Consumer Survey 2013:
Awareness of the Northern Territory seafood labelling laws and the commercial seafood industry

Chris Calogeras and Katherine Sarneckis

July 2013

Northern Territory Seafood Council
Working today for a sustainable tomorrow
Northern Territory Government
C-AID Consultants

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.

Special thanks to Ms Donna English of the NTSC for her ongoing enthusiasm.

Competitive Edge's work on the development and analysis of the survey were critical to the success of this project.

The input from the community in undertaking the survey was invaluable.

CONTENTS

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 so that diners could use this information to make informed decisions regarding their seafood dining preferences.

Following this implementation, the Northern Territory Seafood Council (NTSC), with the support of the Fisheries Research and Development Corporation (FRDC), undertook a project[1] (FRDC Project – 2009) to assess the impact of the legislation on fish retailers (includes restaurants, hotels, motels, takeaways, cafés, fish and chip shops) in the Darwin region, and on consumer choice. The survey results demonstrated the high level of consumer support for seafood labelling laws that identify imported seafood and that this knowledge was a key influencer in their decision making, but there was a degree of confusion as to what the labelling laws involved.

In 2009, following the introduction of the labelling laws, the NTSC 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 NTSC members. To test the effectiveness of the campaign, and with support from the NT Government, the NTSC has developed an annual online survey to take place over a three year period, 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.

This report provides a copy of the survey questionnaire (Appendix I) and a summary of the key findings from the first of these 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 NTSC.

Survey findings clearly show that following freshness, labelling that identifies product origin and supporting the NT commercial fishing industry were major factors that influence consumers' decisions to purchase seafood when dining (Appendix II, Q3 and Q4).

Results showed that most consumers had a strong preference for NT seafood over any other available seafood, as they believed that NT seafood tasted better and had a superior quality to the 'rest' (Appendix II, Q13). The survey also showed that over 90% of the time, when choosing a meal for any occasion, NT seafood has a level of importance (Appendix II, Q16). This was even more important when dining out in a restaurant or having a meal at home with family or guests.

Respondents indicated they were willing to pay a premium for NT seafood (Appendix II, Q14 and Q15). For example, in a restaurant situation, 41.5% responded they were prepared to pay between an 11-20% premium, and 28.5% were prepared to pay in excess of a 20% premium for NT seafood over imported seafood. Similarly, when compared to seafood sourced from elsewhere in Australia, 32.6% of respondents were prepared to pay between an 11-20% premium and a 15.0% a 20% premium.

1 *Tracking the impacts on seafood consumption at dining venues arising from the Northern Territory's seafood labelling laws. 2011. Calogeras, Morgan, Sarneckis, Cooper and Lee. FRDC Final Report 2009/216*

Key influencers in the decision to purchase NT Seafood when dining out were again strongly based around the freshness of local seafood and supporting the NT fishing industry due to the benefits it provides to the community (Appendix II, Q6 and Q21). Better flavour, price and the type of species were also key considerations. Notably nearly all respondents indicated that an understanding of the NT Seafood Labelling laws would influence their choice of seafood purchase.

Strong industry support was shown through the survey findings, as respondents believed that 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 (Appendix II, Q21).

The 'Support NT Caught' campaign, which is supported by the NTSC, has gained a level of community awareness, but there is still significant scope to increase this by continuing, and increasing, the strong presence in the seafood retailer space, and also looking to improve recognition through alternate media, especially internet and social media.

Consumer awareness of the NT seafood labelling laws appears to have improved since the FRDC Project – 2009 survey, but over 50% of respondents in this survey still displayed an incorrect understanding of the laws. A multi faceted approach still appears to be a sound model to improve awareness, perhaps with a focus on cost effective areas of greatest community engagement, including through dining outlets and electronic and social media. Notwithstanding the relatively low level of formal understanding of the laws, over 80% of respondents believe the NT seafood labelling laws have been successful in assisting them to make informed decisions relating to choices when selecting seafood.

The key messages from this survey are that:

- consumers respond positively to seafood labelling that provides them with 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, supporting the local industry and labelling were key decision makers when purchasing seafood
- the NT commercial fishing industry is seen to deliver a range of benefits to the community
- consumer awareness of the labelling laws are improving but understanding could be improved, possibly with more explicit legislation to identify the source of seafood product, and targeted media
- the 'Support NT Caught' campaign has gained a level of community awareness which provides a strong base for future growth of the brand.

2. BACKGROUND AND PROJECT OBJECTIVES

The fish retailer seafood labelling laws have been in place in the NT since November 2008 and the 'Support NT Caught' campaign since 2009. The NTSC felt that is was timely to assess the impact of the labelling requirements on consumers, and the effectiveness of the campaign and the NTSC education material to identify any opportunities to better target resources. Specific issues to consider were the:

- community awareness of the NTSC's promotional footprint within the NT;
- community awareness of the commercial 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 commercial fisheries in the NT.

To assist the NTSC to undertake this assessment, the NT Government provided resourcing to develop and undertake an annual online survey of NT residents over a three year timeframe. The data from this first survey will provide the baseline information as the project information builds over the life of the project. 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

The survey was developed and conducted by Competitive Edge, an independent marketing research company with 40 years experience in surveying consumer, industrial and service industries, including seafood and environmental studies. The survey was conducted through an online survey, accessed through a weblink. Awareness to this link was increased significantly through advertising to NT residents on Facebook.

