

Executive Summary

The Seafood Consumers Association (SCA) is an independent not-for-profit organisation advocating for transparent, sustainable, and safe seafood choices for Australian consumers. In light of growing consumer concerns about mislabelling, greenwashing, and a lack of accessible information, SCA seeks to build a Trusted Seafood Partnership (TSP) to restore confidence in the seafood industry.

This report provides a strategic overview of Australia's seafood retail landscape, analysing key retailer types, supply chain dynamics, and labelling practices. It highlights critical issues such as fragmented supply chains, over-reliance on imports (66% of consumption), and consumer confusion regarding eco-labels and origin information.

Our research identifies a growing trust gap between seafood consumers and the market. While consumers increasingly value sustainability and traceability, current communication strategies fail to deliver clear, consistent, and credible messages.

To address this, we propose the TSP framework — a voluntary integrity-based program that recognises businesses demonstrating transparent labelling, ethical sourcing, and staff training. The program offers value to consumers through verified information and to businesses through market differentiation and SCA endorsement.

Strategic opportunities include leveraging digital tools (e.g., QR codes), aligning with stakeholder priorities, and targeting communication by demographic segment. Key recommendations involve piloting the TSP with metro retailers, enhancing consumer education, and positioning SCA as the leader in trust and transparency within the industry.

Through the Trusted Seafood Partnership, SCA can lead a national shift toward greater seafood integrity, delivering value for consumers, industry, and the environment alike.

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1.Introduction



Seafood Consumers
Association

Seafood Consumers Association (SCA) is an NGO committed to ensuring safe, sustainable, and affordable seafood for consumers. Our client seeks to improve transparency and trust in Australia's seafood retail market by developing a “Trusted Seafood Partnership.”

In this project, we conducted secondary research to:

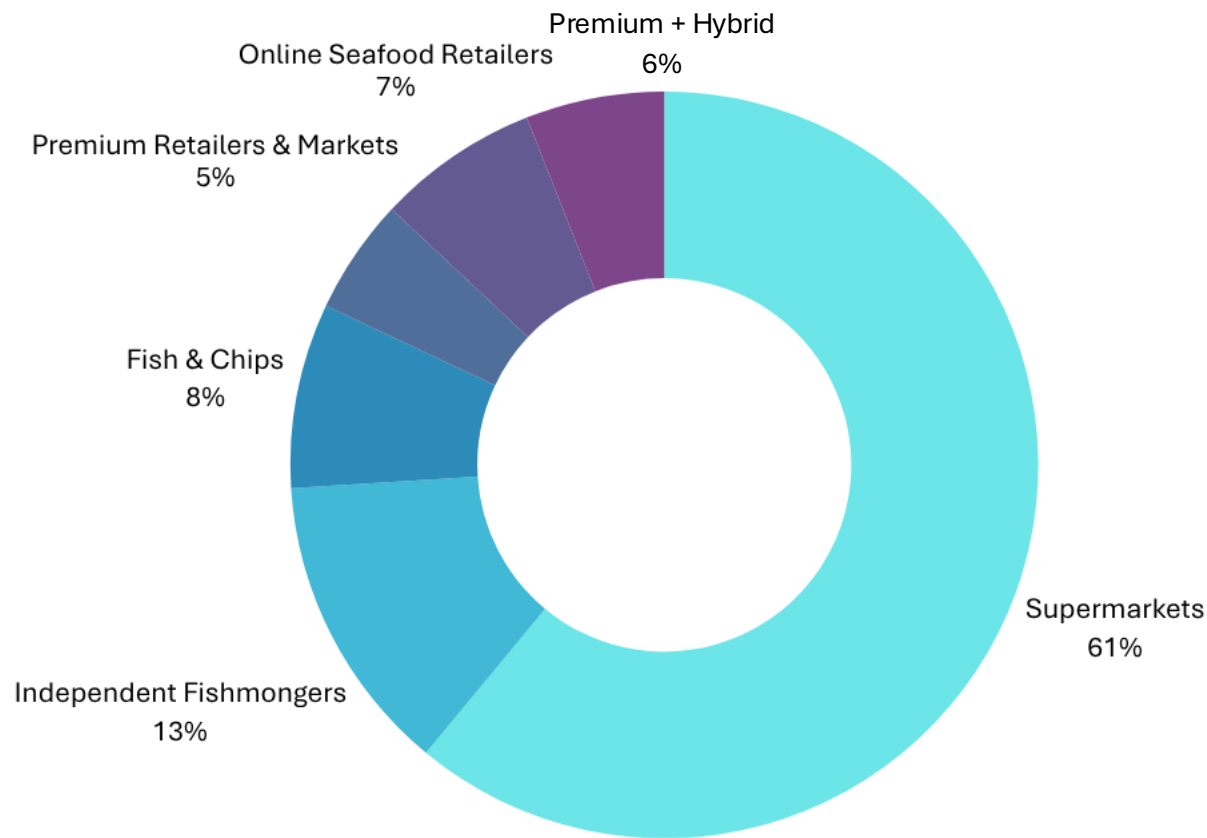
- Understand the structure of Australia’s seafood retail sector
- Analyse consumer behavior and communication channels
- Identify successful communication strategies from other industries

