Report on the 2013, 2014 and 2015 Consumer Surveys:

Awareness of the Northern Territory seafood labelling laws and the commercial seafood industry

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NORTHERN TERRITORY Seafood Council

NORTHERN TERRITORY GOVERNMENT

C-AID CONSULTANTS

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Cover image: Mackerel cutlet marinated with ginger, lime juice, corianders and chilli powder, grilled.

ACKNOWLEDGMENTS

The authors wish to acknowledge the financial support for this project from the Northern Territory Government, through the Fisheries Research and Industry Development Fund.

Competitive Edge's work on methodology, collection and analysis of survey results were critical to the success of this project.

Over the past three years the continued contribution from the local community in undertaking the survey has played a pivotal part for seafood lovers to voice their demand for local seafood and to label it 'local'.

The positive findings within these survey reports undoubtedly express the value, respect and worth to the local community of locally sourced seafood.

Members of the NT fishing and aquaculture industry who continue to supply quality, fresh local seafood to Territorians.

1. SUMMARY

On 11 November 2008, the Northern Territory (NT) became the first (and to date, only) jurisdiction to introduce seafood labelling laws that require restaurants and other dining venues to label imported seafood. This requirement allows consumers to use this information to make informed decisions regarding their seafood dining preferences.

In 2009, following the introduction of the labelling laws, the Northern Territory Seafood Council invested resources to improve the community's awareness and support for the seafood industry through the 'Support NT Caught' campaign. This campaign utilises a range of media, and remains strongly supported by NT Seafood Council members.

To test the impact of the seafood labelling laws and the effectiveness of the campaign with support from the NT Government, the NT Seafood Council developed an annual online survey to take place over a three year period, from 2013 to 2015, to obtain qualitative and quantitative data from Territorians, and explore ways to enhance the education and awareness surrounding the NT seafood industry, including the 'Support NT Caught' campaign.

Three 'Have your say on NT Seafood' surveys have been completed. This report contains the survey questionnaire used in 2014 and 2015 (Appendix I), a summary of the key findings from the three surveys (Appendix II), and focuses on:

- seafood consumption and patterns;
- consumer awareness of the labelling laws;
- consumer preferences and values;
- the impacts of the labelling laws;
- and the promotional footprint of the NT Seafood Council.

The surveys conclusively show that Territorians increasingly consider buying local seafood a high priority. When purchasing seafood from a restaurant, or café, a large majority of consumer decisions are influenced by freshness, followed by labelling that identifies origin of seafood and support for the NT commercial fishing industry (Appendix I - Q3 and Q4).

The results showed over half of the surveyed consumers have a strong preference for NT seafood over any other available seafood (i.e. Australian, but sourced from outside the NT, or imported), as they believe that NT seafood tastes better and had a superior quality to the 'rest' (Appendix I - Q 12 and Q 13). The survey results emphatically showed that when choosing a meal for any occasion, NT seafood is of importance (Appendix I - Q16).

Key influencers in the decision to purchase NT Seafood, when dining out, is strongly based around the freshness of local seafood (Appendix I - Q6).

The NT Seafood Council 'Support NT Caught' campaign has resulted in a growth in community awareness. This has been raised through a range of media streams, increasingly social media platforms. Based on the survey finding, a continued focus on extending the reach via social media platforms should assist the seafood industry to strengthen community support and increase the numbers of NT consumers purchasing and asking for local seafood.

The key messages from the three annual surveys are that:

- consumers respond positively to seafood labelling that provides them with origin information to assist in making informed decisions about their seafood purchases
- consumers have a strong preference for local NT seafood and are prepared to pay a premium for that product
- after freshness, origin labelling, were key decisions makers when purchasing seafood
- the NT commercial fishing industry is seen to deliver a range of benefits to the community
- strengthening consumer awareness and an improved understanding of the labelling laws can be seen and this can be attributed to targeted clear and direct messaging
- consumer awareness of the labelling laws required a direct and clear message and ongoing education, possibly with more explicit legislation to identify the specific country source of seafood product (NB current NT legislation only requires identification of non-Australian seafood as being 'imported')
- consumer awareness and familiarisation of the NT Seafood Council and the 'Support NT Caught' campaign has increased largely due to online media streams. Notwithstanding this media, significant opportunity to build 'word of mouth' should continue
- consolidating and building on a range of media/extension opportunities have led to a steady increase in consumer knowledge of the labelling laws and 'Support NT Caught' campaign (i.e. social media platforms, word of mouth and TV).
- NT Seafood Council and the 'Support NT Caught' campaign should continue to explore and adapt the communication streams to ensure growth and a wider community awareness.

2. BACKGROUND AND OBJECTIVES

Seafood labelling laws have been in place in the NT since November 2008 and the 'Support NT Caught' campaign since 2009. In 2013, after a number of years operation of the labelling laws and the 'Support NT Caught' campaign, the NT Seafood Council felt that is was appropriate to assess the impact of the labelling requirements on consumers, and the effectiveness of the 'Support NT Caught' campaign and NT Seafood Council education material, to identify any opportunities to better target resources. Specific issues to consider were the:

- community awareness of the NT Seafood Council's promotional footprint within the NT
- community awareness of the professional NT seafood industry, seafood labelling laws in the NT, and the influence labelling has on consumer choices
- demand for NT seafood within the NT; and
- level of confidence in the quality of NT seafood, and awareness of the sustainability status of professional fisheries in the NT.

To assist the NT Seafood Council to undertake this assessment, the NT Government provided resourcing to develop and undertake an annual online survey of NT residents over a three year time frame, the 2015 survey being the third.

The information obtained through this project was designed to specifically assist the NT seafood industry and NT Government to assess the impact of the current labelling laws, and the effectiveness of the current educational materials and approaches.

3. METHOD

Survey methodology and structure was developed and conducted by Competitive Edge, an independent marketing research company with 42 years' experience in surveying consumer, industrial and service industries, including seafood and environmental studies.

The annual survey was conducted through an online survey, accessed through a web link. Awareness of this link was increased significantly through advertising to NT residents on both the NT Seafood Council and Support NT Caught Facebook pages. The opportunity to participate in the annual survey was also promoted through a range of media and a Direct Letter (DL) flyer and by email. An invitation to participate in the 2015 survey was also emailed to the 2014 and 2013 survey respondents who had provided an email address. The flyers were also included in one letterbox drops to specific suburbs. Specific suburbs were; Leanyer, Woodleigh Gardens, Wulagi, Anula, Malak, Karama. Darwin City, Cullen Bay, Stuart Park, Tipperary Waters, Ludmilla, Parap, Fannie Bay and the RAAF Base.

The survey questions (Appendix I) seek qualitative and quantitative information relating to demographics, seafood consumption patterns, awareness and understanding of NT seafood labelling laws, decision factors and impacts when purchasing seafood, and awareness of the seafood industry. The 2013 survey questionnaire was amended slightly in 2014 to improve the clarity of data for Questions 8, 14, 15 and 18 (see Appendix I). No further amendments were made in 2015.

Survey design was constructed so that it was statistically robust so findings could be reported with a high level of confidence, questions were unbiased, and participation would warrant an appropriate sample for results to be indicative of the general NT Top End population.

All surveys were completed over a two to three week period in the months of February and March (2015: 16 February to 10 March; 2014: 17 February to 3 March; 2013: 28 February to 12 March).

4. RESULTS

Over the three annual surveys, a total of 1,689 responses were collected, with 438 Territorians completing the survey in 2015, and over 600 for both the 2013 and 2014 surveys. This is important, as at least 350 respondents were required for a 95% confidence level for the survey results in any one year.

Tabulated results of responses from all three surveys are shown at Appendix II. Following is a summary of the three annual survey findings based around key areas.

It should be noted that FRDC Project - 2009/216 tested similar variables to those in the consumer survey, but due to different methodology it is not possible to always compare the findings from the three surveys, however where that is possible and applicable, comparisons have been provided.

4.1 Seafood Consumption

Overall the majority of survey respondents were people classified as 'low seafood consumers' from dining or take-away venues, meaning they only eat seafood once a fortnight or less (an average over the three surveys of 77.2% at restaurants and 78.4% from takeaways). Conversely, respondents who were 'high seafood consumers' in the home, had seafood once or more a week (an average over the three surveys of 72.8%) (Appendix II - Q2, Figure 1.).

During the three year survey period 'high seafood consumers' reported a decrease in those eating seafood twice or more a week with a corresponding increase in those eating fish only once a week at home.

The trend for 'low seafood' consumers at all venues remained relatively stable over the three surveys (Appendix II - Q2).

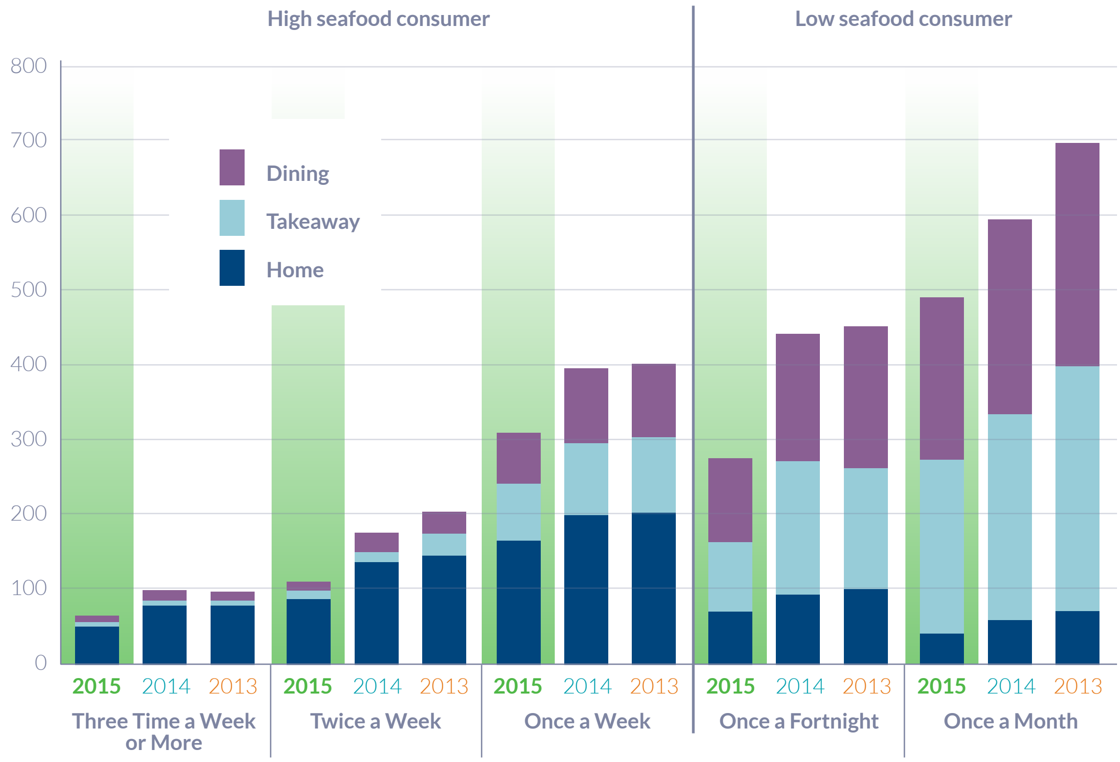

Figure 1: Consumption of seafood by Territorians - results for 2013 to 2015 surveys

4.2 Consumer Values and Preferences

Consumer values relate to personal values that allow consumers to weigh up a range of factors and consider them when making decisions about purchasing seafood in a food service sector venue.