The survey was promoted through local newspaper media reports, a newsletter distributed by the NTSC, and a Direct Letter (DL) flyer specifically designed and developed for supporting the survey, and by email to all current stakeholders. The flyer was distributed to major restaurants and retailers selling seafood, as well as agencies and other stakeholder and consumer interest groups within the Darwin community. DL flyers were also included in two letterbox drops to specific suburbs over a two week period. Week one suburbs were; Leanyer, Woodleigh Gardens, Wulagi, Anula, Malak, Northlakes, Marrara and Karama. Week two suburbs were Darwin City, Larrakeyah, Cullen Bay, The Gardens, Stuart Park, Tipperary Waters, Bayview, Woolner, The Narrows, Ludmilla, Parap, Fannie Bay and the RAAF Base.

The survey questions (Appendix I) sought 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 survey design was constructed so that questions were unbiased, it was statistically robust enough so that findings could be reported with a high level of confidence, and participation would warrant an appropriate sample for results to be indicative of the general Top End population.

4. RESULTS

The survey was responded to by over 600 Territorians between 28th February and 12th March 2013. This was well in excess of the 350 respondents required for a 95% confidence level for the survey results. The survey advertising through Facebook resulted in 55% of the surveys being completed through that platform, with the balance completed directly through the weblink.

Tabulated results of responses from the survey are shown at Appendix II. Following is a summary of the survey findings based around key headings.

It should be noted that although the FRDC Project – 2009 tested similar variables to those in this current survey, due to different methodology, it is not possible to always compare the findings from the two surveys, however where that is possible and applicable comparisons have been provided.

4.1 Seafood Consumption

Survey respondents were predominately people who are considered 'low seafood consumers' from dining or take-away venues which means they only eat seafood once a fortnight or less (a total of 75.6% at restaurants and 78% from takeaways).

Conversely, respondents were 'high seafood consumers' in the home, having seafood once or more a week (a total of 72.4%) (Appendix II, Q2).

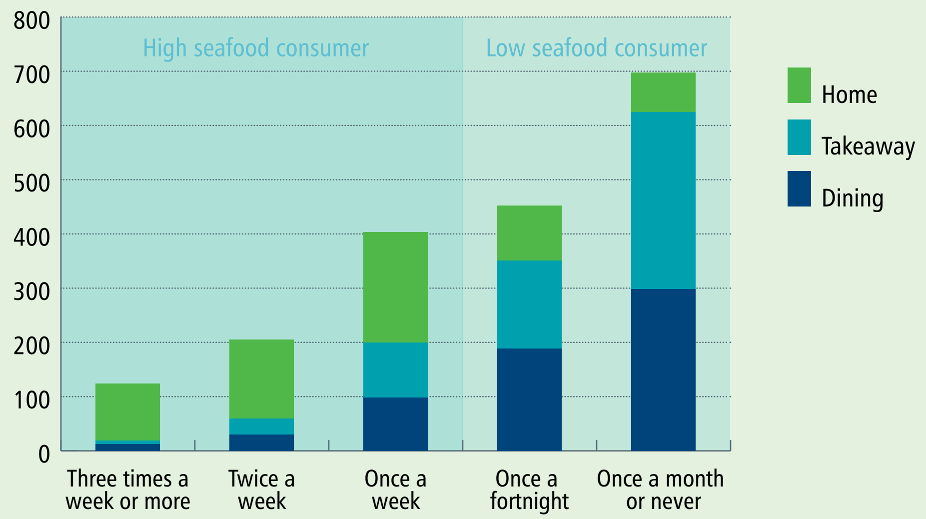

Figure 1: Consumption of fish by Territorians

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 variables 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.

The survey results showed clearly that the most important factor influencing purchase decisions in a restaurant/café and takeaway outlet was product 'Freshness' (extremely important in a restaurant/café 77.7%, and takeaways 71.2%) (Appendix II, Q3 and Q4). If analysis includes all responses that stated that 'Freshness' was of at least some importance, this accounted for 99.5% in a restaurant/café and 98.5% for takeaways.

Following 'Freshness', many of the values rated closely with only small parts of a percentage difference between individual values and across venue type. The following were the key decision value influences that rated highly in both venue types.

'Country of Origin' was considered extremely important and rated 3rd most important in a restaurant/café (47.0%), and 2nd in takeaways (43.5%). If analysis includes all responses that stated that 'Country of Origin' was of at least some importance, this accounted for 88.6% in a restaurant/café and 84.4% for takeaways.

'Support for the NT Industry' was considered extremely important and was rated as the 2nd most important value in a restaurant/café (47.7%), and 4th in takeaways (40.1%). If analysis includes all responses that stated that 'Country of Origin' was of at least some importance, this accounted for 89.9% in a restaurant/café and 87.0% for takeaways.

'Price' was identified as an important value considered by survey participants, rating 4th in a restaurant/café (42.0%), and 3rd in takeaways (40.6%). If analysis includes all responses that stated that 'Price' was of at least some importance, this accounted for 82.5% in a restaurant/café and 87.0% for takeaways.

Although 'Region of Origin', 'Species', 'Wild Caught v Farmed' and 'Menu Option' were all important considerations by respondents, they rated at lower values (than Freshness, Support for Industry, Origin and Price) when consumers were purchasing seafood at a restaurant/café and takeaway outlets.

Whether a product came from 'Sustainable Fisheries' was rated only the 7th most important consideration when purchasing seafood at both venue types. However, 33.6% in a restaurant/café and 32.1% in takeaways still responded that this was an extremely important factor when choosing seafood. If analysis includes all responses that stated that 'Sustainable Fisheries' was of at least some importance this accounted for 84.1% in a restaurant/café and 81.5% for takeaways.

