

Victorian Seafood Consumer Survey

Survey Result Assessment

Prepared by **macroplan**
For **Seafood Industry Victoria**

December 2021

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Executive Summary

This report presents the **results** of a **consumer survey** held during the month of **November 2021** to better understand the consumption of **seafood** within **Victoria, Australia**.

The survey results yielded considerable information and will assist Seafood Industry Victoria (SIV) and peak bodies to learn:

- **How people learn about seafood,**
- **How they consume it,**
- **Where they think it comes from,**
- **What factors are influential in their purchase and consumption patterns, and to**
- **Enable the industry to provide an evidence base for future investment and education/promotion activities**

The comprehensive survey process also yielded a range of interesting indicative and inferential data that can be further explored by SIV and peak bodies and utilised in several ways, for example, in future advertising or marketing campaigns for seafood products. We have provided a range of summary tables and charts for these data sets and discussed their pertinence.

Executive Summary

A range of findings were emergent are discussed and explored in the body of this presentation, but these are also distilled below:

- **Interesting patterns of consumption of Victorian seafood exist. Melbourne's east and southeast as well as CBD and inner suburbs both had high response rates and appear to spend the most on seafood products. These postcodes reflect some of the highest income postcodes when Census data is reviewed.**
- **The above is interesting because our research showed little correlation between spend and income.**
- **The highest and lowest income groups were the main consumers on seafood spending the most. We compare this with census data.**
- **Census data has been cross referenced, and both northern and parts of the south-east quadrant suggest relationships between cultural background and seafood consumption and spending.**
- **Moreover, that data didn't show a clear pattern between higher incomes and higher spend or increased consumption levels.**
- **Clear patterns in terms of purchase location emerged; a high proportion sought our markets while a surprisingly small proportion shopped for Victorian Seafood at supermarkets.**
- **Advertising was found to be lacking with the resultant outcome being knowledge is important, and if increased information was reaching consumers this could act to increase consumption.**

Introduction

This report presents the results of a consumer survey held during the month of **November 2021** to better understand the **consumers of seafood within Victoria, Australia**.

The survey is intended to allow Seafood Industry Victoria (SIV) to better understand people's **knowledge and consumption of seafood**, as well as their **consumption and purchase preferences**.

The report has been prepared in accordance with the instructions received from Seafood Industry Victoria (SIV) and consists of the following sections and assessment considerations:

Section 1

Geographical Context

Presents an overview of the **locational context** of the survey respondents.

- We separate the data from urban areas from that of regional and examine urban areas by region within broader Melbourne.
- All non-urban and rural responses are analysed together.
- Data goes down to postcode level for granular analysis moving forward.

Section 3

Seafood Demand Analysis

Reviews the drivers of consumer **demand** for seafood and assesses the **market and opportunities** for seafood sales and consumption to be expanded.

- We break down demand type, value, and purchasing patterns to determine demand.
- Demand location, purchasing power and type are critical
- This is important in informing new retailing outlets and supply additions.

Section 2

Socio-demographic Profile

Examines the respondents of the survey results including **population levels** and the **socio-demographic profile**.

- We examine respondent groupings and compare with Census socio-economic data and draw out relationships between the consumers of seafood and their backgrounds.

Section 4

Summary

Provides a summary of the key findings of the survey results identifying **key outcomes and opportunities**.

- We focus on using the learnings from this research and how they inform peak bodies around consumers and their consumption patterns.
- Practically, how these findings could be used to get more local, Victorian seafood to market and from this, translate into higher purchase and consumption levels.

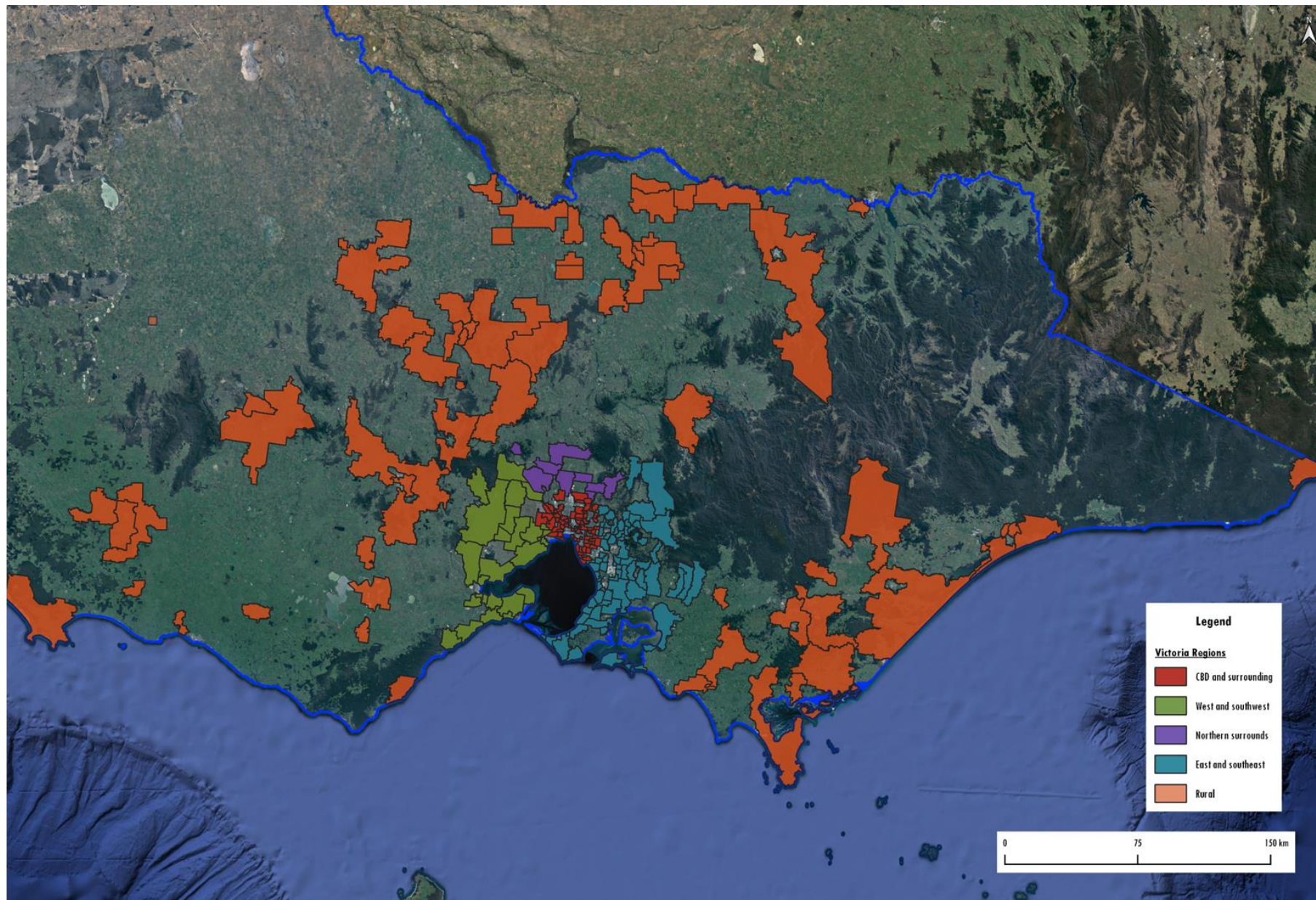
1_Geographical Context

During the month-long survey period in November 2021, there were a total of survey **526 participants** from **246 unique postcodes** within Victoria, Australia.

These survey participants were **segmented into geographical divisions** of Victoria into the following locational groupings:

- **CBD and surrounding**
- **West and southwest**
- **Northern**
- **East and southeast**
- **Rural/regional**

These regions shall be referred to as the survey respondents (or 'respondents') for the remainder of this report.



Map 1.1: Survey Result Assessment - State Context

2_Socio-demographic Profile

This section of the report examines the respondents of the survey results including **population characteristics** and the **socio-demographic profile** of survey respondents. Much of this data is critical informing background and adding depth to the response data.

Much of this data can be compared with 2016 Australian Census data that has been included which provides medians and averages for individuals and households in Melbourne. We note that 2021 was a Census year however the updated data won't be available until mid-2022.

Respondents' profiles are outlined, including:

- **Gender**
- **Age**
- **Place of birth**
- **Income**

2.1_Respondents Profile

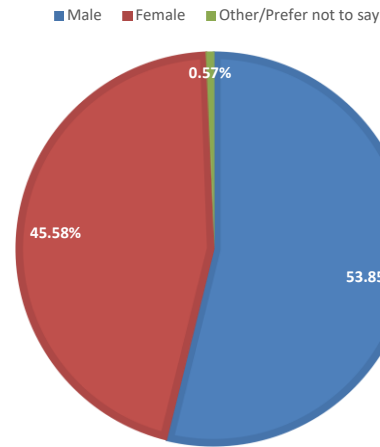
Gender and Age

Gender

Of the 526 survey responders, there was almost a 50-50 split.

- 280 (53.85%) identifying as male,
- 237 (45.58%) as female, and
- 3 (0.57%) as other or preferred not to say.

Chart 2.1_Population by Gender

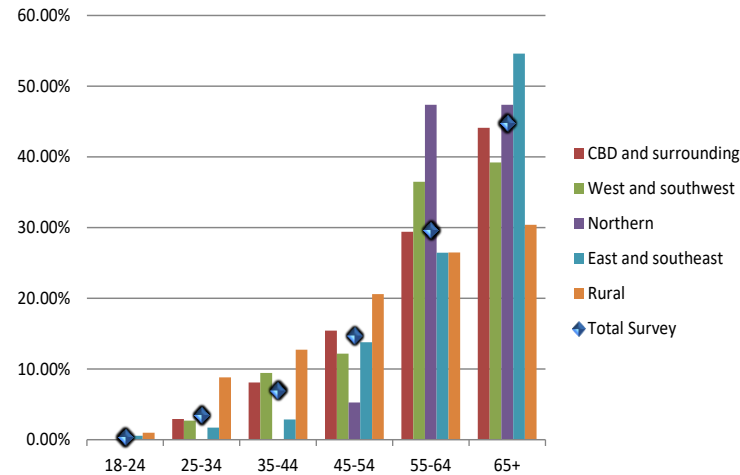


- *This data is quite representative of the population at large.*
- *We would generally associate female respondents with doing more shopping, however, we note the age imbalance suggesting most of the respondents would no longer be working full-time.*
- *We can infer that the targeting of future advertising needs to be gender neutral, and that traditional gender norms are not holding – at least for the respondent cohort*

Age

- The majority of participants are an **older demographic** – being aged 55 and above.
- In this cohort all areas were well represented, northern region was strongly represented in both 55-64 and 65+
- This age skew differs to the Melbourne metropolitan (30.8%) and Australia (33.8%) of people aged 50+.
- *[from Australian Bureau of Statistics (ABS) 2016 census of population and housing in Table 2.2 and Chart 2.4 (Slide 19)]*

