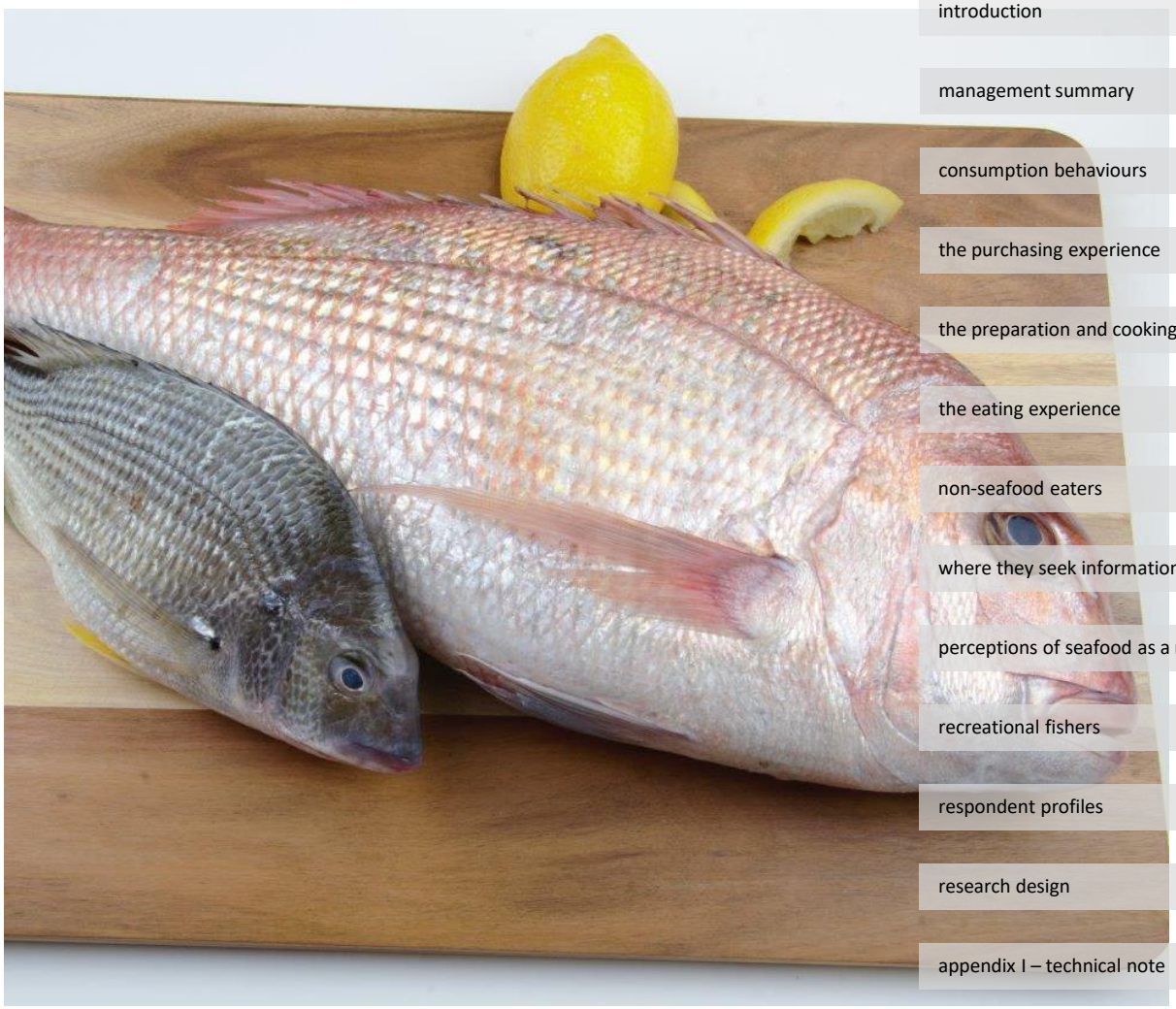


Unpacking the consumer seafood experience

a report prepared for:
Fisheries Research & Development Corporation (FRDC)

November 2016

intuitive solutions



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what's the challenge?

Seafood consumption is a key focus for the 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.

With that in mind, a research study of Australian adult consumers was initiated. This research 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.

about the research

An online survey of n = 2,000 adult Australian main grocery buyers was undertaken over the period 21st June to 2nd of July 2016.

The coverage of the research included collecting information on consumers' buying, cooking and eating experiences with seafood.

As there were a number of different pathways through the questionnaire, the length of the questionnaire ranged from 8 to 18 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.



we spoke to 2,000 adult Australians about their seafood experiences.

these are their experiences. . . .



what they told us. . . .

- ✓ 95% told us they eat at least some form of seafood with slightly fewer (91%) consuming fresh seafood; so while not everyone eats seafood on a regular basis the overwhelming majority of Australians consume seafood.
- ✓ Some people purchase regularly, some less often. There is a small segment of the population who right now don't and won't eat seafood.
- ✓ The majority of Australians (57%) buy their seafood from the major supermarkets as part of the regular shop.
- ✓ For a lot of people seafood is still an occasion based experience; there are fewer for whom seafood is part of the weekly food plan.
- ✓ Almost one in three households have someone in who won't or can't eat seafood. This impacts the incentive for buying seafood.
- ✓ Seafood is generally seen to be of the same value for money as meat. Value is, and will always be an influence, but the relative perceived value to other proteins is less of an obstacle.
- ✓ Driving purchases will be about unlocking the opportunities and overcoming barriers of the customer journey and experience – we've unpacked the journey into three discrete experiences: the buying, preparation | cooking and eating experiences.

People's best seafood memories are anchored to important occasions . . .





Friends & Family

I was with a group of thirty or so friends one night at seafood restaurant when about six of us decided to order the big fresh seafood platter. Fresh prawns, crabs, oysters, lobsters, bugs, sashimi, tuna, king fish salmon, fresh scallops in the shell, squid. It was to die for, absolutely divine.

John, 48, NSW



Major Milestones

Happiness on a plate, Celebrating my wedding anniversary, enjoying good seafood close to the sea, that delicious aroma when it arrives on your plate and enjoying the seafood with a good bottle of wine

Jacquie,32, VIC

Just three weeks ago we travelled back to Townsville for a week and went to our favorite fish monger, grabbed a beautiful, full, cooked mud crab and half kilo of fresh off the boat, never frozen king prawns and sat on the balcony, overlooking the beach of our holiday unit and ate it all with some French stick, butter and 3 bottles of white wine. Yes, 3 bottles.

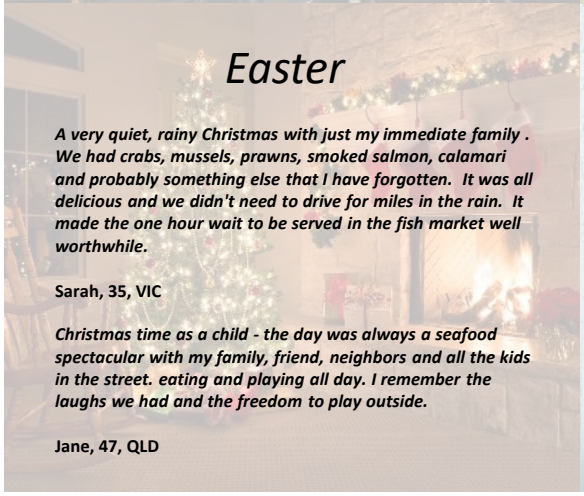
Greg, 35, NSW



Summer

Christmas time. Prawns and cold wine or beer relaxing on the patio. Summer time barbeques grilling fresh seafood. My late mother in laws seafood crepes for special occasions - to die for!

Marie, 66, QLD



Easter

A very quiet, rainy Christmas with just my immediate family . We had crabs, mussels, prawns, smoked salmon, calamari and probably something else that I have forgotten. It was all delicious and we didn't need to drive for miles in the rain. It made the one hour wait to be served in the fish market well worthwhile.

Sarah, 35, VIC

Christmas time as a child - the day was always a seafood spectacular with my family, friend, neighbors and all the kids in the street. eating and playing all day. I remember the laughs we had and the freedom to play outside.

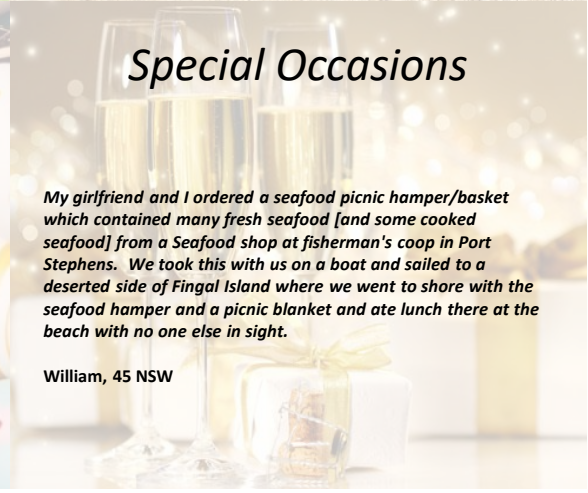
Jane, 47, QLD



Christmas

I always enjoy eating seafood at Easter with family & friends, cooking on the BBQ, dishing up with salads etc. breads.

Mardi, 45,QLD



Special Occasions

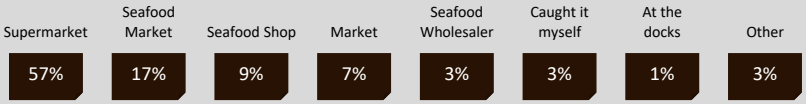
My girlfriend and I ordered a seafood picnic hamper/basket which contained many fresh seafood [and some cooked seafood] from a Seafood shop at fisherman's coop in Port Stephens. We took this with us on a boat and sailed to a deserted side of Fingal Island where we went to shore with the seafood hamper and a picnic blanket and ate lunch there at the beach with no one else in sight.

William, 45 NSW



the purchasing experience

where do they **purchase or source** their seafood?



there is not a strong level of confidence about the buying seafood



there are five key things that are **important** to people when they purchase seafood:

1. Knowing where the seafood was caught
2. Knowing how long it's been in store
3. Knowing if the seafood is fresh or has been frozen
4. Whether the seafood was caught in Australia or overseas
5. Knowing how long the seafood will last at home

What don't they like about buying seafood?

20%

Not knowing how long ago the seafood was caught

| | |

"We have no indication of how fresh the seafood is or how long it has been kept under refrigeration. Never know how long it's been there, or whether its been thawed for days!"

13%

Poor range of seafood / they don't have the seafood I want

| | |

"Limited variety of choices. I don't think the quality is quite as good as at the seafood markets."

8%

The smell of the seafood is off-putting

| | |

"The same as what I don't like about buying it anywhere... the smell."

6%

Inconvenient purchasing experience – the market is too far away, it's crowded and it's hard to find parking

| | |

"The effort of getting up early to go there and actually travelling and parking there."

6%

I don't know where the seafood was caught

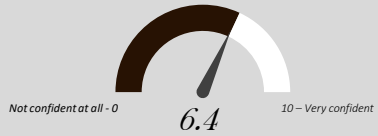
| | |

"The fact that a vast amount of this seafood comes imported from Asian countries and at times fresh seafood from Australia is not always available."



the preparation & cooking experience

Consumers are not entirely confident in **preparing & cooking fresh seafood**



those who are confident (8-10 rating, 37% of market)
have **no problem** with these preparing experiences:

1. Where they should cook seafood (oven, stove top, etc.)
2. Knowing what to serve seafood
3. Knowing what to add in when preparing seafood

those who are not confident (0-4 rating, 16% of market)
have **some problems** with these preparing experiences:

1. Knowing how long to cook seafood
2. Knowing what to add in when preparing seafood
3. The smell of seafood when cooking



What don't they like about preparing & cooking?



29%

The smells: on their hands, lingering in their house, coming from the bin

"Can be messy depending on how prepared it is when you buy it. House can smell like fish for days."

15%

The mess and having to clean up the waste it (shells, scales, heads etc.) creates

"Getting rid of the waste e.g. bones/shells/guts etc. Have to bag it then freeze it then remember to put it in the trash on bin day."

13%

Cleaning the seafood: gutting, deboning and scaling fish, peeling prawns, shelling crabs etc.

"When preparing certain types of fish making sure you've found all the small bones is a pain..."

9%

Preparing seafood is too time consuming

"Time-consuming and more effort than buying seafood which has already been prepared."