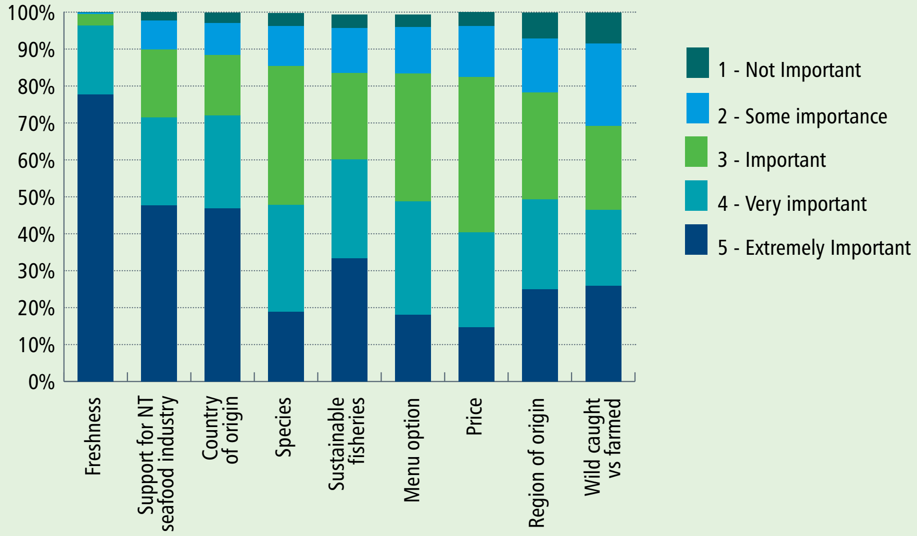

Figure 2: Influencing factors when purchasing seafood in a restaurant or café

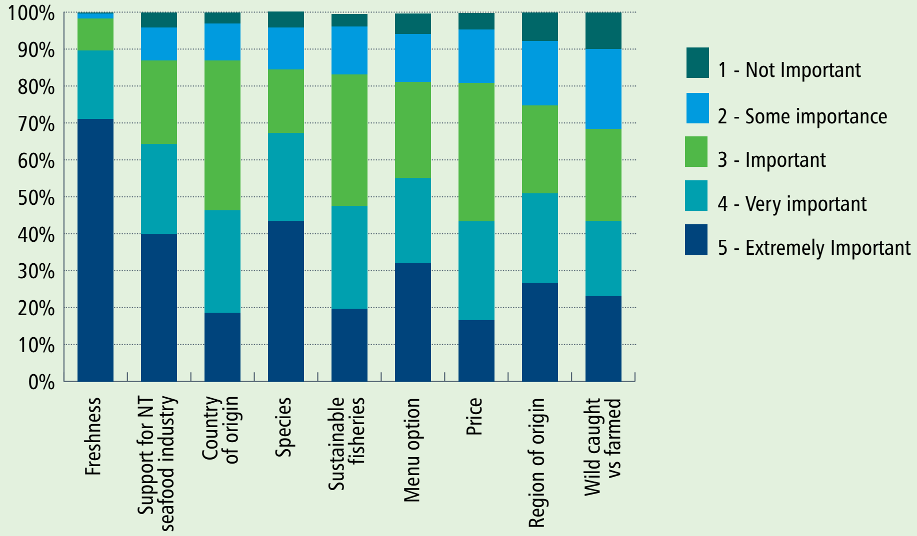

Figure 3: Influencing factors when purchasing seafood from a take away outlet

4.3 Awareness of Labelling Laws

The NT labelling laws are framed such that if seafood on a menu does not have an 'imported' label it means that it must be caught or farmed in Australia, as only imported product has to be identified under the legislation. This causes some level of confusion with people who are unaware of the workings of the legislation.

Survey participants were asked to respond to a question relating to their awareness and understanding of the current NT labelling laws.

Forty five point six percent (45.6%) of respondents identified correctly that if a seafood item on a menu didn't have 'imported' attached to it, it was Australian product, whilst only 18.6% assumed the product was imported (Appendix II, Q5). A further 35.8% were wrong in their assumption of where seafood came from or didn't know.

This is a significant improvement from the data obtained in the FRDC Project – 2009, where over 40% of respondents assumed that seafood which did not have a label of origin was imported, with a further 23% indicating they did not know the origin of unlabelled seafood.

More respondents (24.8%) were 'not at all aware' of the labelling requirements in the NT than those that were 'very aware' (18.4%) (Appendix II, Q7[2]). This is a large decrease in those 'not at all aware' when compared to responses from Darwin residents in the 2009 survey, when 40% rated their awareness 'not at all aware' (pg 25, FRDC Project – 2009). However, a large proportion of respondents from this latest survey (63.4% – based[2] on those who rated 1, 2 or 3) could be considered to have little or no awareness of the requirements.

Survey participants were asked to indicate how they had heard about the NT seafood labelling laws, and were provided a range of categories to select from. Many respondents indicated they became aware of the laws via multiple mechanisms, with quite an even spread amongst most of the media types (Appendix II, Q8).

The most effective communication method, as reported by those surveyed, was via various local media mechanisms (i.e. 'general' 29.1%, 'newspapers' 22.0%, and 'TV' 19.1%). This showed a large increase when compared to the 2009 survey, especially with respect to 'general' increasing from 12%, 'newspapers' from 18%, and 'TV' 16% (Appendix II, Q8 and pg 25, FRDC Project – 2009)

All other methods showed quite large increases also when compared to the 2009 survey; 'NT Fisheries' were now 19.3% compared to 9% in 2009, 'NTSC' now 21.7% compared to 11% and 'Fishmongers' now 16.6% compared to 6% (Appendix II, Q8 and pg 26, FRDC Project – 2009). Interestingly 'internet' increased from only 5% in 2009 to 12.3% in the latest survey, and 'social media' which wasn't part of the 2009 survey was 10.3%.