Chart 2.2_Population by Age

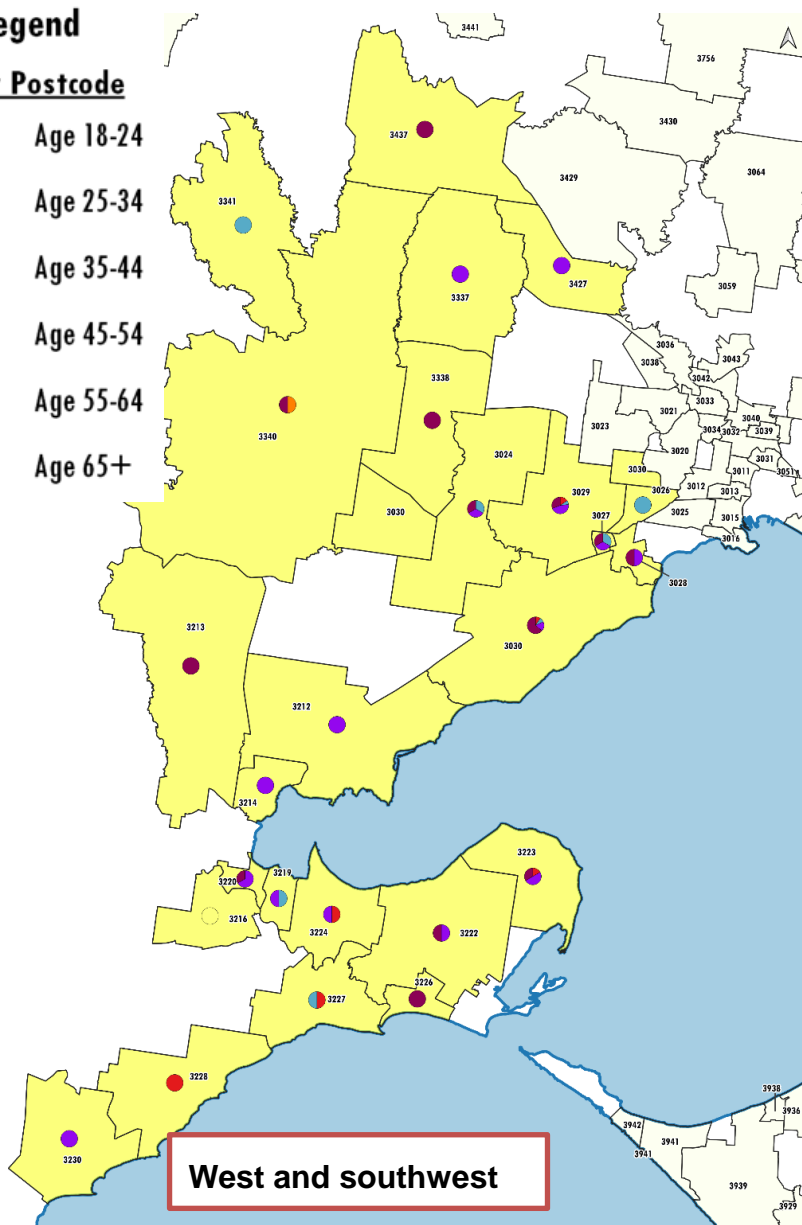


Source: SurveyMonkey; Macroplan

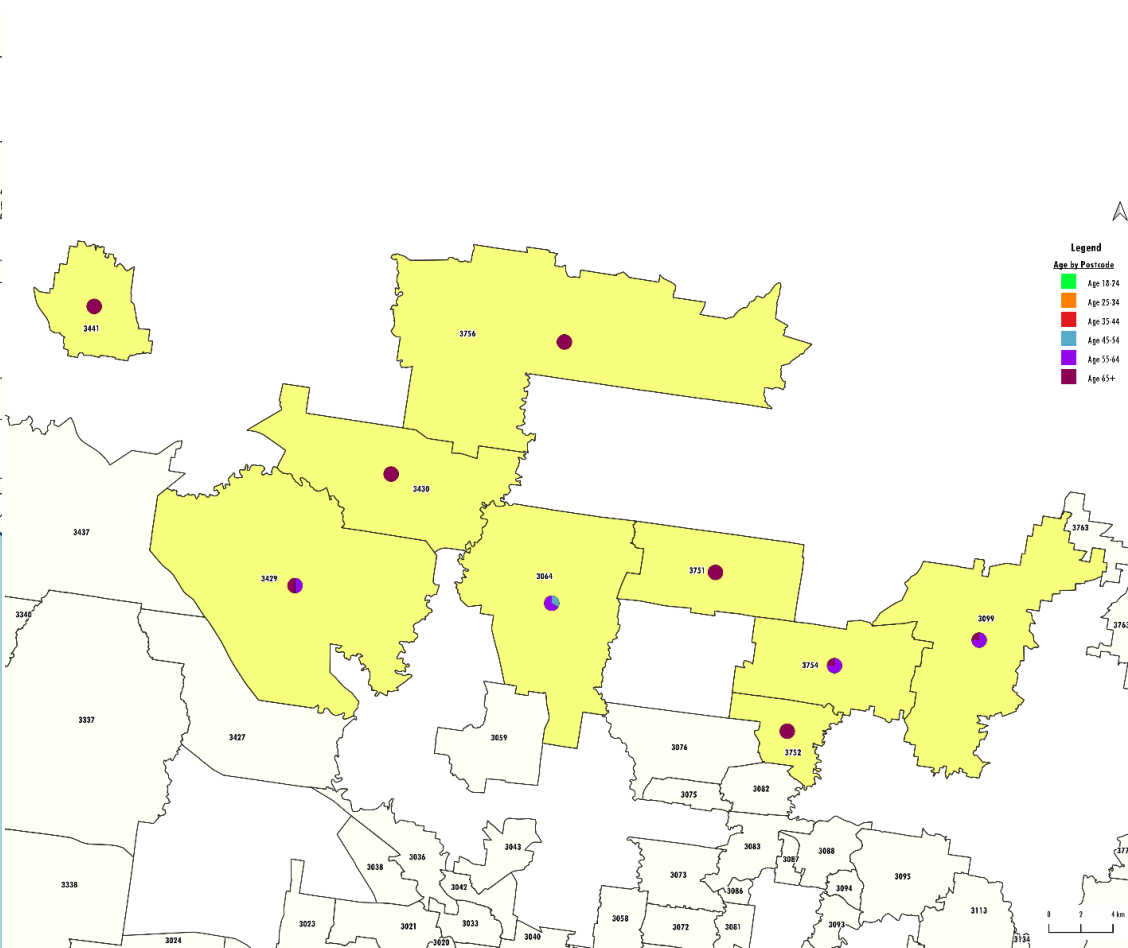
- *As referenced above, we see strong representation in the 55+ cohort, and specifically the 65+ cohort, above 40% for 3/5 regions*
- *While gender data shows balance, age data doesn't. Older consumers are by far the dominant cohort and this must be factored in.*
- *We consider the limited spread of respondents' age groups an important consideration in future planning.*

Legend

Age by Postcode



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Map 2.1_Survey Result Assessment – Age by Region: West and southwest, Northern

Map 2.1

This Map shows the west and southwest regions and the northern region, pictorially. Indicating respondents age groupings by postcode.

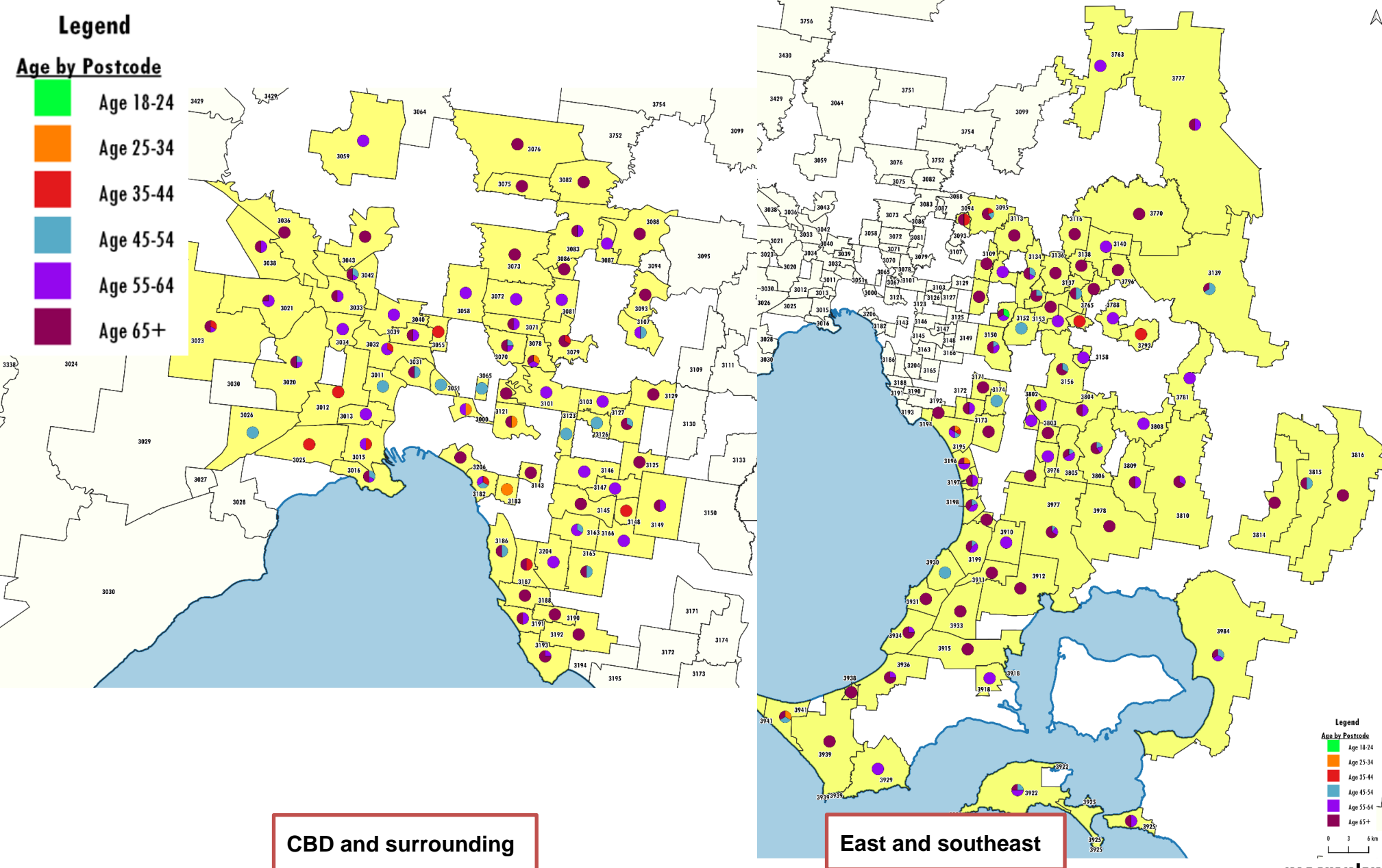
We found that overwhelmingly that respondents to the survey were aged 55+ years, but we believe the real value in the above map is in the examination of postcodes with multiple respondents (indicating an interest in seafood) and the co-location of responses. A single colour dot could indicate multiple respondents in a single age range, however a varied (age) group of respondents would indicate a stronger, and more diverse market demand base within a postal code area. This has value for future marketing but also development of retailing.

Critically, what this data does allow us to see is regions or areas of depth of respondents. Within the four defined regions of Melbourne, and the fifth region being the remainder of regional and rural Victoria this individual postcode respondent data allows examination of demand pockets and can examine this by age. We see for example in Map 2.1 that the south and south-west regions present far greater age diversity than in the Northern. This can then be examined in conjunction with spend.

