



Australian Government

**Fisheries Research and
Development Corporation**



Seafood Consumption Omnibus Results





■ National Omnibus Survey:

■ Aims:

- Determine the level of seafood consumption in Australia
- Understand consumers purchase preferences
- Identify specific issues influencing their consumption patterns

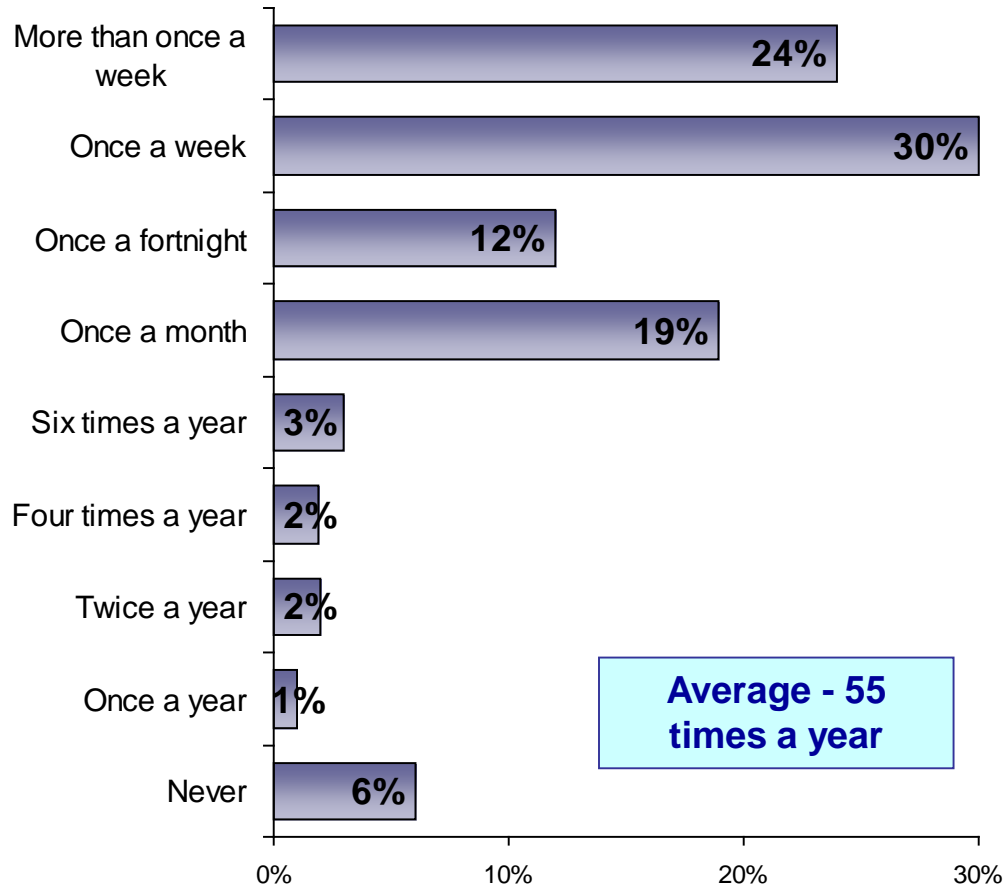
■ Methodology:

- Total of 692 telephone interviews were conducted with a nationally representative sample of adult consumers aged 18 years and over
- All 7 States were represented
- Main grocery shopper in household was interviewed
- Omnibus conducted 21 to 22 August 2006.
- The data is weighted to more accurately reflect the latest ABS population estimates.



Australian consumers eat seafood around 55 times a year on average

Frequency eat seafood



■ Over half of those surveyed consume seafood at least once a week (54%).

- 30% eat seafood once a week.
- 24% consume seafood more than once a week.
- On average, respondents eat seafood 55 times a year.

Q2a. How often do you usually eat seafood?