Our goal is to provide actionable insights that support better seafood labelling, staff training, and consumer trust.



2. Australian Seafood Industry

2.1 Major Categories of Seafood Retailers in Australia



Australia’s seafood retail sector is dominated by supermarkets, followed by a long tail of independent and specialized retailers.

Each format has distinct supply chain structures, consumer engagement models, and traceability standards — all of which shape the potential pathways for SCA’s Trusted Seafood Partnership rollout.

Note:
This percentage distribution is based on a synthesis of data from Seafood Industry Australia (2023) and IBISWorld Industry Research (2024).
The figures for supermarkets (61%) and independent fishmongers (13%) are drawn directly from consumer surveys.
The estimates for fast food (8%) and online platforms (7%) are based on recent structural reports and market trend analyses.
The remaining 11% (grouped here as "Other") includes premium seafood retailers and hybrid dine-in + retail models, inferred through industry profiles and location-based business data.

2.1 Major Categories of Seafood Retailers in Australia - Supermarket

Supermarkets account for approximately 65% of household seafood consumption (Lawley & Birch, 2013; ABARES, 2023).

Control around 82% of the broader grocery retail sector in Australia (Seafood Industry Australia, 2024).



Structural Features

- A national duopoly led by **Coles and Woolworths**, with Aldi and Costco serving as secondary players.
- Operate through a three-tiered supply chain:
 1. Import or centralised sourcing hubs
 2. Regional distribution centres (RDCs)
 3. In-store cold displays or fresh seafood counters, some offering on-site cutting and portioning

Core Capabilities

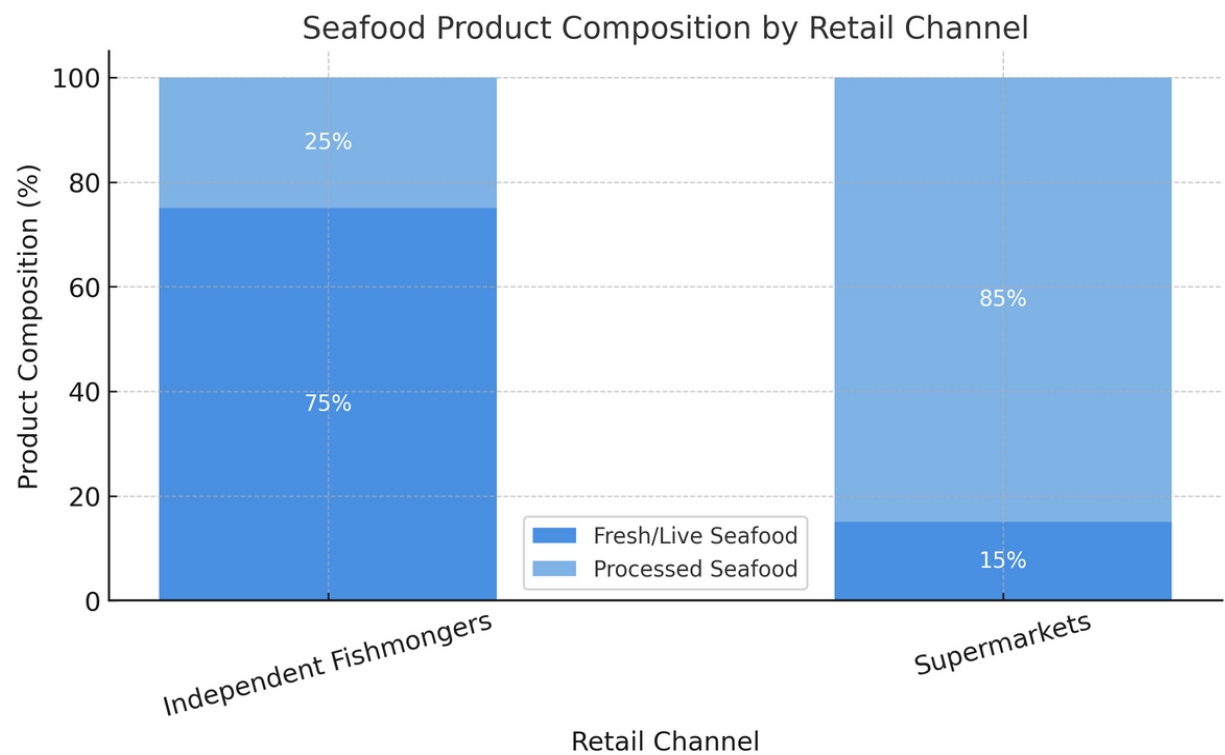
- Economies of scale: Purchasing costs are estimated to be **20–30%** lower than those of independent fishmongers.
- Omnichannel coverage: Home delivery and click-and-collect services cover over **95% of the Australian population**.