To test these values, survey participants were presented with a range of options and asked to self-rate on a scale of 1 to 5 (1 = least and 5 = most) the importance of a range of factors when making a seafood purchase. Data is shown in Appendix II - Q3 and Q4, Figure 2 and Figure 3.

The survey results showed clearly that the most important factor influencing purchase decisions in a restaurant/café and takeaway outlet was product 'Freshness'. If analysis includes all responses that stated that 'Freshness' was of at least some importance, this accounted over 99.8% in a restaurant/café and takeaways.

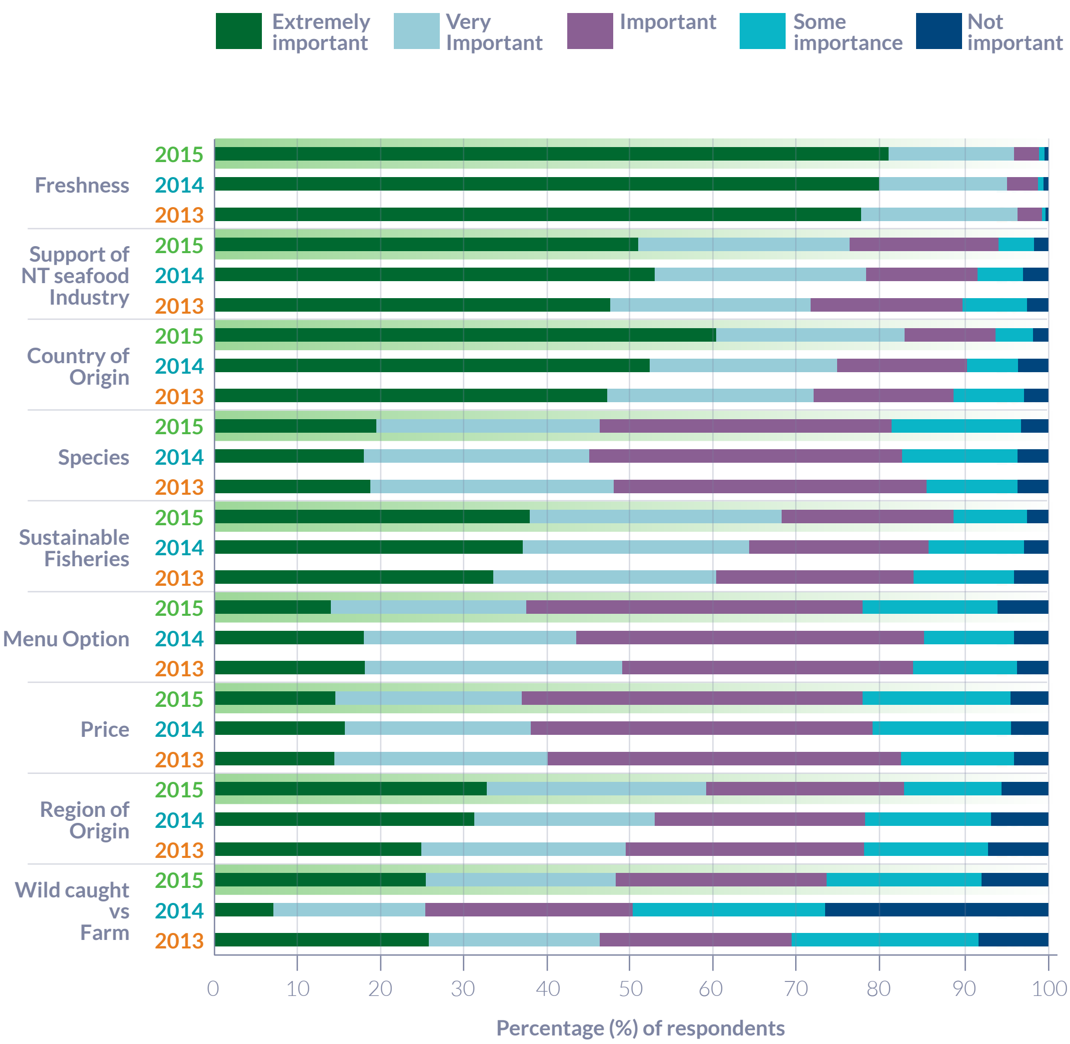

Figure 2: Influencing factors when purchasing seafood in a restaurant or café

'Support for the NT Industry' was considered extremely important in all survey years, and was rated as 2nd most important value in a restaurant/café and in takeaways.

'Country of Origin', is seen extremely important, with this level of rating growing each year, with an evident swing showing an increase of 13.3% in restaurant/café and 15.5% in takeaways; when compared to 2013 results. Over the three years it was the 3rd most important consumer value, after 'Freshness' and 'Support for the NT Industry'. In all years it was the 2nd most 'extremely important' factor when dining at restaurants, cafes and takeaways.

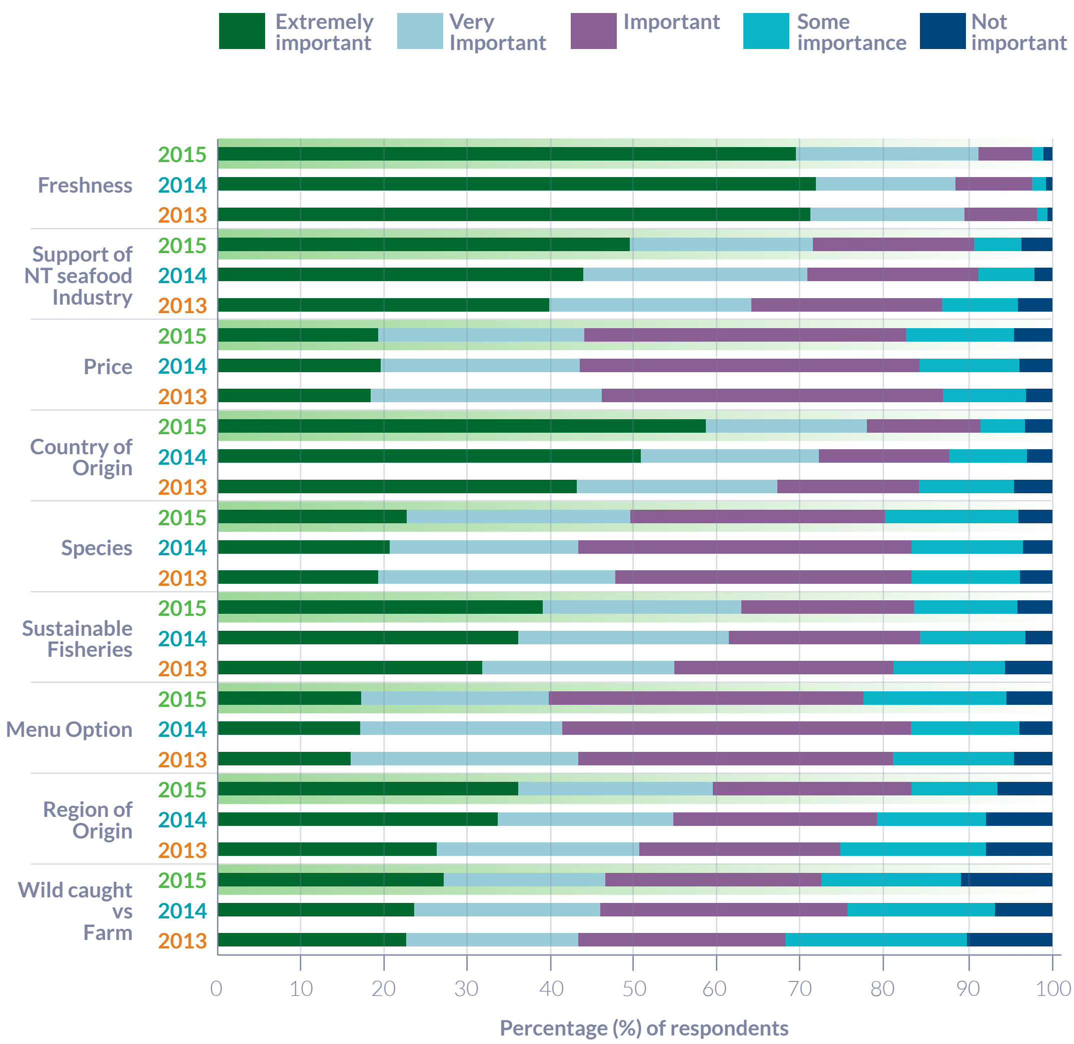

Figure 3: Influencing factors when purchasing seafood from a take away outlet

4.3 Awareness of Seafood Labelling Laws

Survey participants were asked to respond to a question relating to their awareness and understanding of the current NT seafood labelling laws. The NT seafood labelling laws are framed such that, if seafood on a menu does not have an 'imported' label, it means that it must be harvested in Australia, as imported products have to be identified under the legislation. This causes some level of confusion with people who are unaware of the workings of the legislation.

On average 69.9% of respondents correctly identified that if a seafood item on a menu didn't have 'imported' attached to it, it was Australian product. Of the remaining 30.1% of respondents, 20.7% assumed the product was imported and 9.3% didn't know where the seafood was from (Appendix II - Q 5). The awareness of consumers was generally consistent in both 2013 and 2015, with a slight decrease in correct interpretation of non labelled seafood in 2014.

Each year a decrease was recorded in category of 'not at all aware' of the labelling requirements and an increase in the 'very aware' categories (Appendix II - Q 7). This shows an improvement amongst respondents of the awareness of seafood labelling laws in the NT. It is a substantial improvement when comparing 2015 responses (18.4% 'not at all aware') to those from the 2009 survey, when 40% rated their awareness 'not at all aware' *(pg 25, FRDC Project - 2009/2016).*

Survey participants were asked to indicate how they had heard about the NT seafood labelling laws. Many respondents indicated that they became aware of the laws via multiple mechanisms, with the 'Northern Territory Seafood Council', 'Local TV' and 'Word of Mouth' showing increases each year as effective communication methods. A decreasing awareness was reported in the three years from both 'through dining outlets' and 'fishmongers'. (Appendix II - Q 8, Figure 4).

