Consumer Research
Australian Prawn Farmers Association

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Non-technical Summary

This marketing report focuses on consumer perceptions and preferences when buying prawns.

The report is based on both relevant secondary research and empirical marketing knowledge as well as primary consumer research, focusing on younger consumers. The instruments used encompass in-depth interviews, focus groups, intercept surveys and a quantitative survey. Key areas for investigation include product origin and colour influences, product form preferences, barriers to purchase and communication.

Key findings of the study include:

A strong expressed preference amongst Australians for locally grown prawns, but not necessarily behaviour that supports this attitude. Also, the lack of an Australian offering in some prawn sub-categories.

Clear preferences for fresh over frozen and whole over peeled product forms, with an even spread between cooked and green forms, and expressed lack of interest in pre-packaged prawns.

Price is by far the most common reason people don't buy prawns.

Most consumers do eat prawns, however only 1 in 3 young consumers is likely to purchase his/her own prawns.

Buying behaviour of prawns is generally low in involvement and habitual.

Consumers buy from repertoires, so may 'switch' between prawns and other meat/seafood products from one purchase situation to the next.

The limited number of 'brand-attribute' associations that consumers have with prawns.

From these key findings six main areas of strategy have been identified:

COMMUNICATIONS: The need to highlight the value of prawns to consumers, increase brand-attribute associations, establish an overarching 'Australian Farmed Prawns' brand, emphasise the product's Australian origin, and reallocate investment.

PRODUCT FORM: Penetration of additional sub-categories, and the need to increase MAP pack awareness.

PRICING: Making price comparable with other animal protein products.

TARGET MARKET: Marketing prawns to the consumer in the household who is likely to actually be in the purchase situation.

DISTRIBUTION: Penetrating existing distribution channels.

INDUSTRY DEVELOPMENT: within the Australian prawn aquaculture industry.

NOTE: Where empirical marketing knowledge is highlighted in the report, the product category of 'prawns' (or 'Australian farmed prawns') is often referred to as a 'brand'.

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Introduction
to the project

The following marketing report focuses on consumer preferences when buying prawns.

The problem addressed in the project relates to the small 'share-of-stomach' that prawns currently have in Australia, in comparison with other animal protein products. A major focus is to determine methods to increase the consumption of prawns amongst the Generations X and Y markets. Through analysis and research of the market for prawns with a specific focus on these younger consumers, it is hoped that an idea of the best future direction for the industry can be determined.

> **"The problem addressed in the project relates to the small 'share-of-stomach' that prawns currently have in Australia..."**

There are a number of key objectives for this project:

1. To gauge understanding of the influence that an Australian grown logo has on a consumer's decision to purchase prawns. Also to determine the price point at which the logo becomes negligible.

2. To understand the impact that flesh colour has on consumers' willingness to buy prawns and on their preference of prawn variety.

3. To ascertain consumer preferences in regard to product form (fresh/frozen, peeled/whole, cooked/green) and packaging, including pack size and style.

4. To determine barriers to purchase.

5. To establish an appropriate and effective communications strategy for the APFA.

The methodology included the use of both secondary and primary research, with an emphasis on the latter in the following forms:

- Focus groups with people from Generations X & Y, to gain a basic understanding of the barriers to purchase and scope for consumers' thought processes when it comes to purchasing prawns (a precursor to research interstate).

- Consumer surveys in retail outlets in Sydney and Brisbane, both mainstream and independent.

- In-depth interviews with various stakeholders along the supply chain.

- A quantitative survey given to UniSA students and other Generation Y consumers in Adelaide.

Product and Organisational Analysis

The Australian Prawn Farmers Association (APFA) was established in 1993 as a representative body for Australian prawn farms in the states of Queensland and New South Wales. To date, there are approximately 55 association members.

The purpose of the APFA is not only to represent its members, but also to act as an intermediary between the farms and end users, as well as to explore and implement new initiatives within the industry. The APFA also works with government to preserve and develop the industry.

The APFA deals directly with three main organisations. Blue Harvest and Aquamarine Marketing are agents that handle the processing, distribution and marketing of prawns from various independent prawn farms throughout Queensland and New South Wales. Seafarm is an integrated company that owns and operates its own hatchery, farm, processing and sales and marketing operations, and markets prawns under the 'Crystal Bay Prawns' brand.

Figure 2 provides a map of the various major brands that exist within the Australian farmed prawn industry. Looking at it through this perspective, the Australian farmed prawn industry (and Australian prawn industry in general) contrasts with other Australian produce industries such as lamb and bananas, which utilise a single, overarching brand (see Figure 1). While in the prawn industry, each supplier promotes using its own brand, marketing communication in the lamb and banana industries is streamlined. This latter strategy has proven to be an extremely successful method for increasing awareness and sales[1].

Use of an overarching brand has greatly helped other industries increase awareness and sales

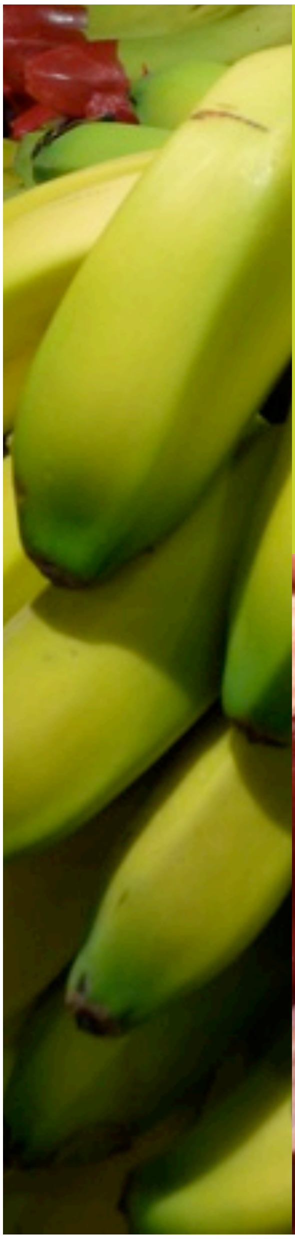

Figure 1: Brands employed by the Australian Lamb and Banana industries

We love our Lamb

AUSTRALIAN BANANAS

Make your body sing!

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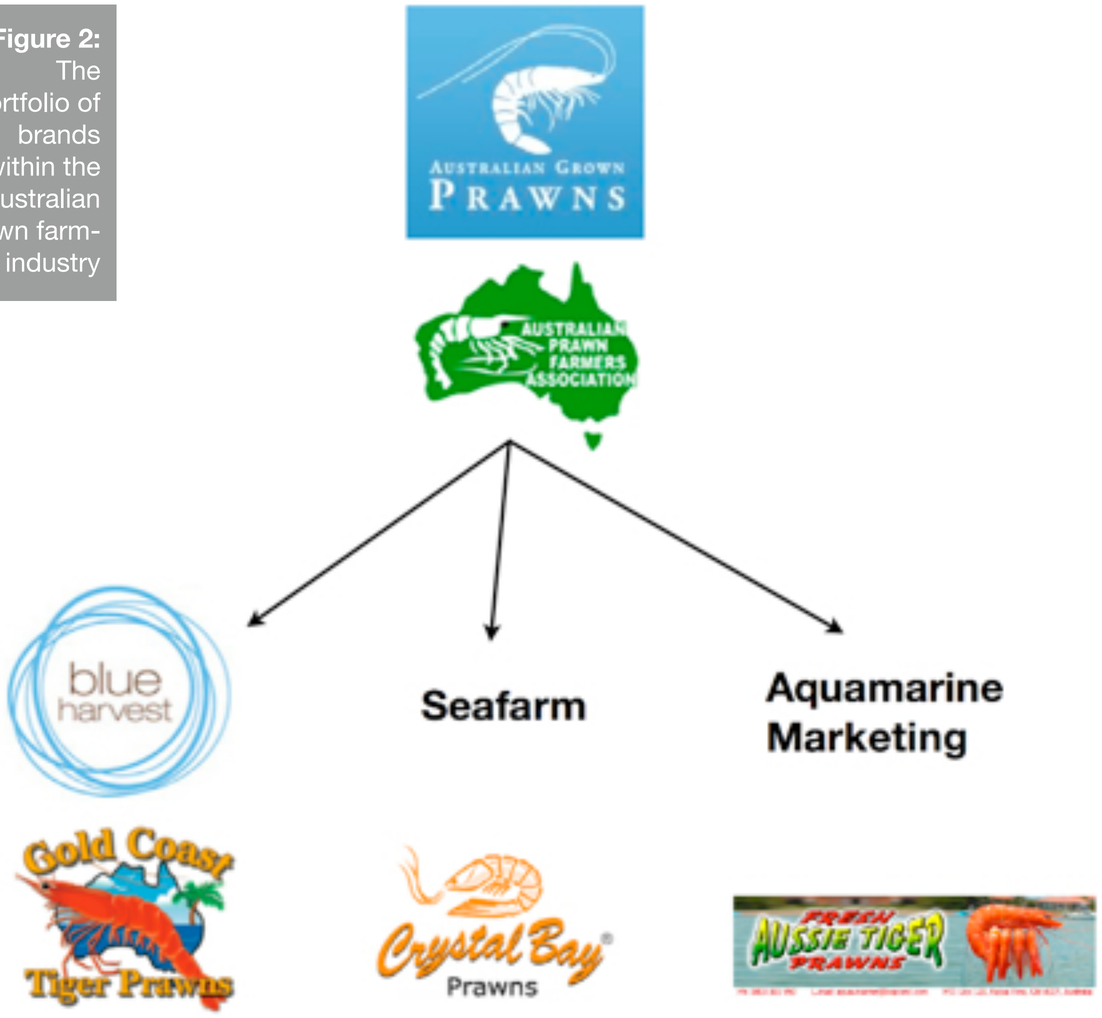
[1] As evinced by Janice Byrnes, Senior Brand Manager, Meat and Livestock Australia; and David Chenu, Domestic Marketing Manager, Horticulture Australia, at the Australian Prawn and Barramundi Farmers' Conference 2009, Townsville QLD.

The prawn varieties sold through the three key association members consist of the following:

Tiger prawns marketed under the ‘Gold Coast Tiger Prawns’ and ‘Aussie Tiger Prawns’ brands.

Black tiger prawns (Penaeus Monodon) are a specific variety farmed in Australia. These prawns are distinguished by a significant ‘stripe’ and are comparatively larger in size than other farmed prawn varieties. They are generally the preferred choice for a whole, cooked prawn, and as such, are most commonly sold in this form. Farmed varieties are harvested and available fresh during the earlier months of the year, with a frozen product available in the remaining months.

Figure 2: The portfolio of brands within the Australian prawn farming industry

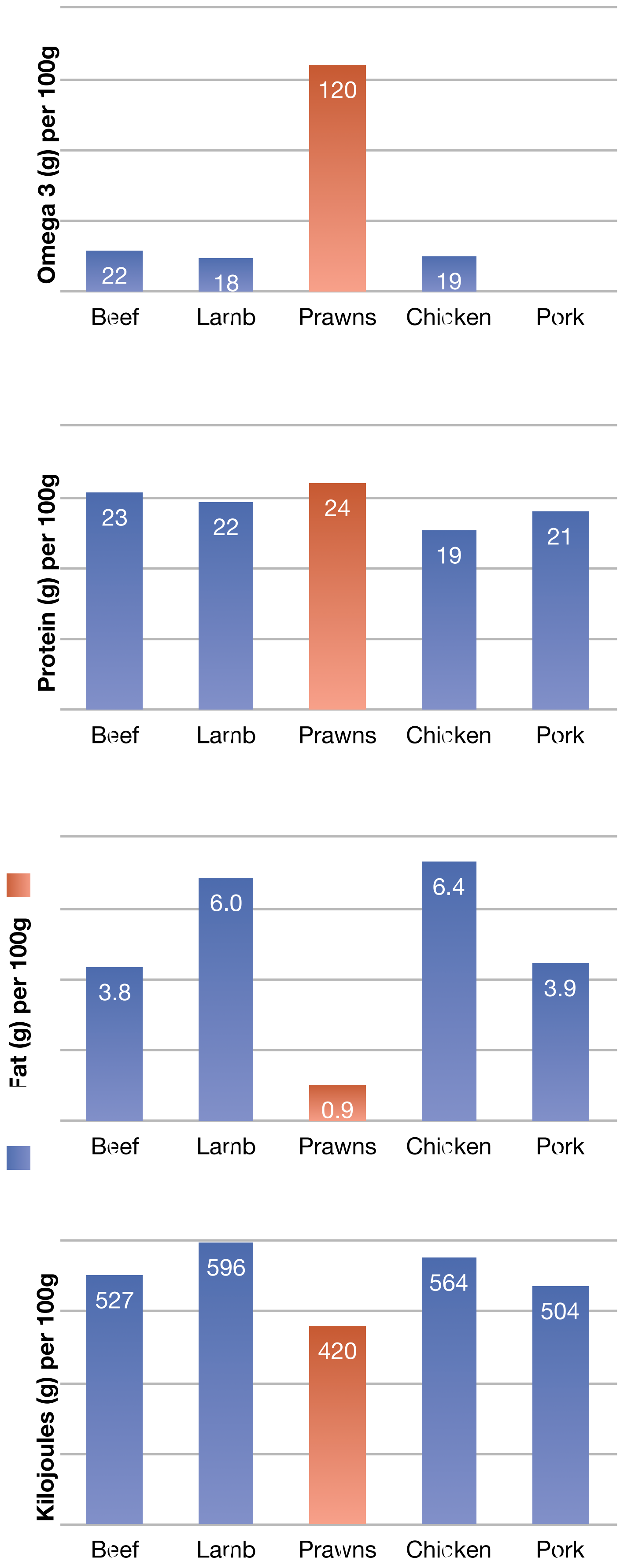


Banana prawns marketed under the ‘Crystal Bay Prawns’ brand.

