Australians are more likely than younger Australians to say prawns are one of their favourite Christmas foods (Baby Boomers 47% compared to Gen X 42% and Millennials 35%).

Key findings (continued...)

Favourite way to eat prawns (Q10)

- Of those that intend on buying/ eating prawns this summer/ for Christmas, prawn cocktail (45%) is their favourite way of eating prawns, followed by BBQ'd prawns (39%), Grilled prawns (39%), butterflied with the tail on (30%) and fried (28%).
- Preferences differ by gender with men more likely than women to say that BBQ'd (43% compared to 34%) and grilled (43% compared to 35%) is their favourite way of eating prawns, while women are more likely than men to say prawn cocktail is their favourite (49% compared to 41%).
- Older Australians are also more likely than younger Australians to say prawn cocktail is their favourite (Baby Boomers 50% compared to Millennials 37%).
- Preferences again differ by state with those living in NSW most likely to say BBQ'd prawns (48%) is their favourite way of eating prawns, while those living in both NSW (43%) and VIC (43%) are more likely to prefer grilled prawns and those living in WA (57%) and SA (53%) are most likely to prefer prawn cocktail.

Questionnaire

CLIENT - HISTORY WILL BE KIND

MARKET	Australia
SAMPLE	n=1000, nationally representative, 18+
QUESTIONNAIRE NAME	191003 MSC Christmas Prawns - Questionnaire
USE AU DEMO TEMPLATE	Yes

Qtn #	Question Text	Logic
Q1	<p>How likely are you to buy/eat prawns this summer/for Christmas? Please select one option only</p> <p><i>Single select</i></p> <ol style="list-style-type: none"> Very likely Somewhat likely Not at all likely I do not eat/am allergic to prawns and/or other shellfish 	Ask all
Q2	<p>Which of these prawn types have you ever purchased? Please select all that apply</p> <p><i>Multi select; randomise</i></p> <ol style="list-style-type: none"> School prawns Endeavour prawns Banana prawns Coral prawns Tiger prawns King prawns I really am not sure what prawns I buy, I just select the ones that look the best at the time or are on special/at a good price 	Ask if eat prawns i.e. code 1-3 in Q1
Q3	<p>Below are images and names of four different types of prawns. Please select the correct name for each type of prawn. Please select one response per row</p> <p><i>Single grid; Include prawn images; randomise rows</i></p> <ol style="list-style-type: none"> Endeavour prawns Banana prawns Tiger prawns King prawns 	Ask if eat prawns i.e. code 1-3 in Q1
Q4	<p>Prawns can be caught locally, or overseas and then imported into Australia. Have you ever bought/eaten prawns sourced from Thailand, Vietnam or Australia? Please select all that apply</p> <p><i>Multi select; randomise</i></p> <ol style="list-style-type: none"> Yes, Thailand Yes, Vietnam Yes, Australia - Northern Territory Yes, Australia - New South Wales Yes, Australia - Western Australia Yes, Australia - Queensland I am not sure where the prawns I have purchased were caught 	Ask if eat prawns i.e. code 1-3 in Q1

Qtn #	Question Text	Logic
Q5	<p>Which of these have you ever done?</p> <p>Please select all that apply</p> <p><i>Multi select</i></p> <ol style="list-style-type: none"> 1. Bought fresh or frozen prawns without the blue sustainability label 2. Bought fresh or frozen prawns with the blue sustainability label 3. Asked the fishmonger/retailer if the prawns you are buying are sustainable 4. Decided to not buy prawns because you found out they were not sustainable 5. None of the above/ Not sure/ I do not know what 'sustainable' prawns are 	<p>Ask if eat prawns i.e. code 1-3 in Q1</p>
Q6	<p>Prawns can be labelled as 'sustainable' if they come from a fishery that has been independently certified to the Marine Stewardship Council's standard for a well-managed and sustainable fishery. It means that the prawns have been caught in a way that will protect and preserve the number of prawns in the ocean now and into the future.</p> <p>Now that you know what 'sustainable' prawns are, how likely is it that you will look for sustainable prawns the next time you purchase prawns?</p> <p>Please select one option only</p> <p><i>Single select</i></p> <ol style="list-style-type: none"> 1. Very likely 2. Somewhat likely 3. Not at all likely 4. Don't know 	<p>Ask if eat prawns i.e. code 1-3 in Q1</p>
Q7	<p>Do you know where you can buy sustainable prawns?</p> <p>Please select one option only</p> <p><i>Single select</i></p> <ol style="list-style-type: none"> 1. Yes 2. No 	<p>Ask all</p>
Q8	<p>To what extent do you agree or disagree with this statement?</p> <p>Christmas would not be the same without prawns on the menu.</p> <p>Please select one option only</p> <p><i>Single select</i></p> <ol style="list-style-type: none"> 1. Strongly agree 2. Somewhat agree 3. Disagree 	<p>Ask all</p>

Q9 Which of the following would you say are your favourite Christmas foods? Ask all

Please select all that apply
Multi select; randomise

- 1. Prawns
- 2. Turkey
- 3. Ham
- 4. Pavlova
- 5. Lamb
- 6. Christmas Pudding
- 7. Mince pies
- 8. Oysters
- 9. Potato salad
- 10. Trifle
- 11. Other (Please specify) _____
- 12. None of the above

Fixed
Fixed and exclusive

Q10 What are your favourite ways of eating prawns? Ask if eat prawns i.e. code 1-3 in Q1

Please select all that apply
Multi select; randomise

- 1. BBQ'd
- 2. Grilled
- 3. Butterfly with the tail on
- 4. Prawn cocktail
- 5. Fried
- 6. Other (Please specify) _____

Fixed

Demographics

- Age
- Sex
- Location (State and metro/regional)
- Marital status
- Children in HH
- Work status
- HH income

Thank you for your attention!

**The best panel,
the best data,
the best tools**

YouGov[®]

The bottom half of the slide features several overlapping, semi-transparent geometric shapes. There is a teal triangle pointing downwards, a purple trapezoid, and a pink trapezoid. The shapes are layered, with the teal one being the most prominent in the center.