2.1 Major Categories of Seafood Retailers in Australia - Fishmongers



"87% of independent seafood retailers are located within 50 km of the coast" (ABS, 2023).

2.1 Major Categories of Seafood Retailers in Australia - Fishmongers



Supply Chain Model

- Direct vessel-to-retailer sourcing is common, by passing wholesale intermediaries.
- Live and fresh seafood exceeds **70%** of inventory, significantly higher than the **15%** fresh share typically found in supermarkets (IBISWorld, 2024).

2.1 Major Categories of Seafood Retailers in Australia - Fish & Chips



- Fish & chips franchises contribute approximately **12% of national seafood consumption**, based on consumption tracking by OzHarvest (2023).
- Top-performing brands (e.g., Hunky Dory, Barnacle Bill, Red Rooster) each hold an estimated **5–8% market share**.
- While the sector is fragmented, it commands **high visibility and regular consumption**, especially among **younger consumers**.
- Approximately **62% of fish & chips** outlets are located near transport hubs such as petrol stations, train stations, and highway rest stops (LEK Consulting, 2023).

Note: Some fast-food chains include seafood offerings but are not exclusively fish & chips.

2.1 Major Categories of Seafood Retailers in Australia

Online Platforms, Hybrid Stores, and Premium Markets

Online Platforms



High annual growth rate (18%, IBIS), 2-hour delivery, complete cold chain, support for digital traceability

Hybrid (Dine-in + Retail)



Restaurant + retail combination, usually located in tourist ports, 40% of customers are tourists.

Premium Markets



Premium seafood markets serve high-value clientele, offer luxury product assortments, and operate in tourism-focused locations such as the Sydney Fish Market.

2.2 Supply Chain Structures & Pricing Dynamics

2.2.1 Highly fragmented and long-distance:

Average transport distance ~1,800 km

Predominantly road freight (cost ~AUD \$0.33/tkm) Seafood - Supply Chain

2.2.2 Three main product flows:

Imported chilled/frozen products → processing → retail

Imported processed (e.g. canned) → distribution → supermarket

Domestically caught → fish markets → wholesalers/exporters

2.2.3 Cost & Pricing Dynamics

Purchase cost = 67.9% of total revenue—industry's largest cost driver.

High refrigeration and rent costs for seafood retailers

Supermarkets achieve lower purchase prices through scale; independent fishmongers face higher costs.