Farmed banana prawns (Fenneropenaeus Merguiensis) are smaller in size than tiger prawns, and noticeably paler in colour. They are generally preferred as a cooking prawn, though they are offered in stores in both green and cooked forms. The warm climate of Seafarm’s location in Cardwell, North Queensland, enables these prawns to be harvested and offered fresh, year round. This is a significant competitive advantage in that for wild-caught and imported prawns, the product must be frozen before sale (at least at some stages during the year for wild-caught).

At this stage, Australian farmed prawns are generally sold to the consumer loose in deli cabinets (in either fresh or frozen form depending on the variety and time of year). Retail packs, in the form of Modified Atmosphere Packaging (MAP) and other pre-packaged options, have also been trialled in Australian supermarkets with varying levels of success. It is important to note that Australian farmed prawns are not offered in peeled form for the Australian market, due to the high cost of processing associated with this. Similarly, in the form of pre-packaged frozen bags, generally an Australian product is not currently available.

At the commercial level (e.g. food service and the supermarkets themselves) prawn options are in the form of 5, 10 and 18kg boxed packs.



Figures 3, 4, 5 and 6:
The per 100g omega 3, protein, fat and kilojoule contents of different animal protein products

> **"Prawns are an extremely wholesome food..."**

Prawns are an extremely wholesome food, with numerous health benefits:

- High in selenium and iodine (currently lacking in young Australian children[2]), as well as zinc, iron and calcium.
- Comparatively higher in omega 3 and protein than other non-seafood animal protein products[3] (see Figures 3 and 4).
- Comparatively lower in fat and kilojoules and than other non-seafood animal protein products (see Figures 5 and 6)

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[2] Li M, Eastman CJ, Waite KV, Ma G, Zacharin M, Topliss DJ, Harding PE, Walsh JP, Ward LC, Mortimer R, Mackenzie E, Byth K and Doyle Z. Are Australians iodine deficient? The results of the Australian National Iodine Nutrition Study. *Med J Aust* 2006;184:165-169.

[3] Australian Grown Prawns Healthy Eating www.australianprawns.com.au/healthyeating.php#a

Price comparisons of animal protein products

	Chicken	Beef	Tiger Prawns (16-20/lb)	Banana Prawns (21-30/lb)
/kg price range	$4-17	$9-40	$25-30	$20-26
example product /kg price	Breast fillet $14	Porterhouse steak $17	Whole cooked $26	Whole cooked $23
Per serve (main component)	200g breast $2.80	200g fillet $3.40	150g (6 prawns) $3.90	150g (8 prawns) $3.45
Per serve (minor part of dish)	100g $1.40	100g $1.70	75g (3 prawns) $1.95	75g (4 prawns) $1.73

Table 1: The per kg and per serve price comparison between different animal protein products

Per kilogram, prawns are relatively more expensive than other animal protein products, with prices ranging from $11/kg for an imported Vannamei to $30+/kg for an Australian Tiger Prawn (particularly around Christmas time). On a per serve basis, however, the cost is not so differentiated. A standard serving of prawns, where they are the main component of the dish, is 6 large prawns, while only around 3-4 per serve are required in a dish like a laksa or marinara[4].

This equates to a per serve price of around $4 for the former and $2 for the latter (assuming the example pricing and sizing stipulated in Table 1, above), which is relatively comparable with chicken breast or steak.

> **"Per kilogram, prawns are relatively more expensive than other animal protein products..."**
>
> **but per serve...**

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[4] Serving sizes based on personal communication with chefs as well as home cooks who are familiar and regularly cooking with prawns

Market Analysis

This report is focussed on the Australian market for prawns, within the broader market for seafood, looking at both current consumers and non-eaters[5]. The market is currently made up of both farmed and wild-caught prawns, which our research shows are not differentiated by consumers at point of purchase[6]. More than 70% of Melbourne, Sydney and Perth consumers are not concerned whether their fish/seafood comes from wild stocks or aquaculture[7]. This is a contrast to the perception in the seafood industry, that consumers have negative associations with farmed seafood.

Of all food-based primary industries in Australia, the seafood industry ranks fourth, after beef, wheat and milk[8]. Within that industry, prawns are the most frequently consumed seafood by consumers[8]. 2008-09 output states that Australian farmed prawn production was at 3925 tonnes, an increase of 30% volume and 34% value within the industry[9].

Australian supply for its domestic seafood market may decrease in future years, with an estimated 2020 seafood production that meets less than 25% of Australian domestic demand[5]. It is also predicted that the demand for seafood in developing countries will increase which will be met with an increase in their local supply.

In regard to communications within the current seafood market, an important observation is that currently, point of sale (POS) is fairly cluttered. This channel appears to be the most-utilised medium for many seafood brands. In the context of the industry, it is therefore the environment in which the Australian consumer is probably the most bombarded with information. Additionally, websites are a common form of communication for seafood brands, providing the consumer with a greater depth of information about the product (such as recipe ideas and health benefits). It is important to note that such a medium does not 'reach out' to the consumer, but rather requires the consumer to 'come to you'. Whilst having an informative website is important, it should be a supplementary means of communication rather than the primary channel. Radio is another less common communication medium used. However, this medium is highly fragmented, and advertising spots tend to be bought on a per-station basis, which therefore in practice limits its reach[10]. Furthermore, stations do tend to appeal to distinct market segments, which again limits reach[11].

Additionally, the physical nature of prawns and their distinctive appearance make visual advertising media an ideal choice.

The seafood industry is the fourth largest food-based primary industry in Australia

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[5] For the purpose of this project, non-eaters are those consumers who do have a propensity to buy (i.e. are not allergic to prawns), but do not.

[6] See Appendix 2: focus group findings

[7] Retail Sale and Consumption of Seafood – Melbourne 2006

[8] Dundas-Smith, P. & Huggan, C. An overview of the Australian seafood industry – April 2006

[9] Information sourced directly from APFA

[10] Nelson-Field, K 2009, 'Different? Or much of the same? A descriptive study of the demographic and product usage profiles of media audiences, with implications for targeting strategy', PhD thesis, Ehrenberg-Bass Institute for Marketing Science, University of South Australia.

Typical route to market

Prawns are grown in Australian farms and harvested around two to three times per year. Generally this is done ‘to order’, with animals kept in farm ponds until required. The farm processing facility is often located on site, and involves sorting, cooking (if not to be sold green), and cooling of prawns. Packaging (in its different forms) can then also take place, before the product is transported by refrigerated truck to the wholesale and retail outlets (such as markets, supermarkets and fishmongers), where it is sold to the consumer. Important to note is that the processing, distribution and sales steps may be carried out by an agent, as is the case with Blue Harvest and Aquamarine Marketing in the AFPA.

There are six external environmental factors that affect the Australian market for prawns:

Political

In 2005-06 Queensland only made up 9% of seafood farms in Australia (see Figure 7)[11]. This has led to the Queensland Government’s interest to grow the industry and support development of new and existing seafood farming operations in the state, through additional funding and research & development.

Vannamei prawn farming has been prohibited under Australian Law, in order to preserve and protect native prawn species[12].

Economic

There are several significant economic differences between the prawn farming industry in Australia and those of other countries. Lower costs associated with production and labour, emphasised by comparatively massive economies of scale, mean that foreign producers can run far more efficiently than the Australian industry. Increasing worldwide prawn aquaculture production[13] will put downward pressure on prawn prices, accentuated by ‘cheapening’ imports due to a strengthening Australian dollar.

While negatively impacting many industries, the Global Financial Crisis of 2008 actually had the effect of stabilising and promoting seafood sales at the retail level[14] as more and more consumers avoided the expense of eating out in restaurants etc. This shift in place of purchase, caused by people’s lower disposable income, may have the effect of positioning seafood as more of a realistic ‘at-home’ meal option in the future.

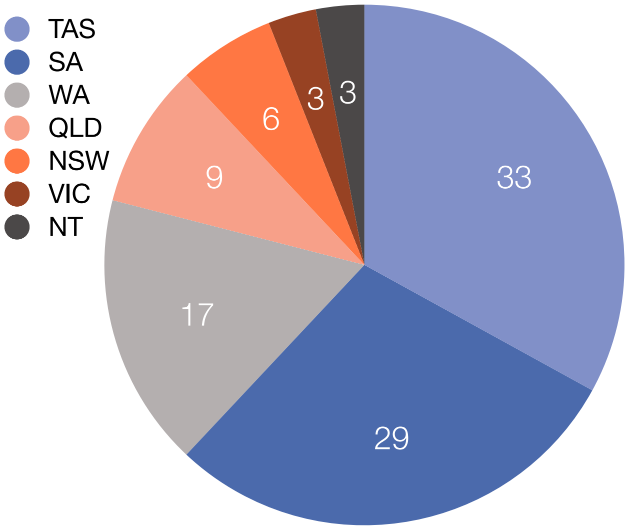

Figure 7: The proportion (%) of seafood produced by each Australian state/territory

Demographic

Research indicates that the largest in/out of home consumption of seafood is the market of people aged 40-59 (baby boomers), with 15-19 year olds showing the lowest consumption[15]. Presumably, this contrast between the two groups is due to differences in their awareness and regard for the health benefits of seafood, as well as disposable income differences.

Another demographic factor is Australia’s aging population. Over the next 90 years, the current 13% of the population aged 65+ is expected to increase to 29-32[16]. Seafood is a category widely recognised as being appropriate for the health and well-being of older people, so we can expect this ‘high consumption group’ to grow in the future.

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[11] Dundas-Smith, P. & Huggan, C. An overview of the Australian seafood industry – April 2006

[12] As evinced by Warren Lewis, Director, Aqua-Marine Marketing Pty Ltd

[13] As evinced by Jaques Gabaudan, DSM Nutritional Products, Aquaculture Center Asia Pacific, at the Australian Prawn and Barramundi Farmers’ Conference 2009, Townsville QLD.

[14] As evinced by Donald Keith, seafood purchasing officer for Woolworths

[15] Retail Sale and Consumption of Seafood – Melbourne 2006

[16] Australian Bureau of Statistics – Scenarios for Australia’s aging population
http://www.abs.gov.au/ausstats/abs@.nsf/0/95560b5d7449b135ca256e9e001fd879?OpenDocument

Social/cultural

In Australia, seafood continues to be considered by many consumers as a somewhat luxury item to be consumed when dining out, rather than an everyday meal[17]. Additionally, prawns are most often regarded as a summertime food rather than one to cook with (as is the case in various other countries)[18]. However, important to note is the increasing multiculturalism of Australia, which is both seeing the emergence of ethnic-based submarkets, as well as the development of modern Australian cuisine. Where 'meat and three veg' was once the norm, now fish has become a regular item on weekly menus in many Australian households. However, there appears to still be a lack of education among many Australians as to the different varieties of fish and seafood available, and their various attributes (e.g. exact health benefits).