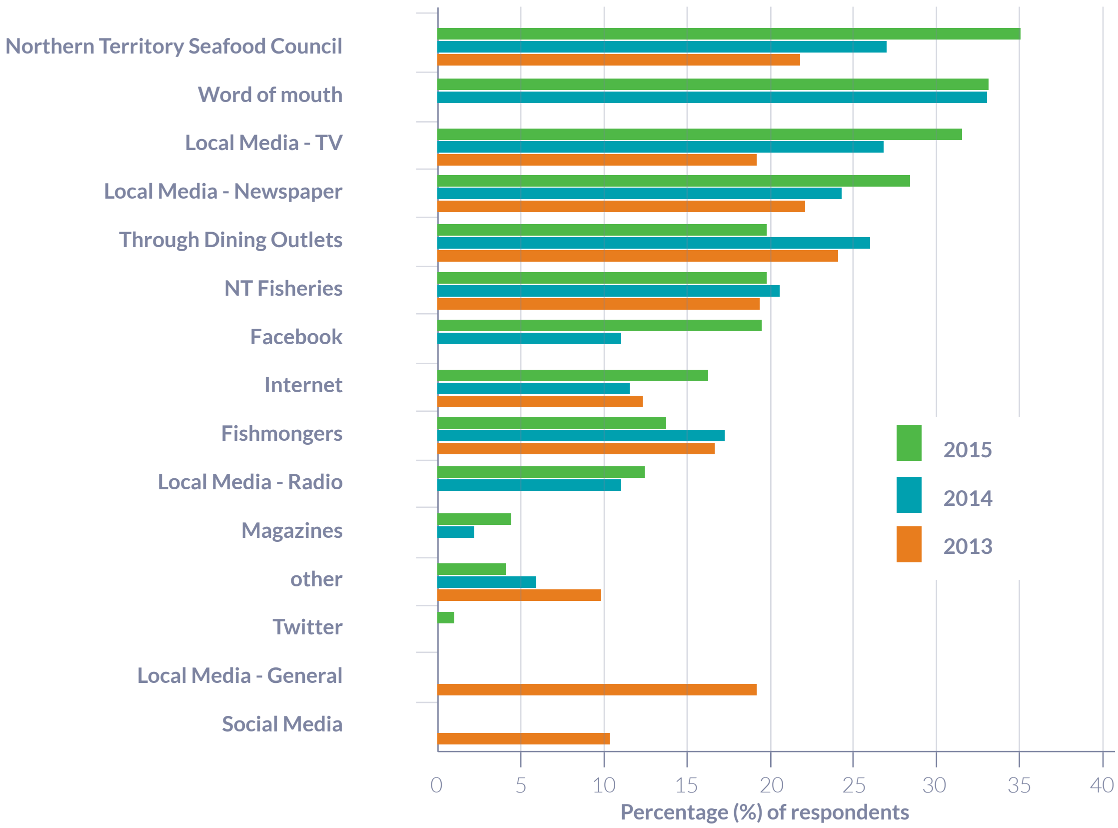

Figure 4: Source of information about NT seafood labelling laws

Survey participants were asked to consider that if it was clearly identified that their meal 'contained imported seafood products', as specified under NT seafood labelling laws, would that influence their choice of seafood purchases. The response of 'yes' was received from an average of 93.9% of respondents (over the three surveys), clearly showing that labelling that identifies the origin of seafood is a compelling driver in the purchasing decision making process (Appendix II - Q 9).

In light of the above, and with an increase each year, 85.4% of respondents in 2015 believed the NT seafood labelling laws have been successful (i.e. excellent, good, successful) in assisting them to make informed decisions relating to choices when selecting seafood. Only 2.1% in 2015 believe that it had 'no success' in assisting them in making an informed choice (Appendix II - Q 10, Figure 5).

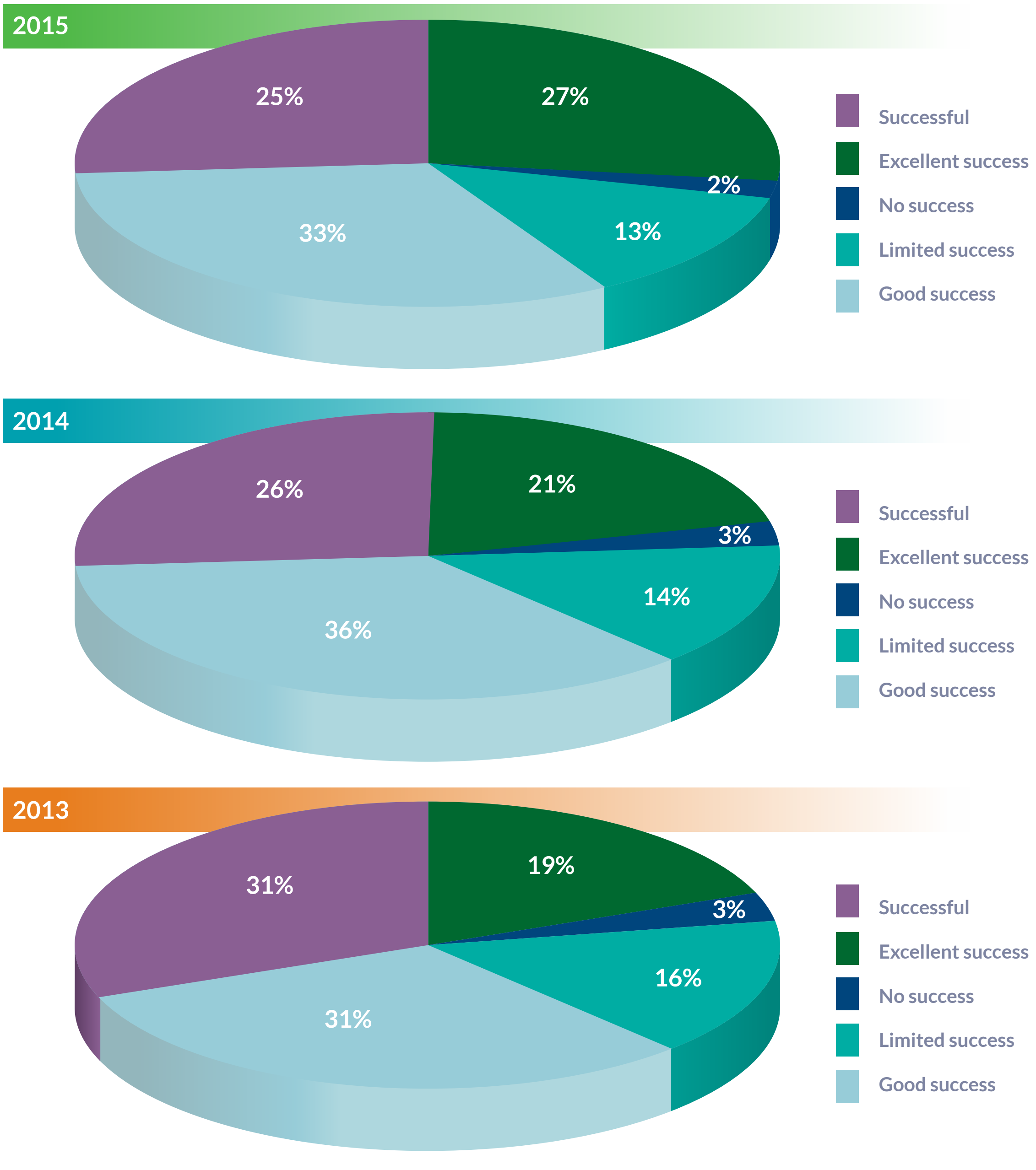

Figure 5: How Territorians rate the success of NT seafood labelling laws

4.4 Promotional Footprint of 'Support NT Caught' Campaign

The level of awareness by survey respondents of the 'Support NT Caught' campaign showed continual growth each year, with 65.0% of respondents in 2015 being aware of the campaign, an increase of 16.9% compared to 2013 (Appendix II - Q 17).

Survey respondents identified that they had seen the 'Support NT Caught' logo through a range of mediums. Throughout the three years 'seafood retailers' continues to be by far the most commonly identified source for displaying the logo, with 73.9% of respondents indicating they had seen the logo at that type of venue. (Appendix II - Q 18, Figure 6).

A large proportion of people (44.1% in 2015, 50.0% in 2014 and 56.4% in 2013) skipped this question. It is unclear if that is due to their lack of knowledge of the logo or they 'haven't seen the logo'.

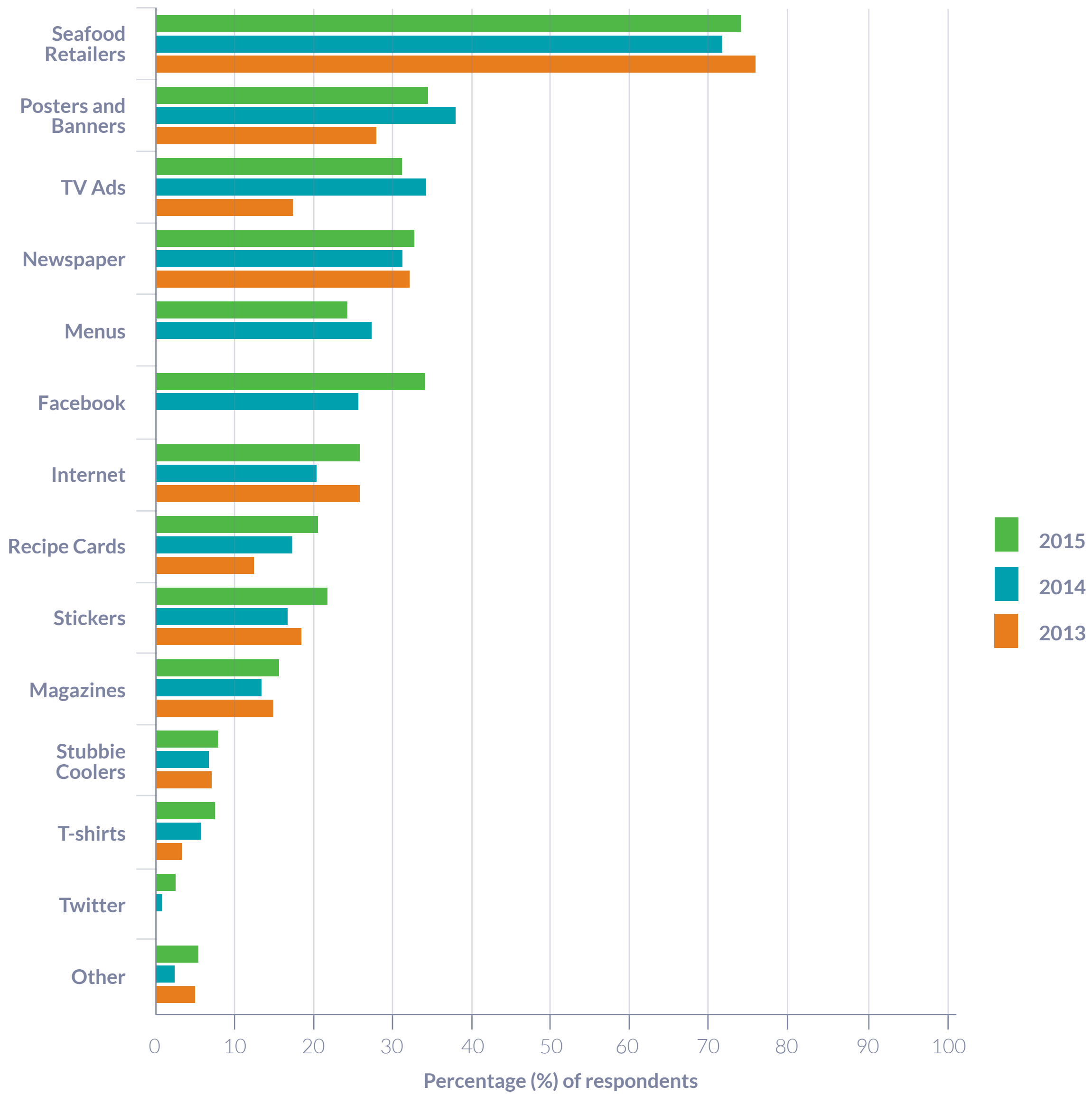

Figure 6: Sources of awareness of the 'Support NT Caught' logo

4.5 Preferences for NT Seafood and Consumption Trends

On average, over the three surveys, 53.4% of survey respondents believed that they were eating more seafood than they were 18 months previously. Only 4.2% indicated that their consumption had decreased over the period; i.e. they responded 'much less' or 'slightly less' (Appendix II - Q 11).