Legend

Age by Postcode

- Age 18-24
- Age 25-34
- Age 35-44
- Age 45-54
- Age 55-64
- Age 65+



CBD and surrounding

East and southeast

Legend
Age by Postcode
 Age 18-24
 Age 25-34
 Age 35-44
 Age 45-54
 Age 55-64
 Age 65+

0 3 6 km

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Map 2.2_Survey Result Assessment – Age by Region: CBD and surrounding, East and Southeast

Map 2.2

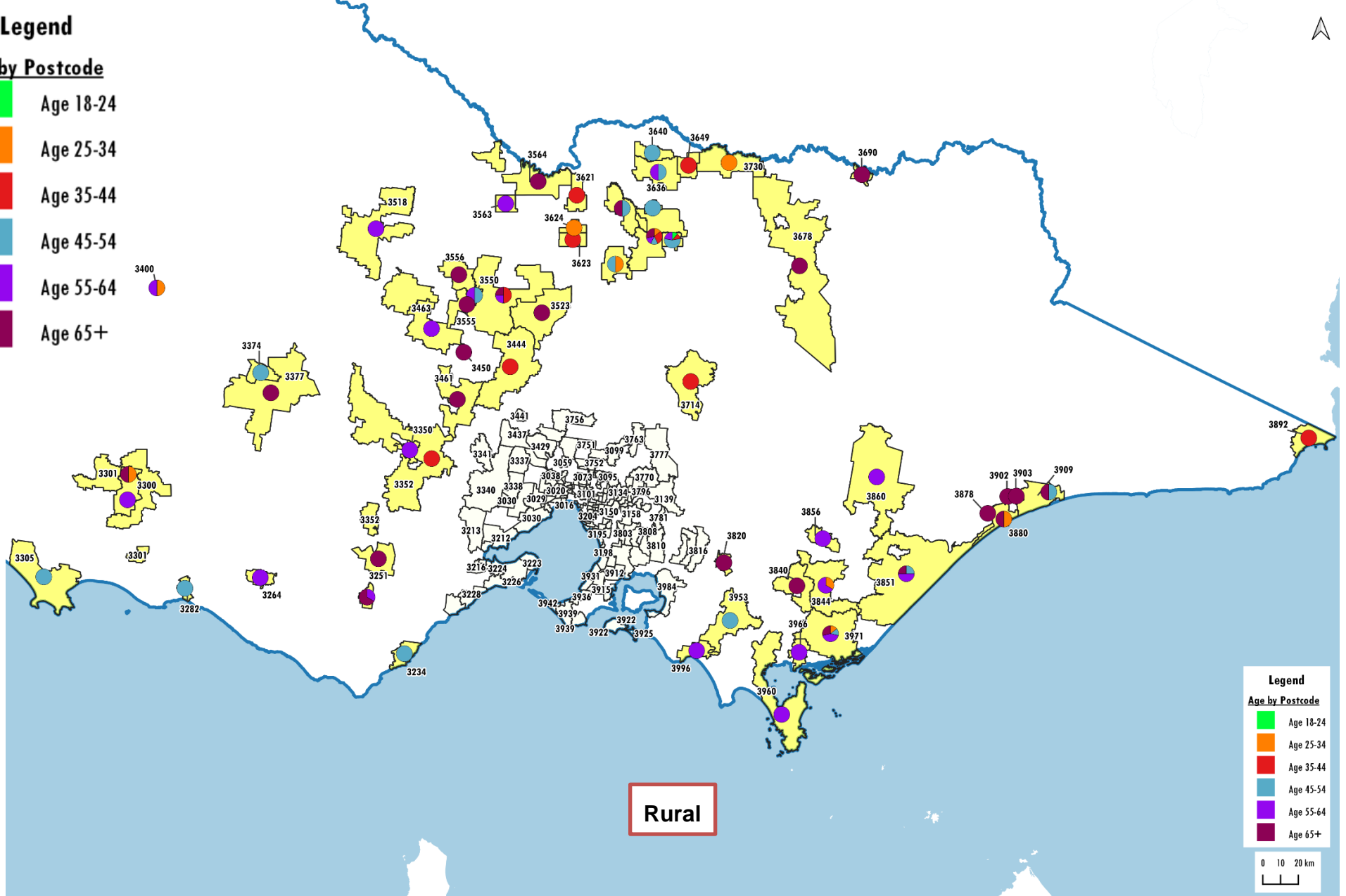
This Map shows CBD and surrounding areas and the east and southeast regions, pictorially. Indicating respondents age groupings by postcode. Of interest in the CBD and surrounds map we note the appearance of more, younger respondents, particularly those in the 45-54, who were more highly represented. And in inner locations we responses from even younger groups.

Conversely, this contrasts quite clearly with the south-eastern suburbs where, particularly in the middle and outer suburbs we note higher concentrations of 55-64 and 65+ age cohorts.

Legend

Age by Postcode

- Age 18-24
- Age 25-34
- Age 35-44
- Age 45-54
- Age 55-64
- Age 65+



Map 2.3_Survey Result Assessment – Age by Region: Rural

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Map 2.3

This map shows the rural and regional areas of Victoria and their respondents age cohorts by postcode, pictorially.

We note that it is entirely likely that most of the identified postcodes only had one respondent, we note in areas of central Victoria and areas around the Gippsland Lakes that the older cohort was highly represented – here we highlight the Gippsland Lakes as a popular destination for retirement.

Across other regional and rural areas of Victoria however there is little in terms of patterns of evidence around respondents, with all age ranges represented. Generally single-colour coded postcodes were 45 years or above, while areas around south-Gippsland and the Murray River near Echuca had more diverse ages among respondents.

With this map we give consideration to responses from the west coast (although limited), the east coast around Corner Inlet and Gippsland Lakes – all major commercial fishery areas. And note that other areas, such as along the Murray, could have had their response rates/levels affected due to the prominence of the recreational fishery.

2.1_ Respondents Profile

Place of Birth

- The majority of participants were born in **Australia 78.53%**.
- This is higher than the ABS 2016 census of population and housing which illustrates 68.5% and 71.9% of the Melbourne metropolitan and Australian demographic being Australian born
- We note a number of responses from rural and regional Victoria where the % of population born in Australia is higher.
- We believe, when viewed in conjunction with other data that there is evidence of strong cultural linkages, even from those born in Australia.

Table 2.1_Country of Birth

Answer Choices	Responses
Australia	78.53%
Brazil	0.00%
Canada	0.00%
China	0.19%
France	0.00%
Germany	0.39%
India	0.77%
Italy	0.19%
Japan	0.00%
Mexico	0.00%
New Zealand	3.29%
Russia	0.00%
Spain	0.00%
United Kingdom	8.12%
United States	0.58%
None of the above	7.93%

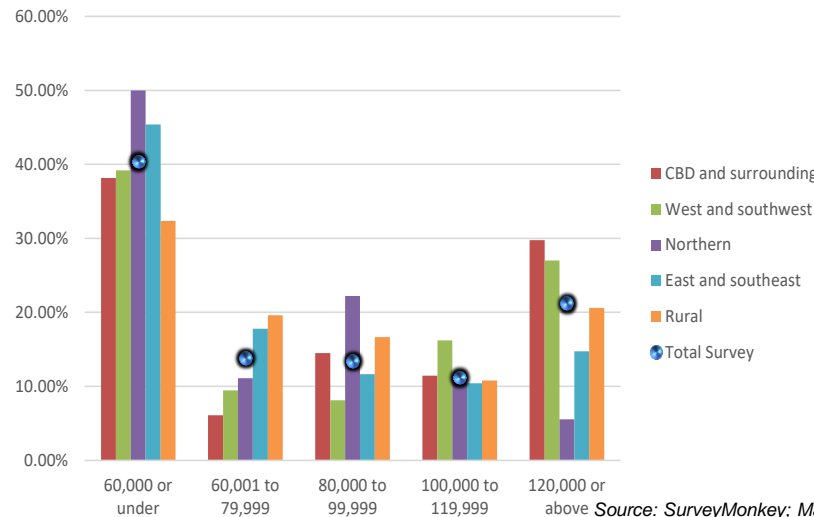
Source: SurveyMonkey; Macroplan

- Higher than average levels of those born in Australia
- We note however strong response rates from outer suburbs – specifically in the west, south-east and north, which generally have higher than average migrant populations.
- The UK and New Zealand make up the other main respondent groups, however, we note that nearly 8% of the respondents selected none of the above suggesting cultural influence in seafood consumption and decision making.

Income

- 40.40%** of the survey respondents had incomes of **\$60,000 or under**, with the **northern segment** representing the **highest** proportion of this range at **50.0%**.
- 21.20%** had incomes of \$120,000 and above, with the **CBD and surrounding** presenting the **highest** percentage at almost **30%**.
- Average Melbourne metropolitan income was \$41,365 from the ABS 2016 census of population and housing.
 - [from ABS 2016 census of population and housing in Table 2.2 and Chart 2.4 (Slide 19)]

Chart 2.3_Annual Household Income



Source: SurveyMonkey; Macroplan

- We note that the separation of income groups is counter to expectations around spend relative to income.
- Over 30% of respondents from each locational quadrant earned \$60,000 or under.
- High income earners, above \$120,000 per year, were focused around the CBD which was in-line with expectation relative to house prices and socio-economic data

2.1 Respondents Profile

Place of Birth

- The majority of participants were born in **Australia 78.53%**.
- *It is important to consider, that, when viewed with other data, the two main respondent groups (55-64 and 65+) are the cohorts most likely to no longer be working full-time, and thus, have capacity and be willing to complete a survey. This may have skewed the profile of seafood consumers – younger groups should not be excluded from future marketing campaigns or new retailing offerings.*
- *We believe that there could be links to retired, first generation Australian's who still have strong cultural ties to their heritage (driving seafood consumption), especially in outer northern and south-eastern suburbs, but who no longer work full-time.*
- This is higher than the ABS 2016 census of population and housing which illustrates 68.5% and 71.9% of the Melbourne metropolitan and Australian demographic being Australian born.

Income

- **40.40%** of the survey respondents had **incomes of \$60,000 or under**, with the **northern segment** representing the **highest** proportion of this range at **50.0%**.
- *This is unexpected, given that seafood is often considered luxurious or a higher-end product, often associated with events like Christmas and Easter this large cohort with low earnings is interesting. However, when viewed with demographic data it is likely that many of these respondents are no longer working full-time.*
- **21.20%** had incomes of \$120,000 and above, with the **CBD and surrounding** presenting the **highest** percentage at almost **30%**.
- *This outcome is more in-line with expectation, higher income suburbs most highly represented here and direct link with seafood seen as an expensive protein option.*
- Average Melbourne metropolitan income was \$41,365 from the ABS 2016 census of population and housing.
 - *[from ABS 2016 census of population and housing in Table 2.2 and Chart 2.4 (Slide 19)]*

Macroplan and Australian Bureau of Statistics (ABS) 2016 Census of Population and Housing

Table 2.2

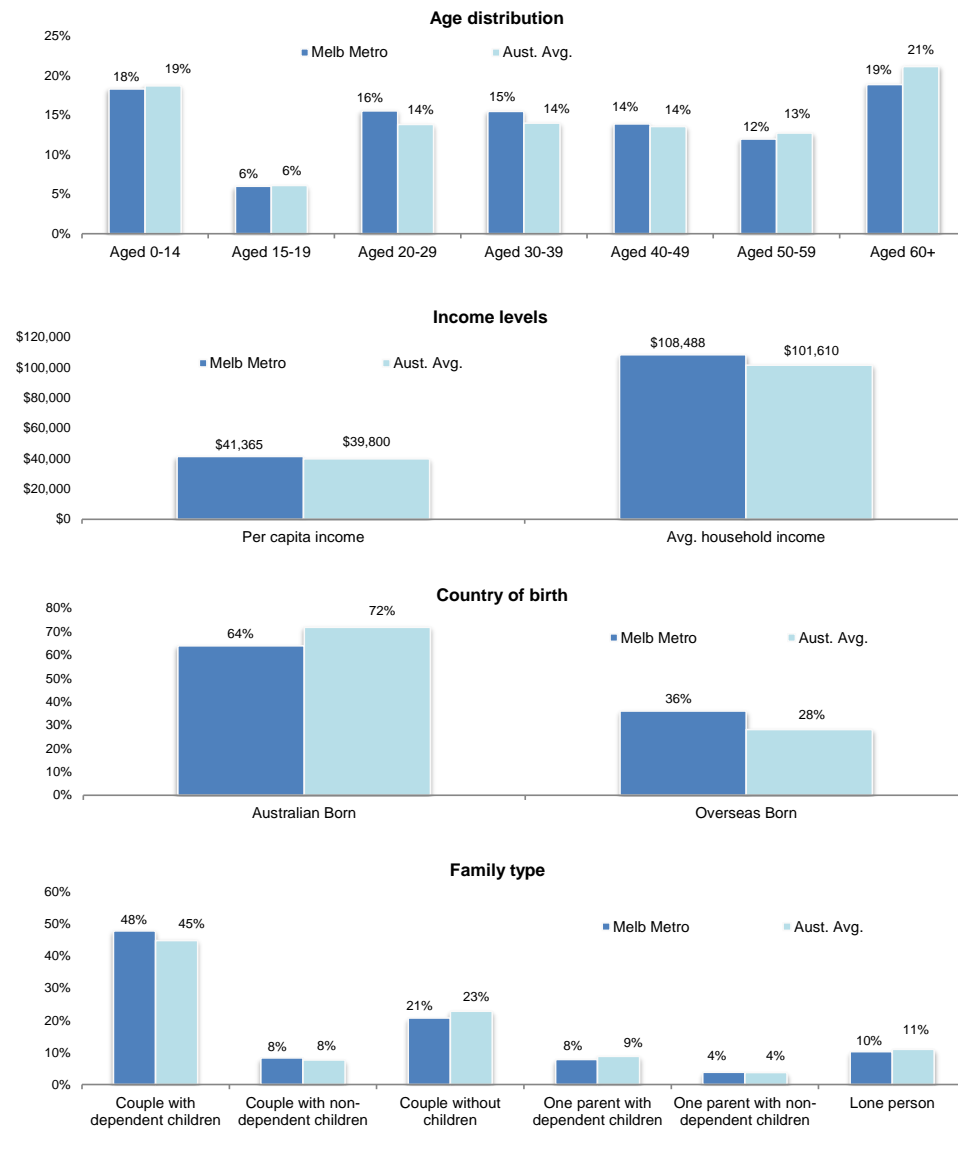
Main trade area - socio-demographic profile, 2016