Weighted Base: n=11.6 million (All respondents)



Australian consumers eat seafood around 55 times a year on average

By main demographics – there were no significant differences by other demographics

<i>Frequency eat seafood</i>	Total	Male	Female	NSW	VIC	QLD	SA	WA	TAS	NT
<i>Weighted base (n=)</i>	11.6M	4.7M	7M	3.9M	2.8M	2.3M	887,969	1.2M	296,346	82,444
More than once a week	24%	20%	27%	28%	27%	21%	16%	19%	33%	20%
Once a week	30%	36%	26%	29%	27%	30%	41%	31%	22%	30%
Once a fortnight	12%	12%	12%	12%	12%	11%	16%	15%	5%	7%
Once a month	19%	23%	16%	16%	19%	26%	10%	18%	19%	42%
Six times a year/Every two months	3%	2%	3%	4%	3%	2%	1%	5%	-	-
Four times a year/Every three months	2%	2%	2%	2%	2%	2%	-	1%	12%	-
Three times a year/Every four months	<1%	<1%	1%	<1%		1%	2%	1%	-	-
Twice a year/Every six months	2%	1%	3%	3%	1%	2%	2%	-	-	-
Once a year	1%	1%	1%	1%	2%	<1%	1%	-	-	-
Less often than once a year	<1%	-	<1%	-	<1%	-	-	-	-	-
Never	6%	4%	8%	5%	7%	4%	11%	10%	8%	-
<i>Average times a year</i>	55	52	56	59	56	50	48	48	60	50

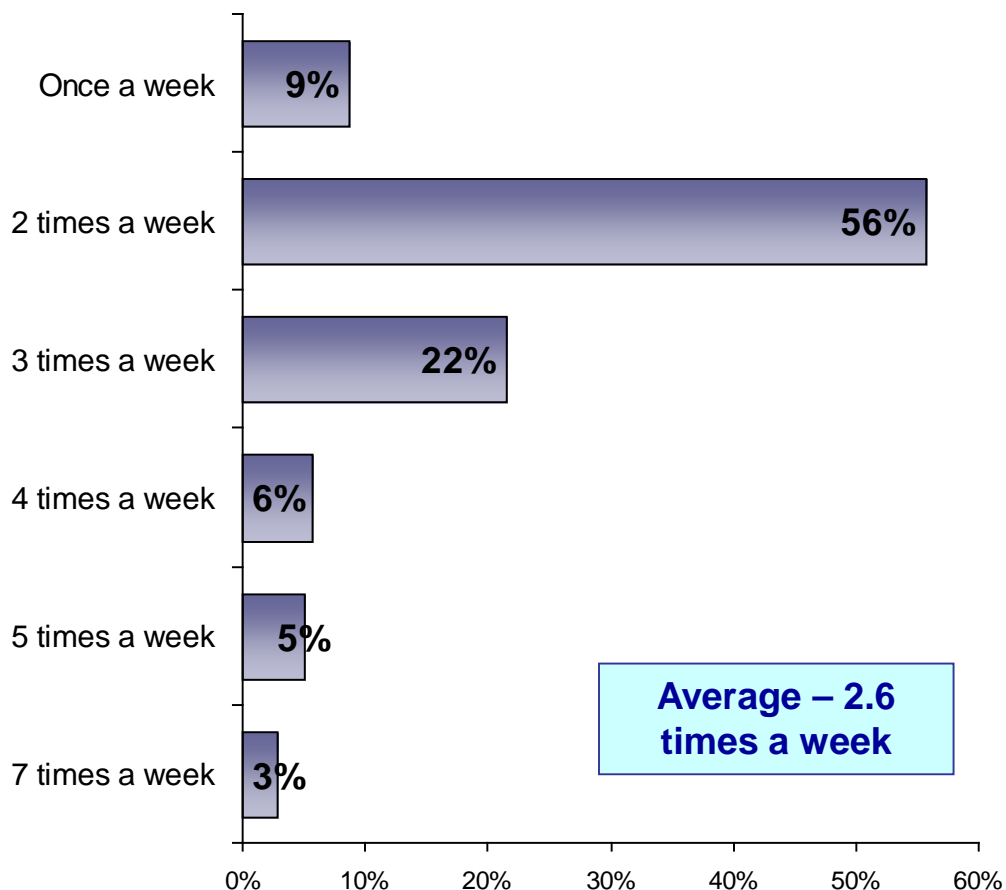
Q2a. How often do you usually eat seafood?