2.2.4 Import Dependency

66% of seafood consumed in Australia is imported aus-seafood-trade

Premium Australian seafood often exported; domestic supply supplemented with low-cost imports

2.3 Current Labelling Practices & Regulatory Framework

2.3.1 Labelling Requirements

AFNS (Australian Fish Names Standard):

mandatory species names on menus and labels

CoOL (Country of Origin Labelling): mandatory for packaged and unpackaged seafood

Labelling standards outlined in **Australia New Zealand Food Standards Code (ANZFSC)**

2.3.3 Regulatory Enforcement

ACCC has released Greenwashing Guidelines (2024):

Must use clear, evidence-based environmental claims

Avoid broad/unqualified terms (e.g. “ocean-friendly”)

2.3.2 Issues in Practice

Eco-labels (MSC, ASC, BAP) often misunderstood or lack recognition

Greenwashing concerns: vague or unverified sustainability claims are common

Mislabelling remains a problem: e.g., 40% of seafood mislabelled in some outlets

2.3.4 Impact on Trust

Confusing or inaccurate labels undermine consumer trust

Trusted labelling and staff training are needed to improve transparency

3.1 Where do consumers seek information about seafood?

- ❖ Consumers are increasingly interested in **detailed information** about their seafood, particularly regarding **safety and traceability**, including information about ingredients and processing stages (Kim et al., 2023).
- ❖ Consumers predominantly turn to **online channels** for seafood information, including:
 - Official brand websites
 - Social media platforms
 - Digital marketing toolsWhile online channels are dominant, traditional media still plays a role for certain demographics.
- ❖ They seek **transparency** regarding:
 - Product origin
 - Safety
 - SustainabilityWith traceability information playing a crucial role (Kim et al., 2023; MDPI, 2022).



3.2 Factors influencing Australian consumers' behaviour towards seafood

- **Sustainability and Origin:** There is a strong preference for sustainable seafood, making it a significant factor in their purchasing decisions (MSC, n.d.). The origin of seafood also plays a role (Carlucci et al., 2015).
- **Price** (Carlucci et al., 2015).
- **Health and Nutrition:** Perceived health benefits of seafood are a driver for consumption (Govzman et al., 2021)
- **Safety and Quality:** Concerns about food safety and the quality of seafood significantly influence choices. Traceability information, which assures safety and quality, is highly valued (MyFoodSoftware, n.d.; Carlucci et al., 2015)
- **Taste and Preference:** Individual taste preferences and familiarity with certain seafood types are fundamental (Christenson et al., 2017).
- **Convenience and Preparation:** Ease of preparation and accessibility can influence consumption (Christenson et al., 2017).
- **Demographics:** Factors like age (McManus et al., 2007), socioeconomic status, and geographic location (Bose & Brown, 2000) can affect seafood consumption patterns.
- **Barriers to Consumption:** Perceived barriers include concerns about freshness, lack of knowledge on preparation, and cost (Christenson et al., 2017).



3.3 Consumers' level of awareness regarding seafood labelling

Eco-Labels

- ❖ Eco-labels are intended to communicate sustainability
- ❖ Consumers' ability to fully understand and interpret these labels can vary (Gutierrez & Thornton, 2014).

Mislabeling

- ❖ Seafood mislabeling is a concern, impacting consumer trust and the effectiveness of labeling efforts (Mitchell et al., 2019; Ryburn et al., 2022).
- ❖ This suggests that while labels exist, consumers may not always be aware of the extent of mislabeling or have the tools to verify label accuracy.

Barriers to Understanding

- ❖ Labeling must be:
 - clear
 - consistent
 - easily understandable
- ❖ A lack of the above can act as a barrier to purchase seafood (Birch & Lawley, 2012).

4. MARKETING AND COMMUNICATION TOOLS USED BY VARIOUS RETAILERS



4.1 MAJOR RETAILERS

- **WOOLWORTHS**

- Woolworths Group is committed to the responsible sourcing of seafood.
- It uses **MSC-certified wild-caught** seafood, **ASC-certified farmed** seafood, and various other certifications.

**LOOK FOR THE
BLUE LABEL**



- **COLES**

With a large selection of seafood with **the MSC blue fish tick label** in the deli, frozen, and canned seafood sections, Coles is a leader in the sourcing of MSC-certified seafood.

coles





4.2 SYDNEY FISH MARKET

- The Sydney Fish Market has a long history of supporting ethical sourcing and is a key player in the Australian seafood sector.
- Some of their commitment include:
 - Overseeing that their suppliers correctly identify the country of origin and use the Australian Fish Names standard **when labelling their products.**
 - They monitor the environmental impact and sustainability status of our source fisheries.