Census item	Melb Metro avg.	Aust. avg.
Per capita income	\$41,365	\$39,800
<i>Var. from Melb Metro bmark</i>		
Avg. household income	\$108,488	\$101,610
<i>Var. from Melb Metro bmark</i>		
Avg. household size	2.6	2.6
<u>Age distribution (% of population)</u>		
Aged 0-14	18.3%	18.7%
Aged 15-19	6.0%	6.1%
Aged 20-29	15.5%	13.8%
Aged 30-39	15.5%	14.0%
Aged 40-49	13.9%	13.5%
Aged 50-59	12.0%	12.7%
Aged 60+	18.8%	21.1%
Average age	37.6	38.6
<u>Housing status (% of households)</u>		
Owner (total)	<u>68.5%</u>	<u>67.4%</u>
• Owner (outright)	31.4%	31.9%
• Owner (with mortgage)	37.1%	35.5%
Renter	30.9%	31.8%
<u>Birthplace (% of population)</u>		
Australian born	63.9%	71.9%
Overseas born	<u>36.1%</u>	<u>28.1%</u>
• Asia	17.3%	11.2%
• Europe	11.0%	9.6%
• Other	7.8%	7.4%
<u>Family type (% of population)</u>		
Couple with dep't child.	47.8%	44.8%
Couple with non-dep't child.	8.3%	7.7%
Couple without child.	20.7%	22.8%
One parent with dep't child.	7.8%	8.8%
One parent w non-dep't child.	3.9%	3.7%
Lone person	10.2%	11.0%

Source: ABS Census of Population & Housing, 2016; Macroplan

Chart 2.4

Main trade area - socio-demographic profile, 2016



Source: ABS Census of Population & Housing, 2016; Macroplan

3_Seafood Demand Analysis

This section of the report reviews the consumer drivers of **demand** for seafood and assesses the **market and opportunity** for seafood sales and consumption to be expanded

Key demand drivers:

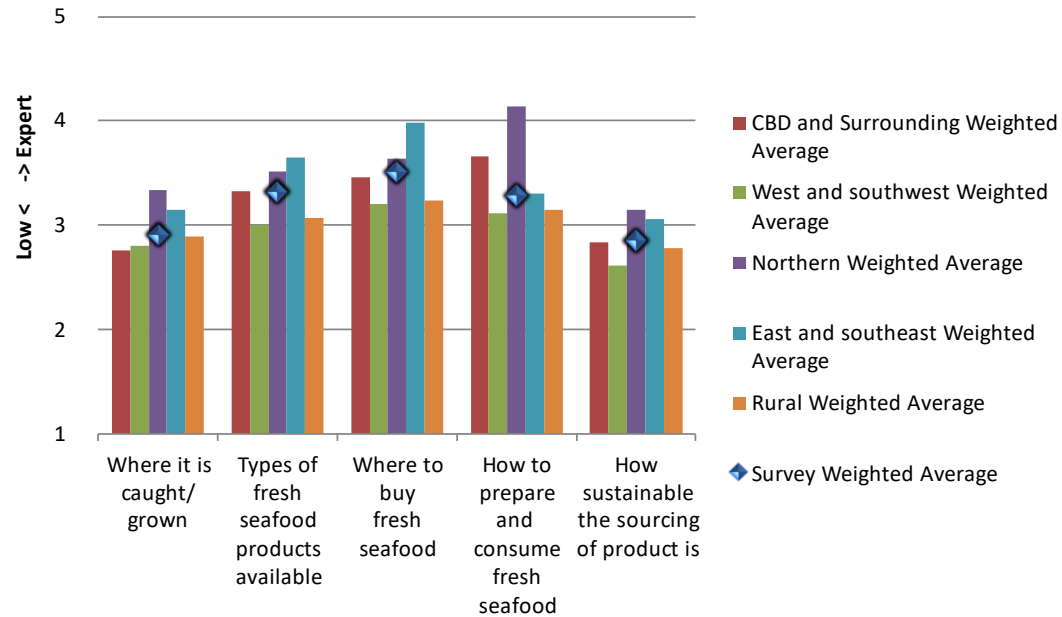
- **Seafood knowledge**
- **Seafood purchases**
 - Annual spend
 - Purchase frequency
 - Place of purchase
 - Type of purchase

3.1_Key Demand Metrics

Seafood Knowledge

- Consumers tend to buy based on opinion and what they know.
- Chart 3.1 details the respondents' knowledge of seafood. Knowledge was weighted to determine if respondent consumers had 'low' to 'expert' knowledge – 1 being 'low' and 5 being 'expert'.
- The **total** weighted average consensus indicates a **'moderate' to 'informed' knowledge of seafood**.
 - Participants in the North region and East and southeast rated the highest in terms of knowledge, with West and southwest region having the lowest.

Chart 3.1_Seafood Knowledge



Source: SurveyMonkey; Macroplan

- *We note that the large majority of respondents have above moderate levels of seafood knowledge, and the northern region generally had very high levels of knowledge and census data suggest that this could be cultural.*
- *Melbourne's east and southeast as well as CBD and inner suburbs being the largest consumers, and also being very knowledgeable is a clear indication that knowledge is (purchasing) power.*
- *The south-east region was also knowledgeable and was the most knowledgeable for seafood purchasing locations.*
- *The area where there was the least knowledge was around sustainability of product – information around sustainability of sourcing could be focused on by peak bodies in order to further increase consumer knowledge.*

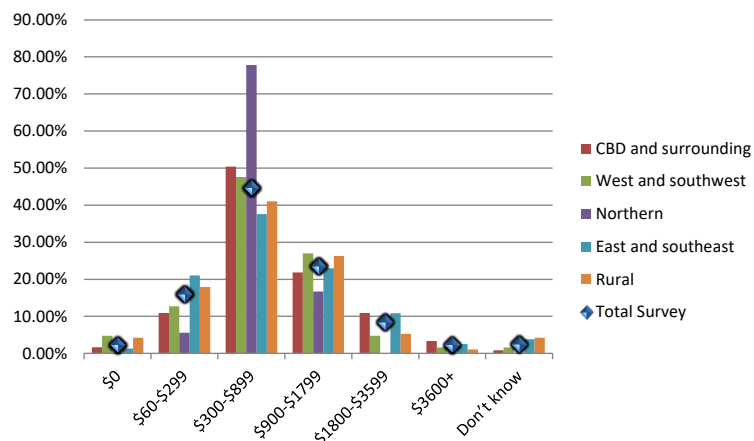
3.1_Key Demand Metrics

Seafood Purchases

Annual Spend

- There appears to be no large correlation between incomes and seafood purchases from the survey respondents – with **most regions spending a majority of \$300-\$899 per annum** on seafood (Chart 3.2).
- The northern region segment accounts for the least of spread of spend with 78% of respondents spending between \$300 and \$899 per annum. The highest spending regions were CBD and surrounding and east and southeast with 14.29% and 13.32% of respondents spending \$1,800 and above per annum, respectively.

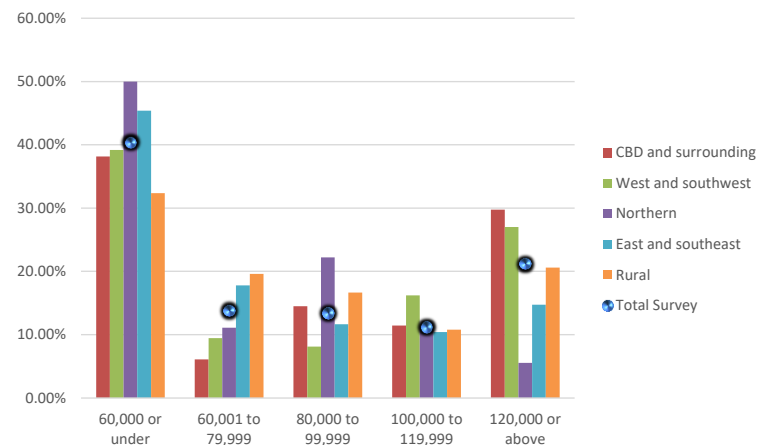
Chart 3.2_Annual Seafood Spend



Source: SurveyMonkey; Macroplan

- We have adjusted the monthly income responses into annualised data, thereby making it directly comparable with annual household income data, as above.
- The largest group of spend represented is \$300-899 per year, equating to a range of \$25-\$74.90 per month spent.
- We note there is some range in this spend value, however the data strongly suggests that this is the most predominate spend category
- Conversely, moderate incomes represented the smallest sub-groups of respondents, with the vast majority of respondents earning below \$60,000 per household, or over \$120,000 annually.
- It can be inferred from this that income has little bearing on spend amounts for seafood products. And moreover, we can suggest that other factors are impacting spend - the previous slide suggests knowledge of product may supersede annual household incomes. But we believe there could be multiple factors at play.

Chart 2.3_Annual Household Income



Source: SurveyMonkey; Macroplan

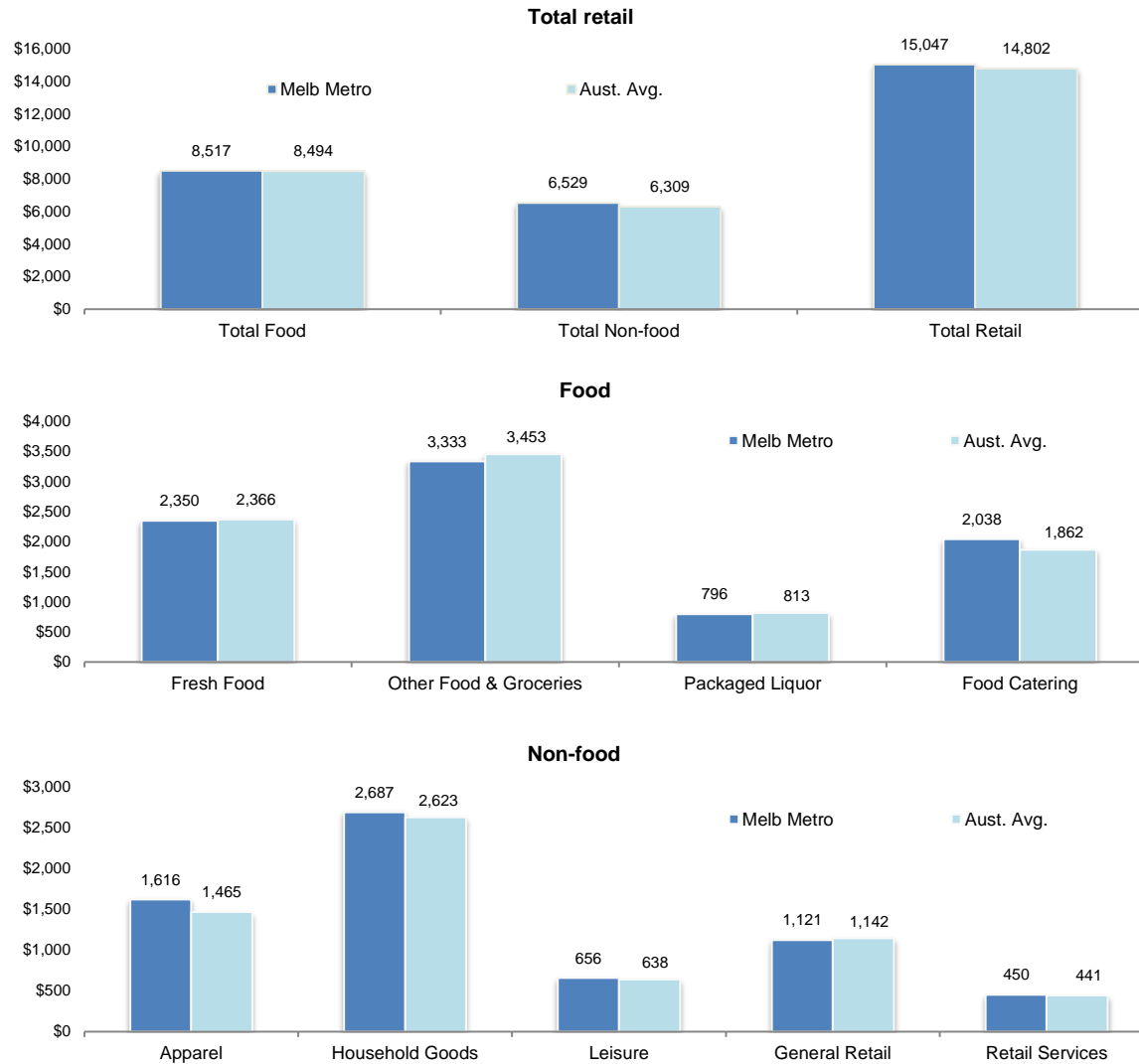
Chart 3.3
Main trade area - retail expenditure per person, 2020/21*