People are becoming more aware of the health benefits of the foods they eat[19], giving prawns the potential to become a more frequently-considered option. This factor, as well as Australia's aging population (mentioned above), are expected to contribute to a yearly per capita domestic seafood consumption rise from around 11kg to 23kg between 2000 and 2050[20].

Other supplementary social trends in Australian society include a growing presence of convenience foods as well as the ideas of industry sustainability and concern for 'food miles'.

Technological

Possibly the most significant technological development in the prawn industry has been the freezing technologies now available in prawn processing. Such technologies allow the freshness and quality of a prawn to be snap-frozen within only a matter of hours of the prawn leaving the pond. Because of this, a defrosted prawn is now of very similar quality to its fresh counterpart by the time each one reaches the seafood cabinet[20].

Additionally, the emergence of new prawn processing technology is seeing such operations as Australian Prawn Processors Pty Ltd., who are enabling the automated peeling of green prawns, a function that was previously unavailable in Australia. Imported products are highly value added, coming in such forms as peeled, tail/head off, seasoned/marinated, or processed in some other way. This suggests that a decision by Australian prawn producers to simply 'avoid value-adding' (due to the higher associated costs) would leave them vulnerable to heightened competition from importers, and would limit their potential for growth in the future.

Ecological

A somewhat critical situation in Australia is the limited potential for growth in the wild-caught prawn industry, highlighting the need for a future emphasis on aquaculture[21]. The major issue here is that Australia, at this stage, is poorly equipped to cater for a significant increase in prawn aquaculture needs.

There are some ecologically-based limitations to prawn farming in Australia. At this stage, only certain prawn species have been successfully farmed, limiting the scope for product species development. The fact that vannamei prawn farming is prohibited in Australia means that Australian prawn farmers are essentially missing out on a number of advantages of this species. These include lower feed costs, faster growth and more efficient use of pond space[22]. Additionally, prawn farms do require a warm climate. Already this is impacting the ability for a fresh product to be offered all year round (as is the case with Tiger Prawns). Also, this factor limits the potential for prawn farms to be established in the southern states in the future.

> **"People are becoming more aware of the health benefits of the foods they eat..."**

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[17] As evidenced by the qualitative research of focus groups and intercept surveys conducted

[18] e.g. South east Asian cuisine such as that from Thailand and Malaysia uses prawns predominantly in cooked dishes

[19] Dundas-Smith, P. & Huggan, C. An overview of the Australian seafood industry – April 2006

[20] As verified by various APFA members

[21] Dundas-Smith, P. & Huggan, C. An overview of the Australian seafood industry – April 2006

[22] As verified by Warren Lewis, Director, Aqua-Marine Marketing Pty Ltd


MILDURA's FINEST
Super fresh, New Season
Asparagus
$1.99
NEW SEASON
White Nectarines
$14.99
Sth Australian
Organically Grown
Broad Beans

Competitor Analysis

The nature of competition from the perspective of AFPA has a tiered effect. Figure 8 provides a visual representation of these levels. At the broadest level, Australian farmed prawns compete with other animal protein products, narrowing to the most direct competition with wild-caught prawns.

Level 1 Competition: Animal Protein Products

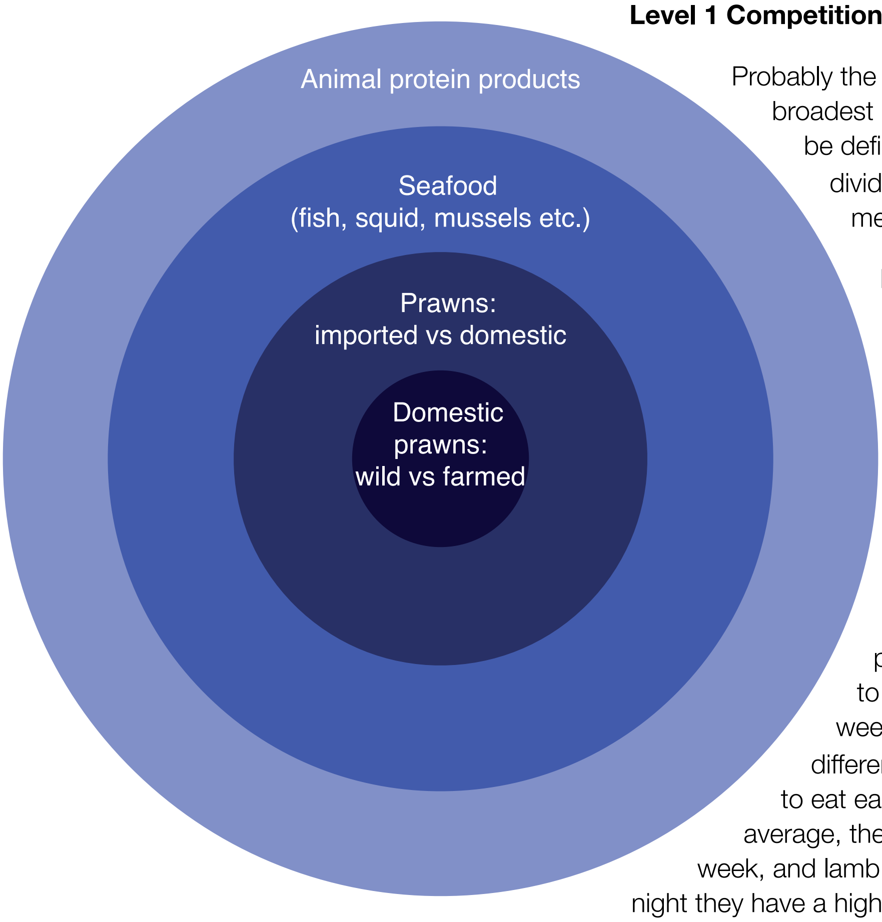

Figure 8: The 4-tiered competitive environment of the Australian farmed prawn industry

Probably the most significant level of competition is the broadest level of animal protein products. This can be defined as 'share of stomach', i.e. how an individual's weekly diet is split between different meats/seafood.

Research into buyer and consumer behaviour has established that within a given product category, consumers buy from a repertoire of brands, switching between each of them from purchase to purchase[23]. In the medium term an individual's repertoire tends to remain fairly consistent, with stable purchase propensities for each brand[24].

Such a generalisation can be extended to people's weekly diets – people don't want to eat the same meal every night of the week, so they eat from a fairly set repertoire of different meals[25]. They have a certain propensity to eat each one of those meals. For example, on average, the Jones family eat chicken three times per week, and lamb once per week; therefore on any given night they have a higher propensity to eat chicken than lamb.

Qualitative research in Sydney and Brisbane has been verified in the context of young Australian consumers, through the quantitative study in Adelaide, looking into the share of stomach of this market of interest. Respondents in both groups were asked to number from 1-3 (where 1 is the most-eaten), the top three meat/seafood products they would eat in a typical week.

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[23] East, T, Wright, M & Vanhuele, M 2008, 'Chapter 2: Customer Loyalty', *Consumer behaviour*: Applications in marketing, Sage.

[24] Ehrenberg, A, Uncles, M and Goodhardt, G 2004, 'Understanding brand performance measures: Using Dirichlet benchmarks', *Journal of Business Research*, vol. 57, no. 12, pp. 1307-1325.

[25] For the purpose of this study, a 'meal' can be classed as a certain animal protein product

An overall count of 'top 3' in the qualitative data (which considered every '1' '2' or '3' response given) indicated 'beef' and 'chicken' to be the most popular, with 'fish', 'lamb' and 'pork' progressively decreasing in popularity, and 'other seafood' trailing behind significantly. This was confirmed in the quantitative data (see Figure 9). Relating back to the theory, the graph indicates that young people have a very low propensity to eat seafood regularly during the week.

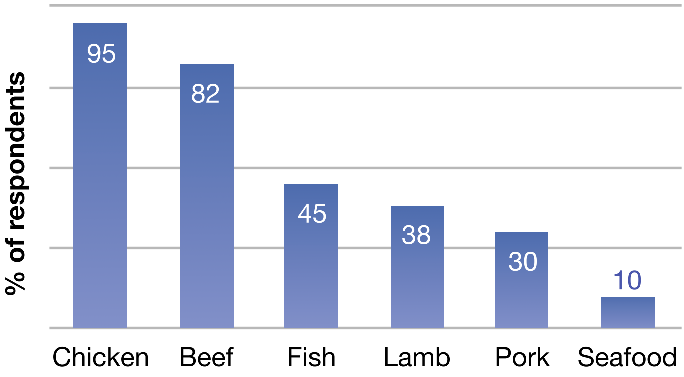

Figure 9: Summary of the 'top 3' quoted meat/ seafood products eaten by young consumers

When only the top 1 (most eaten) was considered, qualitative results significantly segregated 'chicken' at the top, with 'beef' following, and all other products much lower. The quantitative data supports this finding, with 'chicken' further accentuated as most popular animal protein product (see Figure 10).

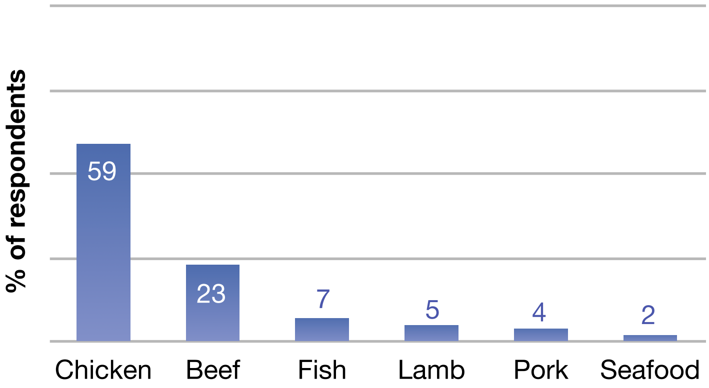

Figure 10: Summary of the 'top 1' quoted meat/ seafood products eaten by young consumers

Level 2 Competition: Other Seafood Products

As well as competing with other animal protein products, prawns compete within their own fish and seafood category. In the overall market for seafood canned fish such as tuna and salmon are, by volume, the most popular amongst consumers, who value their convenience and low cost[26]. Other seafood products with high popularity are fresh salmon (which has seen a huge increase in nationwide sales over the past few years) as well as flake and snapper[27]. As mentioned in the Market Analysis, prawns are currently the most frequently-consumed seafood in Australia[27].

In considering the share of stomach that prawns have amongst consumers, it is natural, as a supplier of prawns, to wonder which other 'meals' that you compete more or less with. The assumption would generally be that prawns compete directly with other crustaceans and molluscs, such as crab, oysters, lobster or mussels[27]. While there is certainly some truth in the substitutability of such seafood products, consumer research would actually suggest an overriding trend.

> **"Young people have a very low propensity to eat seafood during the week"**

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[26] FRDC Retail Sale and Consumption of Seafood – Melbourne 2006

[27] As evidenced by Grahame Turk, Managing Director of the Sydney Fish Market

The duplication of purchase law addresses the idea that all brands share their customers more with big brands and less with small brands[28]. Translating this into the context of share of stomach, as chicken and beef are the most frequently-consumed animal protein products, we would expect to see a pattern whereby buyers of prawns dedicate most of their 'other meal' purchases to chicken, a few less to beef and progressively less to each of the other meal options.

As an example, an individual has planned to cook prawns on the barbecue, but at the time, these are not available. Rather than immediately or exclusively considering alternative mollusc/crustacean options, the high market share of chicken would likely cause he/she to consider an option such as chicken skewers, which in this case could fulfill the same need.

Level 3 Competition: Prawns – Imported versus Domestic

In Australia in 2007/08, imported fresh/frozen prawns accounted for approximately 18,700 tonnes in volume and $167M in value[29]. Meanwhile, the volume of Australian domestic prawns was approximately 14,500 tonnes, with a value of around $184M[30]. Comparatively, the foreign market is a considerable threat to domestic producers, accounting for more than half of the prawns available to Australian consumers.