'Dining outlets' although showing a small decrease of 3% from the 2009 survey to 24%, was still the 2nd most important source of information.

2 *Based on 1 and 2 unaware, 3 being neutral, 4 and 5 aware.*

Survey participants were asked to consider a scenario 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 in the immediate future. The response of 'yes' by 92.7% of respondents clearly shows that labelling that identifies the origin of seafood, is a compelling driver in the purchasing decision making process. This shows a 10% increase since the 2009 survey (Appendix II, Q9 and pg 25, FRDC Project – 2009).

In light of the above, over 80% of respondents believe the NT seafood labelling laws have been, in varying degrees, successful in assisting them to make informed decisions relating to choices when selecting seafood (18.8% 'excellent success', 31% 'good success', and 30.8% 'successful'). Only 3.7% believed that it had had 'no success' in assisting them in making an informed choice (Appendix II, Q10).

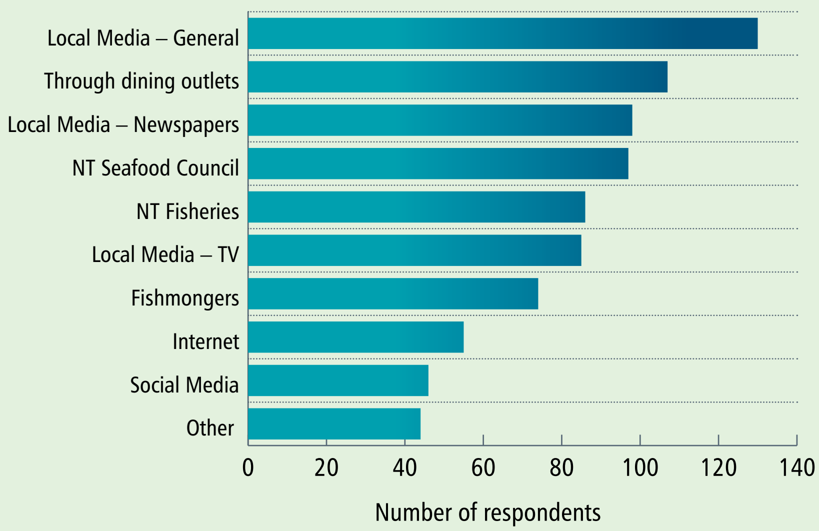

Figure 4: Source of information about NT seafood labelling laws

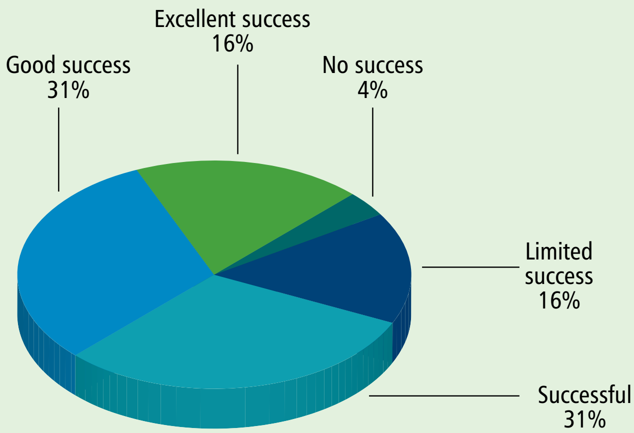

Figure 5: How Territorians rate the success of NT seafood labelling laws

4.4 Promotional Footprint of NTSC

Level of awareness by survey respondents of the 'Support NT Caught' campaign was very close, with 48.1% being aware of the campaign and 51.9% unaware (Appendix II, Q17). It should be noted however that only 43.7% of survey respondents answered this question, so analysis may not accurately reflect general community awareness.

Survey respondents identified that they had seen the 'Support NT Caught' logo through a range of mediums. In 'seafood retailers' was by far the most commonly identified area, with 75.7% of respondents indicating they had seen the logo at that type of venue. 'Newspapers', 'posters and banners' and through the 'internet' were also important medium, accounting for 32.0%, 27.8% and 25.7% respectively (Appendix II, Q18). 'TV adds', 'coolers', 't-shirts', 'stickers', 'magazines' and 'recipe cards' all added to participants' recognition, but were much lower than the top four mediums.

Around half of the respondents (48.6%) were aware of the roles of the NTSC, with the balance unaware of its role (Appendix II, Q22).