7%

It takes too much effort to prepare the seafood

"The amount of work that has to go into it. Sometimes its easier just to make something simple."



the eating experience

Consumers do report **some problems** around the eating experience:

1. The lingering smell of the seafood
2. The smell of the seafood
3. Being careful about eating undercooked seafood

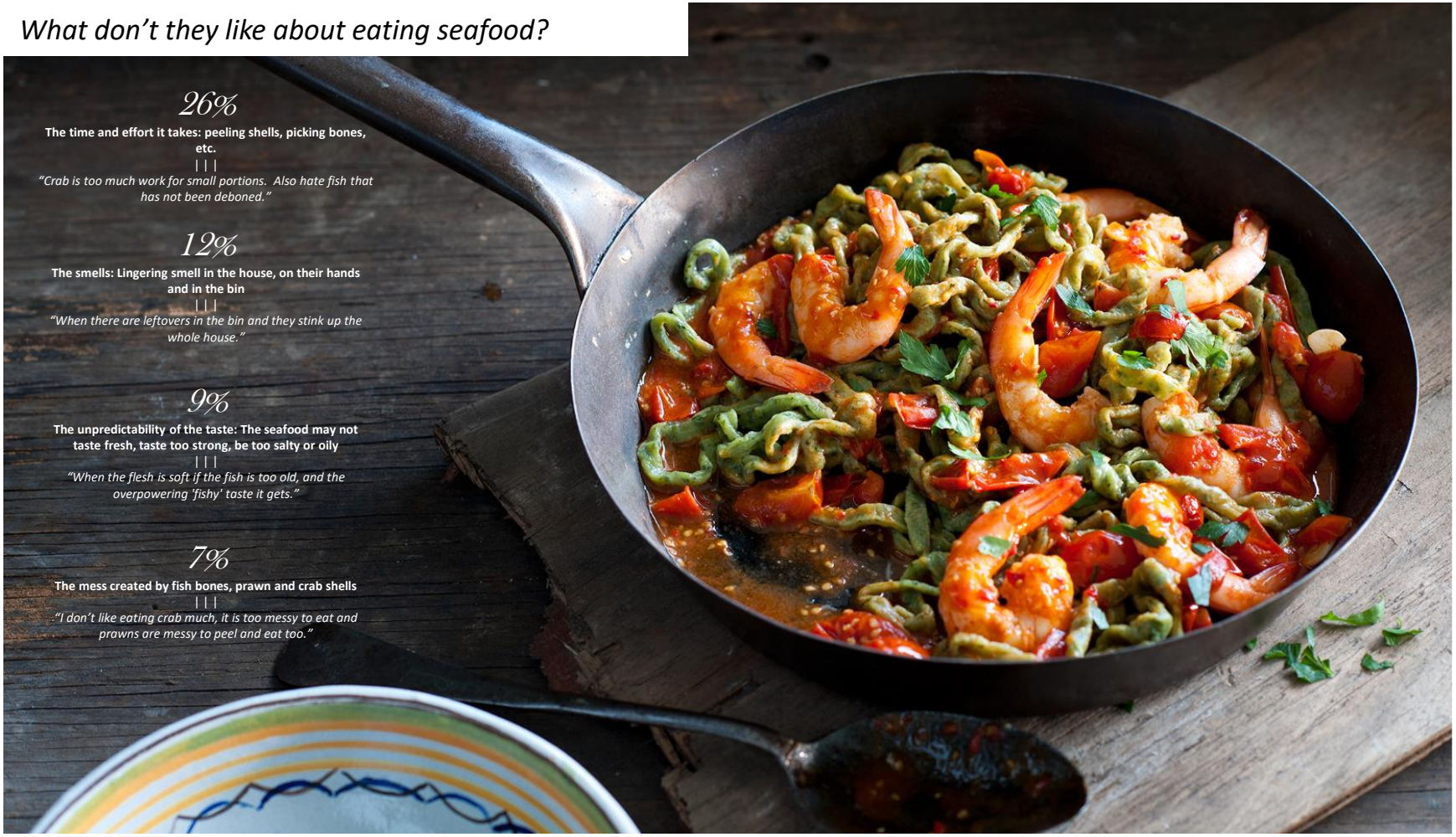
"Fish makes me feel queasy if I eat too much of it. I think its the strong smell and strong flavour that I find upsets my stomach."

"Having to clean up and sometimes the way the cooking smell hangs around."

"The texture and smell, and I can't eat it if it still looks like the animal it came from (if it still has its head or legs on for example)."

"Cannot think of what I like least - if I had dislikes I would not eat it, however, poor preparation or under-cooking would not be a pleasant experience."

What don't they like about eating seafood?



26%

The time and effort it takes: peeling shells, picking bones, etc.

"Crab is too much work for small portions. Also hate fish that has not been deboned."

12%

The smells: Lingering smell in the house, on their hands and in the bin

"When there are leftovers in the bin and they stink up the whole house."

9%

The unpredictability of the taste: The seafood may not taste fresh, taste too strong, be too salty or oily

"When the flesh is soft if the fish is too old, and the overpowering 'fishy' taste it gets."

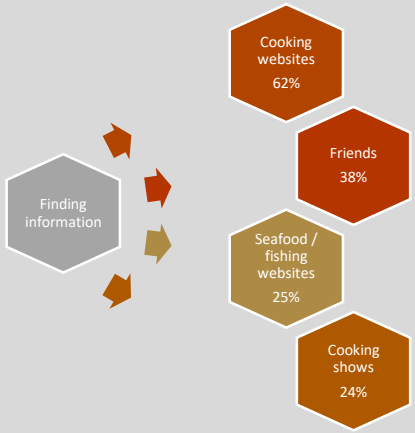
7%

The mess created by fish bones, prawn and crab shells

"I don't like eating crab much, it is too messy to eat and prawns are messy to peel and eat too."

the sources of information used

If they are looking for information, they will generally use . . .



If they are using a digital solution they will predominantly use . . .

facebook — *25%*

http://www — *64%*



Most went searching . . .

Google Australia

the common searches on Google when looking for information . . .

- How to prepare [Fish / specific species]
- How to cook [Fish / specific species]
- Recipes for [Specific species of fish / prawns]
- [Fish / Seafood] recipes

Google Search | I'm Feeling Lucky

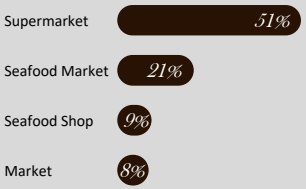
We're not all the same when it comes to fresh seafood consumption. . .

Frequent eaters

Eat fresh seafood at least once a week



- ✓ Make up 31% of all consumers
- ✓ Account for 76% of all main fresh seafood meals eaten
- ✓ They mainly shop for seafood at:



Regular Eaters

Eat fresh seafood at least once a month / at most once a fortnight



- ✓ Make up 33% of all consumers
- ✓ Account for 20% of all main fresh seafood meals eaten
- ✓ They mainly shop for seafood at:



Infrequent Eaters

Eat fresh seafood less often



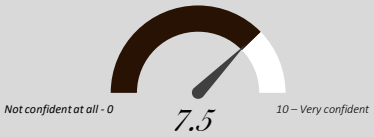
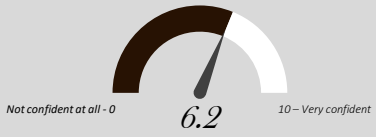
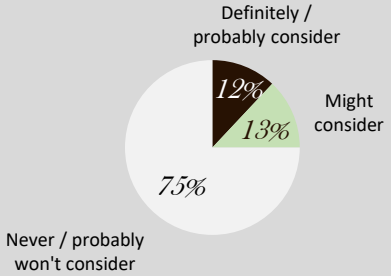
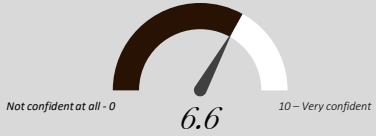
- ✓ Make up 27% of all consumers
- ✓ Account for 4% of all main fresh seafood meals eaten
- ✓ They mainly shop for seafood at:



Non Eaters



- ✓ Make up 9% of all consumers
- ✓ Of this group 31% have never eaten seafood and 26% have not eaten it for the last 10 years
- ✓ Of this group 20% have eaten in the last 2 years

Frequent Eaters *31%*	*Regular Eaters* *33%*	*Infrequent Eaters* *27%*	*Non Eaters* *9%*
			
✓ Confidence in purchasing seafood	✓ Confidence in purchasing seafood	✓ Confidence in purchasing seafood	✓ 25% might or would consider eating seafood again
			
✓ Confidence in preparing seafood	✓ Confidence in preparing seafood	✓ Confidence in preparing seafood	
			
✓ 42% have a postgrad or bachelor degree	✓ 37% have a postgrad or bachelor degree	✓ 26% have a postgrad or bachelor degree	✓ 23% have a postgrad or bachelor degree
✓ 53% male: 47% female	✓ 52% male: 48% female	✓ 46% male: 54% female	✓ 45% male: 55% female
✓ 27% are single	✓ 32% are single	✓ 34% are single	✓ 46% are single
✓ 39% go fishing at least six times per year	✓ 20% go fishing at least six times per year	✓ 6% go fishing at least six times per year	✓ 6% go fishing at least six times per year

Frequent eaters 31%	*Regular Eaters 33%*	*Infrequent Eaters 27%*	*Non Eaters 9%*
			
✓ 30% use FB as a platform to get information about buying & preparing seafood	✓ 26% use FB as a platform to get information about buying & preparing seafood	✓ 19% use FB as a platform to get information about buying & preparing seafood	✓ Allergies are an influence on their decision about seafood for 26% of this group
✓ 29% say that they watch cooking shows (e.g. MasterChef, MKR) for info about how to buy, prepare or cook seafood	✓ 27% say that they watch cooking shows (e.g. MasterChef, MKR) for info about how to buy, prepare or cook seafood	✓ 17% say that they watch cooking shows (e.g. MasterChef, MKR) for info about how to buy, prepare or cook seafood	✓ A previous bad experience with seafood is an influence for 34%
✓ 83% say that everyone in their household eats seafood	✓ 77% say that everyone in their household eats seafood	✓ 64% say that everyone in their household eats seafood	✓ 25% indicated uncertainly about how to handle seafood
✓ 36% believe seafood provides better value for money than meat	✓ 24% believe seafood provides better value for money than meat	✓ 12% believe seafood provides better value for money than meat	
✓ 73% reported they eat seafood regularly for meals during the week	✓ 40% reported they eat seafood regularly for meals during the week	✓ 15% reported they eat seafood regularly for meals during the week	

This concludes an overview of the key findings from the research. A presentation of the more detailed results and analysis from the research now follows.

consumption behaviours

this first section of the report provides an overview of consumers reported consumption of seafood – fresh seafood, frozen and tinned seafood. It also looks to identify the influence of others in the household on the purchasing decisions.



What proportion of consumers eat. . . .

fresh seafood



91% of all consumers

31% eat at least once a week
9% never eat fresh seafood

frozen seafood



86% of all consumers

25% eat at least once a week
14% never eat frozen seafood

tinned seafood



86% of all consumers

30% eat at least once a week
14% never eat tinned seafood

fresh seafood consumers can be grouped into three distinct categories:



Frequent Eater
(n = 623)

Make up 31% of all consumers

They eat fresh seafood:

- More than once a week
- At least once a week



Regular Eater
(n = 666)

Make up 33% of all consumers

They eat fresh seafood:

- No more than once a fortnight
- At least once a month



Infrequent Eater
(n = 533)

Make up 27% of all consumers

They eat fresh seafood:

- No more than once every two months; or
- even less than that

What we asked:

Over the past 12 months, how often would you say that you have eaten fresh seafood for a main meal?
Over the past 12 months, how often would you say that you have eaten frozen fish or seafood for a main meal?
Over the past 12 months, how often would you say that you have eaten tinned fish or seafood (i.e. tinned tuna, tinned salmon, prawns or mussels) for a main meal?



How often they have eaten seafood as a main meal in the last 12 months….

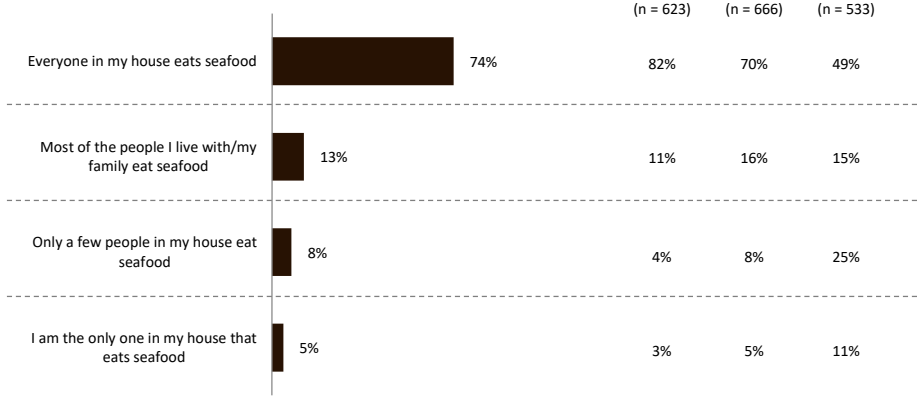
	How often do you eat Fresh seafood? (n = 2,000)	How often do you eat Frozen seafood? (n = 2,000)	How often do you eat Tinned seafood? (n = 2,000)
More than once a week	11%	7%	12%
Once a week	20%	18%	18%
Once a fortnight	15%	18%	15%
About once a month	18%	19%	18%
Six times a year (once every two months)	8%	7%	8%
Four times a year (once every three months)	4%	3%	3%
Three times a year (once every four months)	4%	4%	2%
Twice a year (every six months)	4%	4%	3%
Once a year	2%	2%	2%
Less often	4%	6%	5%
Never eat	7%	11%	13%
Not sure / I don't know	2%	3%	1%

What we asked:

Over the past 12 months, how often would you say that you have eaten fresh seafood for a main meal?
Over the past 12 months, how often would you say that you have eaten frozen fish or seafood for a main meal?
Over the past 12 months, how often would you say that you have eaten tinned fish or seafood (i.e. tinned tuna, tinned salmon, prawns or mussels) for a main meal?