4.2 CERTIFICATIONS AND SUSTAINABILITY

- Many local and global retailers utilize certifications to demonstrate the authenticity of their products and to highlight their commitment to sustainable fisheries and practices.
- Some of the certifications used by various retailers include:
- **MSC (Marine Stewardship Council) Certification:**
Promotes sustainable fisheries
- **ASC (Aquaculture Stewardship Council) Certification:**
Focus on Responsible aquaculture practices.
- **Best Aquaculture Practices (BAP):** It focuses on comprehensive aquaculture certification.





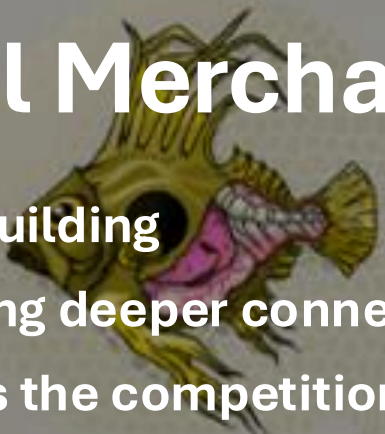
4.3 FISH BUTCHERY

- Fish Butchery is a contemporary Australian fish store founded by Josh Niland and the team behind Saint Peter
- With its unique marketing and communication tactics, it is a prime example of creative seafood shopping.
- One of the marketing strategies used by Fish Butchery is **Visual Merchandise**.



Visual Merchandising

- Brand building
- Achieving deeper connections with your customers
- Surpass the competition



SAINT PETER
FISH EATERY



FISH BUTCHERY

4.3 Partnerships & Collaborations

- Partnerships with major retailers, organizations and government bodies can help in achieving greater impacts on local and international fishing communities, and therefore their respective seafood industries, by encouraging changes to fishing practices to produce more sustainable seafood
- These partnerships can also promote awareness of SCA and its purpose for sustainable seafood to consumers, which can encourage more consumers to seek sustainable seafood options, and further support SCA's seafood sustainability goals
- It is important that all parties involved in the partnership share common goals (e.g. sustainable seafood practices), demonstrate commitment, strive for mutual benefits, and are able and willing to collaborate together

4.3 John West, WWF Australia & the Australian Government (through ANCP)

- Partnership to increase sustainable fishing practices in the neighboring Pacific islands
- Communities in these locations are often dependent on fishing as a source of livelihood and protein, leading to over sourcing and unsustainable seafood practices, resulting in poverty and food insecurities
- Solutions to this problem included working with local community members, community leaders and fishermen to bring awareness to sustainable fishing practices (e.g. management of fish produce), direction towards more sustainable fishing locations and increasing the presence of women in leadership positions in businesses and fisheries



4.3 ZAG SEAFOOD



- ZAG Seafood is a family-owned business that has been established since 1987.
- In Sydney, ZAG Seafood has a number of retail sites, including those in Merrylands, Wetherill Park, Parramatta, and Green Hills.
- ZAG Seafood sources fresh seafood directly from the Sydney Fish Market, ensuring quality and freshness.



4.3 Alaska Seafood

- Alaska seafood is highly regarded for its sustainable practices in seafood production, and holds certifications for sustainable seafood from the Marine Stewardship Council (MSC) and Certified Seafood International (CSI)
- The production of seafood in Alaska is heavily regulated through mandates set by the State of Alaska
- The legal mandates in Alaska are regulated with the support of scientists who conduct surveys and use scientific data on seafood populations and ecosystems, which to determine the appropriate fishing practices for the season
- Additionally, 'waste' seafood parts, such as fish skin, bones and roe are often repurposed for additional products (e.g. in textiles, fertilizer and delicacies respectively) to minimize wastage and maximize use for seafood resources
- Similarly to the communities in the Pacific islands, many Alaskans, particularly those living in rural Alaska, are dependent on the seafood industry for livelihood, demonstrating the need for sustainable seafood practices

4.3 John West

- Major producer of seafood products in Australia
- Over 10 years of partnership with WWF Australia, with a focus on producing more sustainable seafood products
- Partnerships with various organizations focused on sustainable seafood production in the Pacific region, such as Pacifical and MRAG Asia Pacific
- Majority (94%) of John West products are MSA and ASC certified