In addition to this, the projected increase in seafood demand and local supply overseas (as highlighted in the Market Analysis) will likely have a spill over effect – an increased ease, capacity and low cost at which foreign seafood producers can then import into Australia. In fact, the Seafood Importers Association of Australia (SIAA) is already promoting and endorsing imported seafood products (including prawns) as a high quality, inexpensive alternative, that are a necessary offering in the Australian market in order to satisfy its seafood consumption requirements[30] (see Figure 11).

This Thailand Export Quality web-site and associated promotions have been developed in co-operation between the Royal Thai Government's Department of Export Promotion, and the Seafood Importers Association of Australasia Inc.

Figure 11: An example of the kind of advertising for imported prawns being aired in Australia
Source: http://www.seafoodimporters.com.au/index.php

Level 4 Competition: Domestic Prawns – Wild-caught versus Farmed

In 2007/08, tonnage of wild-caught prawns in Australia amounted to 11,473, with a value of $140M[29]. Comparatively, farmed prawns only accounted for 3,088 tonnes in the same period, with a value of $44.2M[29]. Such figures indicate the immense size of the wild-caught prawn industry. This is a significant factor for prawn farmers, since consumers generally do not differentiate between wild-caught and farmed prawns[31]. Essentially, this means that for every 1 farmed prawn in the market, there are 6 wild-caught prawns available to the consumer.

> **"...all brands share their customers more with big brands and less with small brands"**

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[28] Ehrenberg, A 2000, "Repeat Buying – Facts, Theory and Applications", *Journal of Empirical Generalisations in Marketing Science*.

[29] ABARE Australian fisheries statistics 2008

[30] See the SIAA website: http://www.seafoodimporters.com.au/index.php

[31] See Customer Analysis, page 18

Customer Analysis

At the broadest level, the target market for the Australian Prawn Farmers' Association is any people who are not allergic to prawns. Specifically, the target market concerned in this project is consumers in Brisbane and Sydney who are not allergic to prawns, with a focus on younger consumers (in particular, those under 40).

Customer profiles at the individual level

In speaking with various seafood retail operators in Sydney and Brisbane, it is clear that user profiles vary greatly throughout the metropolitan area. For example, the suburb of Blacktown NSW consists of a high Philippino population who buy seafood based on price[32]. In this area, green prawns are far more popular than cooked, and there are minimal differences in quality perceptions between a fresh and a frozen product. On the other hand, a seafood store in Willoughby North NSW will sell to a much more affluent clientele, whose trust and product quality perception of prawns (and often purchase rate) will increase with a higher price[33]. In such a district, almost all consumers will want to find out whether the prawn is Australian.

Customers buy out of habit, and for many purchases, are generally not heavily involved

Customer profiles at the aggregate level – How do buyers buy?

Consumer research has found that consumers tend to buy largely out of habit, which simplifies their lives and suits the fact that for many product purchases (especially those low in importance and risk), they are generally not heavily involved[34]. That consumers buy habitually limits how deeply they are likely to consider all the different alternatives in a buying situation, or their very potential to consider alternatives at all. As a fresh produce item that is a consumable good, prawns are likely to exist in such a low-involvement market.

Non-eaters

An important element of customer analysis is the consideration of non-eaters. For the purposes of this report, those consumers with allergies to prawns were excluded from research activities. Therefore, all non-eaters reported in findings do not eat prawns for a reason other than allergy. The intercept surveys in Brisbane and Sydney and quantitative research in Adelaide asked respondents the question 'do you ever eat prawns?'. Almost all respondents in the qualitative research stated that they do eat prawns, with around 1 in 5 saying 'no'. This was verified in the quantitative data, which also found to hold across genders (see Figure 12).

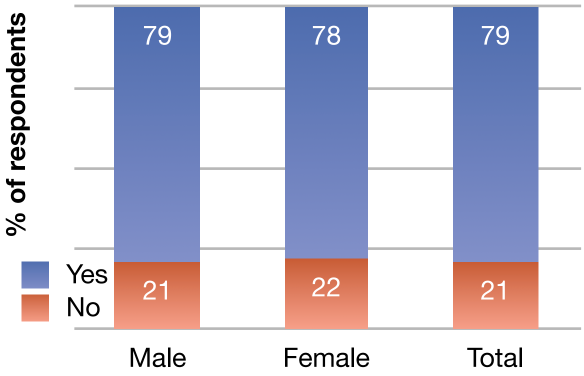

Figure 12: Responses to the question, 'Do you eat prawns?'. Only around 1 in 5 young people do not.

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[32] As evinced by Reno Costi, owner of Costi's @ Westpoint, Blacktown NSW

[33] As evidenced by Danny Khoury, co-owner of Wellstone, Willoughby North NSW

[34] East, T, Wright, M & Vanhuele, M 2008, 'Chapter 1: Ideas and explanations in consumer research', *Consumer behaviour*: Applications in marketing, Sage.

Who buys?

Another important element to consider is the question of ‘who buys’. In both the qualitative and quantitative research the question was asked ‘if there were prawns in the fridge at your house, who would have bought them?’. The response to this in the intercept survey was skewed by the fact that respondents consisted predominantly of shoppers (i.e. the survey was taken in-store) who could be as old as 60+. Taking data only from 18-30 year old consumers, the quantitative results indicated the fact that only about 1 in every 3 young people will be purchasing prawns themselves, with someone else in the household making the purchase in around 2/3 of cases (see Figure 13).

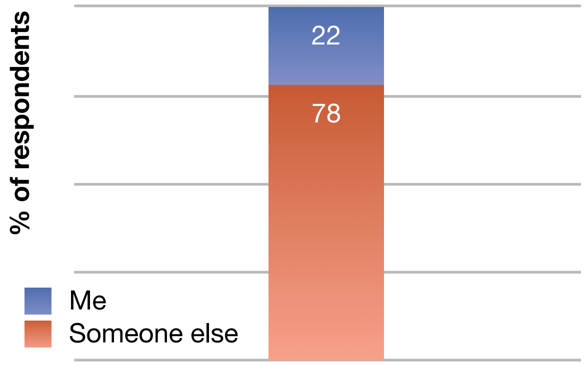

Figure 13: Who (in the household of the young consumer) would be the one most likely to buy prawns. In around 2/3 of cases, someone else in the household will make the purchase.

On observing the individual responses to this question, it is clear that a big factor affecting young people’s consumption of prawns is that many young people still live at home and are therefore not the primary grocery shopper in their household.

In addition to asking ‘who buys’, the intercept survey included the question, ‘how has your consumption of prawns changed over the years?’. There was a clear trend (particularly amongst the older respondents) that as time has passed, people’s consumption of prawns has increased. This fits with empirical findings on generational cohort behaviour, suggesting that interest in certain product categories changes with age, and the interest levels within these age segments remain stable over time[35]. For example, red wine is a product that is generally unpopular amongst younger alcohol drinkers, but will likely become popular amongst these very consumers as they become older and acquire a taste and interest for the product. Such a pattern is likely to be seen with prawns. As consumers become older, their interest in and consumption of prawns increases. In the case of prawns, this is most likely due to changes in their lifestyle (i.e. as mentioned, becoming the primary household shopper) as well as an increase in their disposable income.

How often do buyers buy?

The intercept survey asked consumers how often they purchase prawns. It is clear from the results that there is a strong association between prawns and special occasions – they are considered by many as a ‘once-in-a-while’ food. This is reflected in the fact that majority of people had a monthly or less-than-monthly consumption, with very few people including prawns in their weekly meal repertoire. (See Consumer Perceptions section for more detail).

> **“Interest in certain product categories changes with age...”**

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[35] Von Freymann, J 2006, ‘Age and generational cohort effects in store assessments and choice: a case study’, *Marketing Management Journal*, vol. 16, no. 2, pp. 203-222.

Where do buyers buy?

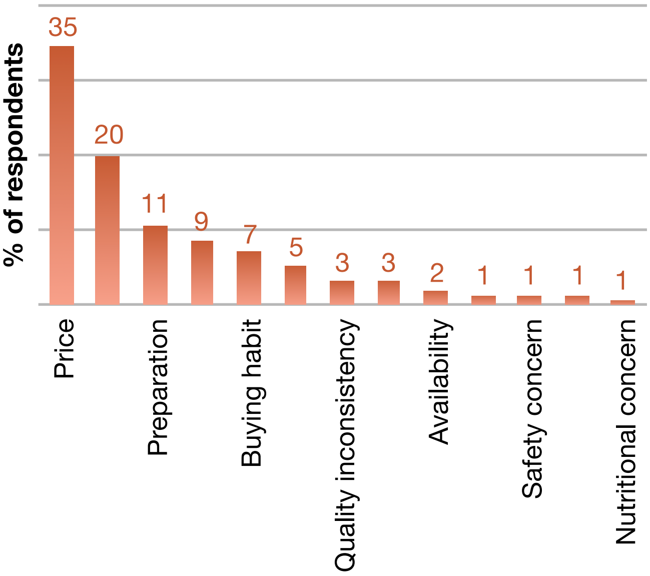
The intercept survey addressed the question of where consumers prefer to purchase prawns. While majority of respondents prefer to (and do) purchase from a specialist, in the form of a fishmonger or seafood wholesaler, there is still a clear demand for prawns to be sold in supermarkets. A supermarket is a regularly-visited location, and therefore is a convenient place to do a one-stop weekly shop, especially those people who are time poor. It is anticipated that the preferred place of prawn purchase will be highly dependent upon the individual and his/her lifestyle.

Why don't people buy?

Both the intercept survey and the quantitative survey asked respondents to quote, unprompted, the number one factor that stops them from buying prawns more regularly. In the qualitative data, 'price' far outweighed other unprompted responses, followed by reasons relating to the respondent or another household member not liking prawns. This followed in the quantitative data (see Figure 14). Interestingly, this data also highlighted the fact that nutritional concern has negligible effect in stopping people from buying prawns, overturning a common industry assumption that consumers are overly concerned about the cholesterol content of prawns.

When prompted with various possible responses, three main reasons for not purchasing prawns emerged amongst the intercept survey participants: 'price', which aligned with the unprompted responses in both the qualitative and quantitative data; 'quality inconsistency' of prawns from purchase to purchase, and 'safety concern' of the product handling, a finding which supported key concerns raised in the focus group (see Appendix 2).

Figure 14: The reasons why people don't buy prawns more regularly. Price is number one.



Aside from the reasons given for not purchasing prawns more often, we would expect the aforementioned pattern of consumers' habitual buying behaviour to be an additional influencing factor. A major reason that people don't eat prawns more regularly is quite possibly because they haven't in the past and therefore 'simply don't think of doing so'. Though we would not expected this to be a conscious thought of the consumer (since, as we know, consumers are not heavily involved in purchases of consumable goods[36]), the survey data does pick up on this habitual behaviour to a certain extent.

There is demand for prawns to be sold in both fishmongers and supermarkets

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[36] Marsha L. Richins and Peter H. Bloch 1986, 'After the New Wears off: The Temporal Context of Product Involvement', *The Journal of Consumer Research*, Vol. 13, No. 2, pp. 280-285.

Consumer Preferences

As previously established, one of the key objectives of this study is to determine consumer preferences when it comes to purchasing prawns. Each of the research instruments addressed this in a selection of its questions, which uncovered some significant trends.

Colour preferences

In the intercept survey, respondents were presented with a chart of four whole, cooked prawns, ranging in colour from pale pink through to bright red[37]. They were not told of the possible species or origin of each prawn. The question was asked, ‘based on appearance, which of the following prawns would you choose to buy?’ and ‘why?’.

A clear majority of respondents preferred prawn B, with many others preferring prawn C. Both prawns A and D received no responses, with the general consensus that A looks ‘overcooked’ and ‘fake’, and D ‘sick’ or ‘anaemic’. This finding is significant in that it contradicts the idea that ‘the brighter the prawn is, the better’.

Product Form

Consumers were asked the question as to which product forms they prefer to purchase prawns in. In the fresh versus frozen category results were unanimous, with every respondent preferring a fresh prawn. However, there is exist several limitations to this finding:

- Consumers were asked which form they prefer, not which they most often purchase
- A social desirability bias – consumers presumably prefer to be heard saying that they ‘buy fresh’ rather than admitting if they often buy a cheaper and ‘less glamorous’ frozen variety
- In stores, most surveys took place in the vicinity of the seafood deli cabinet
- It is unknown how each consumer differentiates between a fresh and frozen prawn (e.g. whether they are aware that many prawn varieties in the deli cabinet are in fact previously frozen)

In terms of preferences regarding cooked versus green prawns, results indicated a fairly even spread between both forms. This highlights the importance of both being made available to consumers into the future, in particular, the increasing demand for green prawns due to the changing dynamics of Australia’s population and eating habits.