Each year the responses showed an increase for 'high preference' for NT Seafood, with 56.3% in 2015, up 7.7% from 2013. Only 0.8% of respondents indicated they had 'no preference' in 2015, a decrease from 2014 (2.6%) and 2013 (2.7%) (Appendix II - Q 12). Over the three years this showed an increased awareness and preference for NT Seafood.

Across the three surveys, respondents increasingly believed (from 75.2% in 2013 to 79.7% in 2015) that NT seafood tasted better and had a superior quality to the 'rest' ('highly agree' or 'agree') with only 3.6% on average disagreeing with that proposition each year (Appendix II - Q 13).

Participants were asked to consider what might influence them to choose NT seafood over other menu choices when dining out. 'Freshness of local seafood', (average of 87.9% over the three surveys) and 'Support for the NT fishing Industry' (average of 72.6% over the three surveys) were again the two main responses (Appendix II - Q 6, Figure 7). Over the three years the support for the industry increased by 4.7%.

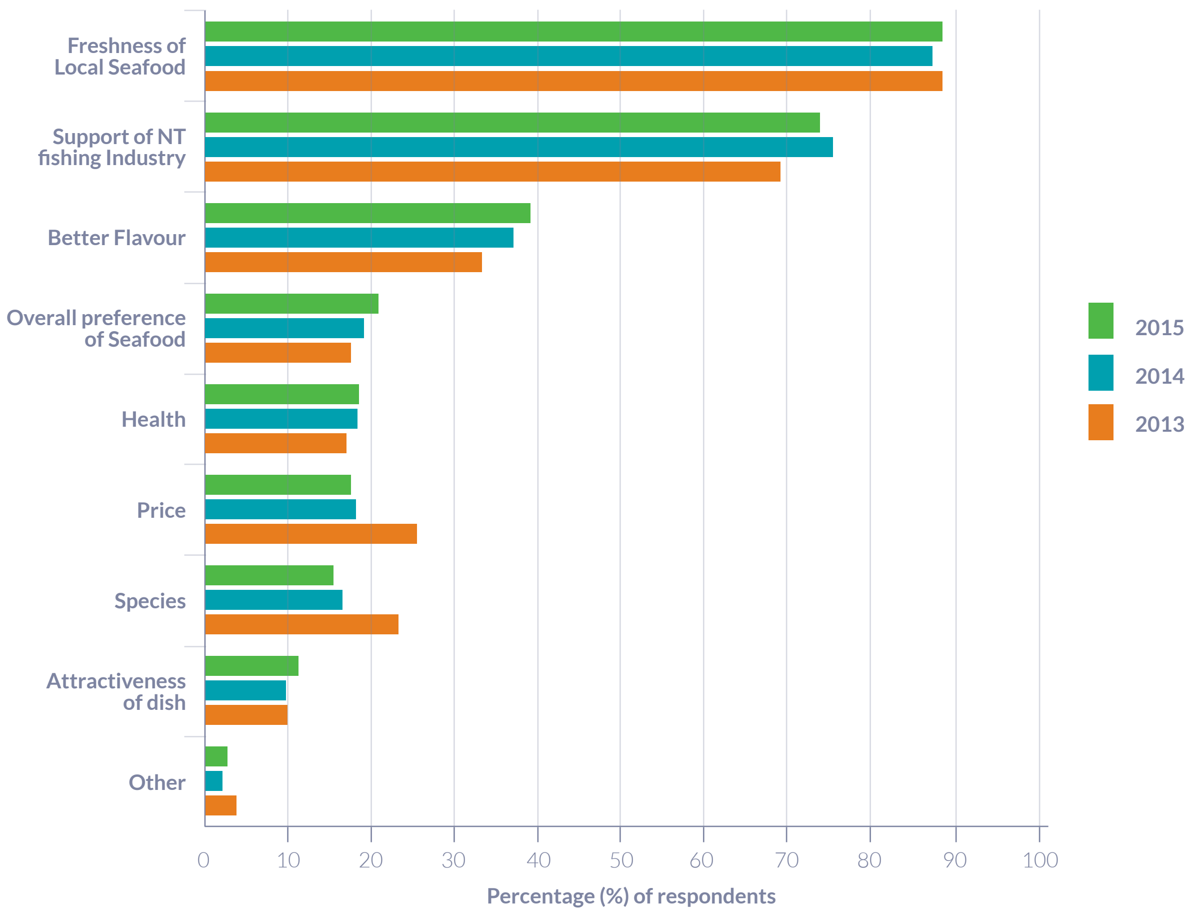

Figure 7: Influencing factors to choose NT seafood over other seafood when dining out

4.6 Value Placed on Australian and NT Caught Seafood

Premium Price

The three surveys sought to identify if consumers were prepared to pay a premium for NT labelled seafood, compared to imported, or non-NT produced Australian product, at two venue types; restaurant/café and takeaways.

Respondents were asked to consider a hypothetical scenario as to whether they would be prepared to pay a premium price for NT labelled fish over fish imported from overseas or from elsewhere in Australia. In both scenarios there was strong consumer indication that there was a willingness to pay some level of price premium for NT labelled seafood over non NT product.

For NT labelled versus imported seafood at takeaway venues, on average 8.8% of respondents indicated that they were not prepared to pay any premium for NT labelled seafood. Consistent with the increasing awareness and support for NT seafood, there was however an increase each year of participants who were prepared to pay over a 20% price premium for NT Seafood over imported product. In 2015 the percentage of participants willing to pay this premium at takeaway venues was 27.2% up 10.3% from 2013 (Appendix II - Q 14, Figure 8).

At restaurants, on average 5.7% of respondents were not prepared to pay any premium for NT labelled seafood, however rises of 3.7% in 2014 and 6.4% in 2015 saw 38.6% of participants prepared to pay in excess of a 20% premium for NT labelled seafood over imported seafood (Appendix II - Q 14, Figure 8).

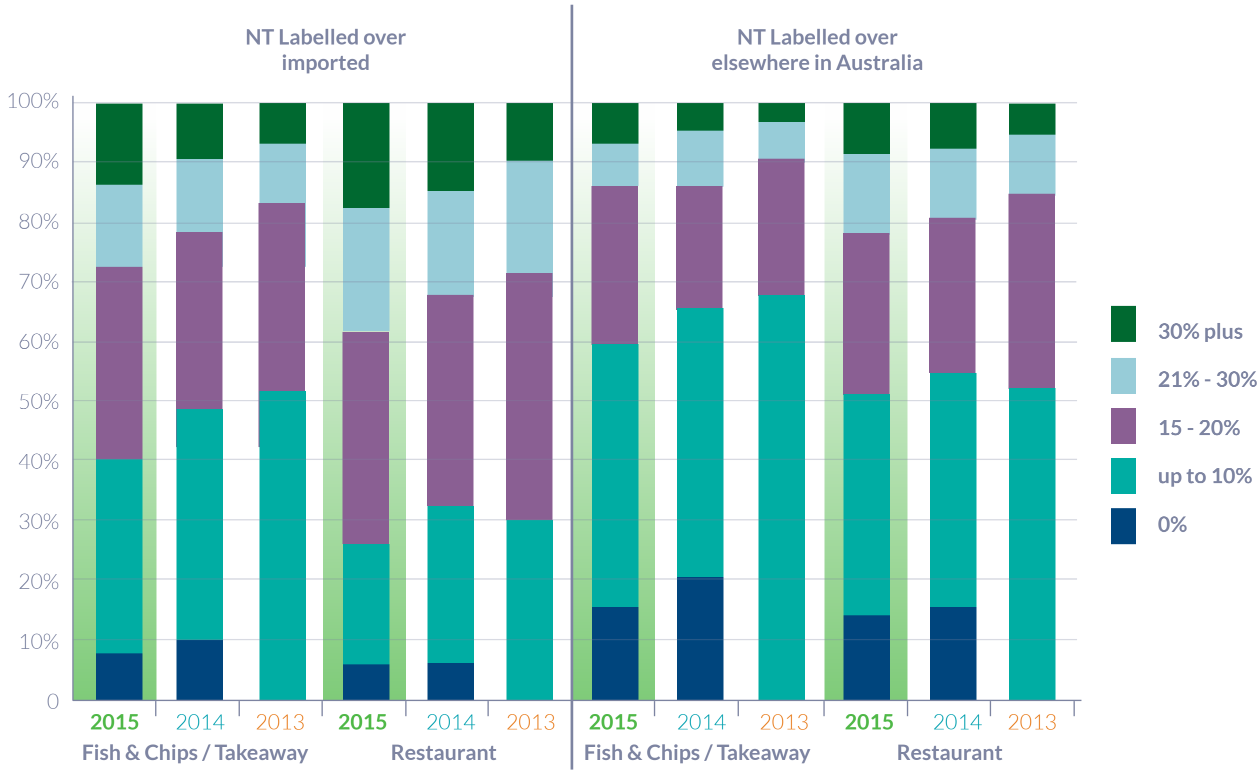

Figure 8: Amount of premium consumers are willing to pay for NT or labelled seafood

For NT labelled versus seafood from elsewhere in Australia at takeaway venues, 15.6% of respondents in 2015 indicated that they were not prepared to pay a premium for NT labelled seafood, a decrease of 4.7% since 2014. The 2015 survey however shows a continuing increase in the number of respondents who are prepared to pay over a 20% premium, 14.3%, up 5.1% since 2013. At a restaurant, 21.6% of respondents, an increase of 6.6% from 2013, indicated they are prepared to pay over a 20% premium. Fourteen percent (14.0%), down 1.4% from 2014, of respondents are not prepared to pay a premium for NT labelled seafood at a restaurant (Appendix II - Q 15, Figure 8).

Participants were also asked to rate, ranging from unimportant (1) to very important (5), how important it was to choose NT seafood in a variety of dining occasions, i.e. 'mid week takeaway', 'fish and chips', 'hotel/ club', 'restaurant', 'home meal' and 'home with guests'.