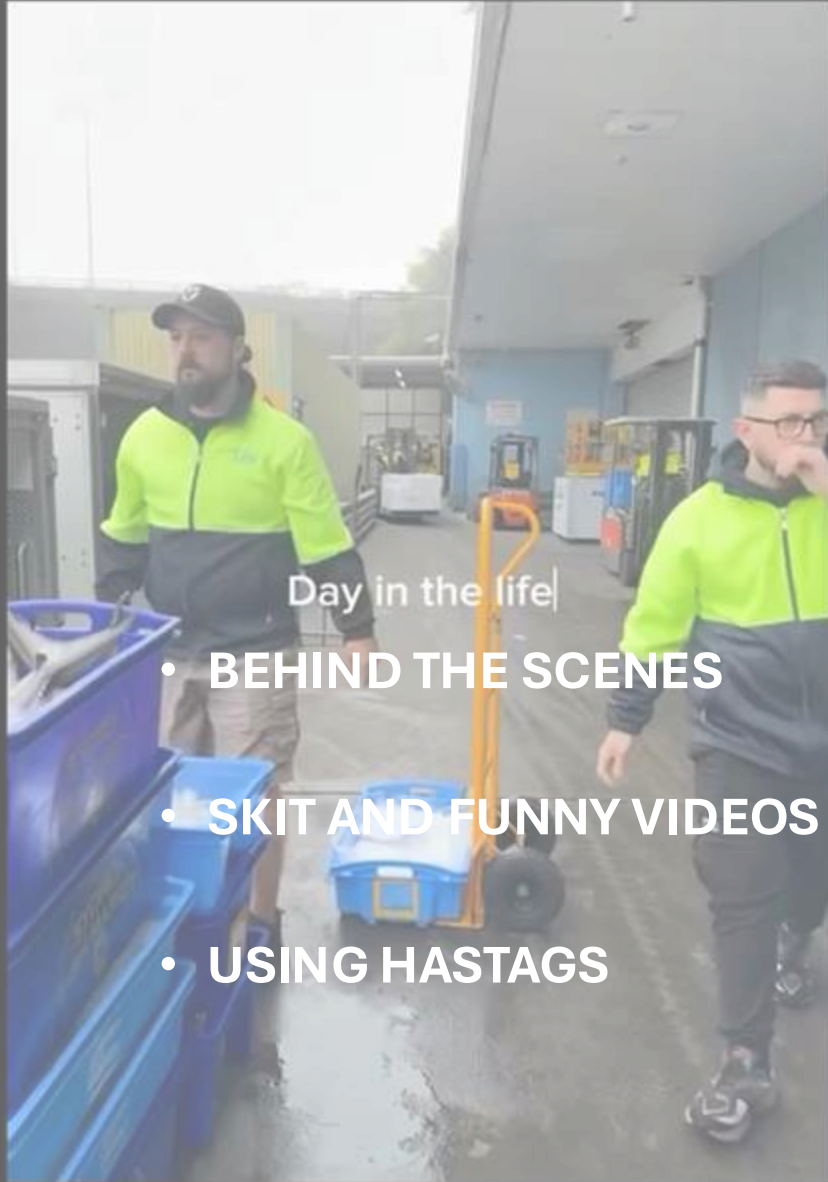


4.3 Social media pages

Zag Seafood uses Instagram and TikTok to promote their business.
By doing this, they:

- Bring in new clients
- Expand your market, especially abroad.
- Increase brand trust and loyalty.
- Engage with clients directly in real time to promote and sell your goods and services.





- BEHIND THE SCENES
- SKIT AND FUNNY VIDEOS
- USING HASTAGS



zagseafood • Follow
Original audio



zagseafood • Day in the life
start, fresh catches, a
🤔
This is how we stock up
— straight from the sea
#ZagSeafood #FishMarket
#freshaf #merrylands
#newcastle #zagseafood
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54 likes
June 13



Add a comment...

5. Digital Marketing Practice - Food Sector

Case 1: McCain Food

Company Info:

- Specialised in frozen food
- The company's product portfolio comprises French fries, potato-based products, cheese nuggets, breaded mushrooms and etc....

User Portrait

Age: 25 to 45 years old

Gender: Primarily female

Occupation & Role: Working mothers

Family Structure: Families with children, typically nuclear households

This group seeks quick, nutritious meal options that cater to their busy lifestyle.