3.1_Key Demand Metrics

Seafood Purchases

Annual Spend (Cont.)

- Data from Macroplan and MarketInfo demonstrates metropolitan Melbourne spends approximately \$8,500 per capita annually on food and \$2,350 on fresh food, translating close to 27% of fresh food spend per total food spend.
- The data relative to income suggests that households from lower income groups, including the lowest category (below \$60,000 annually) are therefore spending high proportions of their total fresh food spend specifically on seafood
- There could be good nexuses to draw here in terms of new retailing options and marketing. It also shows certain groups in locations are prioritising fresh spend on seafood products.



*Including GST
Source: MarketInfo; Macroplan

3.1_Key Demand Metrics

Seafood Purchases

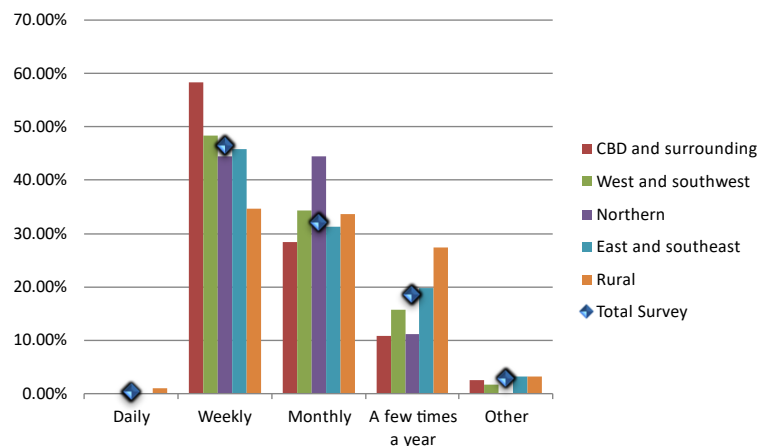
Purchase Frequency

- The majority of respondents **purchase weekly**, closely followed by monthly as second (Chart 3.4).
- Those in rural locations were purchasing, on average, less frequently than other metropolitan locations. This could indicate difficulties accessing fresh seafood in rural locations.

Place of Purchase

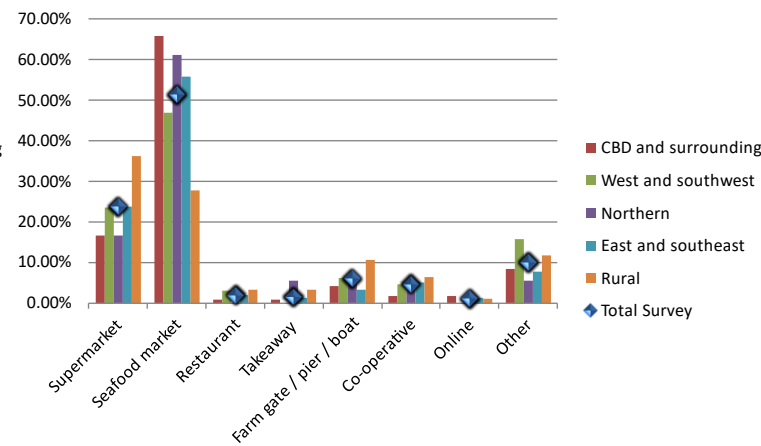
- Purchasing from **seafood markets** are the predominant method of choice (Chart 3.5). This is likely due to proximity of seafood market locations for consumers in metropolitan areas and consumer preferences for fresh fish over frozen.
- Those in rural locations were purchasing from supermarkets, on average, more frequently than other metropolitan locations.

Chart 3.4_Seafood Purchase Frequency



Source: SurveyMonkey; Macroplan

Chart 3.5_Fresh Seafood Place of Purchase



Source: SurveyMonkey; Macroplan

- We note the frequency of purchase, and can expect more consumers to move into higher frequency groups should access be made easier, and information more readily available.
- It is important to consider that for all groups, save for rural/regional consumers, seafood markets are the preferred place of purchase – this is by far the most desired location.
- There is consideration given to the location of markets in and around Melbourne and their sporadic distribution. This is evidently the best channel to reach more consumers and drive increased levels of consumption.
- Although seafood markets were by far the preferred purchasing location it should be noted that the rural/regional areas still purchased heavily from supermarkets, which makes good sense for anyone in non-urban areas not located near major fishing ports such as in the south-west or east of the state. Suggesting that supermarket channel retailing can't be excluded.

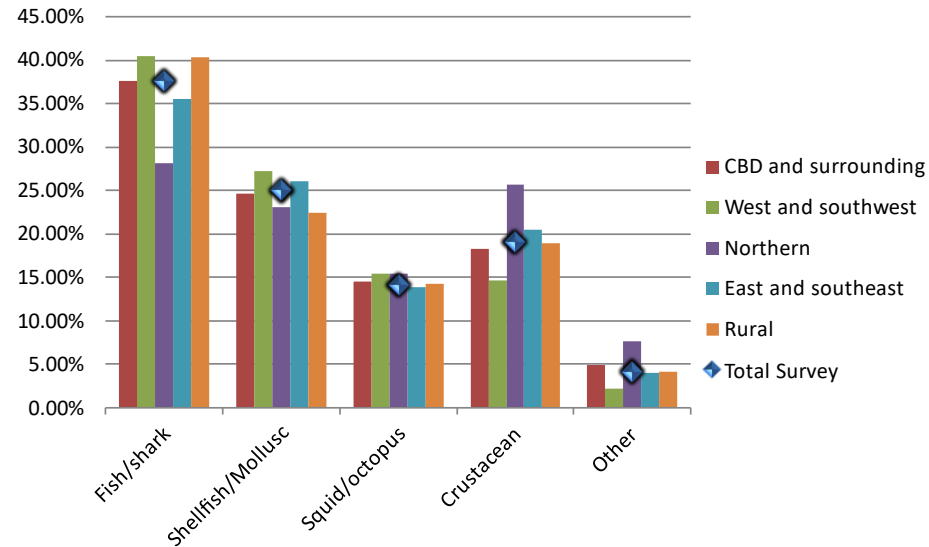
3.1_Key Demand Metrics

Seafood Purchases

Type of Purchase

- The most popular type of seafood purchased by respondent residents was **Fish/shark**.
- Respondents' locations doesn't appear to have considerable influence on the type of seafood purchased.
- We see that traditional seafood such as fish and shark (flake) is still the most demanded by all locations.
- We note that the northern quadrant is the lowest consumer of fish/shark, however this differential (10%) is effectively made up in increased crustacean purchasing.
- We can conclude that new market entry in terms of sale locations would likely need to be markets, and that the base retailing should be focused on fish and shark in the majority of consumers.
- If knowledge/advertising can be increased we believe there is good capacity to move people into other seafood groups.

Chart 3.6_Type of Seafood Purchased



Source: SurveyMonkey; Macroplan

3.1_Key Demand Metrics

Seafood Purchases

Type of Purchase by Location:

The most popular type of seafood purchased by respondents by postcode.

The following slides (Map 3.1-3.3) displays the most popular type of seafood purchased by location of respondent residents -1 being least popular, 3 being most popular.