Weighted Base: n=11.6 million (All respondents)



Weekly seafood consumers claim to eat seafood almost 3 times a week

Number of times per week consume seafood



- Amongst respondents who claim to eat seafood more than once a week, 56% nominated twice weekly consumption.
 - Average consumption of seafood is almost three times a week.

Q2b. And, how many times a week do you usually eat seafood?

Weighted Base: n=2.8 million (Eat seafood more than once a week)



Weekly seafood consumers claim to eat seafood almost 3 times a week

By main demographics – there were no significant differences by other demographics

Number of times consume per week	Total	Male	Female	NSW	VIC	QLD	SA	WA	TAS	NT
<i>Weighted base (n=)</i>	2.8M	947,272	1.9M	1.1M	742,492	465,585	140,285	235,429	96,970	16,892
Once a week	9%	4%	11%	13%	7%	10%	-	3%	-	
2 times a week	56%	65%	51%	54%	63%	35%	55%	74%	67%	
3 times a week	22%	15%	25%	18%	19%	35%	28%	18%	12%	100%
4 times a week	6%	2%	8%	4%	8%	8%	-	-	21%	
5 times a week	5%	11%	2%	7%	1%	8%	14%	-	-	
7 times a week	3%	1%	4%	3%	3%	5%	3%	-	-	
8 times a week	<1%	1%	-	-	-	-	-	5%	-	
Average times a week	2.6	2.6	2.5	2.5	2.4	2.9	2.9	2.4	2.5	3.0

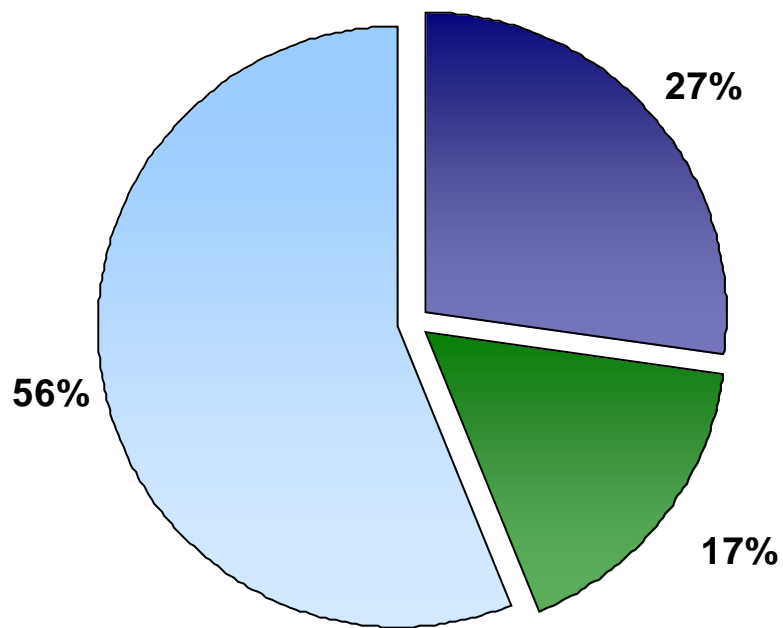
Q2b. And, how many times a week do you usually eat seafood?

Weighted Base: n=2.8 million (Eat seafood more than once a week)



Over a quarter claim to be consuming more seafood currently

Current seafood consumption



■ More ■ Less ■ The same

- Slightly over one in four consumers claim to be eating more seafood compared to a year ago (27%).
- Whilst a small majority indicated similar consumption patterns to 12 months ago (56%).

Q3. Compared to 12 months ago, are you now eating more or less seafood?