The importance of choosing NT seafood increased each year and was rated as being 'important', ‘very important’ or ‘extremely important' when having a meal at a 'takeaway' (68.7%, up 4.9% from 2013). Choosing NT seafood when eating ‘fish and chips’ was rated important for 75.6% participants, up 7.3% since 2013 (Appendix II - Q 16).

Choosing NT seafood for restaurants (34.2%), home meals (36.1%), and if guests were coming for a meal (42.4%), was considered 'extremely important', with all categories showing an increase from 2013. Importantly, the survey showed that over 90.0% of the time, in any venue type, when choosing a meal, NT seafood was of major importance (i.e. rated as having 'some importance' or greater). Specifically, it was considered 'unimportant' by only 1.6% of respondents for 'restaurant choice', 2.1% for 'home meals' and 1.6% for 'home meal with guests'(Appendix II - Q 16).

Community Benefits

Participants were asked to respond to whether the NT commercial seafood industry delivered benefits to the community and the Territory in the form of 'employment', 'fresh seafood availability' and a 'favourable NT image', based on a rating of no benefit (1) to extremely beneficial (5).

The 2015 survey showed that 96.6% of respondents believed the industry delivers some benefits (i.e. 'minor benefit' or greater) in respect to employment, seafood availability, and the NT image (Appendix II - Q 21, Figure 9).

Over ninety one percent of respondents (91.6%) believed the industry provided 'employment' benefits. Over the three surveys an average of 42.5% believed it delivered 'benefits', 31.9% 'strong benefits', and 17.2% felt it was 'extremely beneficial' (Appendix II - Q 21, Figure 9).

With respect to benefits from 'fresh seafood availability', an average of 25.1% believed it delivered 'benefits', 38.7% 'strong benefits', and 31.4% felt it was 'extremely beneficial', a total of 94.8% providing a positive response (Appendix II - Q 21, Figure 9).

With respect to benefits of a 'favourable NT image' an average of 28.1% of respondents, over the three surveys, believed it delivered benefits, 36.4% 'strong benefits', and 28.1% felt it was 'extremely beneficial', a total of 92.6% providing a positive response (Appendix II - Q 21, Figure 9).

As previously mentioned, over half (52.9%) of respondents, on average over the three surveys, (57.5% in 2015, 48.5% in 2014 and 52.7% in 2013) felt the NT commercial fishing industry was sustainable, with only around 5.6% feeling it was unsustainable (Appendix II - Q 20).

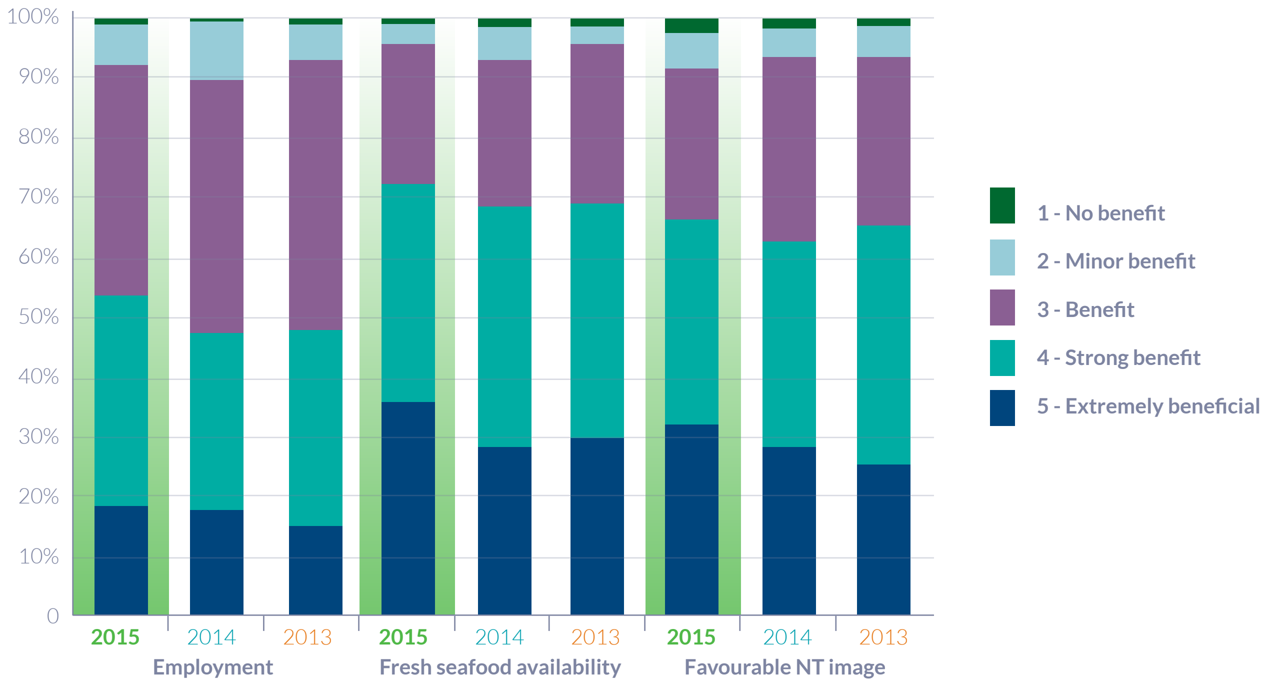

Figure 9: Community benefits of the commercial NT seafood industry

5. CONCLUSION AND KEY FINDINGS

The survey provided insight into a range of issues and improved knowledge surrounding seafood labelling, consumption drivers and values, the role of the NT Seafood Council, and the importance of the commercial fishing industry to the community. These matters are summarised below.

5.1 Seafood Consumption

The majority of survey respondents were rated as low consumers of seafood, for which the source of seafood consumers was largely from food service industries (restaurants/cafes and takeaways). High consumers who had seafood once or more, were consuming most seafood at home rather with only a small amount of consumer at food service industries.

This provides two opportunities to seek to increase consumption of NT seafood; firstly to encourage greater uptake in food service areas, and secondly to seek to increase the use of NT seafood as a part of the weekly home meal. Focussing on both of these strategies provides an opportunity to increase consumption of NT seafood.

5.2 Consumer Values and Preferences

Freshness is the major consumer value when it comes to seafood, and by having local product (NT seafood), consumers feel this provides them with freshness.

Country of Origin was also a key value for a number of reasons; including a close link to freshness and supporting local industry.

As overall preference for seafood is also a major consumer driver, industry must ensure that it continues to supply the local market, and encourage retailers and restaurants to label their seafood 'NT'. This will allow consumers to easily choose NT seafood over other seafood on the menu.

Industry must also focus on ensuring consumers maintain their desire to support the NT industry and purchase NT seafood. Industry can achieve this by continuing to highlight their community contributions and by showing consumer the values they provide, such as; delivering consistent supplies of local product, providing employment, and building consumer sentiment relating to the industry's sustainability credentials, and the health benefits seafood has.

5.3 Awareness of Labelling Laws

It appears the majority of consumers are still unclear on the understanding of the NT seafood labelling laws and what they mean. Consumer awareness has slowly been increasing since its introduction and in 2015, 49.0% responded correctly as to the operation of the laws, which is an improvement from 2009 when only 23.0% of consumers responded correctly.

A multi-faceted approach would still appear to be a sound model to improve awareness. The survey strongly indicates that respondents are acquiring and retaining information; with the NT Seafood Council, TV media streaming and dining outlets a vital key in providing consumers with the right message and awareness. Word of mouth may seem old school but its value as a tool has been clearly shown through the 2014 and 2015 survey results.

5.4 Promotional Footprint of 'Support NT Caught' Campaign

There is significant scope to improve consumer awareness of the 'Support NT Caught' campaign, with respondents increasing awareness each year of the campaign (65.0% in 2015, 61.4% in 2014 and 48.1% in 2013).

This is still a large number of unaware potential consumers and this provides a great opportunity to work towards increasing awareness, and thereby demand for NT supplied product. This could be achieved by continuing, and increasing, the strong presence in the seafood retailer space, increasing support through dining venues, imbedding the recognition through TV streaming, and bolstering and targeting social media.

5.5 Preferences for NT Seafood and Seafood Consumption

Fifty three percent (53.5%) of survey respondents on average believed that they were eating more NT seafood than they were 18 months ago. There was also a strong preference (84.5% in 2015, 82.4% in 2014 and 79.3% in 2013) for NT Seafood over other available seafood, due to its superior taste and quality.

Freshness is the major influencer when choosing NT seafood, but there were also very strong drivers to support the NT fishing Industry.

The three surveys reiterate that knowledge of the origin of seafood impacts on consumer choice, and labelling as NT product is a major positive influencing factor for consumers when choosing seafood.

This highlights the value of having labelling laws clearly and consistently detailed at the point of sale, including at dining venues. Notably, 93.9% of respondents on average over the three years indicated that a clearer or better understanding of the NT Seafood Labelling laws would influence their choice of seafood purchase towards NT product.

5.6 Value Placed on Australian and NT Caught Seafood

The vast majority of respondents indicated that they were prepared to pay some premium for NT labelled seafood compared to any other seafood in a restaurants/café, takeaways and for home consumption. Consumers generally indicated a strong willingness to pay a premium for NT labelled seafood over product sourced from elsewhere in Australia, and an even greater premium for NT over imported product.

At a restaurant level, there is high value placed on NT labelled seafood in comparison to imported and other Australian sourced product. When compared to imported product, 74.2% in 2015 (up 6.8% since 2014) were prepared to pay an 11% plus premium for NT seafood, with almost 38.6% (up 6.4%) of those willing to pay 21% plus.

Taking onboard feedback from the 2013 survey (Q14 - Q15), the 2014 and 2015 survey included a new category, 'participant not prepared to pay any premium for NT labelled seafood'. This showed that 5.5% in 2015 and 5.9% in 2014 were not prepared to pay any extra for NT labelled seafood. These results show that there is a definitive price premium available to the industry by clearly labelling seafood as NT product in restaurants.

At a takeaway level, there is again a premium placed on NT labelled seafood. When compared to imported product, 59.9% of respondents (up by 8.8% on the 2014, and 11.4% on the 2013 survey), were prepared to pay an 11% plus premium for NT seafood, with almost 27.1% (up 5.5% and 10.2% respectively) of those willing to pay 21% plus. With the new category, 'participants not prepared to pay any premium for NT labelled seafood', 7.7% were not prepared to pay any extra for NT labelled seafood (down 2.1% from 2014).

This result highlights that there is also a definitive price premium possible in takeaways (albeit at a lower level than restaurants) by labelling NT seafood.

The survey showed that the desire to consume NT seafood played a role and influenced 96.0% of choices when choosing a meal at any dining occasion. This was particularly so when dining out at a restaurant or hotel/club, at home, and when guests come over for a meal.

The other aspect of 'value' of an industry relates to its community contribution through variables such as employment, perception and food provision. The NT seafood industry rated very well, with over 98.8% of respondents believing the industry delivers some benefits in respect to employment, seafood availability and the NT image. This was a very strong result and provides a sound base to continue to build awareness of the industry's benefit to the community.