5. Digital Marketing Parctice - Food Sector

Case 1: McCain Food

Digital Marketing Practice:

1. Social Media Engagement:

McCain Foods recognizes the importance of a robust presence on social media platforms such as **Instagram, Facebook** and **TikTok**.

2. Internet campaign events:

Just McCain: Focuses on product diversity and convenience. Platform: Instagram, Facebook, TikTok

Snack-O-Clock: Celebrates snack culture and encourages sharing. Platform: Indian social media

Outcome:

- 26.52% interaction rate (10% above industry); Facebook page reach surged by 149%;
- Brand’s fan base grew by 15%;
- 3x growth active followers on Instagram
- McCain reported an impressive 800K incremental retail revenue in select region

Social Media Platform	Engagement Metrics	Growth Rate
Facebook	149% reach increase, 2,000+ shares on video content	15% fan base growth
Instagram	Triple growth in active fan base	N/A
YouTube	3.8 lakh views on advertising campaign	N/A

5. Digital Marketing Practice - Food Sector

Case 2: MIXUE

Company Info:

- A leading Chinese beverage and dessert brand
- Specializes in affordable ice cream, milk tea, fruit tea, and other cold beverages.
- Known for its cheerful branding and extensive franchise network

User Portrait

Age: Primarily 15–30 years old

Occupation: Students, young white-collar workers

Income Level: Low to middle-income groups

Consumption Motivation: Price sensitivity, frequent social media use, interest in trendy and affordable beverages

Purchase Channels: Primarily offline (near schools, train stations, and shopping streets), with increasing use of delivery platforms and mini-programs



5. Digital Marketing Practice - Food Sector

Case 2: MIXUE

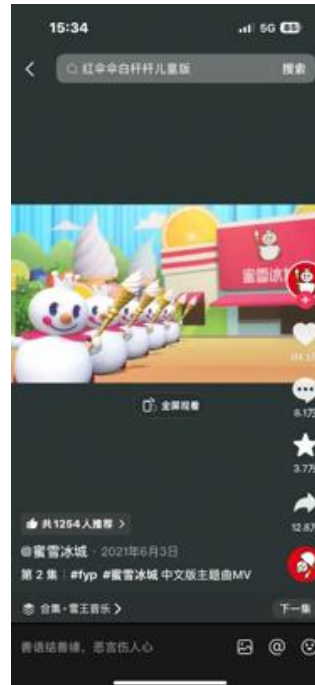
Digital Marketing Practice:

1 . Social media operation:

- On social media platforms such as TikTok and Red, Mixue releases videos that follow trending topics to create marketing buzz.
- Promotional livestreams on social media platforms, distributing and selling discount coupons to attract customers.

2 . Brand Recognition:

- Mixue enhance its brand recognition through **brand cultural building**, for example:
- Mascot “**Snow King**” and its **series cartoon**, **theme song** of its stores.



Mixue's official TikTok account has amassed 3.533 million followers.

← The theme song of Mixue has receives 840 thousands of “like” on tiktok.

6. Messaging Framework

Seafood consumers have become increasingly interested in the safety of the seafood they eat

Tailor-made messages are critical to promoting consumer safety and increasing the marketing of seafood products

Trusting The Product



Source: Google Image.com,2025

This framework, we will enhance labels to foster customer trust in seafood products and enhance transparency in supply chain activities

The framework will emphasize sharing information on the origin of the seafood product, allowing the customer to understand how and where the particular seafood is coming from, and addressing sustainability issues

The framework will also provide the mode of traceability and reassure retailers and consumers about the quality of the seafood they purchase

6. Messaging Framework

Product Visibility



Source: Google Image.com,2025



The framework will focus on innovative labelling to efficiently communicate with customers at all levels



It will also emphasize staff-related training to increase sales and reduce risk in the seafood business environment



The properly labelled product will reduce mis-labelling fines and compliance issues, which can lead to increased customer confidence.



A well-labeled seafood product will enhance better product differentiation (e.g., type of seafood, farmed, wild-caught, etc.)