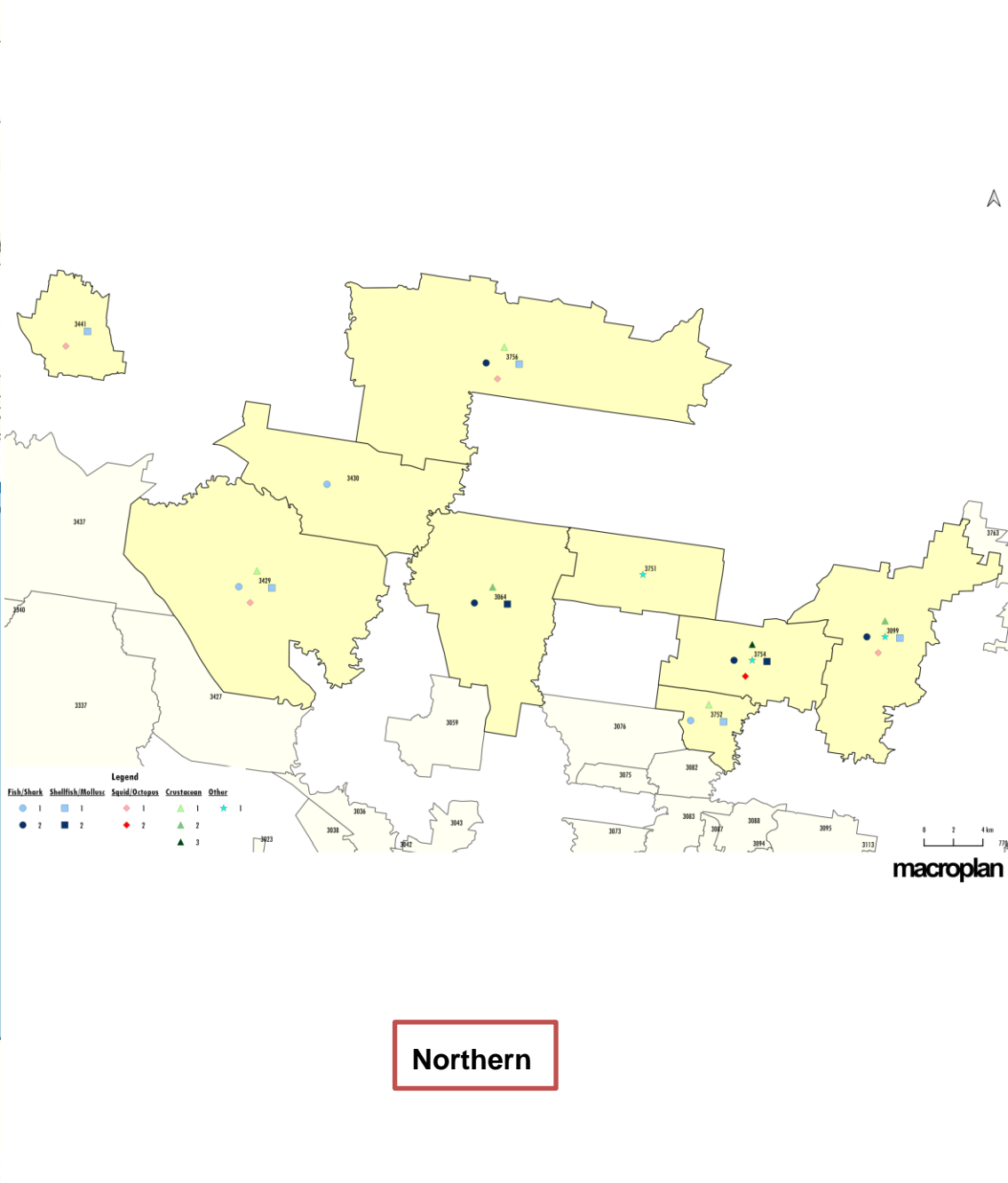
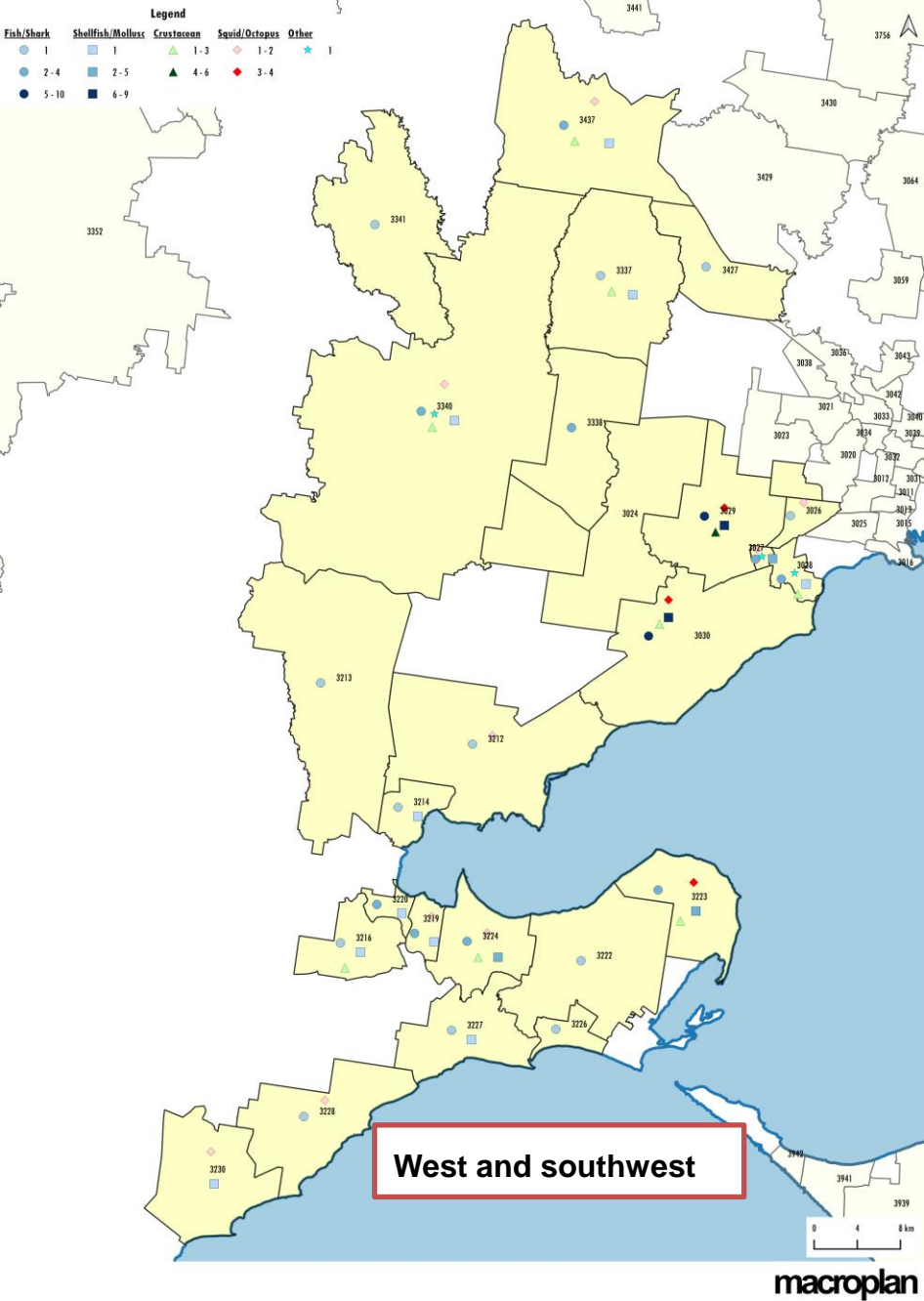
To the right (Table 3.1) we have collated the mapped data into a table showing postcode weightings for seafood preference. We note that this wasn't necessarily the same as consumption by locational quadrant but was broken down to postcode level to determine preference.

Table 3.1 Most Popular Seafood by Location

Ranking	Fish/shark		Shellfish/Mollusc		Squid/Octopus		Crustacean		Other	
	Postcode	Location	Postcode	Location	Postcode	Location	Postcode	Location	Postcode	Location
1	3029	West and southwest	3029	West and southwest	3195	East and southeast	3029	West and southwest	3165	East and southeast
2	3977	East and southeast	3030	West and southwest	3030	West and southwest	3630	Rural	3631	Rural
3	3631	Rural	3030	West and southwest	3806	East and southeast	3629	Rural	3805	East and southeast
4	3030	West and southwest	3023	West and southwest	3029	West and southwest	3150	East and southeast	3183	East and southeast
5	3971	Rural	3805	East and southeast	3150	East and southeast	3016	West and southwest	3640	Rural

Source: SurveyMonkey; Macroplan

The most popular type of seafood in a postcode is displayed and weighted against the other types of seafood purchased in each individual postcode. This mapped data helps present what type of seafood respondents are buying (if any) and which type they prefer in a particular suburb - used to tailor future types and quantities of seafood for respondents in each postcode.



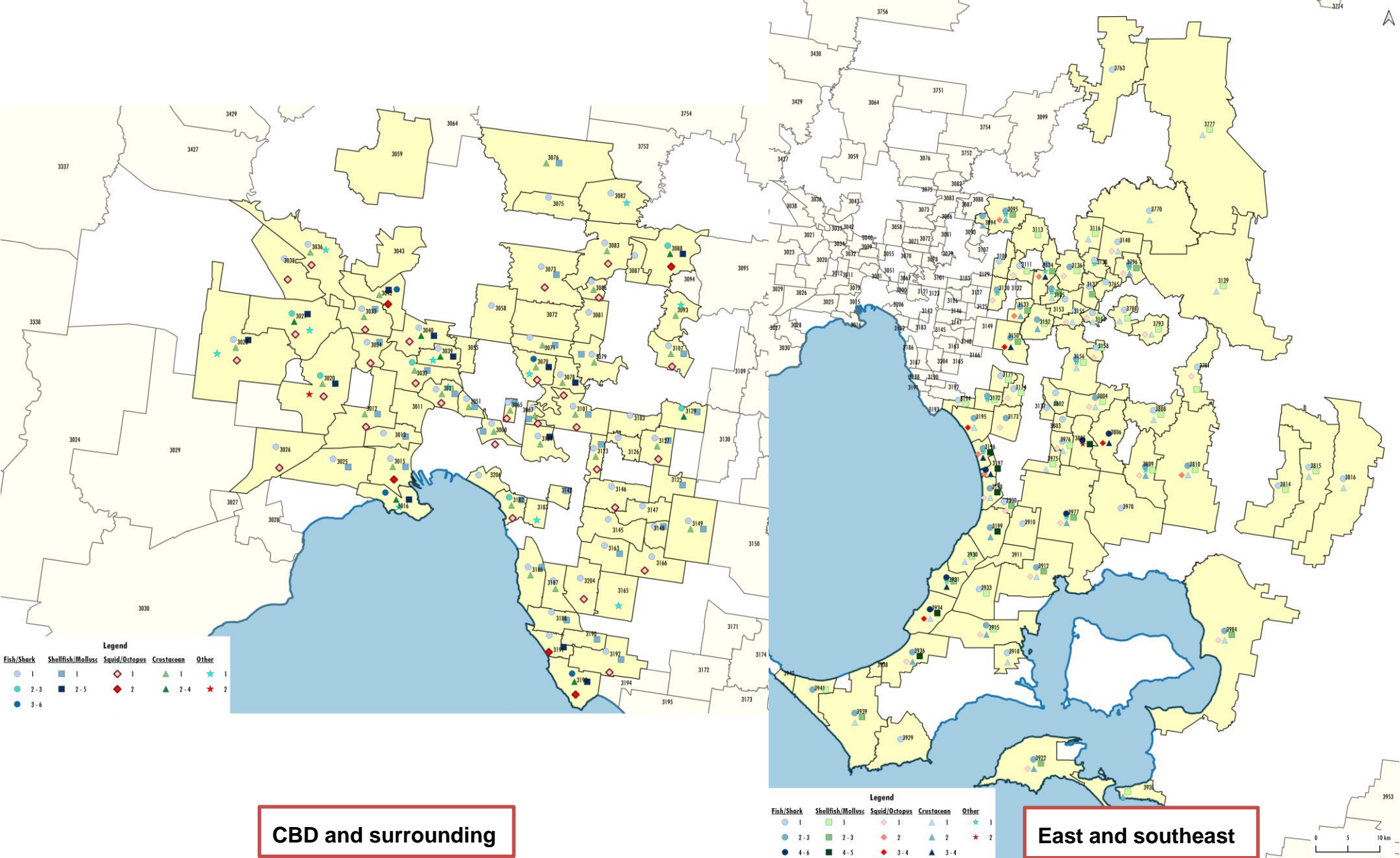
Map 3.1_Survey Result Assessment – Popularity of Seafood Purchased – West and southwest, Northern

Map 3.1

This Map shows the west and southwest regions and the northern region, pictorially. Indicating respondents seafood type preferences groupings by postcode.

We found that overwhelmingly that respondents still chose fish/shark as their most commonly consumed Victorian seafood product, but we believe the real value in the above map is in the examination of postcodes with multiple respondents (indicating an interest in seafood) and the co-location of responses. Multiple seafood type preferences within a postcode has value for future marketing but also development of retailing.