Although there was only a very small proportion (6.4%) who specifically identified that they felt that the industry was not sustainable, there was a large percentage also who were 'not sure' (36.1%) as to its sustainability. In addition over the three years there was a shift that saw less respondents being unsure of industry sustainability to an opinion of yes or no with regards to sustainability.

Appendix I: Survey

Seafood Industry Awareness Survey 2015

We invite you to complete this survey independently conducted by Competitive Edge Marketing on behalf of the Northern Territory Seafood Council. The aggregated results will allow us to monitor and track consumer sentiments and opinions regarding seafood consumption in the Northern Territory.

All respondents who complete this survey are eligible to enter the prize draw to win one of four dining vouchers for Mitchell's Grill, Hilton Darwin. For logistic reasons, prizes are only available to NT Residents.

* 1. Do you eat seafood?

- ◯ Yes
- ◯ No

* 2. On average, how often do you eat seafood (dining out / take away / at home)?

	Three times a week or more	Twice a week	Once a week	Once a fortnight	Once a month or Never
Dining	◯	◯	◯	◯	◯
Take Away	◯	◯	◯	◯	◯
Home	◯	◯	◯	◯	◯

3. When purchasing seafood in a restaurant or café , please indicate the extent to which the following factors are important to your selection (1 = Not Important, 5 = Very Important)

	1 - Not Important	2 - Some Importance	3 - Important	4 - Very Important	5 - Extremely Important
Country of origin	◯	◯	◯	◯	◯
Region of origin	◯	◯	◯	◯	◯
Freshness	◯	◯	◯	◯	◯
Support for NT seafood industry	◯	◯	◯	◯	◯
Price	◯	◯	◯	◯	◯
Species	◯	◯	◯	◯	◯
Wild caught versus farmed	◯	◯	◯	◯	◯
Menu option	◯	◯	◯	◯	◯
Sustainable fisheries	◯	◯	◯	◯	◯

Seafood Industry Awareness Survey 2015

4. When purchasing seafood in a take-away outlet , please indicate the extent to which the following factors are important to your selection (1 = Not Important, 5 = Very Important)

	1 - Not Important	2 - Some Importance	3 - Important	4 - Very Important	5 - Extremely Important
Country of origin	◯	◯	◯	◯	◯
Region of origin	◯	◯	◯	◯	◯
Freshness	◯	◯	◯	◯	◯
Support for NT seafood industry	◯	◯	◯	◯	◯
Price	◯	◯	◯	◯	◯
Species	◯	◯	◯	◯	◯
Wild caught versus farmed	◯	◯	◯	◯	◯
Menu option	◯	◯	◯	◯	◯
Sustainable fisheries	◯	◯	◯	◯	◯

* 5. If you see seafood on a NT menu without an “imported” or country of origin label, where do you assume it is from?

◯ Darwin

◯ NT

◯ Northern Australia (NT, WA, QLD)

◯ Australia

◯ Overseas

◯ Don’t Know

Seafood Industry Awareness Survey 2015

6. What might make you choose NT seafood over other menu choices when you dine out? (You may choose up to three (3) of the categories below.)

- [ ] Better flavour
- [ ] Attractiveness of dish
- [ ] Health
- [ ] Price
- [ ] Support for NT fishing industry
- [ ] Freshness of local seafood
- [ ] Overall preference for seafood
- [ ] Species

Other (please specify)

7. Are you aware of seafood labelling requirements for food outlets in the Northern Territory? Please select the number that corresponds with the level to which you agree.

- ○ 1 - Not at all aware
- ○ 2
- ○ 3
- ○ 4
- ○ 5 - Very aware

Seafood Industry Awareness Survey 2015

* 8. How did you hear about the NT seafood labelling laws? (You may choose more than one category)

- [ ] NT Fisheries
- [ ] Northern Territory Seafood Council
- [ ] Fishmongers
- [ ] Local Media – TV
- [ ] Local Media – Newspapers
- [ ] Local Media – Radio
- [ ] Local Media – Magazines
- [ ] Internet
- [ ] Facebook
- [ ] Twitter
- [ ] Through dining outlets
- [ ] Word of mouth

Other (please specify)

* 9. Seafood not harvested from Australian waters is to be clearly labelled "imported". Dishes which contain multiple seafood ingredients, one or more of which have not been harvested in Australian waters, are to be labelled "contains imported seafood products". Would this knowledge of NT seafood labelling laws influence your choice of seafood purchases in the immediate future?

- ○ Yes
- ○ No

Seafood Industry Awareness Survey 2015

* 10. How successful have the NT labelling laws been in assisting you to make informed choices between Australian and imported seafood?

- Excellent success
- Good success
- Successful
- Limited success
- No success

Comment

* 11. Do you think that you are eating more NT seafood today compared to 18 months ago?

* 12. Overall, do you have a preference for NT seafood over other available seafood? Please indicate your preference on the scale below

- 1 - No Preference for NT seafood
- 2
- 3
- 4
- 5 - High Preference for NT seafood

* 13. "NT seafood product tastes better and has superior quality to the rest" when dining in the NT. Do you agree?
Please rate the statement above, from your viewpoint, 1-5 on the scale below.

- 1 - Disagree Strongly
- 2 - Disagree
- 3 - No Real View
- 4 - Agree
- 5 - Highly Agree

Seafood Industry Awareness Survey 2015

* 14. How much of a premium price would you be willing to pay for NT labelled seafood over seafood that is imported?

	0%	1% - 10%	11% - 20%	21% - 30%	30% plus
Fish & Chips / Take Away	○	○	○	○	○
Restaurant	○	○	○	○	○

* 15. How much of a premium price would you be willing to pay for NT labelled seafood over seafood that is from elsewhere in Australia?

	0%	1% - 10%	11% - 20%	21% - 30%	30% plus
Fish & Chips / Take Away	○	○	○	○	○
Restaurant	○	○	○	○	○

* 16. How important is choosing NT seafood for the following occasions? (1 = UnImportant, 5 = Very Important)

	1 - Unimportant	2 - Some Importance	3 - Important	4 - Very Important	5 - Extremely Important
Mid-week take-away meal	○	○	○	○	○
Fish & Chips	○	○	○	○	○
Hotels / Motel / Club meal	○	○	○	○	○
Restaurant meal	○	○	○	○	○
Home meal	○	○	○	○	○
Home meal with guests	○	○	○	○	○

17. Are you aware of the SUPPORT NT CAUGHT campaign?

○ Yes

○ No

Seafood Industry Awareness Survey 2015

* 18. Where have you seen this logo? (You may nominate more than one of the categories below)

- [ ] Posters and Banners
- [ ] TV Ads
- [ ] Newspaper
- [ ] Stubbies Coolers
- [ ] T-Shirts
- [ ] Stickers
- [ ] Magazines
- [ ] Recipes Cards
- [ ] Internet
- [ ] Facebook
- [ ] Twitter
- [ ] Menus
- [ ] Seafood retailers (supermarket/fish shop)

Other (please specify)

We would now like to ask you some questions about the seafood industry and ...

* 19. Are you aware of the Darwin Commercial Fishing/Seafood Precinct at Fisherman's Wharf?

* 20. Do you think the Northern Territory's commercial fishing industry is sustainable?

- ( ) Yes
- ( ) No
- ( ) Not sure

Seafood Industry Awareness Survey 2015

* 21. In your opinion, does the NT commercial seafood industry deliver benefits in terms of:

	1 - No Benefit	2 - Minor Benefit	3 - Benefit	4 - Strong Benefit	5 - Extremely Beneficial
Employment	◯	◯	◯	◯	◯
Fresh seafood availability	◯	◯	◯	◯	◯
Favourable NT image	◯	◯	◯	◯	◯

* 22. Are you aware of the Northern Territory Seafood Council and its representative role for the NT seafood industry?

Please assist us with a profile of our survey respondents

* 23. Gender

* 24. Number of persons in your household

* 25. Age of survey respondent

* 26. Length of time in the NT

* 27. Darwin Postcode

28. By providing your email address below, you will automatically go into the draw to win one of four dining vouchers for Mitchell's Grill, Hilton Darwin. If you not wish to enter for the prize draw we would like to thank you very much for your contribution to the Northern Territory Seafood Industry survey.

Prize draw entry details

Email contact (Essential)

Name (Optional)

Phone Number (Optional)

Thank you for completing NT seafood survey.
Winners of the prizes will be contacted on 13 March 2015

The following amendments were made to the 2013 survey questionnaire for the 2014 and 2015 survey:

Question 8 expanded the selection options to include 'Local Media - Radio', 'Local Media - Magazines', 'Twitter', 'Facebook' and ' Word of Mouth' which replaced the 2013 options of 'Local Media - General' and 'Social Media'.

Question 14 and **15** in 2014 included an option for respondents to select 0% premium price and subsequently amended the next category to 1% -10%, which replaced the 'Up to 10%' option in 2013.

Question 18 expanded selection options to include 'Twitter', 'Facebook', and 'Menus'.

Appendix II: Survey Results

Q1 Do you eat seafood?

	2015		2014		2013	
	Response					
	%	Count	%	Count	%	Count
Yes	100	438	98.5	593	98.8	641
No	0	0	1.5	9	1.2	8
Answered Question		**438**		**602**		**649**
Skipped Question		0		1		0

Q2 On average, how often do you eat seafood (dining out/take away/at home)?

	Three Times a Week or More		Twice a Week		Once a Week		Once a Fortnight		Once a Month		Total Response count	Total Skipped
	Response											
	%	Count	%	Count	%	Count	%	Count	%	Count		
2015												
Dinning	2.2	9	2.9	12	16.3	68	26.8	112	51.9	217	**418**	
Take Away	1.4	6	2.6	11	18.2	76	22.3	93	55.5	232	**418**	20
Home	12.2	51	21.1	88	39.7	166	17.0	71	10.1	42	**418**	
2014												
Dinning	2.5	14	4.6	26	17.5	100	29.8	170	45.6	260	**570**	
Take Away	1.2	7	2.5	14	16.8	96	31.2	178	48.3	275	**570**	33
Home	13.9	79	24.0	137	35.1	200	16.5	94	10.5	60	**570**	
2013												
Dinning	1.9	12	4.8	30	15.6	98	30.1	189	47.5	298	**627**	
Take Away	1.1	7	4.6	29	16.3	102	25.8	162	52.2	327	**627**	23
Home	16.7	105	23.3	146	32.4	203	16.1	101	11.5	72	**627**	

Q3 When purchasing seafood in a restaurant or café, please indicate the extent to which the following factors are important to your selection?