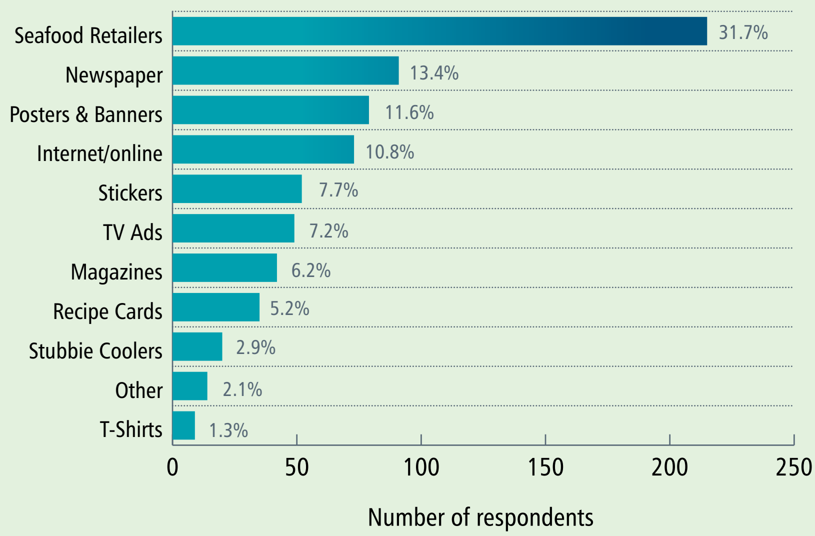

Figure 6: Sources of awareness of the Support NT Caught logo

4.5 Preferences for NT Seafood and Seafood Consumption

Fifty four percent of survey respondents believed that they were eating more seafood than they were 18 months previously (21.7% 'much more' and 32% 'slightly more'). Only 4.4% indicated that their consumption had decreased over the period; i.e. they responded 'much less' or 'slightly less' (Appendix II, Q11).

A 'high preference' (48.6%) and a 'preference' (30.7%) to choose NT Seafood over other available seafood was indicated by respondents. Only 2.7% of respondents indicated they had 'no preference for NT seafood'. (Appendix II, Q12).

Over 75% of respondents believed that NT seafood tasted better and had a superior quality to the 'rest' (25.7 highly agree and 49.5% agree) (Appendix II, Q13). Only 2.9% did not agree with this (0.3% 'strongly disagree' and 2.6% 'disagree').

Participants were asked to consider what might influence them to choose NT seafood over other menu choices when dining out. 'Freshness of local seafood', (88.3%) and 'Support for the NT fishing industry' (68.9%) were the two main survey choices (Appendix II, Q6). 'Better flavour' (33.1%), 'Price' (25.3%) and 'Species' (23.1%) were also identified as other key consideration, but were well below the importance of freshness and industry support.

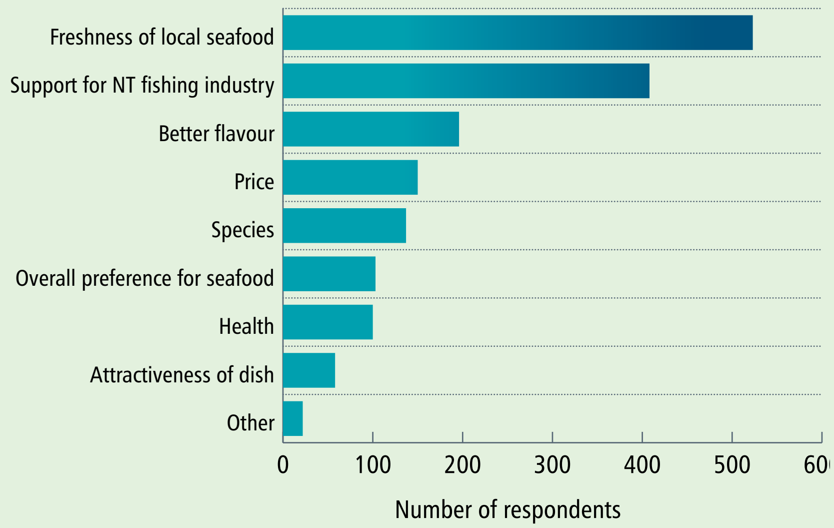

Figure 7: Influencing factors to choose NT seafood over other seafood when dining out

4.6 Value Placed on Australian and NT Caught Seafood

Premium Price

The survey 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 or from elsewhere in Australia. In both scenarios, there was strong consumer indication that there was a willingness to pay a price premium more than 10% for NT labelled seafood over both imported and product sourced from elsewhere in Australia.

For NT labelled versus imported seafood at takeaway venues, 51.5% of respondents indicated that they were prepared to pay up to a 10% premium, 31.6% an 11-20% premium, and the balance (16.9%) over a 20% premium. At a restaurant, 30.0% responded that that were prepared to pay up to a 10% premium, whilst 41.5% were prepared to pay between an 11-20% premium, and 28.5% were prepared to pay in excess of a 20% premium (Appendix II, Q14).

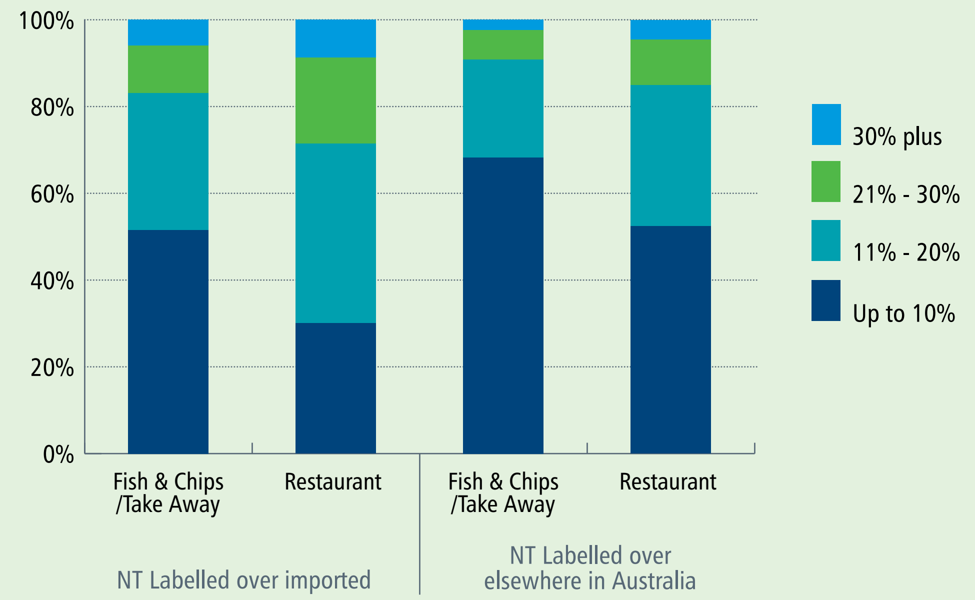

Figure 8: Amount of premium consumers are willing to pay for NT or Australian fish