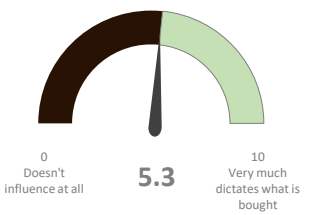


In your household, including yourself, how many people would you say eat seafood?

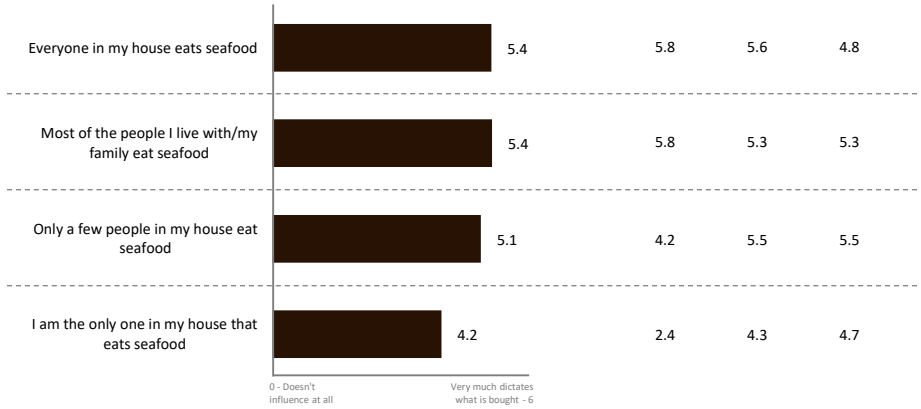


Base: All respondents who eat seafood; (n = 1,896)

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





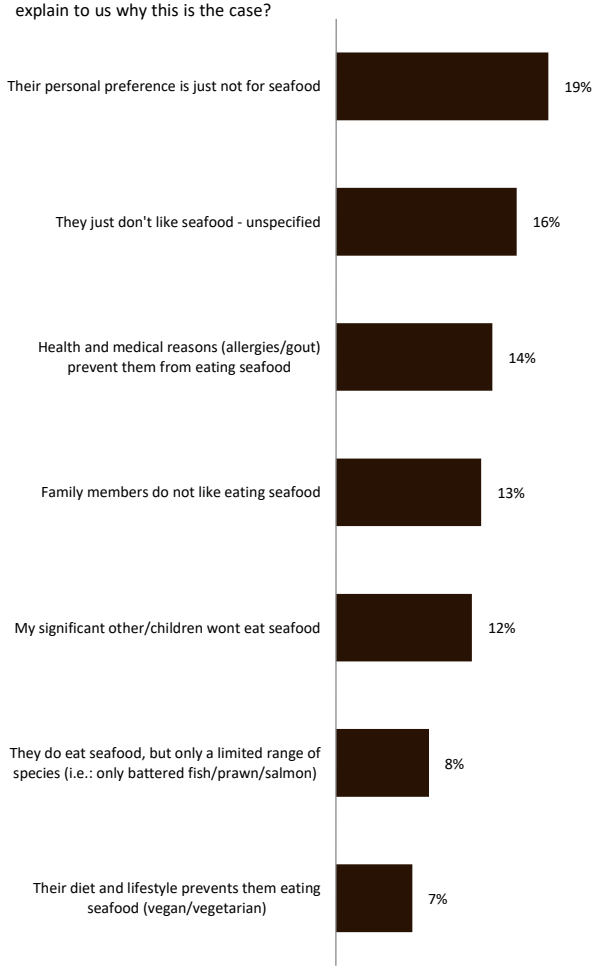


Base: All respondents who eat seafood; (n = 1,896)

What we asked:

In your household, including yourself, how many people would you say eat seafood?
How much would you say the eating habits of others in your household influences your decision to buy seafood?

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



Base: All respondents with household members that do not eat seafood and provided a response; (n = 597)

Excludes responses accounting for <5% of total responses

Some of what they said…

"They don't like the taste of some fish and only two of us like oysters, prawns etc."

"Husband is allergic to prawns and shell fish hence does not eat it"

"My daughter does not like the texture or taste of fish and my husband and I don't like prawns. We like fish though"

"My husband doesn't like shellfish and I have 2 young children who don't like the strong flavour"

"Partner doesn't like the taste although perhaps once a year she will have a piece of King George Whiting and also eats canned tuna in a salad from time to time"

"They have an allergy to shellfish. It affects their tongue"

"I personally hate seafood and only like a couple of types of fish, but everyone else in my family loves and eats seafood"

"My husband is not really fond of prawns. He will taste a little but will not eat it as a meal. He is not allergic at all, but he says that he is not accustomed to the taste. But he eats other seafood, such as squid and tuna."

"Most are just not a fan of the fishy taste, especially the young ones"

"My wife has an allergy to anything that has fish in it - including tablets"

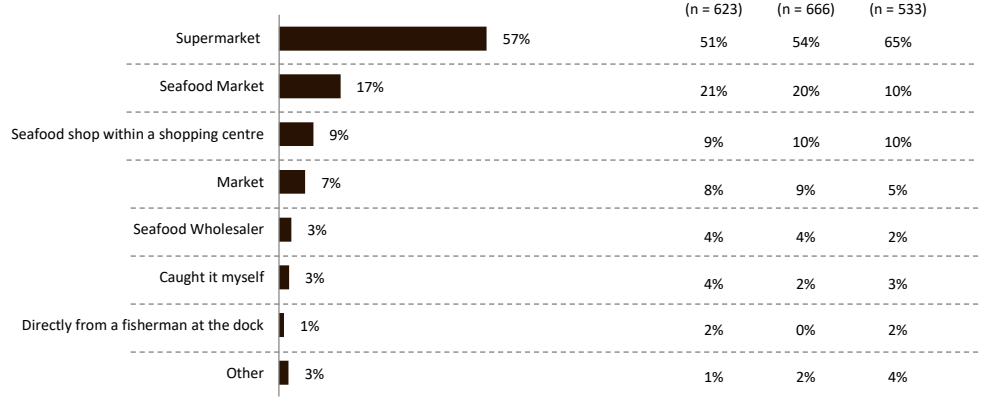
What we asked:

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

the purchasing experience

this section of the report explores the consumer purchasing experience to identify what they do, their level of confidence in buying seafood and what they like most and least about purchasing seafood.

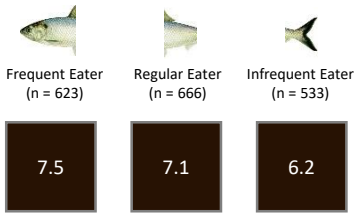
Where do you buy seafood from most often?

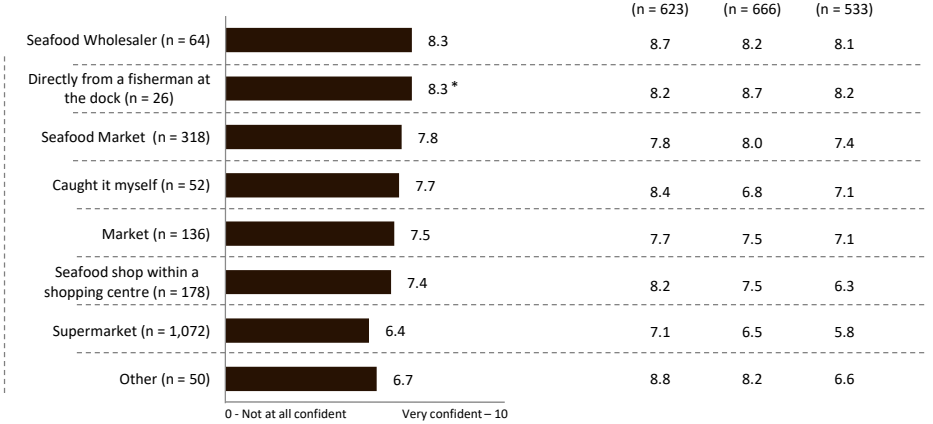


Base: All respondents who eat seafood; (n = 1,896)

How confident are you in buying fresh seafood from your most frequently used location?







Base: All respondents who eat seafood; (n = 1,896)

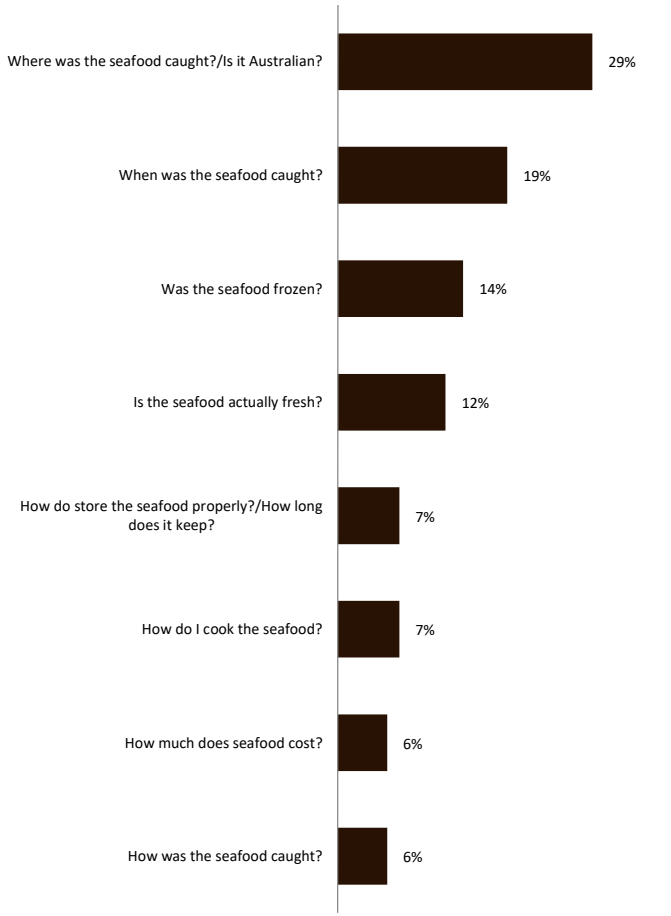
*** Small sample sizes (n<30). Exercise caution with these results**

What we asked:

How confident are you in buying fresh seafood from [your most frequently used location]?
Where do you buy your seafood from most often?

what information would help when buying

What information would help you in buying seafood?



Base: All respondents who rated their confidence in purchasing seafood as <6; (n = 505)

Excludes responses accounting for <5% of total responses

Some of what they said…

"More info on the fish - where and when it was caught. Is it fresh or has it been frozen?"

"I would like to know: 1 - how fresh it is, 2 - How long it lasts, 3 - How do I cook it?"

"I would like clear signs/labels, cooking suggestions and well-informed staff to help me"

"Where and when it was caught How long it was it frozen for?"

"How do I scale or shell the seafood and what's the best way to cook it"

"I would like to be sure I know what I'm doing. I would like help with selection, storage, cooking and how long it lasts under different circumstances...I'm pretty sure mercury poisoning & other food poisoning are pretty high risk in fresh seafood."

"Country of origin, whether it had been frozen, labelling of the species."

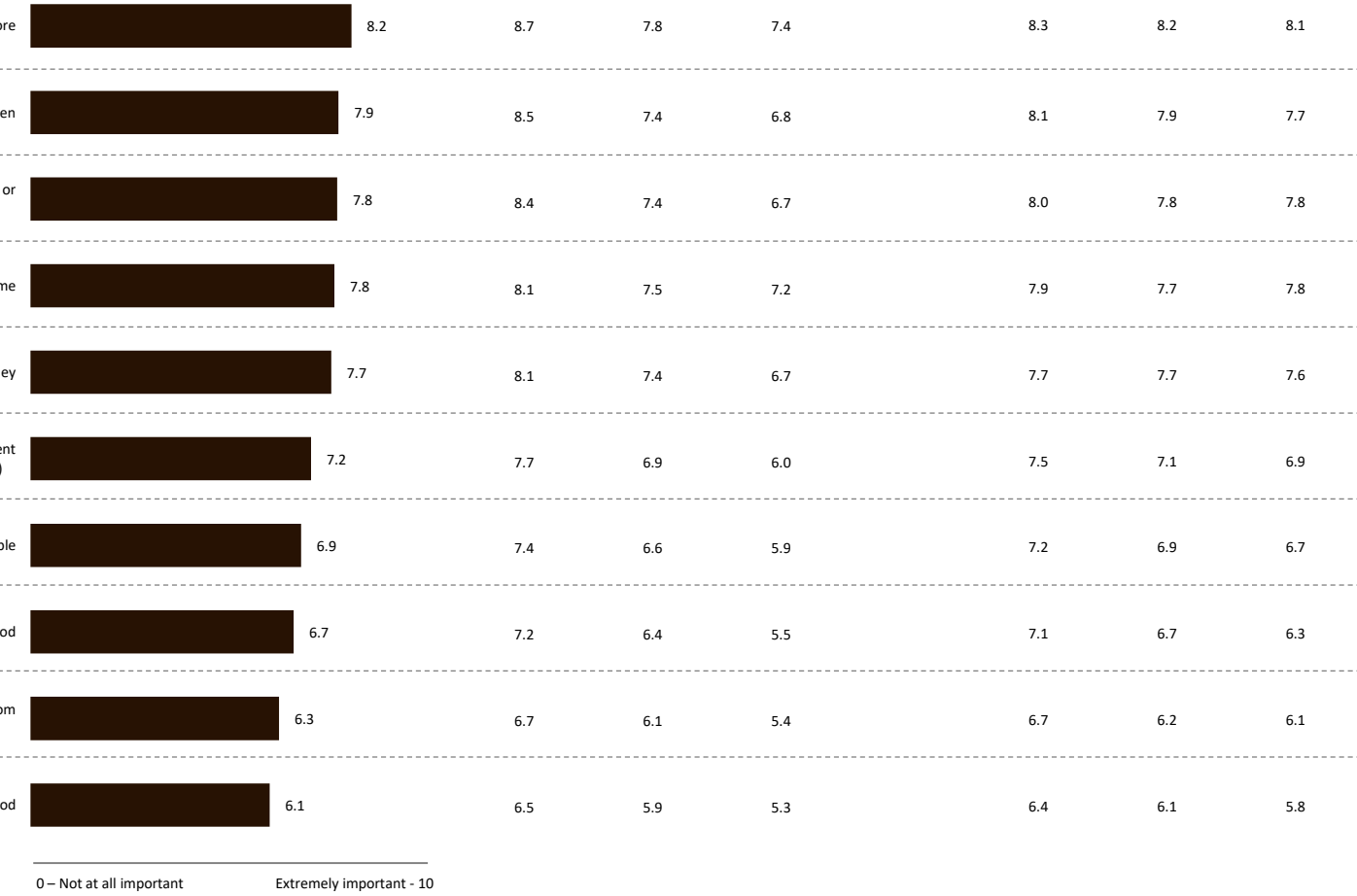
"I would like to know about the storage and transport conditions as well as the country of origin"

"Cooking guide and preparation any instruction on cooking and different dishes"

What we asked:

What information would help you in buying seafood?