	1 Not Important		2 Some Importance		3 Important		4 Very Important		5 Extremely Important		Total Response count	Total Skipped
	Response											
	%	Count	%	Count	%	Count	%	Count	%	Count		
2015												
Country of Origin	1.7	7	4.4	18	11.1	45	22.5	91	60.3	244	**405**	
Region of Origin	5.7	23	11.6	47	23.7	96	26.1	106	33.0	134	**406**	
Freshness	0.3	1	0.5	2	3.2	13	15.0	61	81.1	330	**407**	
Support of NT seafood Industry	1.7	7	4.2	17	17.9	72	25.1	101	51.0	205	**402**	
Price	4.2	17	18.0	73	40.5	164	22.7	92	14.6	59	**405**	31
Species	3.2	13	15.5	63	34.7	141	26.9	109	19.7	80	**406**	
Wild caught vs Farm	7.7	31	18.8	76	25.2	102	22.7	92	25.7	104	**405**	
Menu Option	5.7	23	16.6	67	40.4	163	23.0	93	14.4	58	**404**	
Sustainable Fisheries	2.5	10	8.6	35	20.7	84	30.1	122	38.0	154	**405**	
2014												
Country of Origin	3.5	19	6.3	34	15.6	85	22.4	122	52.2	284	**544**	
Region of Origin	6.7	36	15.1	81	25.1	135	21.9	118	31.2	168	**538**	
Freshness	0.4	2	0.7	4	3.7	20	15.3	83	79.9	432	**541**	
Support of NT seafood Industry	2.6	14	5.5	30	13.7	75	25.1	137	53.2	291	**547**	
Price	4.3	23	16.9	91	40.6	219	22.4	121	15.9	86	**540**	55
Species	3.5	19	13.9	75	37.4	201	27.0	145	18.2	98	**538**	
Wild caught vs Farm	7.2	39	18.1	98	25.0	135	23.5	127	26.3	142	**541**	
Menu Option	4.1	22	10.9	59	41.4	224	25.3	137	18.3	99	**541**	
Sustainable Fisheries	2.6	14	12.0	65	21.1	114	27.4	148	37.0	200	**541**	
2013												
Country of Origin	2.8	17	8.6	53	16.5	101	25.1	154	47.0	288	**613**	
Region of Origin	7.0	43	14.7	90	28.9	177	24.5	150	25.0	153	**613**	
Freshness	0.2	1	0.3	2	3.1	19	18.7	115	77.7	477	**614**	
Support of NT seafood Industry	2.3	14	7.8	48	18.4	113	23.8	146	47.7	293	**614**	
Price	3.7	23	13.8	85	42.0	258	25.7	158	14.7	90	**614**	34
Species	3.4	21	10.9	67	37.7	231	28.9	177	19.0	166	**612**	
Wild caught vs Farm	8.3	51	22.3	140	22.8	140	20.6	126	25.9	159	**613**	
Menu Option	3.4	21	12.6	77	34.9	213	30.8	188	18.2	111	**610**	
Sustainable Fisheries	3.8	23	12.1	74	23.6	144	26.9	164	33.6	205	**610**	

Q4 When purchasing seafood in a takeaway outlet, please indicate the extent to which the following factors are important to your selection?

	1 Not Important		2 Some Importance		3 Important		4 Very Important		5 Extremely Important		Total Response count	Total Skipped
	Response											
	%	Count	%	Count	%	Count	%	Count	%	Count		
2015												
Country of Origin	3.0	11	5.4	20	13.7	51	19.0	71	59.0	220	**373**	64
Region of Origin	6.2	23	10.5	39	23.9	89	22.9	85	36.6	136	**372**	
Freshness	1.1	4	1.1	4	6.4	24	21.7	81	69.7	260	**373**	
Support of NT seafood Industry	3.5	13	5.7	21	19.2	71	21.6	80	50.0	185	**370**	
Price	4.3	16	12.9	48	38.3	143	24.7	92	19.8	74	**373**	
Species	3.5	13	16.1	60	30.6	114	26.8	100	23.1	86	**373**	
Wild caught vs Farm	10.5	39	16.9	63	25.8	96	18.8	70	28.0	104	**372**	
Menu Option	5.4	20	16.9	63	37.5	140	22.5	84	17.7	66	**373**	
Sustainable Fisheries	4.0	15	12.1	45	21.0	78	23.2	86	39.6	147	**371**	
2014												
Country of Origin	2.9	14	9.3	45	15.4	75	21.2	103	51.2	149	**486**	115
Region of Origin	7.6	37	13.0	63	24.5	119	20.8	101	34.0	165	**485**	
Freshness	0.6	3	1.7	8	9.1	44	16.9	82	71.8	349	**486**	
Support of NT seafood Industry	2.1	10	6.6	32	20.2	98	26.8	130	44.3	215	**485**	
Price	3.5	17	12.0	58	40.7	197	23.8	115	20.0	97	**484**	
Species	3.1	15	13.5	65	39.8	192	22.4	108	21.2	102	**482**	
Wild caught vs Farm	6.6	32	17.8	86	29.4	142	22.0	106	24.2	117	**483**	
Menu Option	3.7	18	13.1	63	41.5	200	24.1	116	17.6	85	**482**	
Sustainable Fisheries	2.9	14	12.8	61	22.6	108	25.1	120	36.6	175	**478**	
2013												
Country of Origin	4.2	24	11.4	65	17.2	98	23.7	135	43.5	248	**570**	34
Region of Origin	7.7	44	17.4	99	23.9	136	24.3	138	26.7	152	**569**	
Freshness	0.4	2	1.2	7	8.8	50	18.5	105	71.2	405	**569**	
Support of NT seafood Industry	4.0	23	9.0	51	22.7	129	24.3	138	40.1	228	**569**	
Price	3.0	17	10.0	57	40.6	231	27.8	158	18.6	106	**569**	
Species	3.5	20	13.1	74	35.6	202	28.0	159	19.8	112	**567**	
Wild caught vs Farm	9.8	56	21.8	124	24.8	141	20.6	117	23.0	131	**569**	
Menu Option	4.4	25	14.6	83	37.5	213	26.9	153	16.5	94	**568**	
Sustainable Fisheries	5.5	31	13.1	74	26.1	148	23.3	132	32.1	182	**567**	

Q5 If you see seafood on a NT menu without an 'imported' or country of origin label, where do you assume it is from?

	2015		2014		2013	
	Response					
	%	Count	%	Count	%	Count
Australia	49.0	192	37.0	193	45.6	274
Overseas	21.4	84	22.2	116	18.6	112
NT	12.5	49	15.3	80	11.63	70
Northern Australia (NT, WA, QLD)	7.4	29	11.3	59	9.0	54
Darwin	1.5	6	5.4	28	4.2	25
Do Not Know	8.2	32	8.8	46	11.0	66
Answered Question		**392**		**522**		**601**
Skipped Question		46		81		49

Q6 What might make you choose NT seafood over other menu choices when you dine out? (May choose up to 3 categories)

	2015		2014		2013	
	Response					
	%	Count	%	Count	%	Count
Freshness of Local Seafood	88.3	341	87.1	446	88.3	523
Support of NT fishing Industry	73.6	284	75.2	385	68.9	408
Better Flavour	38.9	150	36.9	189	33.1	196
Overall preference of Seafood	20.7	80	19.0	97	17.4	103
Health	18.4	71	18.2	93	16.9	100
Price	17.4	67	18.0	92	25.3	150
Species	15.3	59	16.4	84	23.1	137
Attractiveness of dish	11.1	43	9.6	49	9.8	58
Other	2.6	10	2.0	11	3.7	22
Answered Question		**386**		**512**		**592**
Skipped Question		52		91		58

Q7 Are you aware of seafood labelling requirements for food outlets in the Northern Territory?

	2015		2014		2013	
	Response					
	%	Count	%	Count	%	Count
1 - Not at all Aware	18.4	71	21.5	108	24.8	147
2	13.8	53	15.1	76	14.3	85
3	25.7	99	26.3	132	24.3	144
4	18.2	70	17.9	90	18.2	108
5 - Very Aware	23.9	92	19.1	96	18.4	109
Answered Question		**385**		**502**		**593**
Skipped Question		53		101		57

Q8 How did you hear about the NT seafood labelling laws? (may choose more than one category)

	2015		2014		2013	
	Response					
	%	Count	%	Count	%	Count
Word of mouth	33.0	104	32.9	132	N/A	N/A
Northern Territory Seafood Council	34.9	110	26.9	108	21.7	97
Through Dining Outlets	19.7	62	25.9	104	24	107
Local Media - TV	31.4	99	26.7	107	19.1	85
Local Media - Newspaper	28.3	89	24.2	97	22	98
NT Fisheries	19.7	62	20.5	82	19.3	86
Fishmongers	13.7	43	17.2	69	16.6	74
Internet	16.2	51	11.5	46	12.3	55
Facebook	19.4	61	11.0	44	0	0
Local Media - General	N/A	N/A	N/A	N/A	19.1	130
Local Media - Radio	12.4	39	11.0	44	0	0
Magazines	4.4	14	2.2	9	0	0
Social Media	N/A	N/A	N/A	N/A	10.3	46
Twitter	1.0	3	0.0	0	N/A	N/A
other	4.1	13	5.9	24	9.8	44
Answered Question		**315**		**401**		**446**
Skipped Question		123		202		204

Q9 Seafood not harvested from Australian waters is to be clearly labelled 'imported'. Dishes which contain multiple seafood ingredients, one or more of which have not been harvested in Australian waters, are to be labelled 'Contains imported seafood products'. Would this knowledge of NT seafood labelling laws influence your choice of seafood purchases in the immediate future?

	2015		2014		2013	
	Response					
	%	Count	%	Count	%	Count
Yes	93.8	361	95.3	481	92.7	548
No	6.2	24	4.8	24	7.3	43
Answered Question		**385**		**505**		**591**
Skipped Question		53		98		59

Q10 How successful have the NT labelling laws been in assisting you to make an informed choice between Australian and imported seafood?

	2015		2014		2013	
	Response					
	%	Count	%	Count	%	Count
Excellent Success	27.0	103	20.7	104	18.8	111
Good Success	33.0	126	36.5	183	31.0	183
Successful	25.4	97	26.1	131	30.8	182
Limited Success	12.6	48	14.1	71	15.7	93
No Success	2.1	8	2.6	13	3.7	22
Answered Question		**382**		**502**		**591**
Skipped Question		56		101		59

Q11 Do you think that you are eating more NT seafood today compared to 18 months ago?

	2015		2014		2013	
	Response					
	%	Count	%	Count	%	Count
Much More	19.7	75	20.6	102	21.7	128
Slightly More	31.8	121	34.3	170	32.0	189
Same	44.6	170	40.7	202	41.9	247
Slightly Less	2.6	10	3.2	16	2.7	16
Much Less	1.3	5	1.2	6	1.7	10
Answered Question		**381**		**496**		**590**
Skipped Question		57		107		60

Q12 Overall, do you have a preference for NT seafood over other available seafood?

	2015		2014		2013	
	Response					
	%	Count	%	Count	%	Count
1 - No Preference for NT Seafood	0.8	3	2.6	13	2.7	16
2	1.3	5	2.8	14	3.2	19
3	13.4	51	12.2	60	14.7	87
4	28.2	107	27.1	134	30.7	181
5 - High Preference for NT Seafood	56.3	214	55.3	273	48.6	287
Answered Question		**380**		**494**		**590**
Skipped Question		58		109		60

Q13 'NT seafood product taste better and has superior quality to the rest' when dining in the NT. Do you Agree?