For NT labelled versus seafood from elsewhere in Australia at takeaway venues, 68.3% of respondents indicated that they were prepared to pay up to a 10% premium, 22.5% an 11-20% premium, and the balance (9.2%) over a 20% premium. At a restaurant, 52.4% responded that they were prepared to pay up to a 10% premium, whilst 32.6% were prepared to pay between an 11-20% premium, and 15.0% a 20% premium (Appendix II, Q15).

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'.

Choosing NT seafood was rated as being 'important' when having a meal at a 'takeaway' (31.6%), 'fish and chips' (29.1%) and 'hotel/club' (30.1%). In addition, it was also rated highly as being 'very important' and 'extremely important' in these same venues (Appendix II, Q16).

For restaurants (35.6%) and home meals (31.3%) choosing NT seafood was considered 'very important' and if guests were coming for a meal, 36.8% considered it 'extremely important' (Appendix II, Q16).

The survey showed that, in all instances, over 90% of the time when choosing a meal in any venue type, NT seafood has a major importance (i.e. rated as having 'some importance' or greater). Specifically it was only considered 'unimportant' by 2.9% of respondents for 'restaurant choice', 3.8% for 'home meals' and 3.4% for 'home meal with guests' (Appendix II, Q16).

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).

Overall, the survey showed that between 98% and 99% 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, Q21).

With respect to benefits from 'employment' 44.9% believed it delivered 'benefits', 32.2% 'strong benefits', and 15.4% felt it was' extremely beneficial' (Appendix II, Q21).

With respect to benefits from 'fresh seafood availability' 26.4% believed it delivered 'benefits', 39.0% 'strong benefits', and 30.2% felt it was 'extremely beneficial' (Appendix II, Q21).

With respect to benefits of a 'favourable NT image' 28.5% believed it delivered 'benefits', 39.5% 'strong benefits', and 25.4% felt it was 'extremely beneficial' (Appendix II, Q21).

In addition as previously mentioned although a large percentage (42.7%) of respondents felt the NT commercial fishing industry was sustainable (Appendix II, Q20).

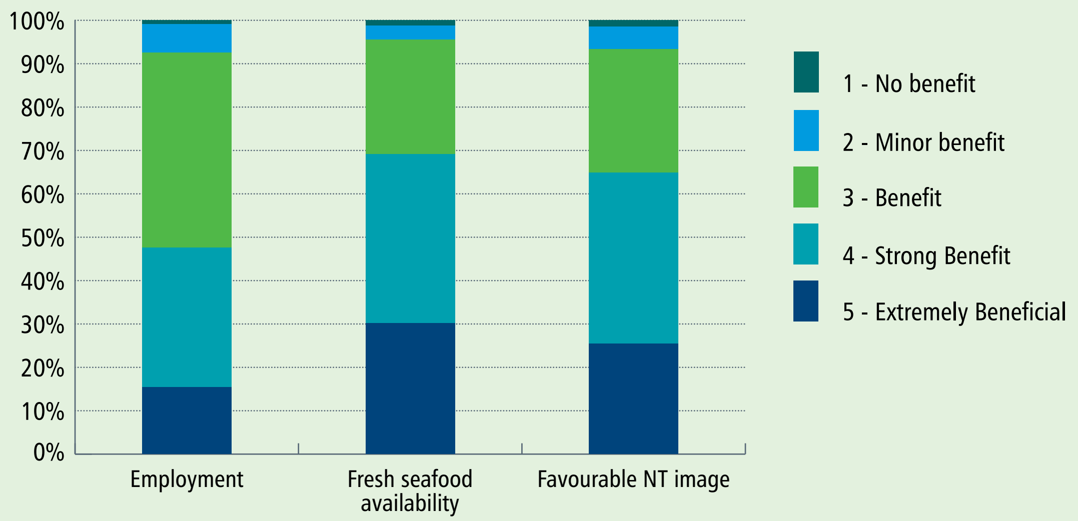

Figure 9: Community benefits of the commercial NT seafood industry

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 NTSC, 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 seafood consumers from food service industries (restaurants/cafés and takeaways), but the majority had seafood once or more a week at home.

This provides two opportunities to seek to increase consumption of NT seafood; firstly to encourage greater uptake in food service areas, and also to seek to increase the use of NT seafood as a part of the weekly home meal. Focusing 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 that this provides them with freshness. Country of Origin was also a key value and this would be for a number of reasons; including a close link to freshness and supporting local industry.

As price is also a major consumer driver, industry must ensure that there is a 'value for money' proposition to encourage consumers to choose NT seafood. This can't be just price based, it 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 highlighting the consumer values they provide such as; delivering local product, providing employment, and building consumers sentiment relating to the industry's sustainability credentials.

5.3 Awareness of Labelling Laws

It appears consumers are gaining a greater understanding of the NT seafood labelling laws and what they mean, but over 50% still responded incorrectly as to the operation of the laws.

A range of suggested actions were provided in the final report on the FRDC Project – 2009 and many of these still stand, specifically to simplify the labelling process so that product is identified as being either imported or Australian on menu and boards. This should significantly reduce the miscomprehension that remains.