Weighted Base: n=10.9 million (Indicated eat seafood)



Over a quarter claim to be consuming more seafood currently

By main demographics – there were no significant differences by other demographics

Current seafood consumption	Total	Male	Female	NSW	VIC	QLD	SA	WA	TAS	NT
<i>Weighted base (n=)</i>	10.9M	4.5M	6.4M	3.7M	2.6M	2.2M	787,141	1.1M	272,475	82,444
More	27%	20%	33%	32%	23%	25%	29%	24%	20%	63%
Less	17%	19%	15%	16%	15%	19%	22%	16%	4%	30%
The same	56%	62%	52%	52%	62%	55%	49%	60%	76%	7%

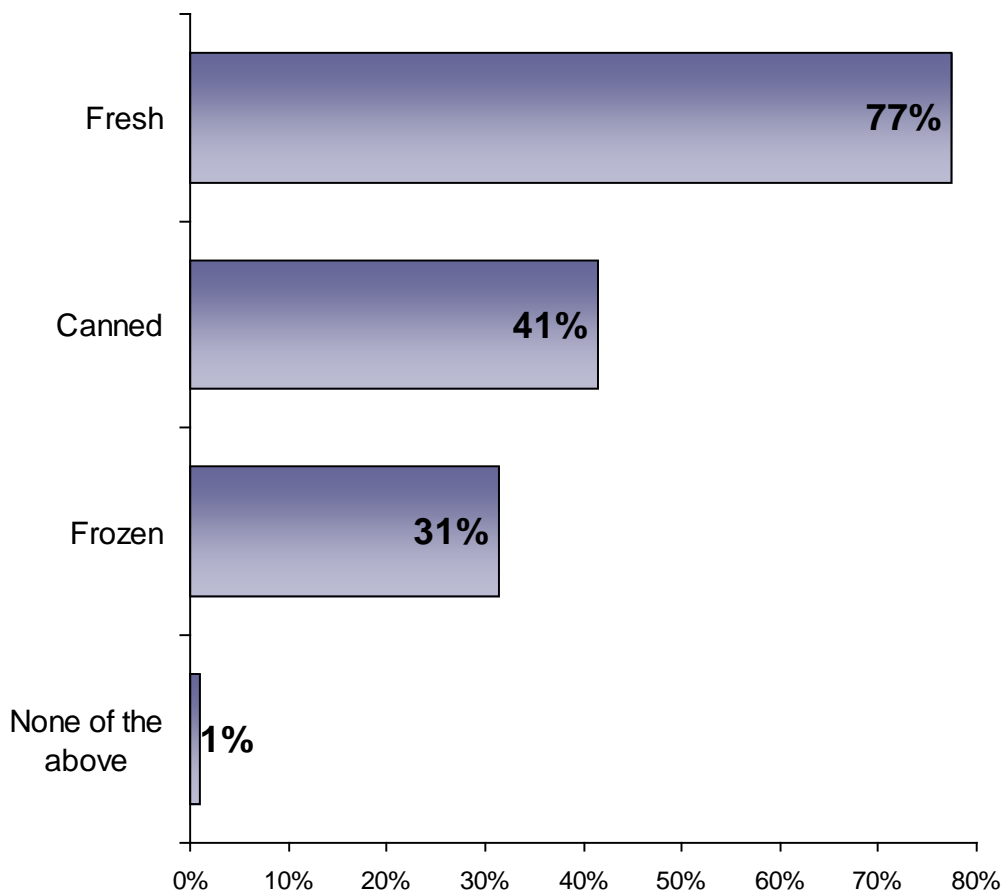
Q3. Compared to 12 months ago, are you now eating more or less seafood?

Weighted Base: n=10.9 million (Indicated eat seafood)



The vast majority usually purchase fresh seafood, based on their own definition

Type of seafood usually purchase*



- A large proportion of Australian consumers cite preference for fresh seafood (77%).
- To a lesser extent, canned (41%) and frozen (31%) varieties are purchased.