In regard to whole versus peeled prawns, a clear preference for whole prawns emerged. However, like the fresh versus frozen results, limitations of this finding include a suspected social desirability bias, as well as the skew resulting from many of the surveys being conducted near the seafood deli cabinet.

Consumer preferences would not suggest that ‘the brighter the prawn is, the better’

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[37] Refer to Appendix 3

Australian Grown

Respondents were asked to rate, from 1-10 (where 10 is the most important), how important it is to them that the prawns they buy are Australian grown. Results were highly skewed to the top end of the scale, with around half of respondents giving an automatic ‘10’ response. However, a clear social desirability bias was evident in these responses, with one researcher observing that a respondent who stated ‘10’ had just purchased 1kg of imported vannamei prawns, further evidencing that people like the idea of supporting local industry but do not necessarily follow this through in their behaviour. It also suggests that the fact that prawns are Australian is not heavily recognisable in product labeling. This pattern of ‘what people say’ poorly correlating with ‘what people do’ has been identified in much consumer research[38].

Studies have shown that 89% of consumers believe that it is either ‘very important’ or ‘important’ that the fresh food they buy is Australian[39]. This verifies the focus group findings in regard to Australian grown prawns (see Appendix 2). Meanwhile, it has been found that 98% of consumers recognise the Australian Made/Grown logo[40], and that 75% of consumers would like to see the Australian Made/Grown logo displayed on fresh produce[39]. The Australian Made Australian Grown campaign is one that Australian farmed prawn suppliers would qualify for, satisfying the requirement that 90% of the weight of the product is indeed grown in Australia[41]. With an annual fee of only 0.1% of budgeted sales of products carrying the logo[41] the campaign is not only attainable for APFA members, but also affordable.

In the intercept survey, a number of respondents rated their importance of Australian origin around 8 or 9, indicating an admitted partiality to often be satisfied with imported prawns.

Respondents were questioned as to how much more they would be willing to pay for an Australian prawn over an import. Close to all respondents would be willing to pay 25% more, but willingness declined sharply from here on, with less than half willing to pay 50% more, and very few (≤10%) willing to pay 75% or more extra. This highlights a significant issue for the Australian prawn farming industry, which does not run at the kind of low production costs that allow imported producers to sell their products so cheaply.

One additional finding was that there were a number of people who stated that if they were to buy prawns they would only buy Australian. On first reaction, it would seem logical to a marketer of Australian prawns to try to heavily find and target such consumers in the hope of establishing a highly loyal customer base. However, consumer research has found that these solely loyal customers are not overly valuable to any brand[42]. Firstly, solely loyal customers are actually fairly rare. Also, they tend to be very light users of the category (e.g. over a year a consumer who bought ‘only Coca Cola’, actually only bought twice from the category of soft drink). We would expect this pattern to hold in regard to customers who are solely loyal to Australian prawns.

An additional factor in this situation relates to the concept of ‘substitution’. If an Australian prawn is unavailable or considered ‘too expensive’, the consumer who buys ‘only Australian prawns’ may sacrifice their original idea and substitute it with a product that fulfills the same basic need (e.g. another meat product).

Studies have shown that the key reason consumers buy imported products instead of Australian ones is that ‘Australian is not available’[39].

What people say often doesn’t correlate with what people do

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[38] Sharp, B 1997, ‘Attitudes & future buying behaviour’, Ehrenberg-Bass Institute, UniSA Working Paper.

[39] Roy Morgan research for the Australian Made, Australian Grown campaign, 2007

[40] Roy Morgan research for the Australian Made, Australian Grown campaign, 2006

[41] As per the Australian Made Australian Grown published requirements

[42] Ehrenberg, ASC, Uncles, MD, & Goodhardt, GJ 2004, ‘Understanding brand performance measures: Using Dirichlet benchmarks’, *Journal of Business Research*, vol. 57, no. 12, pp. 1307–1325.

Peeling Prawns

There is a common assumption that teenage/early 20s females prefer not to peel their own prawns. Intercept survey respondents were asked the question, ‘If you were to buy whole prawns, would you peel them yourself?’. Almost every respondent was willing to, however there were several limitations to this finding:

Though consisting of many consumers between 18 and 25, the sample for the in-store survey ranged across a variety of different ages

Most respondents were likely to be regular household shoppers, who presumably have a greater involvement and experience with handling different foods

The findings were tested by asking the same question to university students, specifically in the age bracket of 18-30, in the quantitative survey. The results are shown in Figure 15.

The key findings were a 1/3 – 2/3 pattern, indicating that while around 1/3 of consumers are not willing to peel their own prawns, the majority 2/3 are. Interestingly, this finding holds across genders, overturning the assumption that young females are less likely than males to be willing to peel prawns. The main reasons for a ‘no’ response related to the respondent either finding the idea unappealing or not knowing how to peel prawns.

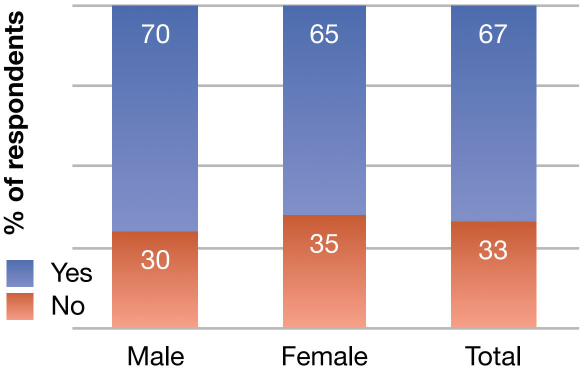

Figure 15: Who is willing to peel his/her own prawns. Results show no significant difference between genders.

2 in every 3 young people are willing to peel their own prawns...

Consumer Perceptions

The focus groups and other supplementary elements of our qualitative research revealed several key findings of consumer perceptions regarding prawns, which were not specifically identified through the other survey-based research methods.

Key Associations

When respondents were asked to talk about their experience with and consumption of prawns, the association between prawns and Christmas was clear amongst everyone. Generation X particularly mentioned times of the year when the weather is warmer, with key descriptors as being 'lighter meal option' and 'good for entertaining'. This did not come up as clearly in the Generation Y group. It is anticipated that this is due to the fact that these consumers have a different idea of what 'entertaining' is and probably have less experience with and are less likely to entertain within their own house.

> **"...the association between prawns and Christmas was clear amongst everyone"**

These associations between 'prawns' and 'Christmas/summer' relate directly to the idea of brand associations in marketing research. In the context of branded goods, it is the associations that consumers have with various brands that help them to come to mind as possible options in a purchase situation[43]. Due to the strong 'prawns – Christmas/summer' association that consumers have, the increasingly warmer weather in December, and Christmas symbols prevalent in streets/shopping centres/advertising etc., increase the ease with which 'prawns' come into the consideration sets of consumers as a food to eat. Brand research has established, however, that though there is importance in establishing strong/high quality brand associations, focus should be on establishing a high quantity of associations, in order that a brand may have a wider 'distribution' in the minds of consumers[44]. Therefore, although the association between 'prawns' and 'Christmas/summer' is indeed strong, its relative exclusivity (as one of the only major associations consumers have with prawns) is limiting the 'mental distribution' of the product and therefore inhibiting potential for sales at other times of year/in other situations. This links with the analysis of a prawn's competitive environment, highlighting that prawns should be marketed not purely as an alternative to other crustaceans/molluscs, but as a product appropriate for a whole range of usage occasions (and therefore marketed against other meats like chicken and beef).

Another empirical finding regarding brand associations is the notion of developing associations that build on consumers' existing memory structures[45]. A competition run by Seafarm for Crystal Bay Prawns involved asking consumers to give three words that describe the taste of the product. Although the resulting data revealed some particularly extreme/creative words (due to the nature of the data collection, i.e. a competition), examination of the most common words is a perfect way to establish the

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[43] Nedungadi, P 1990, 'Recall and consumer consideration sets: influencing choice without altering brand evaluations', *Journal of Consumer Research*, vol. 17, pp. 263-276.

[44] Romaniuk, J 2003, 'Brand attributes – 'distribution outlets' in the mind', *Journal of Marketing Communications*, vol. 9, no. 2, pp. 73-92.

[45] As evidenced by Byron Sharp, Director of the Ehrenberg-Bass Institute for Marketing Science

current associations with prawns that already exist in the minds of consumers. Using and building on these existing memory structures would prove a much more efficient method for developing effective 'brand cues' to prawns.

Price Perceptions

In the focus groups, respondents were presented with three varieties of prawns, unlabeled (for a full description, see Appendix 2). When asked to decide upon and assign each prawn with their expected price, most responses were overestimated (see Table 2)

would consider eating prawns more regularly, knowing that they are available at this lower-than-expected price.

Negative implication: In many cases, a consumer's high reference price for prawns may deter him/her from even considering prawns as an option, eliminating the potential for sale before the consumer is even in a purchase situation. This highlights the research finding that it is most often a consumer's behaviour that determines their attitude, i.e. a consumer who purchases prawns very rarely (or only at Christmas when the price is high), will develop an attitude that they are 'too expensive' and simply not consider them as an option in future purchase opportunities.

	Gen X $/kg expectation	Gen Y $/kg expectation	Actual $/kg
Australian Tiger Prawn	**31-35**	**41-45**	**26-30**
Australian Banana Prawn	**26-30**	**16-20**	**20-25**
Vietnamese Vannamei Prawn	**16-20**	**26-30**	**11-15**

Table 2: Price expectations of prawn varieties, given by the focus group members. In many cases these expectations were higher than actual prices.

This task of assigning an expected price correlates, to some degree, with the concept of reference pricing established through consumer research. Consumers hold reference prices in their minds for how much they expect to pay for a product, which are developed over time through previous purchases[46]. In a buying situation, a consumer may compare the actual price with their internal reference price, which will determine their willingness to purchase. A price above the reference point will have a greater negative effect on the consumer's willingness to buy than the positive effect of a price being below the reference point[47]. In the case of an overestimation of the price of prawns (as in the focus group), there are two possible implications:

Positive implication: In some cases, the below-reference price may increase consumers' consideration to purchase. In the focus group, once the participants were given the actual price per kilogram they were considerably surprised and discussed with each other that they

As our research has shown, prawns are, in fact, bought fairly rarely by most Australian consumers, and perceived by many as a luxury, 'once-in-a-while' product. Therefore, we would expect the second negative response to be the most common pattern for people not buying prawns.

Convenience goods & pre-packaged perceptions

The participants were presented with the concept of a ready-to-eat prawn product that included peeled prawns and a separate sauce/marinade, which would accompany them (similar to the John West equivalent). There was little interest across both groups, with most respondents saying they would prefer to make a similar product at home from scratch, and that they would be concerned about the shelf life or freshness of such a product. Some said they would try the product, but it would depend heavily on price and probably only be eaten in the warmer months.

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[46] Sharp, B 1997, 'Attitudes & future buying behaviour', Ehrenberg-Bass Institute, UniSA Working Paper.

[47] Kalyanaram, G, Winer, RS 1995., 'Empirical generalizations from reference price research', *Marketing Science*, vol. 14 no. 3, pp. 151–160.

Over the last 12 months, Woolworths has heavily invested in developing its range of MAP pack seafood products. This would suggest that Woolworths sees the potential for growth in this market. Our research findings show that currently consumers rarely think about buying prawns in this type of product form as they are used to buying them fresh from a deli cabinet. This is not to say that people will never buy this type of product. However, as people are inherently habitual when buying, the challenge will be trying to change their purchasing behaviour. The meat industry has already seen the successful transition from consumers purchasing fresh at a butcher to buying MAP and other pre-packaged products in supermarkets. While some consumers still choose to buy their cuts of meat loose, pre-packaged is now the norm for many and is considered an acceptable way to purchase meat.