A multi faceted approach would still appear to be a sound model to improve awareness. Electronic media appears to be an area that has grown significantly and may benefit from increased resourcing, or as part of any realignment of expenditure seeking to optimise awareness.

There would also be benefit in further refining what 'general media' relates to, so as to better define investment options in that space.

5.4 Promotional Footprint of NTSC

There is significant scope to improve consumer awareness of the 'Support NT Caught' campaign, with less than 50% of respondents being aware of the campaign. It should also be noted that 56.3% of people skipped this question in the survey. This may indicate that the level of recognition is actually much lower. This however 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, but also looking to improve recognition through alternate media, especially internet and social media.

Although sustainability is a whole of globe industry issue with the community in general, the NT commercial fishing industry is well placed to position itself at the forefront of sustainability. Over 50% of respondents believe the industry is sustainable, with only a small proportion (4.6%) believing it isn't, meaning 42.7% were unsure. This is a large audience whose opinion could be shifted, and to link 'Support NT Caught' with sustainability. It would be beneficial to determine the reasons for the uncertainty relating to sustainability credentials, and then determine if there is an awareness campaign, lead by the NTSC, that could address this.

5.5 Preferences for NT Seafood and Seafood Consumption

Over 50% of survey respondents believed that they were eating more seafood than they were 18 months ago, and there was a strong preference (79.4%) 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 was also very strong drivers to Support the NT fishing industry.

The survey reiterates that knowledge of the origin of seafood impacts on consumer choice, and labelling as NT product is a major influential factor for consumers when choosing seafood.

This highlights the value of having labelling laws clearly and consistently detailed at the point of sale. Notably 93% of respondents indicated that an understanding of the NT Seafood Labelling laws would influence their choice of seafood purchase.

5.6 Value Placed on Australian and NT Caught Seafood

Many respondents indicated that they were prepared to pay a price premium more than 10% for NT labelled seafood compared to any other seafood in a restaurant/café, takeaways and for home consumption. Consumers indicated 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, over 70% were prepared to pay an 11% plus premium for NT seafood, with almost 30% of those willing to pay 21% plus. When compared to seafood sourced from elsewhere in Australia, 47.6% prepared to pay 11% plus. This shows that there is a definitive price premium in restaurants available to the industry by clearly labelling seafood as NT product.

At a takeaway level, there is again a premium placed on NT labelled seafood. When compared to imported product, almost 50% of respondents were prepared to pay an 11% plus premium for NT seafood over imported seafood, with almost 17% of those willing to pay 21% plus. When compared to seafood sourced from elsewhere in Australia, 31.7% were prepared to pay 11% plus, with just under 10% prepared to pay a 21% plus premium. This highlights that there is also a definitive price premium 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 major role and influenced over 90% of choices when choosing a meal in any dining occasion. This was particularly so when dining at restaurants, at home and when guests were coming for a meal. Although not as important, it was still a major consideration when having takeaways, fish and chips, and at hotels and clubs.

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 around 95% 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.

APPENDIX I: SURVEY

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 two people at Hanumans, 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					

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

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

***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 – General
- Internet
- Social Media
- Through dining outlets

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

***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

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

	Up to 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?**

	Up to 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

***18. Where have you seen this logo recently? (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/online
- ☐ 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

***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 two people at Hanumans, 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 announced shortly and contacted.

APPENDIX II: SURVEY RESULTS

1. Do you eat seafood?			
		Response Percent	Response Count
Yes		**98.8%**	**641**
No		1.2%	8
		answered question	**649**
		skipped question	

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	Rating Count
Dining	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
Home	16.7% (105)	23.3% (146)	**32.4% (203)**	16.1% (101)	11.5% (72)	627
					answered question	**627**
					skipped question	**23**

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	Rating Count
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 for 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
Species	3.4% (21)	10.9% (67)	**37.7% (231)**	28.9% (177)	19.0% (116)	612
Wild caught versus farmed	8.3% (51)	22.3% (137)	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
					answered question	**616**
					skipped question	**34**

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	Rating Count
Country of origin	4.2% (24)	11.4% (65)	17.2% (98)	23.7% (135)	**43.5% (248)**	570
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 for 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 versus farmed	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
					answered question	**573**
					skipped question	**77**

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

	Response Percent	Response Count
Darwin	4.2%	25
NT	11.6%	70
Northern Australia (NT, WA, QLD)	9.0%	54
Australia	**45.6%**	**274**
Overseas	18.6%	112
Don't Know	11.0%	66
	answered question	**601**
	skipped question	**49**

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).

	Response Percent	Response Count
Better flavour	33.1%	196
Attractiveness of dish	9.8%	58
Health	16.9%	100
Price	25.3%	150
Support for NT fishing industry	68.9%	408
Freshness of local seafood	**88.3%**	**523**
Overall preference for seafood	17.4%	103
Species	23.1%	137
	Other (please specify)	22
	answered question	**592**
	skipped question	**58**

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.

	Response Percent	Response Count
1 - Not at all aware	**24.8%**	**147**
2	14.3%	85
3	24.3%	144
4	18.2%	108
5 - Very aware	18.4%	109
answered question		**593**
skipped question		**57**

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

	Response Percent	Response Count
NT Fisheries	19.3%	86
Northern Territory Seafood Council	21.7%	97
Fishmongers	16.6%	74
Local Media – TV	19.1%	85
Local Media – Newspapers	22.0%	98
Local Media – General	**29.1%**	**130**
Internet	12.3%	55
Social Media	10.3%	46
Through dining outlets	24.0%	107
Other (please specify)		44
answered question		**446**
skipped question		**204**

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?