Q4. Do you usually buy fresh, frozen, or canned seafood?

Weighted Base: n=10.9 million (Indicated eat seafood).

*Multiple responses allowed.



The vast majority usually purchase fresh seafood, based on their own definition

By main demographics – there were no significant differences by other demographics

Seafood type usually purchase	Total	Male	Female	NSW	VIC	QLD	SA	WA	TAS	NT
<i>Weighted base (n=)</i>	<i>10.9M</i>	<i>4.5M</i>	<i>6.4M</i>	<i>3.7M</i>	<i>2.6M</i>	<i>2.2M</i>	<i>787,141</i>	<i>1.1M</i>	<i>272,475</i>	<i>82,444</i>
Fresh	77%	81%	75%	79%	81%	78%	62%	75%	69%	73%
Canned	41%	37%	44%	41%	46%	42%	48%	31%	39%	27%
Frozen	31%	34%	30%	25%	28%	28%	51%	45%	40%	27%
None of the above	1%	1%	1%	1%	1%	1%	3%	1%	-	-

Q4. Do you usually buy fresh, frozen, or canned seafood?

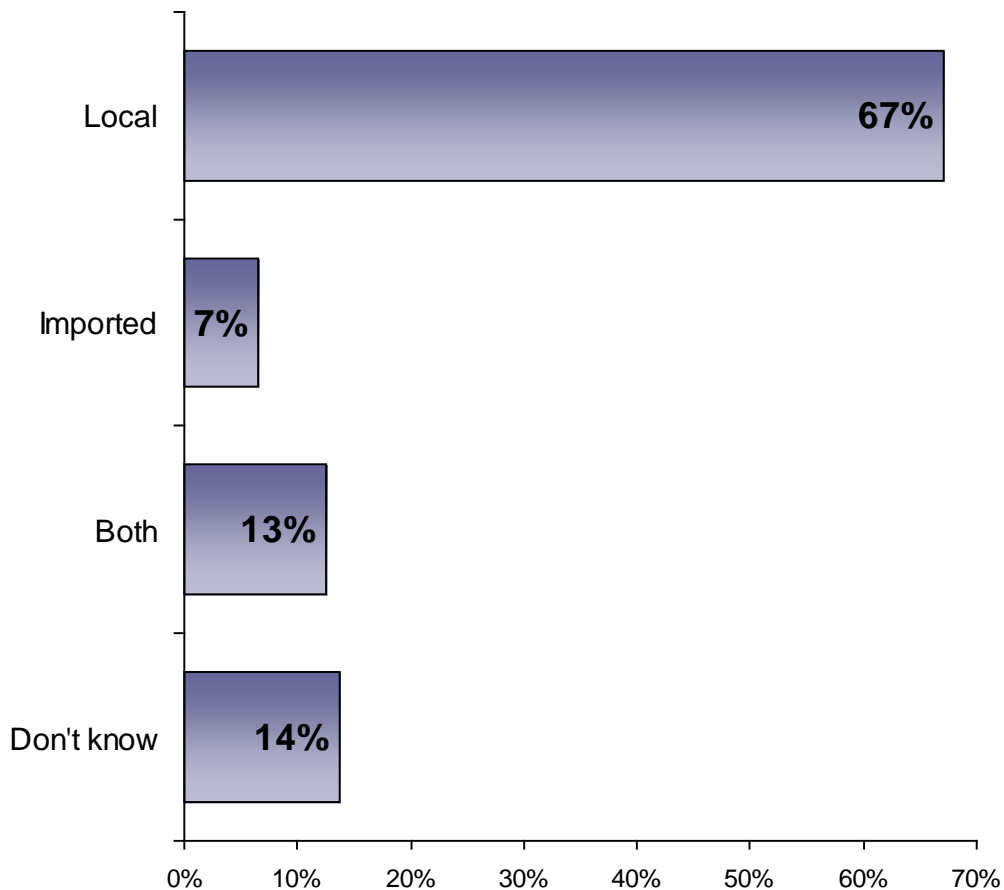
Weighted Base: n=10.9 million (Indicated eat seafood).