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?

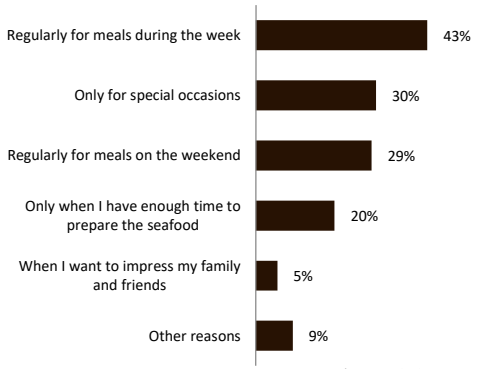


Base: All respondents who eat seafood; (n = 1,896)

What we asked:

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?

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



*Note: multiple responses accepted. Results may not add to 100%

Base: All respondents who eat seafood; (n = 1,896)

	Point of purchase							Confidence in purchasing fresh seafood					
	Supermarket (n = 1,072)	Seafood Market (n = 318)	Market (n = 136)	Directly from a fisherman at the dock (n = 26)	Caught it myself (n = 52)	Seafood shop within shopping centre (n = 178)	Seafood Wholesaler (n = 64)	Confident (8 – 10 rating) (n = 876)	Somewhat confident (5 – 7 rating) (n = 849)	Not confident (0 – 4 rating) (n = 171)	Frequent Eater (n = 623)	Regular Eater (n = 666)	Infrequent Eater (n = 533)
Regularly for meals during the week	42%	47%	40%	50%*	23%	44%	56%	52%	37%	23%	73%	40%	15%
Only for special occasions	31%	28%	32%	35%*	33%	25%	30%	23%	34%	42%	13%	30%	49%
Regularly for meals on the weekend	26%	42%	29%	12%*	17%	30%	27%	34%	27%	11%	44%	32%	9%
Only when I have enough time to prepare the seafood	18%	22%	25%	23%*	17%	20%	16%	18%	22%	13%	11%	23%	25%
When I want to impress my family and friends	5%	6%	7%	4%*	6%	4%	8%	8%	8%	23%	6%	5%	6%
Other reasons	9%	4%	6%	12%*	29%	9%	9%	6%	5%	5%	4%	6%	17%

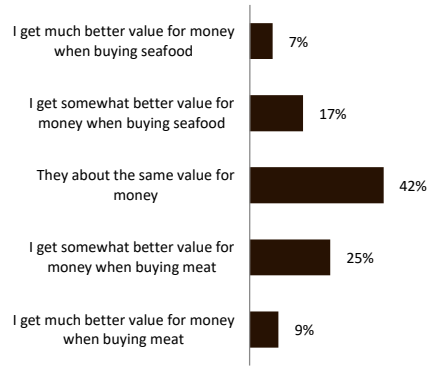
* Small sample sizes (n<30). Exercise caution with these results

*Note: multiple responses accepted. Results may not add to 100%

What we asked:

Which of the following best describes when you buy fresh seafood? Please select all that apply…

How would you rate the value for money of buying fresh seafood vs meat?



Base: All respondents who eat seafood; (n = 1,896)

	Point of purchase							Confidence in purchasing fresh seafood					
	Supermarket (n = 1,072)	Seafood Market (n = 318)	Market (n = 136)	Directly from a fisherman at the dock (n = 26)	Caught it myself (n = 52)	Seafood shop within shopping centre (n = 178)	Seafood Wholesaler (n = 64)	Confident (8 – 10 rating) (n = 876)	Somewhat confident (5 – 7 rating) (n = 849)	Not confident (0 – 4 rating) (n = 171)	Frequent Eater (n = 623)	Regular Eater (n = 666)	Infrequent Eater (n = 533)
I get much better value for money when buying seafood	6%	11%	11%	15%*	0%	5%	16%	11%	4%	5%	12%	6%	4%
I get somewhat better value for money when buying seafood	15%	25%	16%	27%*	15%	13%	14%	19%	16%	10%	24%	18%	8%
I think meat and fresh seafood are about the same value for money	42%	36%	41%	35%*	58%	51%	38%	42%	44%	29%	43%	44%	38%
I get somewhat better value for money when buying meat	27%	21%	26%	19%*	23%	22%	27%	22%	27%	33%	17%	26%	34%
I get much better value for money when buying meat	10%	7%	6%	4%*	4%	8%	6%	6%	9%	23%	4%	7%	16%

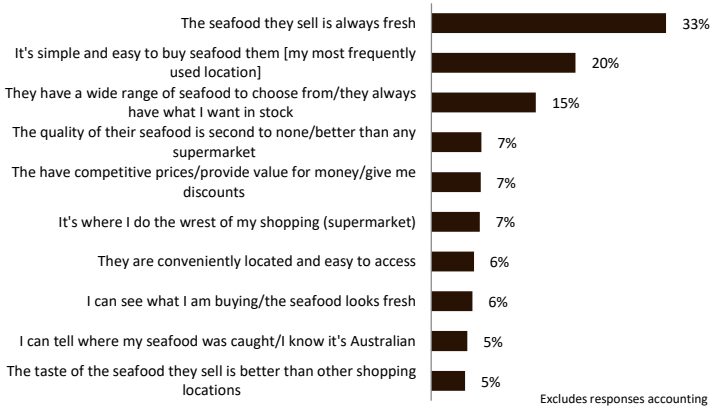
* Small sample sizes (n<30). Exercise caution with these results

What we asked:

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?

what they like most and least about buying fresh seafood

Other than for the price, what do you like **most** about buying fresh seafood from your most frequently used location?



Base: All respondents who eat seafood; (n = 1,896)

Excludes responses accounting for <5% of total responses

Some of what they said…

"I have brought seafood from the market for years and it is always fresh"

"It is ready to cook, no filleting required and I can easily see how it looks and check use by dates before I buy it."

"They specialise in seafood and always know that they're talking about and can help recommend what's good"

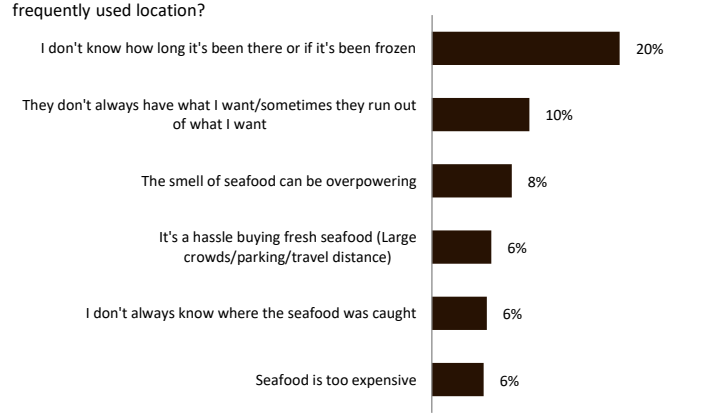
"It's always in stock, always cheap, and always tastes good."

"It is fresh, I can easily see what I am buying and it is convenient."

"I buy from a Chinese supermarket, they have a great selection and it is less expensive."

"I like that there's so many different stalls that sell different types of seafood. You can shop around, haggle and try to get the best price"

Other than for the price, what do you like **least** about buying fresh seafood from your most frequently used location?



Base: All respondents who eat seafood; (n = 1,896)

Excludes responses accounting for <5% of total responses

Some of what they said…

"It's mostly frozen seafood that is thawed and mostly sourced outside Australia"

"The seafood market is not located near the supermarket where I shop so it's a bit inconvenient"

The smell of the place where only seafood exists can be overwhelming"

"It's hard finding fish that has not been previously Frozen and thawed out."

"Sometimes what you want is not available and quality may not be quite as good as buying direct from a fishmonger"

"Sometimes they don't always have the species you are looking for"

"Hate the smell of the place and sometimes we have bought fish that has been disappointing in quality. Its hard to return the product once cooked."

"The effort of getting up early to go to the market and then parking there.

"Hate the smell of the place and sometimes we have bought fish that has been disappointing in quality. Its hard to return the product once cooked."

What we asked:

Other than for the price, what do you like **most** about buying fresh seafood from [your most frequently used location]?
Other than for the price, what do you like **least** about buying fresh seafood from [your most frequently used location]?

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

	Only seafood I buy	Buy it regularly	Buy it occasionally	Buy it very rarely	Never buy it
Fish	9%	51%	27%	9%	4%
Prawns	3%	29%	39%	18%	12%
Crabs	1%	5%	17%	32%	45%
Octopus / squid	1%	9%	23%	27%	40%
Oysters	1%	7%	22%	24%	46%
Shellfish	1%	7%	22%	28%	42%

Base: All respondents who eat seafood; (n = 1,896)

Some of what they said…

"None of my family likes octopus/squid and I have no idea how to cook any of them!"

"Crabs are expensive. Octopus/squid I wouldn't know how to make. Oysters no one likes."

"None of our family have had much experience in tasting squid, octopus or oysters"

"Nobody in this household enjoys oysters or most shellfish which is why we don't buy them. We only eat octopus/squid (both of us) or crab (only me) when dining out at a restaurant because: we don't know how to cook it so it tastes the way we prefer, it is expensive to buy it fresh, cooking seafood in the house makes the house smell bad, my husband doesn't like crab so there is little point buying it for one person in the house"

"I love oysters, but they are just to dear & poor value for money"

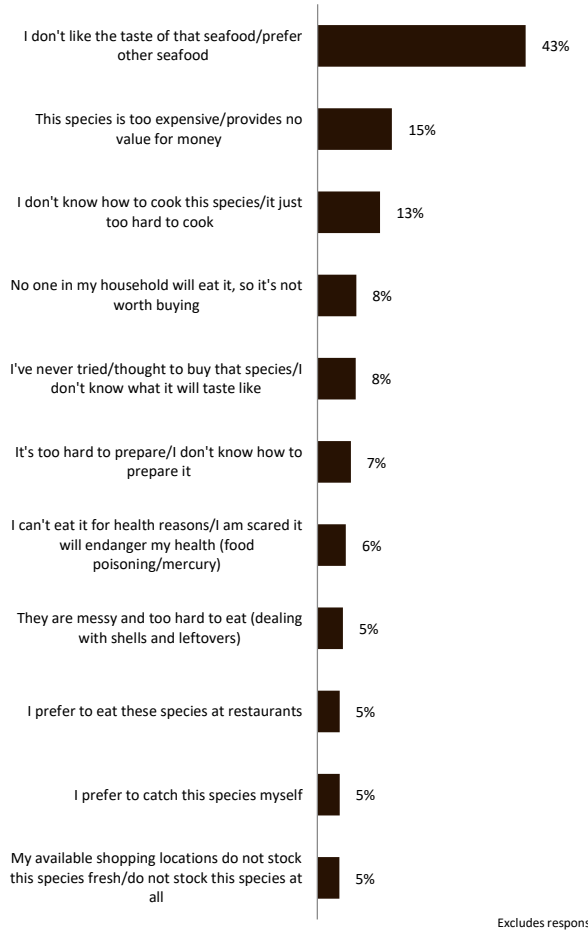
"Crabs & oysters are too expensive. I not overly keen on Octopus/squid and prefer to buy fresh fish."

"Shellfish relatively expensive. I also find crabs too fiddly to eat"

"Oysters are not something I feel confident cooking and I prefer other varieties"

"I like octopus and squid, but have no confidence that I could cook them properly and I don't like oysters"

You have told us that you don't buy a certain species of fresh seafood. What is it about these species stops you from buying?