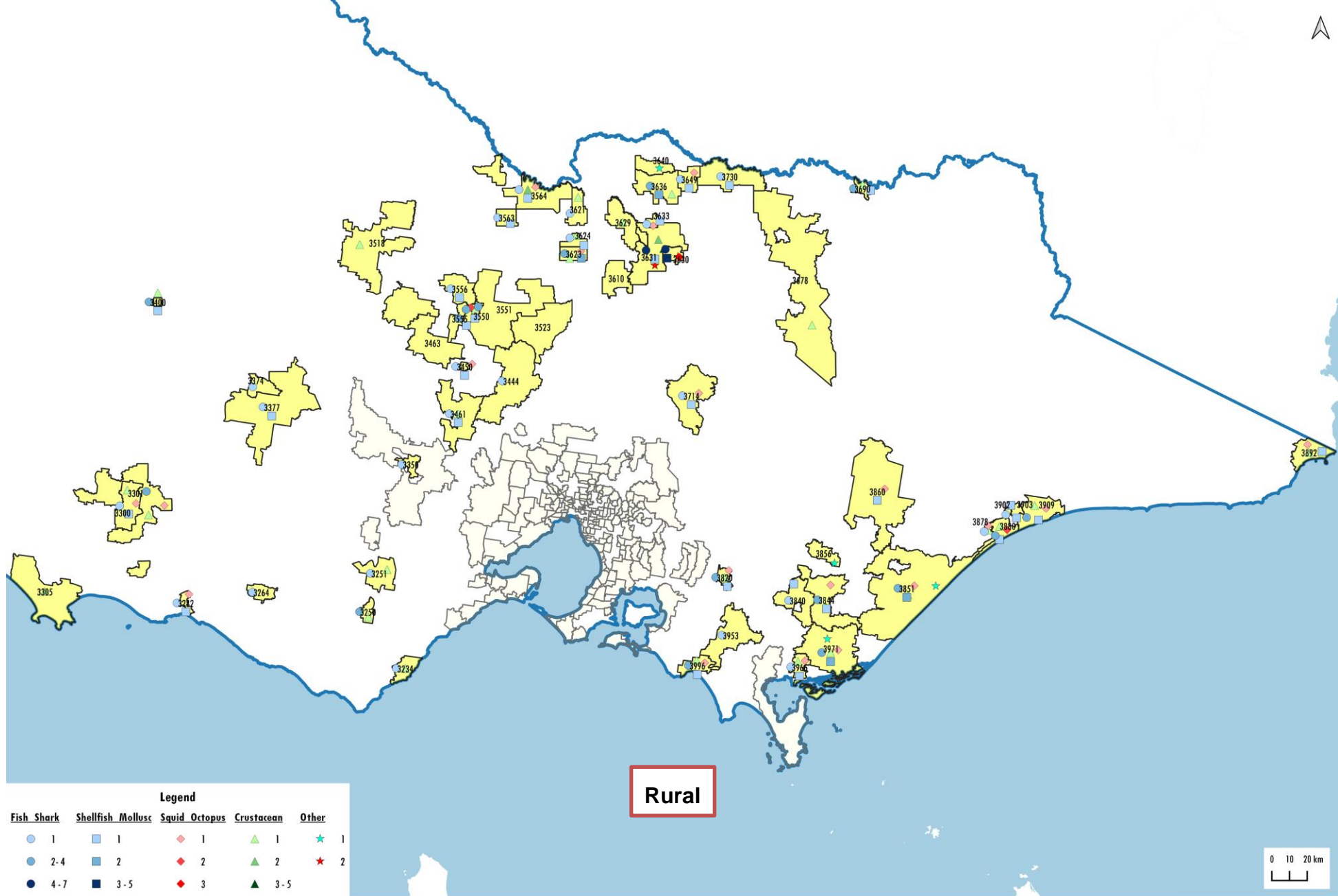
Critically, what this data does allow us to see is regions or areas of depth of respondents. Within the four defined regions of Melbourne, and the fifth region being the remainder of regional and rural Victoria this individual postcode respondent data allows examination of demand pockets and can examine this by age. It was shown that the northern region as a whole preferred fish, flake and crustacean. Interestingly, respondents from postcodes 3441 and 3751 preferred shellfish/mollusc or other types instead of these popular options.



Map 3.2_Survey Result Assessment – Popularity of Seafood Purchased – CBD and surrounding, East and southeast

Map 3.2

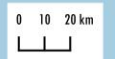
This Map shows CBD and surrounding areas and the east and southeast regions, pictorially. Indicating respondents' seafood preferences by postcode. Of interest in the CBD and surrounds map we note the appearance of more diverse seafood preferences with both 3165 and 3183 preferring the other seafood category, these areas were more highly represented by younger age cohorts in census data and there may be linkages between traditional consumption and emergent consumption patterns among younger, upwardly mobile groups. In postcode 3093 there was a preference for crustacean or other seafood ahead of more traditional seafood types.



Legend

Fish Shark	Shellfish Mollusc	Squid Octopus	Crustacean	Other
● 1	■ 1	◆ 1	▲ 1	★ 1
● 2-4	■ 2	◆ 2	▲ 2	★ 2
● 4-7	■ 3-5	◆ 3	▲ 3-5	

Rural



Map 3.3_Survey Result Assessment – Popularity of Seafood Purchased – Rural

Map 3.3

This map shows the rural and regional areas of Victoria and their respondents' seafood preferences pictorially.

We note strongholds of responses in areas of central Victoria and areas around the Gippsland Lakes that are well represented – here we highlight the Gippsland Lakes as a popular area for both recreational and commercial fishing.

With this map we give consideration to responses from the west coast (although limited), the east coast around Corner Inlet and Gippsland Lakes – all major commercial fishery areas which may impact retailing options, which may, in-turn, impact on type preferences and availability. We find that in coastal areas there is greater diversity in seafood type preference, perhaps reflecting greater availability of a wide range of seafood products. The rural areas of 3678 and 3518, both inland areas, had a strong preference for crustacean.

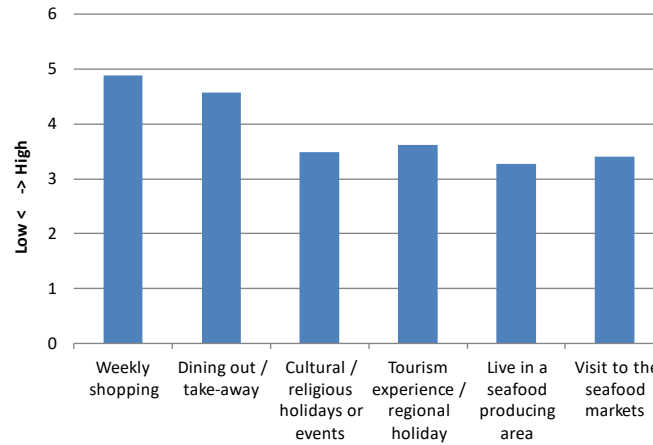
3.1_Key Demand Metrics

Seafood Purchases

Seafood Experiences & Purchasing Decisions

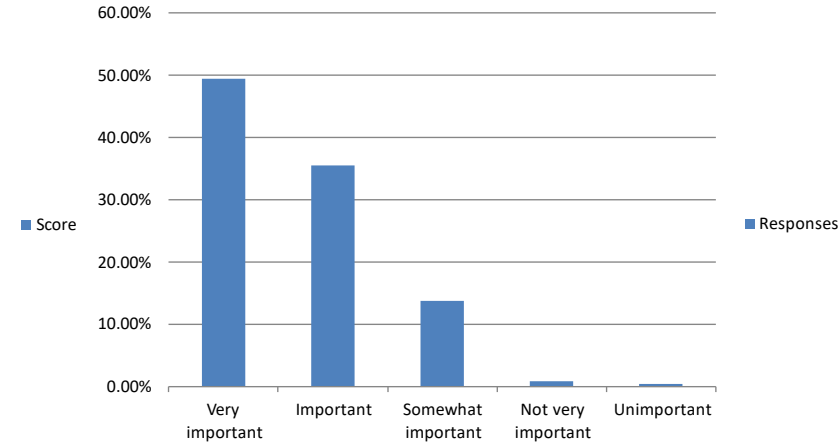
- Respondents indicated they experience seafood the **most** when out **shopping or having meals** (Chart 3.7).
- We note here the anomalous result whereby visit to seafood markets are relatively low, however it has been expressed that this is clearly the preferred purchase point. We can attribute this to limited availability of markets, especially in high-consuming areas.
- Other experiences; religious holidays, tourism and being located within a seafood producing area are also closely followed experiences – seafood plays a part in respondents’ every-day life (Chart 3.7).
- When respondents do experience seafood and make seafood purchases, **knowledge of seafood products influence their purchasing decisions** (Chart 3.8).

Chart 3.7_Seafood Experiences



Source: SurveyMonkey; Macroplan

Chart 3.8_Importance of Seafood Knowledge for Purchasing Decisions



Source: SurveyMonkey; Macroplan

- *Consumers prefer to be well-informed when making a seafood purchase.*
- *The almost equally high level of dining out/take-away as compared to weekly shopping suggests that there is clear channels available to increase access to and information about Victorian seafood through restaurant partners.*
- *This could also work in concert with targeted advertising, which would invariably increase consumption through other channels.*
- *Knowledge is power in consumption of seafood; any increase in availability of purchase points/access would have to be accompanied by a program to increase awareness/knowledge.*

3.1_Key Demand Metrics

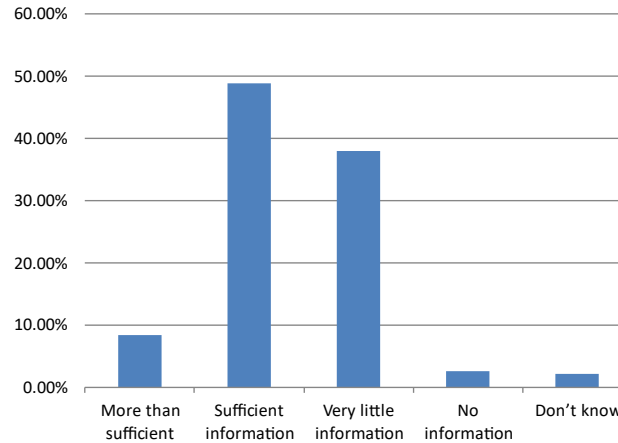
Seafood Purchases

Seafood Information & Advertising

- Chart 3.9 indicates the majority of respondents either have sufficient information about seafood, or very little.
- Respondents mainly receive little to no seafood advertising (Chart 3.10).

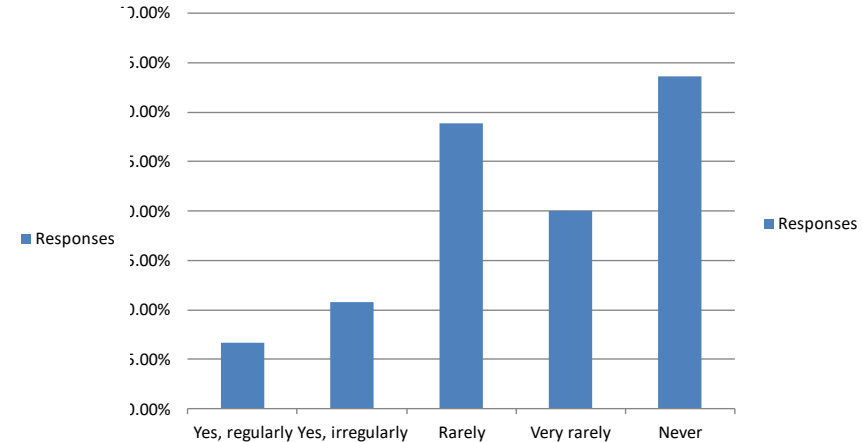
Seafood information analysis is continued on the next slide.

Chart 3.9_Sufficient Information Available for Informed Decisions Buying and Consuming Seafood



Source: SurveyMonkey; Macroplan

Chart 3.10_Receiving Victorian Seafood Advertising



Source: SurveyMonkey; Macroplan

- We note here that for both question groups there is capacity for considerable improvement from peak bodies and retailers.
- In chart 3.9 it is desirable to have more people with more, rather than less information around seafood they are consuming. Too this end, we consider 'sufficient' as just being enough, rather than positioning the consumer as informed or educated. This problematic for new/unique products that may be coming to market.
- Given this, when we view the charts in concert it would appear that little of the knowledge possessed by consumers has been imbued from advertising (suggesting existing). This is important to consider when we think about new retailing additions and how this information could best be disseminated to increase consumption.
- With approximately 15% of respondents receiving advertising regularly or irregularly, with the remaining 85% receiving advertising rarely, very rarely or never we believe this to be a pinch-point for industry to expand and capture more of the market.
- If consider seafood as primarily competing with meat for a protein source to consumers, we would suggest that before access/availability is increased knowledge must be improved so greater access is capitalised upon by informed consumers.