*Multiple responses allowed.



Two in three consumers claim to normally buy local seafood over the imported product

Local vs. imported seafood bought



- For 67% of consumers surveyed, Australian seafood is said to be purchased normally. However, this figure may not actually be as high, if some consumers cannot clearly identify local seafood over imported seafood.
- Only 7% of consumers typically buy imported seafood.

Q5. Do you usually buy local or imported seafood?

Weighted Base: n=10.9 million (Indicated eat seafood)



Two in three consumers claim to normally buy local seafood over the imported product

By main demographics – there were no significant differences by other demographics

<i>Local vs. imported</i>	Total	Male	Female	NSW	VIC	QLD	SA	WA	TAS	NT
<i>Weighted base (n=)</i>	10.9M	4.5M	6.4M	3.7M	2.6M	2.2M	787,141	1.1M	272,475	82,444
Local	67%	72%	63%	62%	70%	75%	52%	73%	61%	47%
Imported	7%	5%	8%	9%	6%	4%	5%	8%	13%	-
Both	13%	12%	13%	15%	10%	13%	16%	4%	19%	20%
Don't know	14%	11%	16%	14%	14%	8%	27%	15%	7%	33%

Q5. Do you usually buy local or imported seafood?

Weighted Base: n=10.9 million (Indicated eat seafood)



Specific issues or events have negligible impact on seafood consumption

Specific issue or event influenced consumption	
Base (n=)	10.9 million
Health benefits	9%
Health concerns (dioxins, mercury)	6%
Media reports / attention	5%
Price / Cost	4%
Safety of imports	1%
Convenience	1%
Availability of seafood	1%
Influence of family / friends	1%
Previous bad experience	1%
Previous good experience	<1%
Other	6%
No specific issue or event	65%

- Almost two-thirds of respondents indicated that consumption levels have not been influenced by any specific occurrences (65%).
- However, one in ten (9%) claim to have been influenced by health benefits.
- Health concerns such as dioxins and mercury content (6%), as well as media reports (5%) were also mentioned.
- Cost was cited as a reason by just 4% of consumers surveyed.

Q6. Has any specific issue or event influenced your seafood consumption in the last 12 months?

Weighted Base: n=10.9 million (Indicated eat seafood)

*Multiple responses allowed.



Specific issues or events have negligible impact on seafood consumption

By main demographics – there were no significant differences by other demographics

Specific issues or events	Total	Male	Female	NSW	VIC	QLD	SA	WA	TAS	NT
Weighted base (n=)	10.9M	4.5M	6.4M	3.7M	2.6M	2.2M	787,141	1.1M	272,475	82,444
Health benefits	9%	6%	11%	8%	11%	6%	6%	13%	11%	42%
Health concerns (dioxins, mercury)	6%	8%	5%	13%	5%	2%	1%	1%	-	-
Media reports/attention	5%	3%	6%	2%	6%	8%	6%	-	16%	-
Price/Cost	4%	4%	5%	6%	3%	2%	8%	8%	-	-
Safety of imports	1%	-	2%	2%	1%	1%	-	2%	4%	-
Convenience	1%	3%	-	-	2%	-	-	5%	-	-
Availability of seafood	1%	1%	<1%	1%	-	<1%	-	1%	-	42%
Influence of family/friends	1%	<1%	1%	1%	-	1%	-	-	-	-
Previous bad experience	1%	1%	<1%	-	1%	-	-	-	-	-
Previous good experience	<1%	<1%	<1%	1%	-	-	-	-	-	-
Other	6%	5%	6%	5%	5%	8%	8%	1%	11%	-
No specific issue or event	65%	69%	63%	61%	65%	72%	71%	70%	58%	15%

Q6. Has any specific issue or event influenced your seafood consumption in the last 12 months?

Weighted Base: n=10.9 million (Indicated eat seafood)

*Multiple responses allowed.