Base: All respondents who "never buy" specific species of seafood; (n = 1,197)

Excludes responses accounting for <5% of total responses

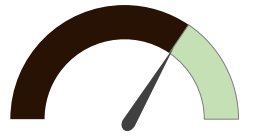
What we asked:?

When you buy fresh seafood, what sorts of seafood do you usually buy? Please select all that apply…?
You have told us that you never buy the following fresh seafood: [Species never bought]. What is it about these species that stops you from buying?

the preparation and cooking experience

this next section of the report focuses on the consumer experience in preparing and cooking seafood – their confidence in doing this and what they like most and least about these processes.

Overall, how confident are you in preparing fresh seafood?



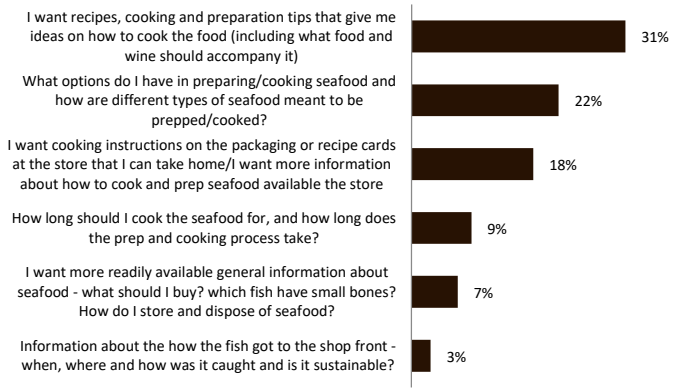
	Frequent Eater (n = 623)	Regular Eater (n = 666)	Infrequent Eater (n = 533)
Confidence in preparing fresh seafood	7.4	6.6	5.3

	Confident (n = 876)	Somewhat confident (n = 849)	Not confident (n = 171)
Confidence in preparing fresh seafood	7.4	5.2	3.9

Confidence in purchasing fresh seafood

Base: All respondents who eat seafood; (n = 1,896)

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



Base: All respondents who rated their confidence in preparing seafood as <6; (n = 704)

Some of what they said…

"Options for preparation, serving suggestions at point of sale with instructions, ingredients on card"

"Knowing how long to cook, how/different ways to cook, what goes with the dishes & convenient quick way to serve & eat it"

"How do I grill the fish when I get it home?"

I would like to know the best way to cook different types of seafood and how to quickly prepare without having the smell in the whole house.

"Maybe the store could put some recipe cards at the seafood counter"

"I want a book for cavemen - how to prepare, cook and enjoy my seafood"

"Good simple recipes for easy to cook species. Nutritional value vs other types of seafood"

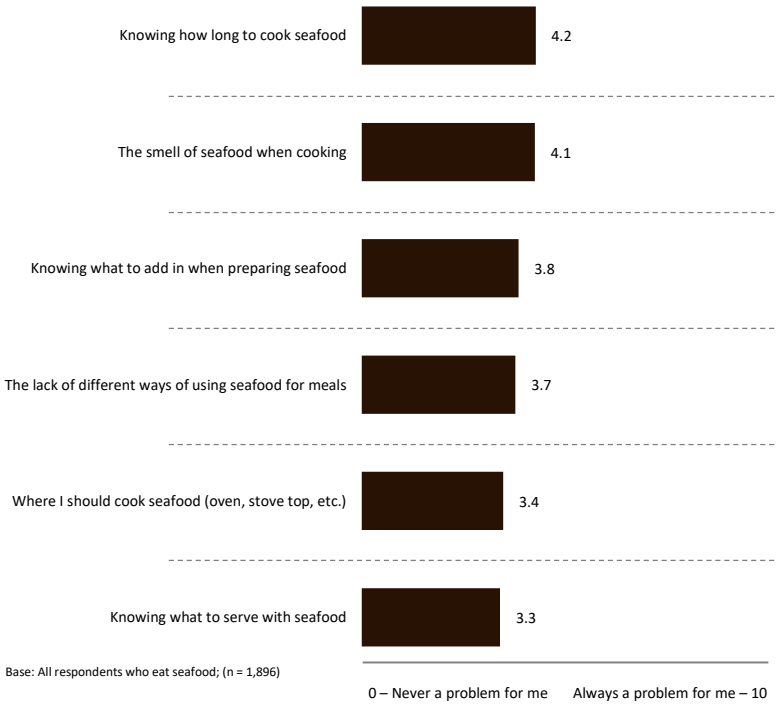
"Knowing it is sustainably caught or farmed. Knowing the seafood source has environmental guidelines that are trusted to be adhered to"

"I want to have cooking ideas and tips on the packaging"

What we asked:?

Overall, how confident are you in preparing fresh seafood?
What information would help you in preparing seafood and encourage you to use it more often than you do now?

We've listed below the experiences of other people when preparing seafood. Please tell us about your experiences with preparing seafood on a scale of 0 to 10 where 0 is "Never a problem for me" and 10 is "Always a problem for me"



	Confidence in purchasing fresh seafood			Confidence in preparing fresh seafood					
	Confident (n = 876)	Somewhat confident (n = 849)	Not confident (n = 171)	Confident (n = 694)	Somewhat confident (n = 900)	Not confident (n = 302)	Frequent Eater (n = 623)	Regular Eater (n = 666)	Infrequent Eater (n = 533)
Knowing how long to cook seafood	3.6	4.6	4.8	2.6	4.8	5.8	3.6	4.2	4.7
The smell of seafood when cooking	3.7	4.5	4.6	3.1	4.6	5.3	3.7	4.1	4.6
Knowing what to add in when preparing seafood	3.1	4.3	4.6	2.2	4.4	5.3	3.1	3.8	4.3
The lack of different ways of using seafood for meals	3.0	4.3	4.4	2.3	4.3	5.0	3.2	3.7	4.1
Where I should cook seafood (oven, stove top, etc.)	2.7	3.9	4.2	1.9	4.0	5.0	2.9	3.4	3.8
Knowing what to serve with seafood	2.7	3.8	3.8	2.1	3.8	4.6	2.9	3.4	3.6

Base: All respondents who eat seafood; (n = 1,896)

What we asked:

We've listed below the experiences of other people when preparing seafood. Please tell us about your experiences with preparing seafood. Please answer on a scale of 0 to 10 where 0 is "Never a problem for me" and 10 is "Always a problem for me".

what they like most and least about preparing and cooking fresh seafood

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



Base: All respondents who eat seafood; (n = 1,896)

Some of what they said…

"Freedom to cook in any way or style you would like"

"I know it is prepared properly and I know it's been caught in Australia"

"I know that the seafood has been cleaned properly and thoroughly"

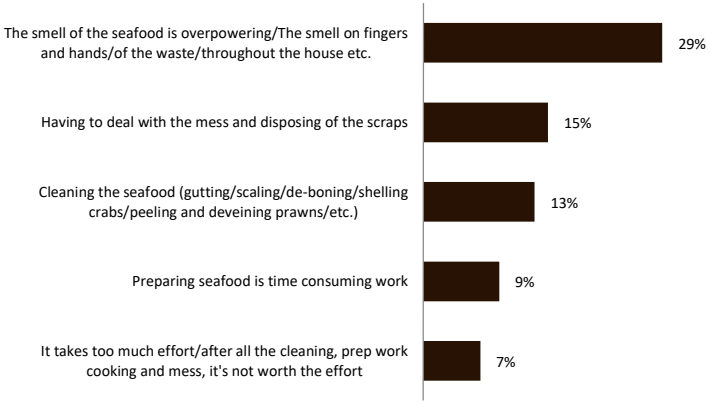
"I find it quick and easy to prepare. Usually I just oil, lemon juice and the sprinkle a few panko crumbs on top and bake for 20-25 minutes. Sometimes I bake chips by putting them in the oven 20 minutes before. Served with a fresh salad and extra lemon what could be better?"

"Easy to handle, spice it to your own liking. Cooks quicker that Meat or Chicken"

"You have control over the way you cook the seafood and can use whatever extra herbs and spices"

"I like the variety of ways seafood can be prepared and served. I like the ease of preparation"

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



Base: All respondents who eat seafood; (n = 1,896)

Some of what they said…

"I have to cook it outside as the smell goes through the house"

"I hate everything about preparing seafood. It's slimy and gross. I have to wear gloves"

"I don't enjoy scaling and cleaning fish"

"shelling crabs/lobsters & getting pricked with spikes – then having to dispose of the shells"

"I hate the smell of the scraps. I have to freeze them until bin day"

"whole fish are difficult, cleaning is not much fun, sardines are fiddley"

"sometimes the smell can stick around the house for a while, that can be unpleasant"

"Disposing of shells, heads, fish guts etc. And no one likes deveining prawns"

"I don't like the smell and getting rid of the left overs. And I'm not sure how long it will last in the fridge after cooking"

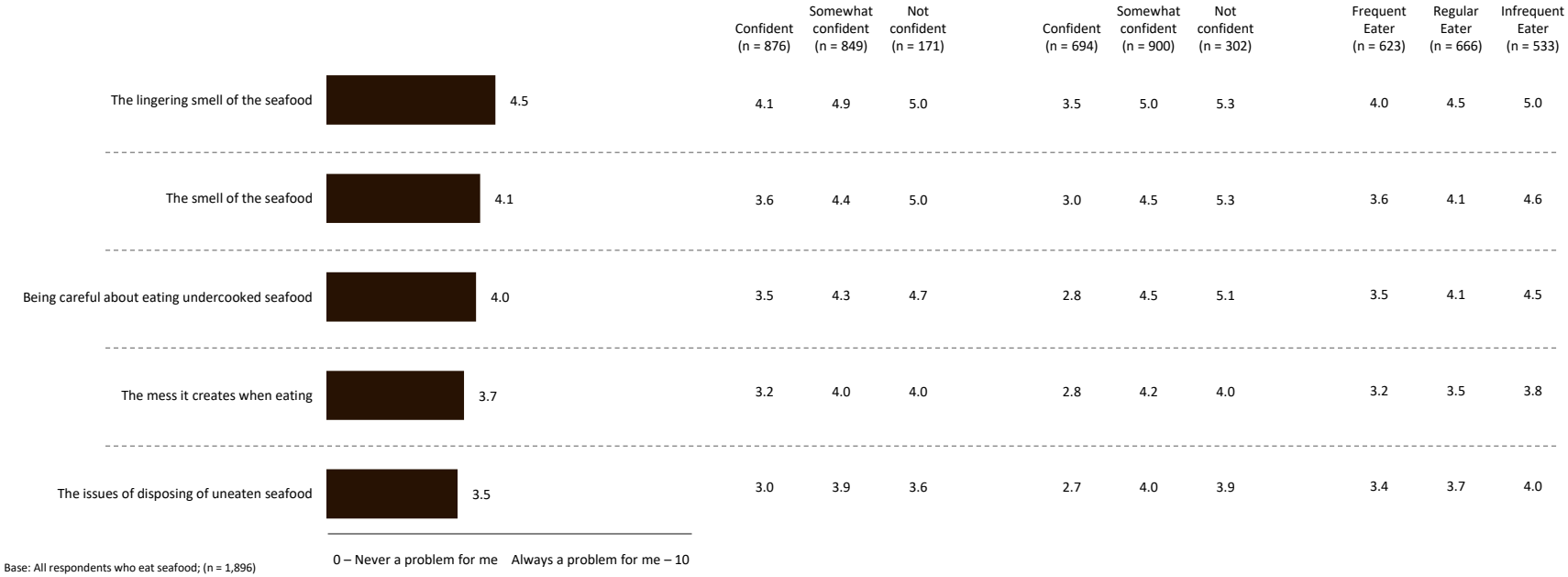
What we asked:

Other than for the price, what do you like **most** about preparing fresh seafood at home?
Other than for the price, what do you like **least** about preparing fresh seafood at home?

the eating experience

the survey sought feedback from consumers on the consumption experience. This section of the report provides an overview of the feedback provided by consumers on the consumption experience

We've listed below the experiences of other people when eating seafood. Please tell us about your experiences with eating seafood on a scale of 0 to 10 where 0 is "Never a problem for me" and 10 is "Always a problem for me"



		Confidence in purchasing fresh seafood			Confidence in preparing fresh seafood					
		Confident (n = 876)	Somewhat confident (n = 849)	Not confident (n = 171)	Confident (n = 694)	Somewhat confident (n = 900)	Not confident (n = 302)	Frequent Eater (n = 623)	Regular Eater (n = 666)	Infrequent Eater (n = 533)
The lingering smell of the seafood	4.5	4.1	4.9	5.0	3.5	5.0	5.3	4.0	4.5	5.0
The smell of the seafood	4.1	3.6	4.4	5.0	3.0	4.5	5.3	3.6	4.1	4.6
Being careful about eating undercooked seafood	4.0	3.5	4.3	4.7	2.8	4.5	5.1	3.5	4.1	4.5
The mess it creates when eating	3.7	3.2	4.0	4.0	2.8	4.2	4.0	3.2	3.5	3.8
The issues of disposing of uneaten seafood	3.5	3.0	3.9	3.6	2.7	4.0	3.9	3.4	3.7	4.0

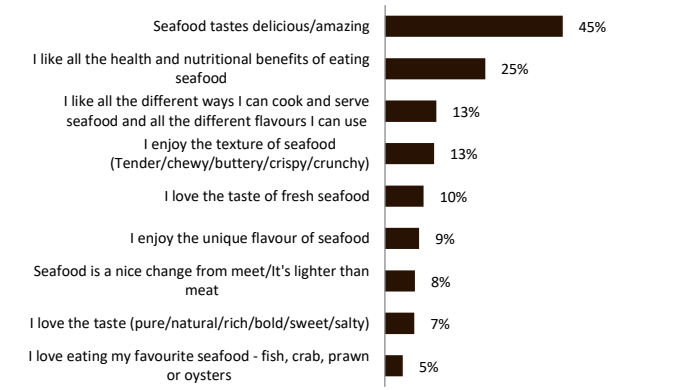
Base: All respondents who eat seafood; (n = 1,896)

What we asked:

We've listed below the experiences of other people when preparing seafood. Please tell us about your experiences with preparing seafood. Please answer on a scale of 0 to 10 where 0 is "Never a problem for me" and 10 is "Always a problem for me".

what they like most and least about eating fresh seafood

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



Base: All respondents who eat seafood; (n = 1,896)

Excludes responses accounting for <5% of total responses

Some of what they said…

"The amazing flavours that come from some seafoods. Even if you're smelling something a bit yucky while cooking... It always come out amazing!"