Frank Bass, a highly regarded academic in the marketing arena has conducted extensive research in new product adoption and the rate at which it occurs. His model suggests that there are two rates of growth new products experience when entering a market.

- In the first situation, products experience immediate high growth as consumers have usually been anticipating the product's launch and have already decided to purchase prior to the product entering the market[48]. This is common for blockbuster movies as before release there is usually significant 'hype' created through advertising and publicity.

- In the second situation, products experience a much slower growth rate and adoption amongst consumers is gradual[49]. This is common for products that have not been heavily endorsed and consequentially consumers are not familiar with them upon launch. Additionally, new products that do not fit with consumer's current behaviour patterns will also experience slow diffusion. This is common for technological products with people being reluctant to purchase until they are confident that others have successfully used it.

In this case, it is most likely that seafood MAP packs will experience the latter of the two rates of adoption. This is because people are not familiar with buying this particular product form and have lower confidence in the quality and integrity of the product (most likely due to the consumer concern for assurance of 'freshness' when buying seafood). However, as people gain more faith in the product and from witnessing purchases or word of mouth recommendations, adoption rates should increase steadily. Additionally, as supermarkets shift focus away from fresh to pre-packaged initiatives, making fresh harder to access, this will also encourage customers to seek available alternatives.

> **"The meat industry has already seen the successful transition from consumers purchasing fresh at a butcher to buying pre-packaged products in supermarkets."**

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[48] Bass, F 2004, 'Comments on "A New Product Growth for Model Consumer Durables"', *Management Science*, vol. 50, no. 12, pp. 1833-1840.

[49] Bass, F 2004, 'Comments on "A New Product Growth for Model Consumer Durables"', *Management Science*, vol. 50, no. 12, pp. 1833-1840.


SCOTTISH PORK
$11.99 Kg
NDOM
TCHERS
ENTAL
AK
99

Strengths
SWOT

Australian Product

S1 Australian grown and qualifies for "Australian Grown" campaign status
S2 Clear perceived taste difference between Australian and imported prawns (imports considered 'tasteless' and 'soft')

Health Benefits

S3 Higher in protein and Omega 3 than chicken, beef, lamb or pork
S4 Lower in fat and kilojoules than chicken, beef, lamb or pork
S5 High in iodine, selium, zinc, iron and calcium
S6 Light option (like chicken) and high in protein (like beef)

Price & Value

S7 Comparable per serve price to land animal products

Product Characteristics

S8 Tiger prawns are larger in size and the preferred choice for a whole cooked prawn
S9 Tiger prawn considered to be 'fresh, firm, tasty, full-bodied, crunchy'
S10 Banana prawns offered both green and cooked
S11 Banana prawns offered fresh all year round
S12 Banana prawn is a paler colour = distinctive element
S13 A prawn is a physical and visual product

Weaknesses
SWOT

Current Consumption

W1 Small ‘share-of-stomach’ - chicken and beef far higher in consumption

Product Availability

W2 Fresh tigers only available during earlier months of the year (eliminates potential competitive advantage of a local product)
W3 Deli cabinet is the only channel of sale for most australian farmed prawns
W4 No Australian peeled prawns available to the Australian market
W5 Frozen packaged (bags) prawns is a sub-category in which Australian farmed prawns do not have presence

Price & Value

W6 More expensive per kilogram than land animal products
W7 High proportion of whole prawn weight is discarded

Product Nature/Appearance

W8 Often more time-consuming to prepare than a product like chicken or beef
W9 Banana prawns are smaller in size
W10 Banana prawn colour is often considered 'sick/too pale/frozen' - negative distinctive element
W11 Potential for tiger prawns to be considered to look artificial in colour
W12 Australian prawn species have higher feed costs, lower growth rates and lower prawn/pond ratios than Vannamei prawns
W13 Prawns, like most foods, are a low-involvement consumer purchase

Industry Structure

W14 Heavily fragmented with many different brands and no one distinctive "Australian Farmed Prawns" brand

Communication

W15 Communication mediums are limited - website, POS, (radio)
W16 Mediums such as websites require customers to act in order for 'brand' exposure
W17 Product labeling of Australian prawns does not heavily identify the product as 'Australian'

Opportunities
SWOT

Industry

O1	Seafood ranks 4th in primary industries in Australia
O2	2008 Increase of 30% volume and 34% value in the farmed prawn industry
O3	Wild-caught stocks are gradually being exhausted = future emphasis on aquaculture
O26	An overall brand for a fresh produce industry has proven to be a great method to increase awareness & sales

Consumer Perceptions

O4	GFC has caused an increase in seafood sales at the retail level perception as an 'at home' meal option
O6	Consumers would consider eating prawns more regularly if they were aware of their affordability
O7	Wild-caught & farmed are not differentiated at point of sale
O8	Imported versus Australian are differentiated at point of sale
O9	Prawns do compete with other animal protein products, broadening their potential for purchase for a variety of usage situations
O10	People are becoming more aware of the health benefits of the foods they eat
O11	Very minimal concerns regarding the perception of cholesterol content of prawns
O12	No safety concerns when purchasing prawns from a specialist seafood shop
O13	Respondents aware of the generic product forms of prawns
O14	Prawns have a secure association with Christmas/summer
O15	Almost all consumers recognise the Australian Made/Grown Logo

Consumer Preferences

O16	High preference towards an australian prawn and supporting local industry (as opposed to buying an import)
O17	75% of consumers would like to see the Australian Made/Grown logo displayed on fresh produce
O18	Still a clear demand for prawns to be sold in supermarkets
O19	Demand for both cooked and green prawns = room for product offering diversity
O20	Majority 2/3 of young people are willing to peel their own prawns, holds across genders

Consumption

O21	Prawns are the most frequently-consumed seafood in Australia
O22	Per capita seafood consumption is set to rise from 11kg to around 23kg per year by 2050
O23	The Global Financial Crisis helped to promote sales of seafood at the retail level
O24	Baby boomers are the highest consumers of seafood in the home - conscious of nutritional value
O25	Aging population in Australia will increase the consumption of seafood
O27	Generational cohort behaviour, i.e. become older = consume more prawns
O28	Only 1 in 5 respondents in qualitative research stated they do not eat prawns, and this holds across genders
O29	Increased multiculturalism of Australia is helping to develop Australian cuisine and use of prawns in meals

Buyer Behaviour

O30	People are habitual in their behaviour and generally buy out of habit
O31	Brand attributes help consumers establish alternatives for purchase

Product Options

O33	MAP & other pre-packaged options
O34	New prawn processing available in Australia (e.g. Townsville facility)
O39	Newer freezing technologies allow for defrosted prawn quality to be very comparable with that of fresh prawns

External Parties/Government

O35	APFA also works with government to preserve and develop the industry
O36	Queensland government interest, support and R&D funding to grow the industry
O37	"Australian Made" status would be affordable and attainable

Threats
SWOT

Industry
T1 Prawns only make up a small part of the overall seafood industry
T2 Australian seafood supply for domestic market may decrease in future to meet less than 25% of demand
T3 At this stage Australia is poorly equipped to cater for a significant increase in prawn aquaculture needs
T4 Ecological: Only certain prawn species can be farmed; require warm climate = no farms in southern states
T5 Vannamei prawns can't be grown in Australia, limiting how closely the Australian industry can compete

Consumer Perceptions
T6 Wild-caught & farmed are not differentiated at point of sale
T7 Prawns considered a luxury item, respondents said they would eat only monthly or less than
T8 Prawns not regarded as a filling meal option
T9 Prawns regarded as a food to eat fresh/cold, not to cook with
T10 Negative associations with pre-packaged prawns
T11 Negative associations with frozen prawns
T12 Negative quality perceptions of prawns sold in supermarket
T13 Price reason people don't buy prawns - high reference price may deter the very consideration of prawns
T14 Lack of awareness of the health benefits of prawns
T15 Lack of education amongst Australians as to fish and seafood varieties available
T16 Limited number of consumer associations with prawns
T38 Consumer reference price for prawns is higher than actual prices

Consumer Preferences
T17 Price and value for money are common concerns - many consumers buy prawns based purely on price
T18 Little interest in a ready-to-eat prawn product - concern about the shelf-life/freshness
T19 Whole prawns preferred = high risk associated with penetrating the peeled market
T20 Fresh prawn unanimously preferred = higher risk associated with penetrating the frozen prawn market
T21 Consumers often not backing their Australian preference with behaviour - only willing to pay around 25% more
T22 Main reason people don't buy Australian is because 'Australian is not available'
T23 Consumers willing to make a trade-off (local vs import) depending on the dish
T24 Colour does matter to consumers - negative perceptions of bright/pale colour extremes

Consumption
T25 15-19 year olds show lowest consumption and hold little value in the health benefits of seafood
T27 Generation Y = often living at home and therefore are not the regular household shopper
T28 Generation Y = lower disposable income decreases propensity to buy prawns
T29 MAP and other prepackaged options for prawns are set to have a slow adoption

Buyer Behaviour
T30 Consumers buy out of habit
T31 Most consumers of prawns are light buyers
T32 Sole-loyal 'Australian prawn' customers are not valuable (i.e. very few of them, very light category buyers)

Competition
T33 Increased ease, capacity and low cost at which foreign seafood producers can import into Australia
T34 Seafood importers association (SIAA) promoting imported seafood as high quality and 'necessary'
T35 Imports account for more than 1/2 of prawns available to Australian consumers
T36 For every 1 farmed prawn there are 6 wild caught prawns available

Communications
T37 Point of sale is a very cluttered advertising medium at the moment for various different seafood products
T39 Radio is low reach and highly segmented

Critical
Issues

The following grid has been used to rank each of the SWOT elements based on the two metrics of level of impact and speed of occurrence.

Level of impact

Speed of occurrence	small	moderate	great
slow	T12 T1 T9 T8 O18 O19 O29 O1 O20 O28 O13 S12 T5 T4 W12 S8 S11 S9 S10 T18 T23 T24	O21 S13 O7 T39 W16 T20 T37 T15 T25 T27 T28 O17 S6	O22 O34 T11 S2 O37 O14
medium	W9 W10 W11 W8 W2 T32	W7 O23 O4 W4 T10 O12 O36 O35 O2 O24 O8 O15 T7	O39 T2 T3 T29 O33 O3 W5 T35 W15 T14
fast		O10 O11 S5 S4 S3 W13	T36 O16 O27 T34 T33 S7 W6 W17 S1 O38 T38 T17 T13 O5 T22 W3 W14 T31 O32 O31 T21 O30 T16

Recommendations
for the APFA

Based on the research and analysis conducted, we have devised several key areas of strategy, under which come recommendations and specific actions to be taken. These are as follows:

1 Communication

	Recommendation	Actions
1A	Highlight value of prawns to consumers	Promote health benefits of prawns
		Don't promote 'no cholesterol issues'
		Introduce attribute associations 'light like chicken, high in protein like beef'

Research findings indicated that price was the most significant reason people don't buy prawns more often. There is little room for lowering the price of Australian prawns, therefore the value of them must be emphasised and communicated to consumers.

Since people are highly unaware of the health benefits of prawns, and place relatively high importance on the nutritional value of the foods they eat, we recommend that the health benefits of prawns be promoted. Additionally, there is no need to emphasise that prawns 'are not going to increase your cholesterol intake', since this is not a consumer concern. If anything, mention of this would possibly have the effect of raising cholesterol as a potential concern (defeating the very purpose of the communication).

Prawns can be communicated as being ‘versatile’ as well as giving the consumer 'the best of both worlds', by highlighting their lightness (like chicken) and high protein (like beef).

	Recommendation	Actions
1B	Focus on penetration and building of new brand attributes	Focus on the older age segment, in which there will always be a higher interest in prawns
		Penetrate existing users to buy 'for a different purpose', i.e. 'penetrating a different customer mindset'
		Link prawns not just with 'Christmas/summer' or luxury' but introduce concept of regular 'weekly meal option'
		Use existing memory structures (i.e. taste & nature associations of prawns)
		Introduce new association between prawns and other times of year/annual events (e.g. fathers day)

Since there is a generational cohort pattern for prawn consumption, prawns suppliers should accept that their predominant source of sales will be older consumers (a market that will also increase in size in the future, with Australia's aging population).