	Response Percent	Response Count
Yes	**92.7%**	**548**
No	7.3%	43
answered question		**591**
skipped question		**59**

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

	Response Percent	Response Count
Excellent success	18.8%	111
Good success	**31.0%**	**183**
Successful	30.8%	182
Limited success	15.7%	93
No success	3.7%	22
Comment		75
answered question		**591**
skipped question		**59**

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

	Response Percent	Response Count
Much more	21.7%	128
Slightly more	32.0%	189
Same	**41.9%**	**247**
Slightly less	2.7%	16
Much less	1.7%	10
answered question		**590**
skipped question		**60**

12. Overall, do you have a preference for NT seafood over other available seafood? Please indicate your preference on the scale below.	Response Percent	Response Count
1 – No Preference for NT seafood	2.7%	16
2	3.2%	19
3	14.7%	87
4	30.7%	181
5 – High Preference for NT seafood	**48.6%**	**287**
	answered question	**590**
	skipped question	**60**

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.	Response Percent	Response Count
1 - Disagree Strongly	0.3%	2
2 - Disagree	2.6%	15
3 - No Real View	21.9%	129
4 - Agree	**49.5%**	**291**
5 - Highly Agree	25.7%	151
	answered question	**588**
	skipped question	**62**

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

	Up to 10%	11% - 20%	21% - 30%	30% plus	Rating Count
Fish & Chips / Take Away	**51.5% (302)**	31.6% (185)	10.9% (64)	6.0% (35)	586
Restaurant	30.0% (176)	**41.5% (243)**	19.8% (116)	8.7% (51)	586
				answered question	**586**
				skipped question	**64**

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?

	Up to 10%	11% - 20%	21% - 30%	30% plus	Rating Count
Fish & Chips / Take Away	**68.3% (400)**	22.5% (132)	6.8% (40)	2.4% (14)	586
Restaurant	**52.4% (307)**	32.6% (191)	10.4% (61)	4.6% (27)	586
				answered question	**586**
				skipped question	**64**

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	Rating Count
Mid-week take-away meal	10.9% (64)	25.3% (148)	**31.6% (185)**	17.3% (101)	14.9% (87)	585
Fish & Chips	7.5% (44)	24.3% (142)	**29.1% (170)**	23.1% (135)	16.1% (94)	585
Hotels / Motel / Club meal	5.0% (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)	25.0% (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
					answered question	**585**
					skipped question	**65**

17. Are you aware of the (Support NT Caught) campaign?

SUPPORT NT CAUGHT

	Response Percent	Response Count
Yes	48.1%	284
No	**51.9%**	**307**
answered question		**591**
skipped question		**59**

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

	Response Percent	Response Count
Posters and Banners	27.8%	79
TV Ads	17.3%	49
Newspaper	32.0%	91
Stubbies Coolers	7.0%	20
T-Shirts	3.2%	9
Stickers	18.3%	52
Magazines	14.8%	42
Recipes Cards	12.3%	35
Internet/online	25.7%	73
Seafood retailers (supermarket/fish shop)	**75.7%**	**215**
	Other (please specify)	14
	answered question	**284**
	skipped question	**366**

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

	Response Percent	Response Count
Yes	**88.7%**	**252**
No	8.5%	24
Don 't Know	2.8%	8
	answered question	**284**
	skipped question	**366**

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

	Response Percent	Response Count
Yes	**52.7%**	**311**
No	4.6%	27
Not sure	42.7%	252
answered question		**590**
skipped question		**60**

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	Rating Count
Employment	0.8% (5)	6.6% (39)	**44.9% (265)**	32.2% (190)	15.4% (91)	590
Fresh seafood availability	1.2% (7)	3.2% (19)	26.4% (156)	**39.0% (230)**	30.2% (178)	590
Favourable NT image	1.5% (9)	5.1% (30)	28.5% (168)	**39.5% (233)**	25.4% (150)	590
answered question						**590**
skipped question						**60**

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

	Response Percent	Response Count
Yes	**48.6%**	**287**
No	34.2%	202
Don't Know	17.1%	101
answered question		**590**
skipped question		**60**

23. Gender

	Response Percent	Response Count
Male	32.1%	185
Female	**67.9%**	**391**
answered question		**576**
skipped question		**74**

24. Number of persons in your household

	Response Percent	Response Count
1	7.6%	44
2	**41.1%**	**237**
3	20.1%	116
4	21.4%	123
5	6.1%	35
6	2.6%	15
7 plus	1.0%	6
answered question		**576**
skipped question		**74**

25. Age of survey respondent

	Response Percent	Response Count
18-25	5.0%	29
26-33	20.0%	115
34-41	18.8%	108
42-49	**23.4%**	**135**
50-57	18.9%	109
57-64	10.1%	58
65+	3.8%	22
answered question		**576**
skipped question		**74**

26. Length of time in the NT

	Response Percent	Response Count
Less than six months	2.8%	16
6 months – 1 year	4.3%	25
1 – 3 years	10.6%	61
3 years plus	**82.3%**	**474**
	answered question	**576**
	skipped question	**74**

27. Darwin Postcode

	Response Count
	576
answered question	**576**
skipped question	**74**

28. By providing your email address below, you will automatically go into the draw to win one of four dining vouchers for two people at Hanuman, 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.

	Response Percent	Response Count
Email contact (Essential)		
Name (Optional)		
Phone Number (Optional)		
	answered question	**549**
	skipped question	

NORTHERN TERRITORY
Seafood Council
WORKING TODAY FOR A SUSTAINABLE TOMORROW

Northern Territory Government

C-AID CONSULTANTS