"I feel like it's a healthy alternative and mixes it up from my usual meaty diet"

"Light and fresh taste, we love the ocean and sucking an oyster feels like you're by the sea... Lighter than red meats, great in summer... Much better if you've caught it yourself! You're unlikely to slaughter your own sheep or cows unless you're a farmer, but anyone can fish or go crabbing. Makes a meal feel like a special occasion"

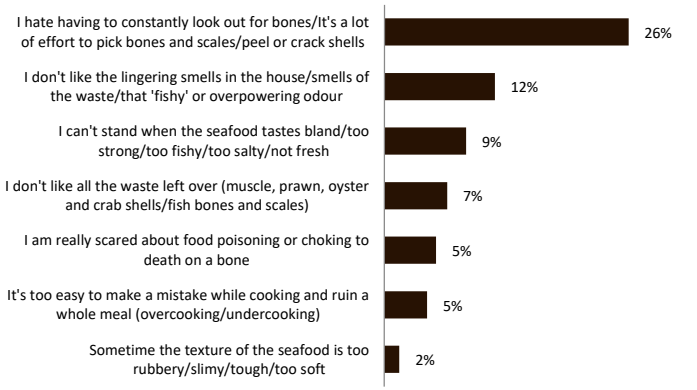
"I love the he creamy, melt in your mouth texture of fresh fish"

"I love knowing that it's fresh and that it's an Australian product and that it has very high nutritional value so it's excellent for my health."

"I really like the freshness and texture of prawns"

"I can't get fresh seafood very often, but when I do, it's a delicacy"

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



Base: All respondents who eat seafood; (n = 1,896)

Some of what they said…

"When eating with others, they serve fish like trout. I hate searching for bones, at home I serve mostly deep sea fish fillets. No bones"

"House can smell like fish for days "

"The smell sometimes lingers in the kitchen"

"I hate it when you can taste that it's not fresh any more. I hate overcooked prawns or squid"

"I don't like the smell or the mess of bones, shells etc"

"Sometimes it is clearly not as fresh as hoped and that can make the flavour pretty ordinary"

"I don't particularly like eating the skin, or eating fish which have a lot of bones (particularly fine bones). Then there is the smell if I forget to wrap up the pieces that are left over soon after eating."

"When the fish still has bones. I hate having to pick out bones when eating fish"

What we asked:

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

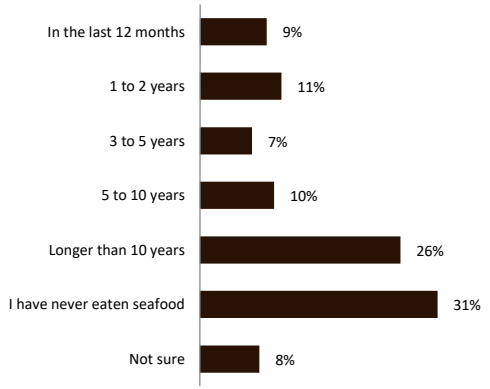
non-seafood eaters

The survey captured the feedback from both people who do and don't consume seafood. This section focuses in on the feedback provided by non eaters.

Non Eaters

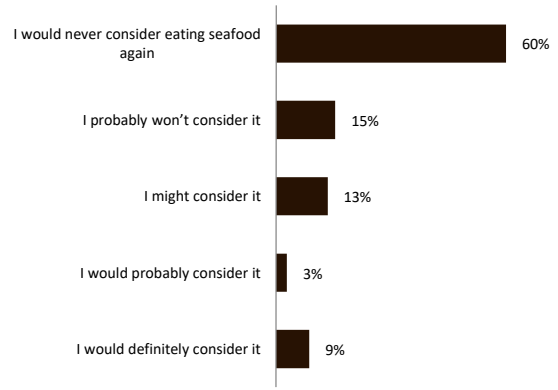
- ✓ Make up 9% of all consumers
- ✓ Of this group, 31% have never eaten seafood and 26% have not eaten it for the last 10 years
- ✓ Of this group, 20% have eaten in the last 2 years

The last time they ate seafood



Base: All non-seafood eaters; (n = 104)

Would they consider eating seafood again?



Base: All non-seafood eaters; (n = 104)

What we asked:

How long has it been since you last ate seafood?
Would you ever consider eating seafood again?

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



	Might or definitely would consider eating seafood again (n = 26)	Never or probably won't consider eating seafood again (n = 78)	0-4 rating	5-8 rating	9-10 rating
The smell of seafood	3.7*	5.7	38%	28%	34%
Previous bad experience eating seafood	2.1*	3.0	66%	13%	14%
My concerns over the impact of fishing	3.1*	2.6	63%	26%	11%
My concerns over the sustainability of seafood	3.0*	2.4	63%	26%	11%
Price of seafood	4.3*	1.7	68%	21%	11%
Health issues	1.4*	2.7	73%	13%	14%
Allergies to seafood	1.5*	2.5	74%	9%	17%
How long it's been in the store	2.7*	1.7	72%	22%	6%
Don't believe there are any health benefits of eating seafood	1.9*	1.9	75%	19%	6%
Don't trust that I'm getting the type of fish I think I am	2.5*	1.7	73%	21%	6%
I don't know how to cook seafood	3.0*	1.5	72%	22%	6%
I don't know how to handle seafood	2.6*	1.5	75%	19%	6%
I don't know what type of seafood to buy	2.6*	1.4	75%	22%	3%
My children won't or can't eat seafood	1.9*	1.6	77%	17%	6%
How long it will last at home	2.6*	1.2	77%	21%	2%

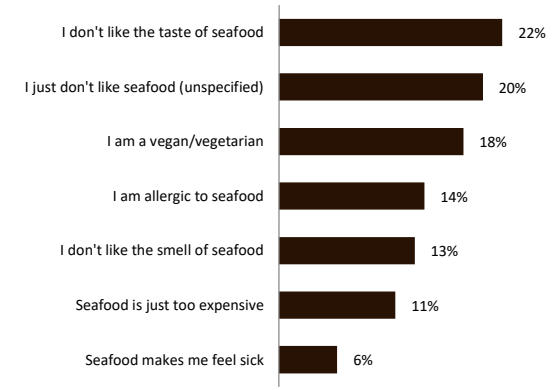
Base: All non-seafood eaters; (n = 104)

*Note: low sample size (n<30) result indicative only.

What we asked:

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

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



Base: All respondents who do not eat seafood; (n = 104)

Some of what they said…

"I don't like the look, the smell, or the texture"

"I am allergic to seafood therefore cannot consume it"

"I have never really liked the taste"

"Too expensive. Not available locally to know its fresh, I wont buy it unless I know 100% that its fresh"

"I have haven't eaten seafood since I was a child as I don't like the taste"

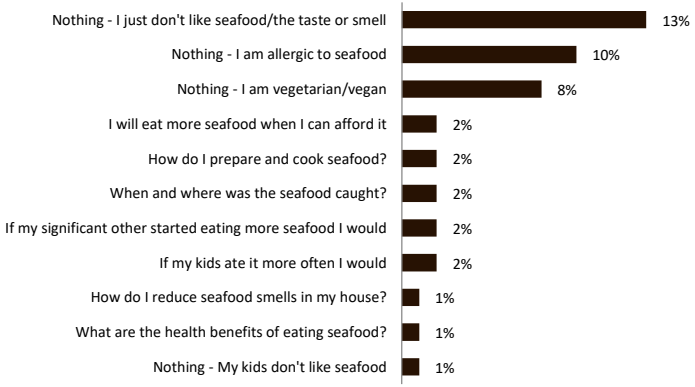
"I hate the taste and smell of seafood"

"I don't consume any animal products as I am vegan"

"I cannot acquire a taste for seafood"

"Price and I don't particularly like it"

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 = 104)

Some of what they said…

"None. I do not like the TASTE!"

"I am a vegetarian"

"What are the true benefits or seafood or fish oil? "

"No information can change me. I'm a wolf not a pelican."

"Only eat as a last resort when I am in a restaurant and there's no other food I would eat"

"none - I cannot eat seafood due to intolerance"

"I'll never give up trying to eat it again. I miss prawns, crab, cod, whiting, so many things."

"Do you have a cure for being allergic?"

"I don't think I will ever knowingly eat animal again "

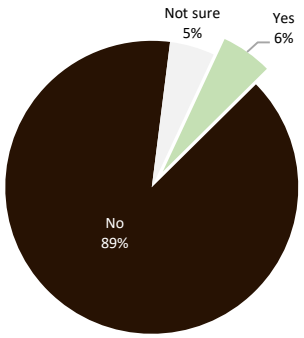
What we asked:

What information would you like to know that might encourage you to buy, prepare and eat seafood again?
What are the two or three major factors in you not buying and eating seafood?

where they seek information about preparing seafood

this section of the report looks at exploring the 'digital or other more traditional destinations' where consumers go to for information about preparing and cooking seafood.

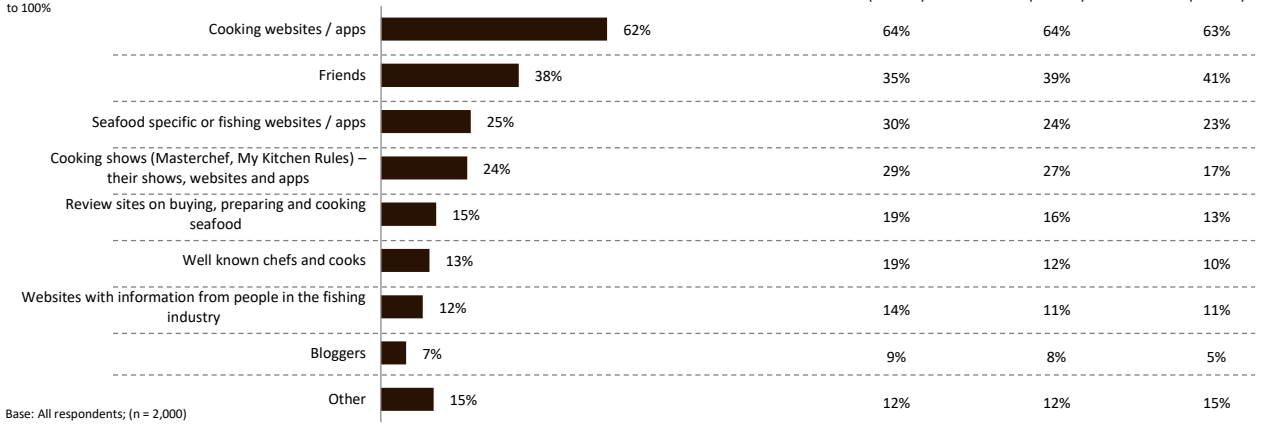
Before today, have you heard or been to the website fishfiles.com.au?