There is no need to increase purchase frequency of 'consumption of prawns for existing purposes' (e.g. no need to say 'buy more prawns at Christmas'). Instead, however, there is a need to penetrate both new and existing consumers to 'buy prawns for a different purpose' – i.e. 'penetrate a different customer mindset'.

New associations need to be introduced, that prawns can be a realistic weeknight meal option. This should be done using existing memory structures to successfully integrate the new association with a familiar product, e.g. 'enjoy the fresh, full-bodied crunch of a prawn once or twice a week'.

Since demand for prawns is typically low in the winter months, specific events should be targeted as ‘a special occasion for prawns’, such as Fathers’ Day in September, as this will help to make demand more consistent throughout the year.

All these new associations will allow 'prawns' to make it into the consideration set of consumers in a wider variety of usage situations. Even when people’s involvement in a product is low (as with prawns), the use of such brand-relevant stimuli in communications can indeed affect their behaviour by strengthening product recognition[50].

Recommendation		Actions
1C	Establish an overall 'farmed prawns' brand	Develop one single identifiable logo
		Utilise this brand in all media channels
		Introduce a promotional levy for APFA members
		Commission a mass-media campaign

There is a need to get people to choose Australian farmed prawns as a product for purchase, and the elements of good advertising should be employed in order to do this.

Advertising is not a strong force that persuades[51], therefore it is not necessary nor worthwhile trying to 'convince' consumers of something about prawns. Rather, advertising is a weak force that gently 'reminds' consumers that the brand exists, helping them to simply think of the brand or anything about it at all[51].

This increased 'salience' of the brand in the consumer's mind leads to it being considered an option for purchase. Salience (and therefore the potential for recall and recognition) is more effectively and efficiently developed through consistent and clear branding that identifies the product as 'uniquely you'[52].

Therefore there is a real need to establish a brand that can be used through all communication channels (packaging, advertising etc.), that clearly labels any Australian farmed prawns as 'Australian farmed prawns'.

Recommendation		Actions
1D	Emphasise the Australian origin of the product	Commission 'Australian Made' logo
		Utilise the logo on every product, and in all communications

Communication based on a point of difference (differentiation), is usually a bad idea, as it is often easily imitable by competitors[53]. But in the case of Australian vs imported, the 'Australian Grown' nature of the prawns cannot possibly be copied by a foreign producer.

Therefore we recommend AFPA members take part in the 'Australian Grown' campaign, and utilise the logo in everything they can.

Consumers like to see the ‘Australian Grown’ logo on fresh produce and they place high importance on seafood being Australian, so the logic behind this recommendation is to 'make it easier for people to act within their intentions'. This will avoid the alternative potential consumer response: 'But I thought these [vannamei] prawns were Australian', by causing some ‘friction’ at POS (where currently there is very little) and ‘interrupting’ the low-involvement behaviour of consumers.

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[50] East, T, Wright, M & Vanhuele, M 2008, ‘Chapter 1: Ideas and explanations in consumer research’, *Consumer behaviour: Applications in marketing*, Sage.

[51] Ehrenberg, A, Banard, N, Kennedy, R & Bloom, H (2002). Brand advertising as creative publicity: bringing theory into line with practice. Adelaide, SA: 1-19.

[52] Romaniuk, J, Sharp, B & Ehrenberg, A 2007, 'Evidence concerning the percieved importance of brand differentiation', *Australasian Marketing Journal,* vol. 15, no. 2, pp. 53.

[53] Ehrenberg, A (1997). ‘Differentiation or salience’, *Journal of advertising research*, vol. 37, no. 6, pp. 7-14.

Recommendation	Actions
1E Reallocate investment into communications	Focus on media that reaches consumer rather than requiring the consumer to 'come to you'
	Importance of distinctiveness, unified brand
	Don't use medium just because it's available (e.g. radio, which is highly fragmented)
	Use medium that allow you to highlight distinctive elements (e.g. visual media rather than purely verbal)
	Use medium that achieves high reach rather than high frequency

As observed in the research, POS seafood advertising is fairly cluttered. Therefore a clear, distinctive, instantly-recognisable brand is especially important in this media channel. Such a recommendation stems from the notion that advertising is a weak force that simply reminds consumers of a product's presence in the market.

Media choice is critical, therefore media that highlights and exhibits the distinctive elements of the product should be chosen. In the case of prawns, the colour and shape of the prawn are major distinctive elements. Therefore visual-mode advertising is most appropriate.

The focus in choosing media should be on reaching as many consumers as possible, rather than trying to reach the same consumers as frequently as possible, since it is proven that brands grow through building penetration and not purchase frequency.

2 Product Form

Recommendation	Actions
2A Penetrate additional sub-categories	Emphasize 'snap frozen' quality and technology
	"Now Australia has a choice" in regard to the origin of packaged frozen prawns
	Opportunity for Fortune prawn processing
	Offer a product that fits with people's habit - buy meat and freeze

Although consumer research indicates a preference for fresh, whole prawns, the pre-packaged frozen prawn market is still patronised by Australians. There is very little presence (or often no presence at all) of an Australian origin product in this form.

Frozen bagged prawns are a product form that fit with Australia's current general ‘weeknight cooking’ consumption habits – i.e. buying and then freezing meat and defrosting during the week for a meal; the trend towards buying value-added products for convenience.

Entering the market of frozen bagged prawns would provide Australian's with a choice. Though the costs associated with Australian production may not allow such a product to be competitive against cheap imports, it is still nevertheless important to recognise this unserviced gap in the Australian market, in conjunction with the significant preference that consumers have for their seafood to be Australian. It would therefore be imperative that Australian Grown branding is emphasised on such a product.

A frozen prawn product would also give APFA members the opportunity to promote the sophisticated freezing technology (and defrosted prawn quality) now available.

Recommendation	Actions
2 B Increase awareness of MAP packs	Taste testing…increase consumer confidence/increase familiarity
	Utilise MAP packaging in mass communication to establish a new brand-attribute association

As discussed in the report, we would expect consumer adoption of MAP packs to grow at a slow rate, due to the relative foreignness and their current low confidence in the product

Though heavily un-influenceable, this adoption could be nurtured through initiatives that increase consumer familiarity with the product form. These could include in-store tastings of MAP packaged prawns, and the use of MAP packs in communications, which would establish a new brand-attribute association.

3 Pricing

	Recommendation	Action
3A	Make price comparable with other animal protein products	Start promoting/advertising prawns with a per serve or per family meal price

As outlined in the report, price is overwhelmingly the number one reason people do not buy prawns more often, therefore the ‘if you can’t lower price then increase perceived value’ rule applies. In the case of a luxury car, the firm would highlight the additional features customers will enjoy from paying a higher price. As mentioned, the nutritional value/health benefits of prawns is one example of such communicable value.

Additionally, people often perceive prawns to be more expensive than alternative animal protein products, due to their higher per kg price (as opposed to other meat products) and perceived level of high wastage (associated with peeling whole prawns). One way to get around this is to break down the price into a per serving (including weight) or family meal price, making them considerably more comparable with a piece of steak or serve of chicken.

4 Target Market

	Recommendation	Action
4A	Don't specifically target young people (for purchase)	Market prawns to those people who are most likely to actually purchase…the regular household shopper

Since only 1 in 3 young people is likely to purchase prawns him/herself, and yet a whole 4 in 5 say that they do eat prawns, it is clear that while these consumers don't have a high propensity to buy prawns, they do have a high propensity to eat them.

There is a way to get young people eating more prawns, but we feel that the way to their stomach is not so much through direct communication to them. Rather, it is by targeting the household shopper, and getting prawns in the fridge more regularly. The idea is that marketing efforts should increase the propensity for prawns to come to the household shopper’s mind in the buying situation. If, in the home, prawns are in the fridge or on the table, the young consumer (4 in every 5 anyway) will eat them.

5 Distribution

	Recommendation	Actions
5A	Continue to penetrate available distribution channels	Make Australian farmed prawns more widely available to consumers
		No need to convince people that 'farmed are okay'

The overwhelming 1:6 ratio of farmed vs wild-caught prawns currently available domestically indicates that wild-caught are purchased more frequently due to their wider availability. This is highlighted by the fact that prawns are a low involvement purchase, and consumers don't differentiate between wild-caught and farmed prawns.

The communication strategies outlined will presumably increase salience of 'prawns' in general (despite being for an 'Australian farmed prawns' brand), which will increase purchase propensity of the category. This must be matched with an increasing availability and shelf prominence of Australian farmed prawns so that 'by default' consumers will buy these rather than a wild-caught alternative or an import.

6 Industry Development

	Recommendation
6A	Need for prawn aquaculture industry to develop and collaborate as an entity competing against the foreign prawn farming industry

Per capita seafood consumption is set to increase, with Australia's aging population and tendency for older people to eat fish and seafood regularly. Additionally, Australia has a decreasing ability to cater for domestic seafood demand, while foreign seafood producers are becoming increasingly able to serve the Australian market at a low cost.

This highlights the importance of associations like the APFA collaborating in order to grow. This will ensure the association can both exploit the upcoming opportunities whilst battling increasing competitive forces.

Time
Scale

The following grid gives an approximate indication of the timescale that we suggest the APFA use when implementing the recommendations.

Time

Relative Importance	0-6 months	7-12 months	13-18 months
High	1B 1D 5A 2B 3A		1C 6A
Medium	1A 1E	2A 4A	
Low			

The first 6 months - High priority

1B Focus on penetration and building of new brand attributes

1D Emphasise the Australian origin of the product

2B Increase awareness of MAP packs

5A Continue to penetrate available distribution channels

3A Make price comparable with other animal protein products

The first 6 months - Medium priority

1A Highlight value of prawns to consumers

1E Reallocate investment into communications

The second 6 months - Medium priority

4A Don't specifically target young people (for purchase)

2A Penetrate additional sub-categories

The third 6 months - High priority

1C Establish an overall 'farmed prawns' brand

6A Need for prawn aquaculture industry to develop and collaborate as an entity competing against the foreign prawn farming industry

Appendix
One

Focus Groups 28 August 2009
Prompt Sheet

Introduction

Procedures
Taping and confidentiality
Requirement for honest answers – looking for your opinions and views
We may sometimes redirect conversations to focus on a particular area
Topic of discussion is prawns. We are looking at consumer preferences when it comes to purchasing prawns.

Current Consumption

How often do you eat prawns?
How often do you personally buy prawns?
Where do you typically buy them? e.g. supermarket, fishmonger, restaurant
When would you usually eat prawns? e.g. Are there certain times of year or certain occasions?
Why?
What kinds of dishes do you usually associate with prawns?
Have you personally cooked these yourself? Are there other meal ideas that you have that contain prawns?
Other than fresh, what are the different product forms of prawns that are you aware of?
In what form would you usually prefer to purchase prawns? e.g. fresh, frozen, cooked, green, whole, peeled
Why?
What kinds of things would you look out for if you went to purchase fresh whole cooked prawns?

Product quality

When you see pre-packaged prawns, what kind of things come to mind?
When you see fresh loose prawns in a deli what kind of things come to mind?
Thinking about fresh food, what kind of importance do you place upon it being Australian-grown?
Thinking about prawns, what kind of importance do you place upon them being Australian-grown?

Health Benefits

In terms of foods in general, to what degree do health benefits impact the foods that you choose to buy/eat?
What do you know about the health benefits/nutritional value of prawns?

Prawn aquaculture

What do you know about aquaculture/prawn farming?
Do you perceive any product quality issues regarding farmed (versus ocean-caught) prawns or seafood?

Presentation of prawns to the group

Have a look at the following samples of prawns:

Present plates of
Aussie Tiger Prawns
Banana prawns
Imported vannemei prawns

Which of these would you purchase, just by looking at them?
Why?

Give price labels to the group

What price range would you expect to pay for each variety of prawn? Use the price-range labels provided and chat amongst yourselves to decide.

Add the Australian Grown logo to the Tiger Prawns

Now, would you change your mind about price at all?

Add the actual prices and the name & origin of each variety

Knowing what you know now, which of these prawn varieties would you be most likely to purchase?

Why?