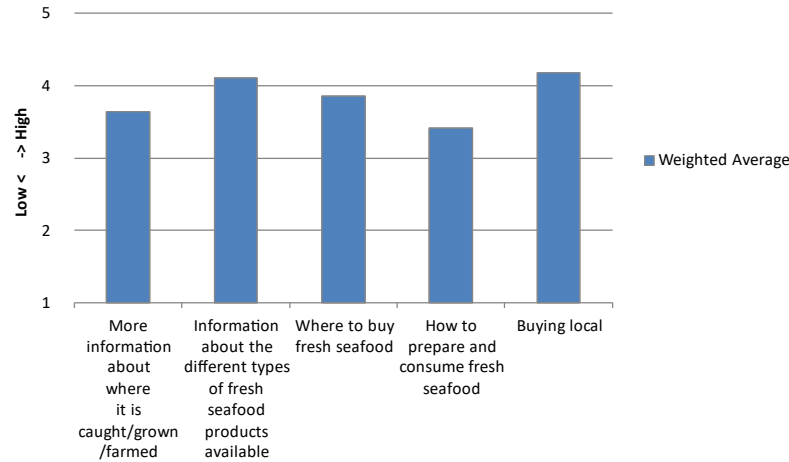
3.1_Key Demand Metrics

Seafood Purchases

Seafood Information (Cont.) & Knowledge

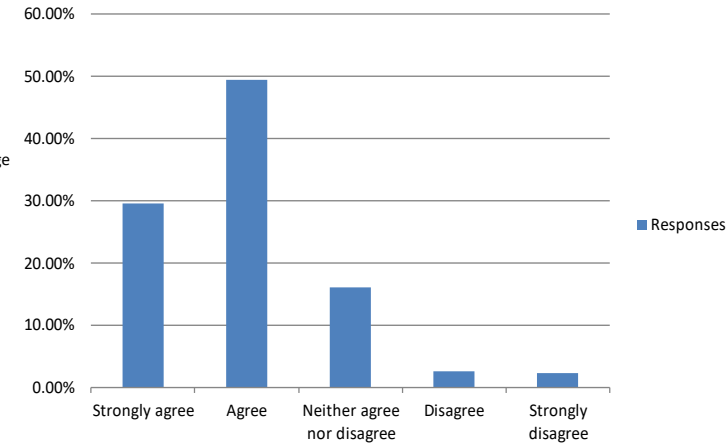
- There was no defining type of information respondents indicated to increase their seafood knowledge (Chart 3.11).
- The two most highly rated types of information was where to buy locally, followed by different types of seafood available.
- Close to 80% of respondents agreed that **higher knowledge** of seafood would **improve seafood consumption** (Chart 3.12).
- Earlier, Chart 3.8 indicated knowledge of seafood products influence purchasing decisions.

Chart 3.11_Important Information Needed to Improve Fresh Victorian Seafood Knowledge



Source: SurveyMonkey; Macroplan

Chart 3.12_Improved Knowledge Would Improve Consumption



Source: SurveyMonkey; Macroplan

- With close to 40% (Chart 3.10) of respondents receiving very little to no information, it is apparent that advertising focused on seafood product information would likely increase seafood purchase and consumption decisions.
- It would appear that a range of knowledge is important to consumers, but that in general information is only just sufficient, or insufficient.
- Chart 3.12 shows most respondents desire more knowledge of seafood and seafood products, and we believe that this suggests the content of the message relative to the topics in chart 3.11 is less important than extending the reach of messaging.
- To this end, more information dissemination would need to be bundled, pre even precede any expansion or development of new retailing facilities.

3.1_Key Demand Metrics

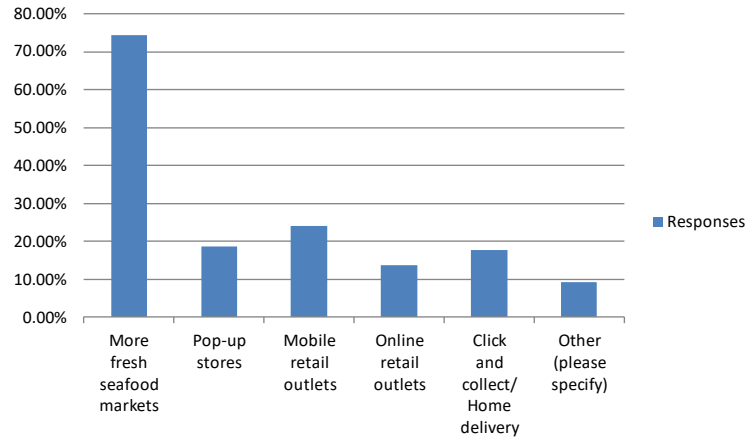
Seafood Purchases

Purchase & Consumption

- Respondents highlighted a **high demand for more fresh seafood markets.**
- Consumers want more choice of fresh seafood in a market type setting rather than a frozen seafood offering at a retail type store.

Seafood market analysis is continued on the next slide.

Chart 3.13_Directly Increase Purchase/Consumption of Victorian Seafood



Source: SurveyMonkey; Macroplan

- *The clear, and somewhat surprising takeaway is the demand for seafood market type retailing. This is quite interesting when one considers the limited availability of markets currently, suggesting that at least a portion of consumers are traveling to markets to purchase their seafood products.*
- *There is clear evidence here that seafood markets are the preferred and most suitable way to induce increased sales. There may be capacity in future research or marketing to understand the consumers views on what makes markets advantageous; this could then be utilised to increase appeal of supermarket seafood retail channels, for example.*
- *The relative lack of interest from consumers in online retail and click and collect specifically is surprising. However, this information is valuable as it will allow peak bodies to better focus resources – in person retailing of high-quality products where knowledgeable retailers can be consulted is clearly the preferred model.*

3.1_Key Demand Metrics

Seafood Purchases

Purchase & Consumption (Cont.)

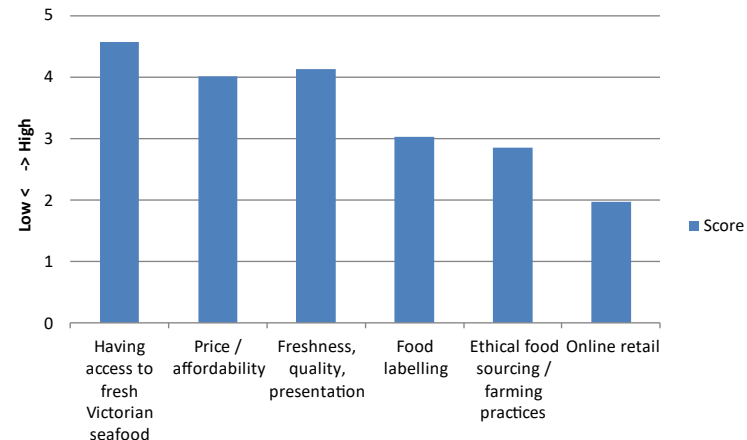
- Demand for **seafood markets** was scored the **highest** for future seafood purchase experiences.
- Chart 3.14 indicates consumers **prefer** to connect and interact more to the seafood they are purchasing and consuming in a **physical setting**, rather than ordering and purchasing in an online space.
- This is re-affirmed in Chart 3.15, with **price and affordability** similarly impacting on the decision-making process.

Chart 3.14_Enhancing Future Seafood Experiences



Source: SurveyMonkey; Macroplan

Chart 3.15_Most Important Feature to Consume More Fresh Victorian Seafood



Source: SurveyMonkey; Macroplan

- *The previous data set has shown clearly where consumers want to purchase their seafood from, this forms an important baseline and focal point – however, other retailing channels can't be ignored therefore other consumption drivers are important.*
- *Chart 3.14 reinforces the fact that online channels are not seen by the majority as important, or effective in increasing consumption. This chart does however reinforce that even as seafood markets are clearly the preferred retailing setting, that if more fresh, local seafood was available in supermarkets consumers experiences would be improved.*
- *Such a roll-out would work well when coupled with increased, targeted advertising, primarily to inform consumers they can get high-quality, local seafood in their local supermarkets, with a view to increase purchase frequency.*
- *Access is reinforced as critical, with both price and quality as seen as very important considerations. There is a clear need for peak bodies to consider information, product and retail channels in a package that will work together, rather than to look at factors in isolation.*

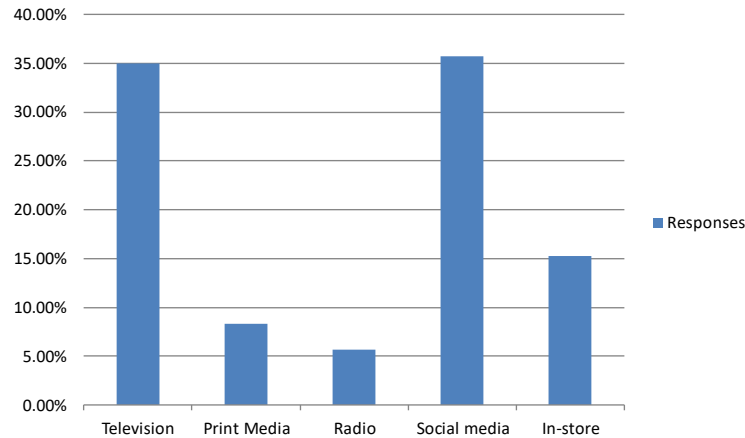
3.1_Key Demand Metrics

Advertising Channel

As established in slide 32, advertising focused on seafood product information would likely increase seafood purchase and consumption decisions.

- Respondents have a preference for fresh Victorian seafood advertising in the **digital space**, either on **television** or via **social media**. Traditional in-store advertising only accounted for about 15%.
- Chart 3.16 demonstrates respondents **prefer to have time to learn** about fresh Victorian seafood while watching television or when they are on social media, before they make a purchase in-store.

Chart 3.16_Most Effective Seafood Advertising Channel



Source: SurveyMonkey; Macroplan

- *With large proportions of respondents representing a propensity to spend on seafood irrespective of their income levels there is capacity to increase access, retailing facilities and opportunities to purchase with good results.*
- *We believe the data suggests untapped demand, and this demand is not directly to linked income levels, suggesting that most areas of Melbourne representing a range of socio-economic backgrounds could be potential development sites for new market retail hubs.*
- *Knowledge of various aspects of seafood is seen as important, again, across regions and consumption types, but contrasting this, most respondents only had a sufficient level of knowledge, or less than sufficient. While in conjunction, the majority received little to no advertising material. We see this as an easy pick-up for industry to reach consumers; by advertising and informing consumption will lift.*
- *The above shows, somewhat predictably, that traditional approaches (television) and newly emergent (social media) are seen as the most suitable channels for advertising. Interestingly these are almost equally weighted in the data, even with an older cohort being the main respondent group – suggesting strong technical proficiency.*
- *For peak bodies advertising campaigns could use the dual approach to reach the largest available group as new markets are developed to reach more consumers with actual product. At this point more in-store marketing could be included.*
- *We also note that in-store advertising, especially in deli sections of spermarkets could work well to increase this poorly viewed retailing channel.*

Summary

This section of the report provides a summary of the key findings of the survey results identifying any key outcomes and opportunities.

The consumer survey undertaken, in conjunction with research and analysis has revealed a clear narrative that will be of use for SIV and peak bodies in their future operational strategies and approaches. The emergent themes and the narrative that has become clear is interesting, with some findings from the sizeable survey (>500 responses) worthy of mention. In particular, the age cohorts most heavily represented, the regions in Melbourne where seafood is most demanded (in particular, relative to income), spend on seafood (relative to income), and the preferred retailing channel (seafood market). While the strong preference for shark/fish as type of seafood was less surprising and suggests further work will be required to expand consumer demand to 'non-traditional' seafood types.

We welcome the above findings, as they disprove assumptions that may have been carried into his research and hypotheses that we were operating under. The findings make clear the path for SIV to better target the local Victorian market with fresh, local seafood. Moreover, certain findings we believe would benefit from future interrogation – specifically spend on seafood from lower income households relative to Census data on fresh food spending, and the indifference shown for supermarket retail consumption of Victorian seafood. Extending this point, the (very) limited appetite for online retailing and/or click and collect services is telling, and quite counter to expectation in an economy governed by convenience. But we believe this to be important as it shows that the consumer interacts with seafood (and seafood retailer) differently than they might with more common meat proteins. This could be capitalised on to develop a competitive edge for the industry moving forward.

To this end, the need to introduce more market-based retailing for Victorian seafood is clear. Importantly, knowledgeable purveyors of seafood can increase sales and concurrently educate consumers which may, in-turn, increase spend and frequency of purchase. However, the roll-out of new retailing facilities would need to be coupled with an advertising campaign not only around these new facilities but to bring Victorian seafood to the forefront of the collective consumer psyche, as the results of this survey indicate that the desire and interest is strong amongst most consumers surveyed. We believe multiple new sites for retailing in conjunction with this continuing advertising campaign will have compounding benefit for the industry.

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