Base: All respondents; (n = 2,000)

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

*Note: multiple responses accepted. Results may not add to 100%

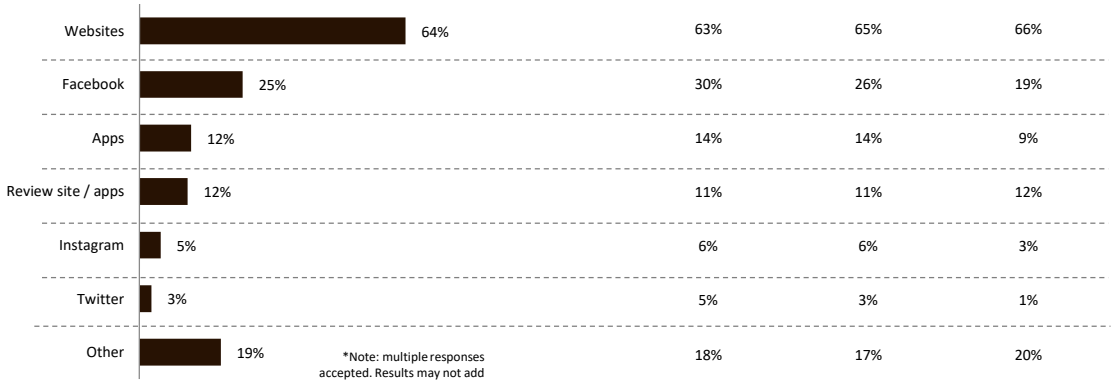


Base: All respondents; (n = 2,000)

What we asked:

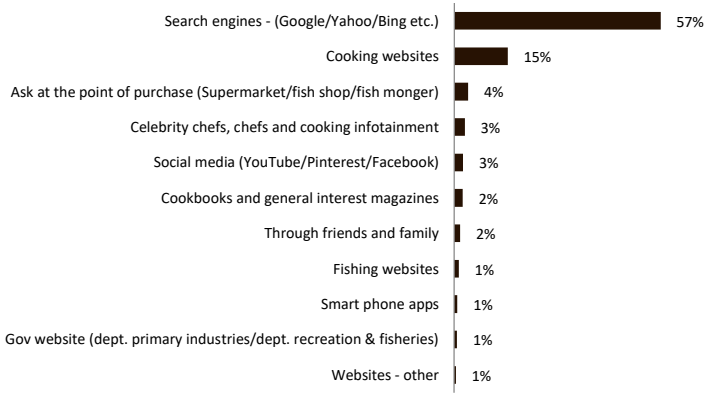
There is a website which provides consumers information about different species, how to buy, handle, prepare and eat seafood. Before today, have you heard or been to the website fishfiles.com.au?
If you went looking for information about how to buy, prepare or cook seafood, which of the following locations would you actually use?

And what platforms do you or would you use if you needed to find information on how to buy, prepare or cook seafood?



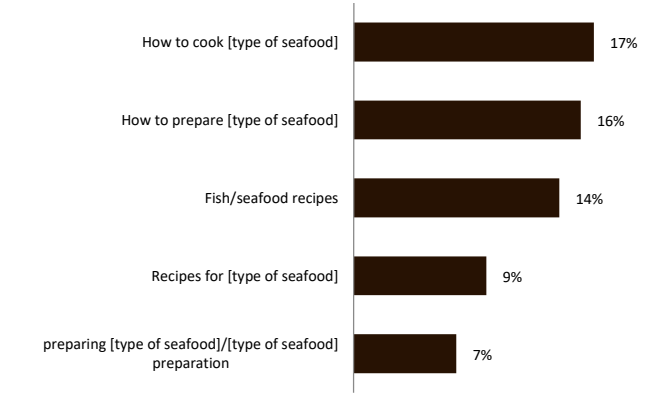
Base: All respondents; (n = 2,000)

If you were looking for information about how to buy or prepare seafood, what websites or apps would you use to find information?



Base: All respondents who provided a response (excluding those who said "none"/"don't know")

You've mentioned Google as one of the websites you would use to find information on buying and preparing seafood Please tell us - what would you search for on Google?



Base: All respondents who specified that they would use Google; (n = 489)

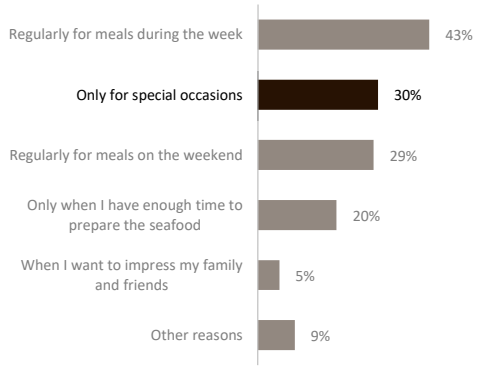
What we asked:

And what platforms do you or would you use if you needed to find information on how to buy, prepare or cook seafood?
If you were looking for information about how to buy or prepare seafood, what websites or apps would you use to find information?
You've mentioned Google as one of the websites you would use to find information on buying and preparing seafood Please tell us - what would you search for on Google?

perceptions of seafood as a meal for special occasions

in this section, we look at the memories consumers associate with eating fresh seafood. On the right is the frequency with which people bring up special occasions when asked about their favourite memories of eating seafood.

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

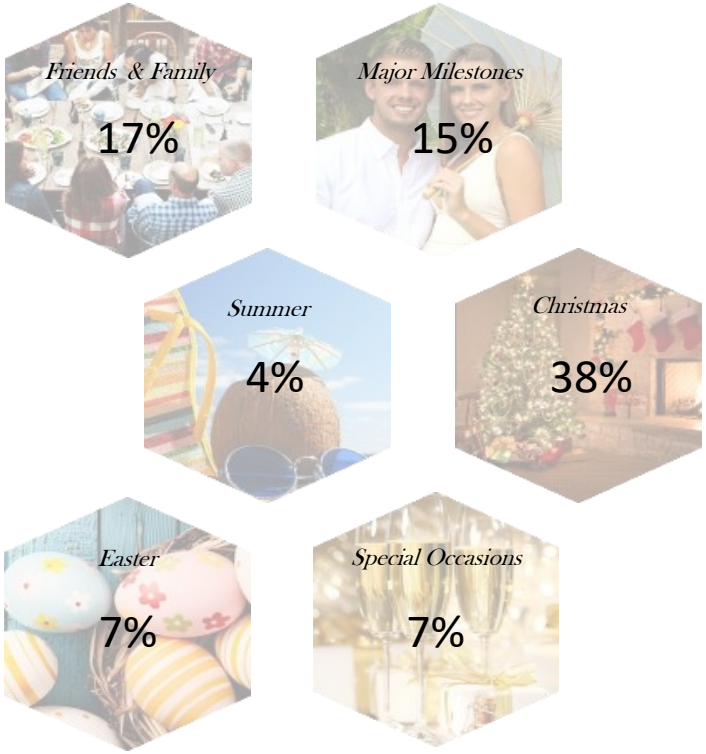


30% of respondents reported that they only purchase fresh seafood for special occasions. It's not surprising then that 33% of consumers reference special occasions when recounting their favourite memories of eating fresh seafood.

Base: All respondents who eat seafood; (n = 1,896)

*Note: multiple responses accepted. Results may not add to 100%

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



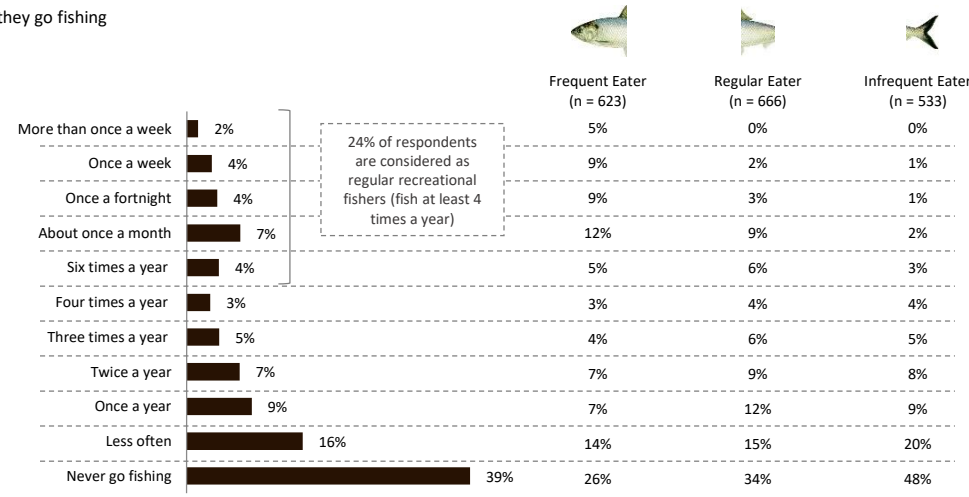
What we asked:

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

recreational fishers

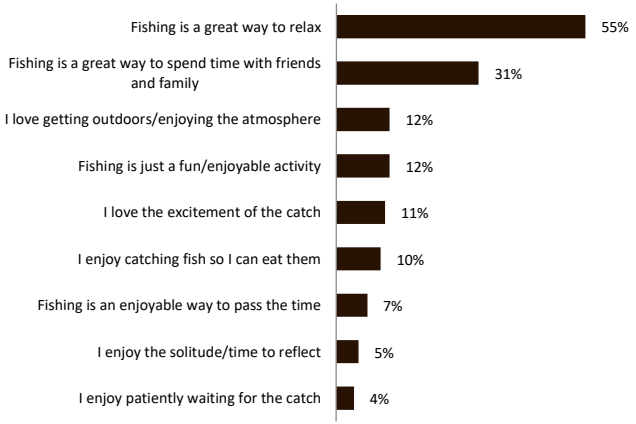
this section of the report looks at regular recreational fishers and explores what their information needs might be – what information they are looking for as they fish and where they might source this information.

How often they go fishing



Base: All respondents; (n = 2,000)

What makes fishing special to you?



Base: All regular recreational fishers; (n = 489)

Some of what they said…

"I enjoy relaxing in the outdoors and them the thrill of a catch"

"The ambience of the occasion and the mateship that goes with fishing"

"It helps me relax and catch a healthy free meal if I manage to catch a big enough fish"

"The quality time spent with friends, as we go offshore to fish , it is a team effort and we all enjoy ourselves. The expectation of catching a large fish and not just the little ones."

"I love the thrill of the chase. All the while I can relax in my boat and enjoy the peace and tranquillity of being on the water"

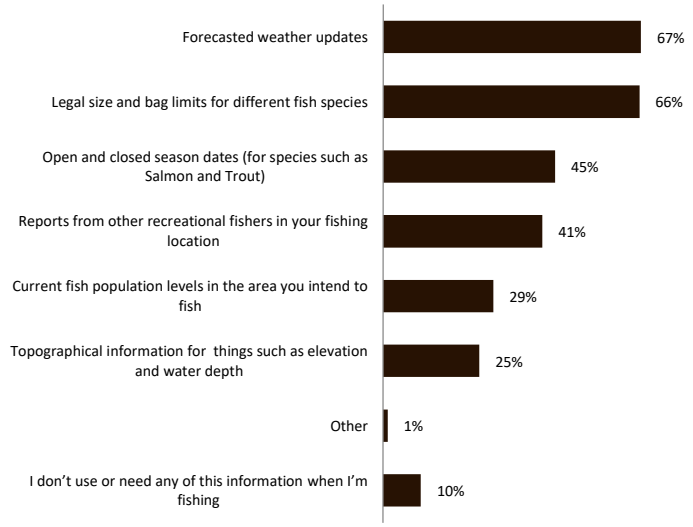
"Relaxing and timeout with the boys"

"I get to spend time with my dad and brothers"

What we asked:

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.
What makes fishing special to you?

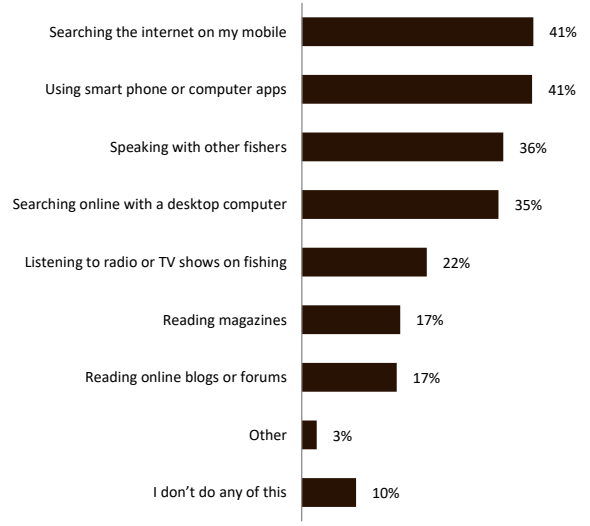
When you're out fishing, what information would you like to have at your fingertips?



Base: All regular recreational fishers; (n = 489)

*Note: multiple responses accepted. Results may not add to 100%

Where do you currently get your information about these types of fishing matters?