Now, help yourself…

Invite group members to peel prawns – see how they react…and see how they go with the task of shelling prawns

Convenience goods

What do you think about purchasing Australian farmed prawns ready-to-eat (cooked) and pre-packaged in marinades such as:

Mediterranean: olive oil, lemon, garlic, oregano
Satay: peanut, soy,
BBQ: Tomato puree, worcestershire, chilli, honey
Thai: Lime juice, fish sauce, peanut oil, palm sugar, coriander, chilli
Garlic Prawns: garlic, olive oil, white wine, parsley

In what kind of situation would you see yourself eating this kind of a product? (e.g. lunch on the run, part of a main meal, on a platter with olives, cheese, marinated vegetables etc.)

So where would be a good place for it to be sold do you think?

(i.e. sushi bars, supermarkets, continental stores)

Do you have any other comments at all?

Appendix
Two

Focus Groups 28 August 2009
Findings

This report of the focus groups conducted includes additional findings not directly referred to in the main report.

The broad areas covered in the focus groups were:

- Current consumption
- Product quality and 'Australian Grown' perceptions
- Health benefits
- Prawn aquaculture awareness and understanding
- Perceptions about price
- Observation of respondents' interactions with prawns
- Convenience goods & pre-packaged perceptions

The main limitation of the focus groups is that respondents were not from the target market of Brisbane/Sydney consumers. Additionally, the Generation Y group was limited to a small number of participants, which hindered the scope for discussion. Although exploratory in nature, focus groups do not allow for conclusions to be drawn for the entire population.

As can be expected, there is a lot of variation from one consumer to the next. As a result this report will only highlight those key points that were distinctive or unanimous within the groups.

Current Consumption

Across both respondent groups there was awareness of the different generic product forms of prawns. However, fresh was definitely the preferred product form in a buying situation, with the common opinion that there is a place for both cooked and green prawns, depending on their intended use.

Product quality and 'Australian Grown' perceptions

When asked what factors they would look out for when purchasing prawns, common concerns between both groups related to price and value for money, appearance (size, colour, damage), and place of origin. Generation X also emphasised food safety concerns (i.e. 'what the prawns are sitting next to in the seafood cabinet').

In general, when the subject of pre-packaged prawns was discussed, negative associations dominated the responses. Examples included 'previously frozen, imported, inferior quality and taste, highly processed', with concerns also raised about lengthy transportation and questionable shelf life. Interestingly, only one respondent (from Generation Y) stated that she had previously purchased such a pre-packaged product.

In regard to perceptions of fresh loose prawns in a deli, perceptions amongst Generation X depended on place of purchase. There were concerns about supermarket quality and handling of prawns, whereas respondents specifically stated that these concerns do not exist when buying from a seafood shop. Generation Y on the other hand had purely positive perceptions regarding this display style, mentioning attributes such as 'fresh, less processing, tasty'.

Respondents did not communicate particularly strong opinions when asked what importance they place on the foods in general they eat being Australian grown. However, for the product category of prawns, preferences were strongly oriented towards a local product. Both groups raised the idea of trade-offs, suggesting that depending on the situation or the recipe, different prawn varieties are acceptable. For example, in the case of making a risotto, an imported prawn was considered quite appropriate.

Health Benefits

When asked about their awareness of the health benefits of prawns, Generation X mentioned 'low in fat, low in carbs,' but also 'high in cholesterol'. Generation Y associated prawns with the health benefits of fish such as 'high in omega 3, zinc and protein', and also highlighted the difference in health benefits depending on the way prawns are cooked/eaten (e.g. battered or fried versus fresh). It is clear people are not fully aware of the benefits of prawns, and it was a concern that the (somewhat false) association of 'high cholesterol' came up.

Prawn aquaculture awareness and understanding

There was limited awareness of prawn farming in Australia, with very little understanding of the process. When respondents were asked their thoughts about quality differences between farmed and wild-caught prawns, it was unanimous that this is not something they think about or consider in the buying situation.

Observation of respondents' interactions with prawns

The focus groups were presented with three plates of cooked, thawed prawns: an Australian tiger prawn, Australian banana prawn and an imported vannemei prawn. The variety and origins were not made known to the groups. Respondents were asked to give their preferences for which variety they would choose based on appearance, and to collaboratively settle on a price they would expect to pay for each prawn.

Amongst Generation X majority preferred the tiger prawn, with a few others preferring the banana, as they perceived the tiger's colour to look somewhat artificial. This stemmed from these respondents' familiarity with a paler coloured prawn. Amongst Generation Y all respondents preferred the tiger prawn for its colour, size and 'freshest' appearance.

As a 'thank-you' to respondents a delivery of Australian farmed tiger prawns was arranged with the association. The smaller samples of the other varieties were also available for participants to sample during the session. The consensus amongst all respondents was overall favourability of the tiger prawns, with descriptions such as 'fresh, firm, tasty, full bodied, crunchy'. There was a clear perceived taste difference between the imported and Australian prawns, with imports considered 'tasteless' and 'soft'. However, Generation Y distinguished that the import would be suitable to cook with.

Appendix
Three

In-store Intercept Survey (Sydney/Brisbane)

Hello
My name is Jackson / Lindsey and I am undertaking a project for the Australian Prawn Farmer's Association.
Do you have 3 minutes to do a quick survey?

1. By looking at these options, which three would you eat most in a typical week, in order?
___ Lamb
___ Pork
___ Fish
___ Other Seafood (e.g. squid, prawns, crab, oysters etc.)
___ Beef
___ Chicken

2. Do you ever eat prawns?
☐ Yes
☐ No...Why?____

3. How has your consumption of prawns changed over the years? (e.g. do you eat more/less than now than what you used to?)

____

4. Nowadays, how often would you eat prawns?
☐ More than once a week
☐ Weekly
☐ Fortnightly
☐ Monthly
☐ Less than monthly
☐ Only for special occasions (please specify):

____

Why?

____

5. If there were prawns in the fridge at your house, who would have bought them?

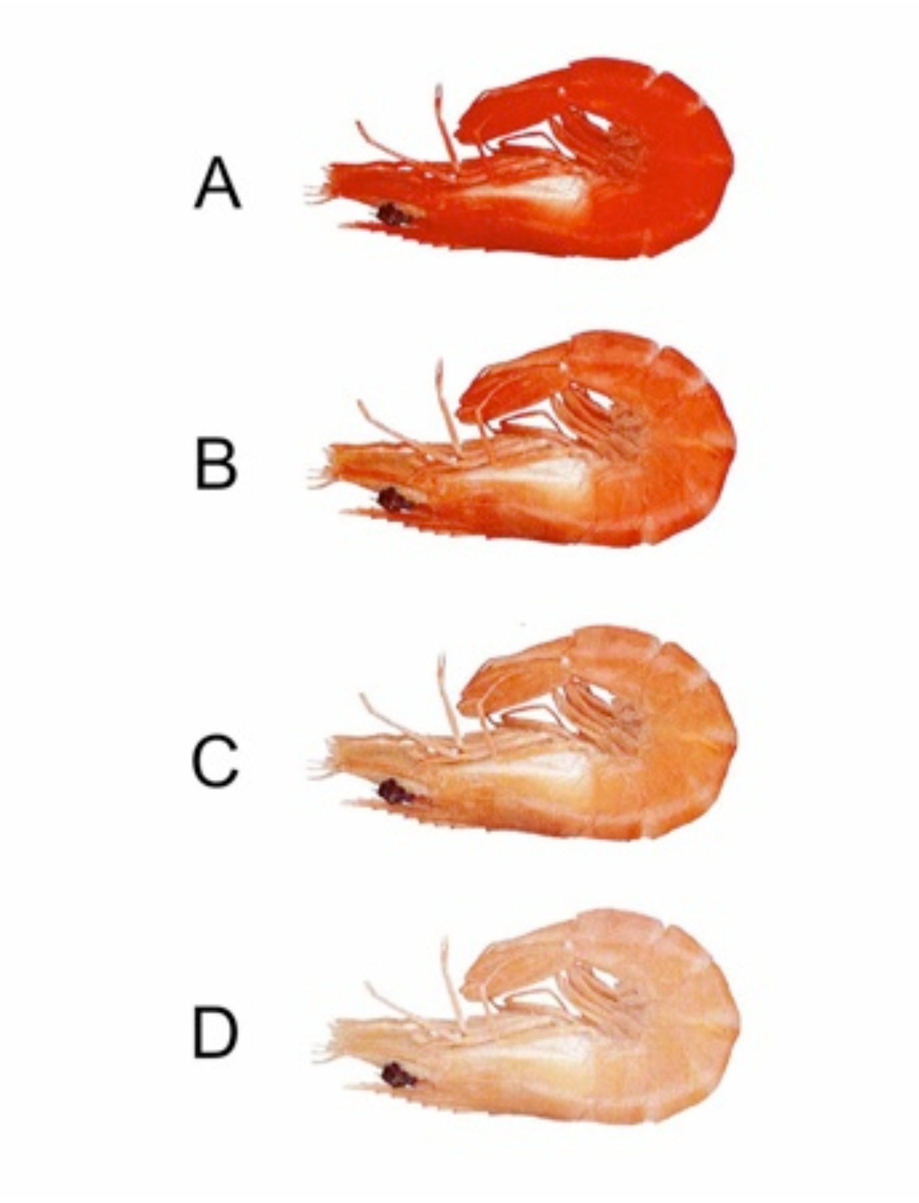
____

6. From where would you normally prefer to purchase prawns?
☐ Supermarket
☐ Fishmonger
☐ Wholesaler
☐ Other (please specify)____________________________________
Is this where you would normally purchase prawns from?
☐ Yes
☐ No...Then where from?________________________________

7. What would be the number one influencing factor that stops you from eating prawns more regularly?

What about:
☐ PRICE Does price have an impact?
☐ PREPARATION Do you think they are difficult to prepare?
☐ AVAILABILITY Are they not always available in your local shops?
☐ SEASONALITY Are they only available to you in certain seasons?
☐ QUALITY INCONSISTENCY Do you find prawn quality is often inconsistent?
☐ SAFETY CONCERN …of eating seafood such as prawns?
☐ WHAT TO DO WITH PRAWNS Do you not know what to do with prawns?
☐ DON'T SHOP OFTEN Is it simply that you are not the regular shopper in your household?

9. Looking at the following photos, which prawn would you choose to buy?
☐ A
☐ B
☐ C
Why?



10. Do you prefer to buy prawns
☐ Fresh
☐ Frozen

11. Do you prefer to buy prawns
☐ Cooked
☐ Raw (green)

12. Do you prefer to buy prawns
☐ Whole
☐ Peeled

13. On a scale of 1-10 how important to you is it that the prawns you buy are Australian grown?
☐ 1
☐ 2
☐ 3
☐ 4
☐ 5
☐ 6
☐ 7
☐ 8
☐ 9
☐ 10

14. For an Australian grown prawn as opposed to an imported prawn, would you be willing to pay:
☐ 25% extra per kilogram e.g. Import=$15.00/kg vs Aus=$18.75/kg
☐ 50% extra per kilogram e.g. Import=$15.00/kg vs Aus=$22.50/kg
☐ 75% extra per kilogram e.g. Import=$15.00/kg vs Aus=$26.25/kg
☐ Double the price per kilogram e.g. Import=$15.00/kg vs Aus=$30.00/kg
☐ More than double the price per kilogram

15. If you were to buy whole prawns, would you peel them yourself?
☐ Yes
☐ No...Why?____

16. What is your age?
☐ 18-25
☐ 26-30
☐ 31-35
☐ 36-40
☐ 40+

17. Gender
☐ Male
☐ Female

Appendix
Four

Quantitative Survey (Adelaide)

1. What are the top three of these meat/protein products that you would eat during a typical week? Please number from 1 to 3, where 1 is the one that you eat the most.

___ Lamb
___ Pork
___ Fish
___ Other Seafood (e.g. squid, prawns, crab, oysters etc.)
___ Beef
___ Chicken

2. Do you ever eat prawns?

☐ Yes
☐ No...Why not?______________________________

3. If there were prawns in the fridge at your house, who would have bought them?

____

4. What would be the number one factor that stops you from eating prawns more regularly?

____

5. If you were to buy (or be presented with) whole prawns, would you peel them yourself?

☐ Yes
☐ No…..why not?______________________________

6. What is your age?

☐ 18-25
☐ 26-30
☐ 31-35
☐ 36-40
☐ 40+

7. What is your gender?

☐ Male
☐ Female