	2015		2014		2013	
	Response					
	%	Count	%	Count	%	Count
1 - Disagree strongly	0.3	1	0.6	3	0.3	2
2 - Disagree	3.4	13	3.6	18	2.6	15
3 - No Real View	16.6	63	18.2	90	21.9	129
4 - Agree	47.6	181	49.2	243	49.5	291
5 - Highly Agree	32.1	122	28.3	140	25.7	151
Answered Question		**380**		**494**		**588**
Skipped Question		58		109		62

Q14 How much of a premium price would you be willing to pay for NT labelled seafood over seafood that is imported?

	Up to 0%		Up to 10%		11% - 20%		21% - 30%		30% plus		Total Response count	Total Skipped
	Response											
	%	Count	%	Count	%	Count	%	Count	%	Count		
2015												
Fish & Chips / Take Away	7.7	29	32.5	123	32.7	124	14.0	53	13.2	50	**379**	59
Restaurant	5.5	21	20.3	77	35.6	135	21.4	81	17.2	65	**379**	
2014												
Fish & Chips / Take Away	9.8	48	39.1	192	29.5	145	12.8	63	8.8	43	**491**	112
Restaurant	5.9	29	26.7	131	35.2	173	17.9	88	14.3	70	**491**	
2013												
Fish & Chips / Take Away	N/A		51.5	302	31.6	185	10.9	64	6.0	35	**586**	64
Restaurant	N/A		30	176	41.5	234	19.8	116	8.7	51	**586**	

Q15 How much of a premium price would you be willing to pay for NT labelled seafood over seafood that is from elsewhere in Australia?

	Up to 0%		Up to 10%		11% - 20%		21% - 30%		30% plus		Total Response count	Total Skipped
	Response											
	%	Count	%	Count	%	Count	%	Count	%	Count		
2015												
Fish & Chips / Take Away	15.6	59	44.3	168	25.9	98	8.2	31	6.1	23	**379**	59
Restaurant	14.0	53	37.2	141	27.2	103	13.7	52	7.9	30	**379**	
2014												
Fish & Chips / Take Away	20.3	99	45.3	221	21.1	103	9.0	44	4.3	21	**488**	115
Restaurant	15.4	75	39.4	192	26.4	129	11.5	56	7.4	36	**488**	
2013												
Fish & Chips / Take Away	N/A		68.3	400	22.5	132	6.8	40	2.4	14	**586**	64
Restaurant	N/A		52.4	307	32.6	191	10.4	61	4.6	27	**586**	

Q16 How important is choosing NT seafood for the following occasions?

	1 Not Important		2 Some Important		3 Important		4 Very Important		5 Extremely Important		Total Response count	Total Skipped
	Response											
	%	Count	%	Count	%	Count	%	Count	%	Count		
2015												
Mid - week Takeaway Meal	9.3	35	22.0	83	31.8	120	16.2	61	20.7	78	**377**	61
Fish & Chips	6.1	23	18.3	69	32.9	124	20.4	77	22.3	84	**377**	
Hotel / Motel / Club Meals	3.5	13	11.7	44	34.0	128	26.3	99	24.7	93	**377**	
Restaurant Meal	1.6	6	6.1	23	26.0	98	32.1	121	34.2	129	**377**	
Home Meal	2.1	8	9.0	34	23.6	89	29.2	110	36.1	136	**377**	
Home Meal with Guests	1.6	6	7.2	27	20.2	76	28.7	108	42.4	160	**377**	
2014												
Mid - week Takeaway Meal	9.9	48	24.3	118	31.7	154	18.9	92	15.2	74	**486**	117
Fish & Chips	6.8	33	17.5	85	32.5	158	26.1	127	17.1	83	**486**	
Hotel / Motel / Club Meals	3.5	17	13.0	63	30.3	147	31.3	152	22.0	107	**486**	
Restaurant Meal	3.3	16	7.0	34	19.8	96	36.6	178	33.3	162	**486**	
Home Meal	3.1	15	9.9	48	23.1	112	33.7	164	30.3	147	**486**	
Home Meal with Guests	2.9	14	7.0	34	19.3	94	32.9	160	37.9	184	**486**	
2013												
Mid - week Takeaway Meal	10.9	64	25.3	148	31.6	185	17.3	101	14.9	87	**585**	65
Fish & Chips	7.5	44	24.3	142	29.1	170	23.1	135	16.1	94	**585**	
Hotel / Motel / Club Meals	5	29	16.1	94	30.1	176	29.2	171	19.7	115	**585**	
Restaurant Meal	2.9	17	8.9	52	22.9	134	35.6	208	29.7	174	**585**	
Home Meal	3.8	22	11.1	65	25	146	31.3	183	28.9	169	**585**	
Home Meal with Guests	3.4	20	8.5	50	20.2	118	31.1	182	36.8	215	**585**	

Q17 Are you aware of the 'Support NT Caught' campaign?

	2015		2014		2013	
	Response					
	%	Count	%	Count	%	Count
Yes	65.0	243	61.4	300	48.1	284
No	35.0	131	38.7	189	51.9	307
Answered Question		**374**		**489**		**591**
Skipped Question		64		114		59

Q18 Where have you seen this logo? (You may choose more than one category)

SUPPORT NT CAUGHT

	2015		2014		2013	
	Response					
	%	Count	%	Count	%	Count
Seafood Retailers	73.9	181	71.5	216	75.7	215
Posters and Banners	34.3	84	37.8	114	27.8	79
TV Ads	31.0	76	34.1	103	17.3	49
Newspaper	32.7	80	31.1	94	32.0	91
Menus	24.1	59	27.2	82	N/A	N/A
Facebook	33.9	83	25.5	77	N/A	N/A
Internet	25.7	63	20.2	61	25.7	73
Recipe Cards	20.4	50	17.2	52	12.3	35
Stickers	21.6	53	16.6	50	18.3	52
Magazines	15.5	38	13.3	40	14.8	42
Stubbie Coolers	7.8	19	6.6	20	7.0	20
T-shirts	7.4	18	5.6	17	3.2	9
Twitter	2.5	6	0.7	2	N/A	N/A
Other	5.3	13	2.3	7	4.9	14
Answered Question		**245**		**302**		**284**
Skipped Question		193		301		366

Q19 Are you aware of the Darwin commerical fishing/seafood precinct at Fisherman's Wharf?

	2015		2014		2013	
	Response					
	%	Count	%	Count	%	Count
Yes	88.5	215	89.3	267	88.7	252
No	7.4	18	8.4	25	8.5	24
Don't Know	4.1	10	2.3	7	2.8	8
Answered Question		**243**		**299**		**284**
Skipped Question		195		304		366

Q20 Do you think the Northern Territory's commercial fishing industry is sustainable?

	2015		2014		2013	
	Response					
	%	Count	%	Count	%	Count
Yes	57.5	215	48.5	235	52.7	311
No	6.4	24	5.8	28	4.6	27
Not Sure	36.1	135	45.8	222	42.7	252
Answered Question		**374**		**485**		**590**
Skipped Question		64		118		60

Q21 In your opinion, does the NT commercial seafood industry deliver benefits in terms of:

	1 No Benefit		2 Minor Benefit		3 Benefit		4 Strong Benefit		5 Extremely Benefit		Total Response count	Total Skipped
	Response											
	%	Count	%	Count	%	Count	%	Count	%	Count		
2015												
Employment	0.8	3	6.7	25	38.9	145	35.1	131	18.5	69	**373**	65
Fresh Seafood Availability	0.5	2	3.8	14	23.6	88	36.2	135	35.9	134	**373**	
Favourable NT Image	2.1	8	7.0	26	24.4	91	34.3	128	32.2	120	**373**	
2014												
Employment	0.4	2	9.9	48	42.4	205	29.0	140	18.2	88	**483**	120
Fresh Seafood Availability	1.2	6	5.8	28	24.6	119	40.2	194	28.2	136	**483**	
Favourable NT Image	1.9	9	5.0	24	30.6	148	34.2	165	28.4	137	**483**	
2013												
Employment	0.8	5	6.6	39	44.9	265	32.2	190	15.4	91	**590**	60
Fresh Seafood Availability	1.2	7	3.2	19	26.4	156	39	230	30.2	178	**590**	
Favourable NT Image	1.5	9	5.1	30	28.5	168	39.5	233	25.4	150	**590**	

Q22 Are you aware of the Northern Territory Seafood Council and its representative role for the NT seafood industry?

	2015		2014		2013	
	Response					
	%	Count	%	Count	%	Count
Yes	55.5	207	48.9	236	48.6	287
No	26.8	100	34.0	164	34.2	202
Don't Know	17.7	66	17.2	83	17.1	101
Answered Question		**373**		**483**		**590**
Skipped Question		65		120		60

Q23 Gender

	2015		2014		2013	
	Response					
	%	Count	%	Count	%	Count
Male	39.5	145	31.9	152	32.1	185
Female	60.5	222	68.1	324	67.9	391
Answered Question		**367**		**476**		**576**
Skipped Question		71		127		74

Q24 Number of people in your household?

	2015		2014		2013	
	Response					
	%	Count	%	Count	%	Count
1	10.4	38	8.2	39	7.6	44
2	39.5	145	33.2	158	41.1	237
3	18.0	66	19.8	94	20.1	116
4	21.8	80	24.6	117	21.4	123
5	5.2	19	9.9	47	6.1	35
6	3.5	13	2.1	10	2.6	15
7 Plus	1.6	6	2.3	11	1	6
Answered Question		**367**		**476**		**576**
Skipped Question		71		127		74

Q25 Age of survey respondent

	2015		2014		2013	
	Response					
	%	Count	%	Count	%	Count
18 -25	4.6	17	4.2	20	5.0	29
26 - 33	10.1	37	17.4	83	20.0	115
34 - 41	18.5	68	23.7	113	18.8	108
42 - 49	25.1	92	22.5	107	23.4	135
50 - 57	19.4	71	16.8	80	18.9	109
57 - 64	13.4	49	10.9	52	10.1	58
65+	9.0	33	4.4	21	3.8	22
Answered Question		**367**		**476**		**576**
Skipped Question		71		127		74

Q26 Length of time in the NT

	2015		2014		2013	
	Response					
	%	Count	%	Count	%	Count
Less Than Six Months	1.4	5	0.6	3	2.8	16
6 Months - 1 Year	1.1	4	2.7	13	4.3	25
1 - 3 years	9.0	33	12.2	58	10.6	61
3 Years Plus	88.6	325	84.5	402	82.3	474
Answered Question		**367**		**476**		**576**
Skipped Question		71		127		74

Q27 Darwin postcode

	2015		2014		2013	
	Response					
	%	Count	%	Count	%	Count
Answered Question		N/A		**476**		**576**
Skipped Question		N/A		126		74

Q28 Contact details for draw prize

	2015		2014		2013	
	Response					
	%	Count	%	Count	%	Count
Email		N/A	100	468	99.8	548
Name		N/A	85.26	399	81.6	448
Phone Number		N/A	64.74	303	63.6	349
Answered Question		N/A		**468**		**549**
Skipped Question		N/A		135		101

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Seafood Council

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