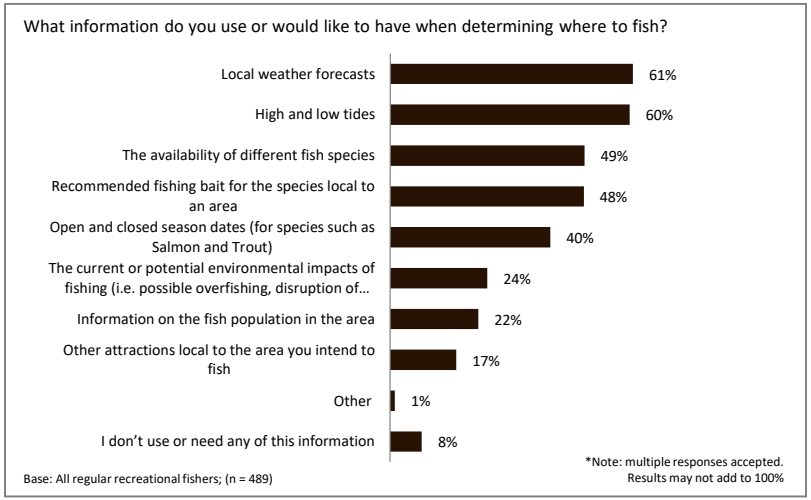
Base: All regular recreational fishers; (n = 489)

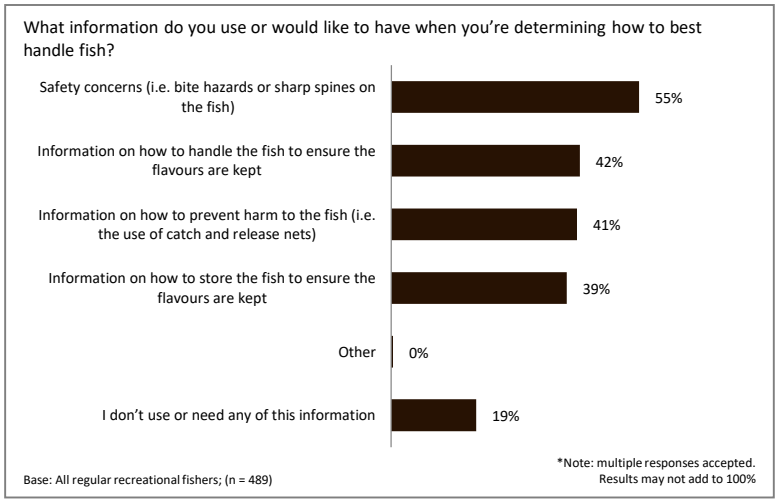
*Note: multiple responses accepted. Results may not add to 100%

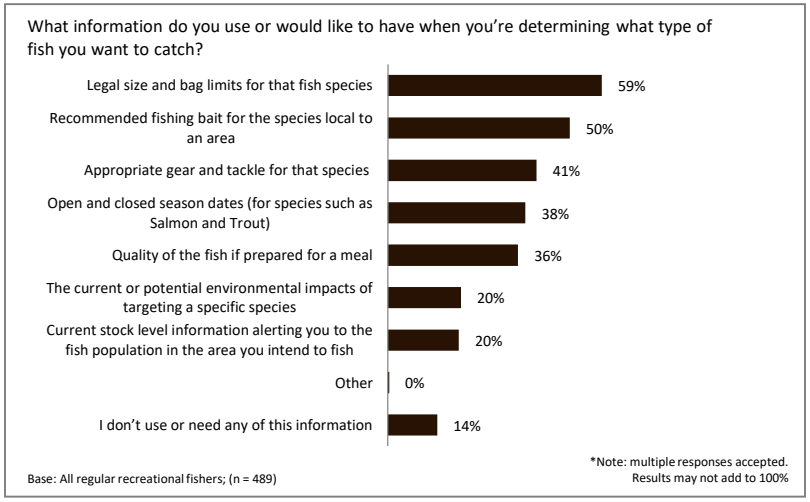
What we asked:

When you're out fishing, what information would you like to have at your fingertips?
Where do you currently get your information about these types of fishing matters?







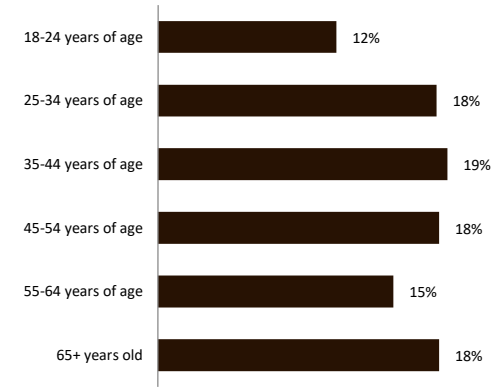


What we asked:

What information do you use or would like to have when you're determining where to fish?
What information do you use or would like to have when you're determining how to best handle fish?
What information do you use or would like to have when you're determining what type of fish you want to catch?

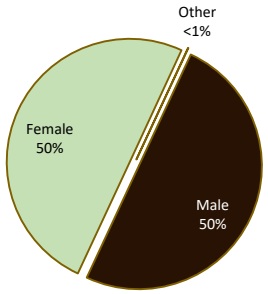
respondent profiles

Age of survey respondents



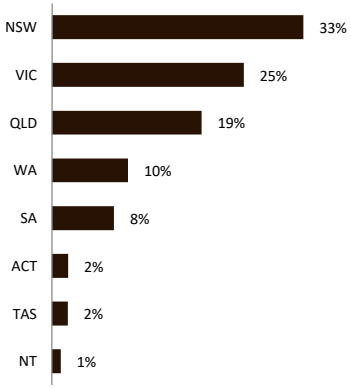
Base: All respondents; (n = 2,000)

Gender of survey respondents



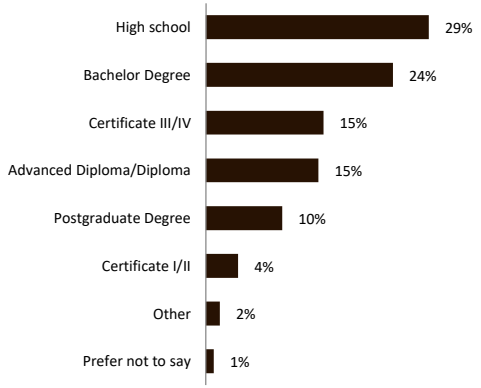
Base: All respondents; (n = 2,000)

Location



Base: All respondents; (n = 2,000)

Highest level of education

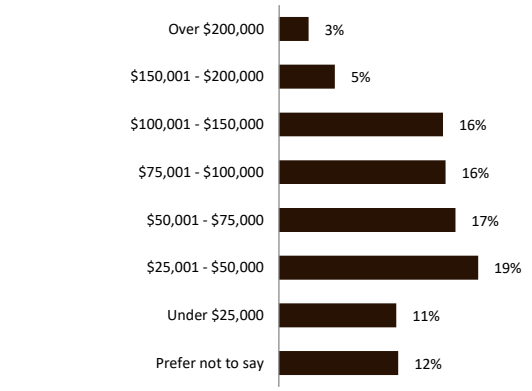


Base: All respondents; (n = 2,000)

What we asked:

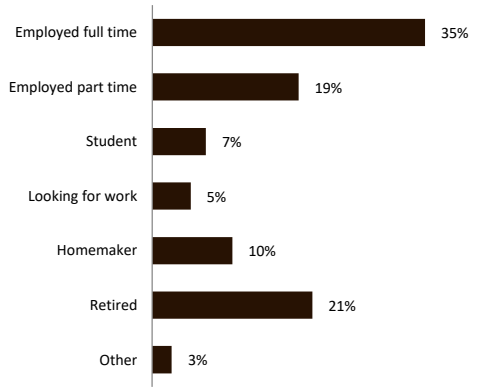
To begin with, in which of the following age brackets do you fall...
Are you...
What state do you live in?
What is the highest level of education you have completed?

Household income



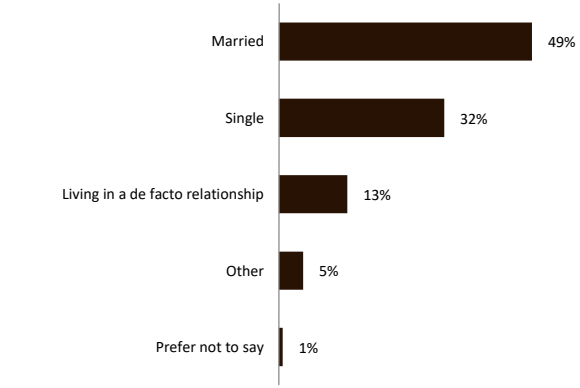
Base: All respondents; (n = 2,000)

Employment status



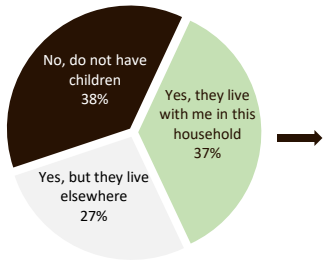
Base: All respondents; (n = 2,000)

Household structure



Base: All respondents; (n = 2,000)

Do they have children?



Age of the youngest child they live with (n = 733)	%
3 years or younger	26%
4 - 9 years	28%
10 - 17 years	27%
18 - 24 years	13%
25 years or older	6%

Base: All respondents; (n = 2,000)

What we asked:

What is your current household income before tax?
What is your current employment status?
Which one of the following best describes your household situation?
Do you have any children? Please select all that apply.
What is the age of the youngest child living with you?

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; Survey Sampling International (SSI).
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 = 2,000 representative of Australia by age, gender and geographical location as matched by ABS estimates:

- n = 42 ACT
- n = 651 NSW
- n= 23 NT
- n = 388 QLD
- n = 161 SA
- n= 41 TAS
- n = 497 VIC
- n = 197 WA

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

Respondents were asked to completed an 8 to 18 minute online survey which. The difference in survey length was due to the survey having 4 unique pathways between those that ate seafood and those that do not versus those that recreationally fish versus those that do not. Topics covered throughout the survey included:

- seafood consumption and purchasing behaviour;
- the experience of preparing fresh seafood;
- the experience of eating fresh seafood;
- what information is sourced when in need of cooking/preparation instructions for fresh seafood;
- the experiences and perceptions of seafood for 'non-seafood eaters';
- the experience of recreational fishing; and
- respondent profiles.

Timing

In total, n = 2,000 interviews were conducted between the 21st June – 2nd July 2016.

Reliability of the Estimates

The estimates in this report are based on information obtained from a sample survey. Any data collection may encounter factors, known as non-sampling error, which can impact on the reliability of the resulting statistics. In addition, the reliability of estimates based on sample surveys are also subject to sampling variability. That is, the estimates may differ from those that would have been produced had all persons in the population been included in the survey.

Non-sampling error

Non-sampling error may occur in any collection, whether it is based on a sample or a full count such as a census. Sources of non-sampling error include non-response, errors in reporting by respondents or recording of answers by interviewers and errors in coding and processing data. Every effort is made to reduce non-sampling error by careful design of survey questionnaires and quality control procedures at all stages of data processing.

Sampling error

One measure of the likely difference is given by the standard error (SE), which indicates the extent to which an estimate might have varied by chance because only a sample of persons was included. There are about two chances in three (67%) that a sample estimate will differ by less than one SE from the number that would have been obtained if all persons had been surveyed, and about 19 chances in 20 (95%) that the difference will be less than two SEs.

Calculation of Confidence Interval

If 50% of all the people in a population of 20,000 people drink coffee in the morning, and if you were repeat the survey of 377 people ("Did you drink coffee this morning?") many times, then 95% of the time, your survey would find that between 45% and 55% of the people in your sample answered "Yes".

The remaining 5% of the time, or for 1 in 20 survey questions, you would expect the survey response to more than the margin of error away from the true answer.

When you survey a sample of the population, you don't know that you've found the correct answer, but you do know that there's a 95% chance that you're within the margin of error of the correct answer.

In terms of the numbers selected above, the margin of error *MoE* is given by:

$$MoE = z * \sqrt{\frac{\hat{p}(1-\hat{p})}{n}}$$

where n is the sample size, $\hat{p}$ is the fraction of responses that you are interested in, and z is the critical value for the 95% confidence level (in this case, 1.96).

This calculation is based on the Normal distribution, and assumes you have more than about 30 samples.

Margin of Error for a given sample size and survey estimate.		Sample Size										
		30	50	75	100	150	200	300	500	1,000	1,500	2,000
Survey Estimate	10%	n/a	n/a	n/a	± 5.88%	± 4.80%	± 4.16%	± 3.39%	± 2.63%	± 1.86%	± 1.52%	± 1.31%
	20%	n/a	± 11.09%	± 9.05%	± 7.84%	± 6.40%	± 5.54%	± 4.53%	± 3.51%	± 2.48%	± 2.02%	± 1.75%
	30%	n/a	± 12.70%	± 10.37%	± 8.98%	± 7.33%	± 6.35%	± 5.19%	± 4.02%	± 2.84%	± 2.32%	± 2.01%
	40%	± 17.53%	± 13.58%	± 11.09%	± 9.60%	± 7.84%	± 6.79%	± 5.54%	± 4.29%	± 3.04%	± 2.48%	± 2.15%
	50%	± 17.89%	± 13.86%	± 11.32%	± 9.80%	± 8.00%	± 6.93%	± 5.66%	± 4.38%	± 3.10%	± 2.53%	± 2.19%
	60%	± 17.53%	± 13.58%	± 11.09%	± 9.60%	± 7.84%	± 6.79%	± 5.54%	± 4.29%	± 3.04%	± 2.48%	± 2.15%
	70%	n/a	± 12.70%	± 10.37%	± 8.98%	± 7.33%	± 6.35%	± 5.19%	± 4.02%	± 2.84%	± 2.32%	± 2.01%
	80%	n/a	± 11.09%	± 9.05%	± 7.84%	± 6.40%	± 5.54%	± 4.53%	± 3.51%	± 2.48%	± 2.02%	± 1.75%
	90%	n/a	n/a	n/a	± 5.88%	± 4.80%	± 4.16%	± 3.39%	± 2.63%	± 1.86%	± 1.52%	± 1.31%

Note. Margin of Errors are provided at the 95% confidence level on the assumption of a large population size (non-finite) and normally distributed.
Results labelled "n/a" are due to the assumption of the normal distribution not being upheld ($n\hat{p} < 10$ or $n(1-\hat{p}) < 10$).

FRDC:
Unpacking the
consumer seafood experience

November 2016

want more information?

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