6. Messaging Framework

- Product Source



Source: Google Image.com,2025



THE MESSAGE
FRAMEWORK WILL BE A
SHARED RESPONSIBILITY
TO BUILD THE CAPACITY
OF EVERYONE ACROSS
THE SUPPLY CHAIN,
FROM FISHERS TO
RETAILERS TO
CONSUMERS



THROUGH TRAINING,
RETAIL STAFF WILL BE
PREPARED TO ANSWER
CUSTOMERS' QUESTIONS



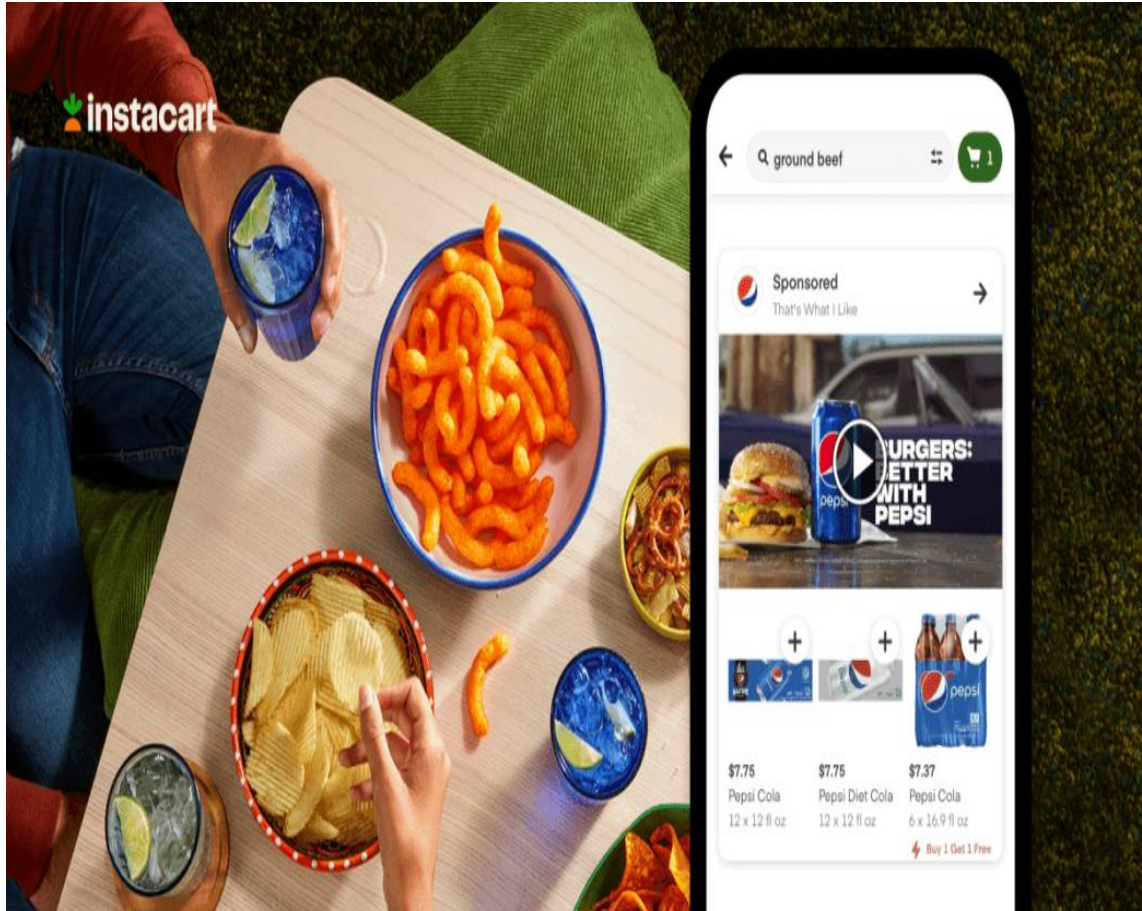
THIS WILL BUILD
CONFIDENCE AMONG
CUSTOMERS AND BOOST
SALES



FROM THE SUPPLY SIDE,
WELL-TRAINED STAFF
WILL ENSURE THAT
SEAFOOD SOURCING IS
ETHICAL AND
SUSTAINABLE

7. Communication Channels

Point of sale videos



This will display important educational messages for customers

The video that repeats on the screen at various points in the store will show information about seafood types, sources, and how to read the label

Source: Google Image.com,2025

7. Communication Channels

- Social Media Campaign



Source: Google Image.com,2025

This channel resonates mostly with young consumers, where platforms such as Instagram, TikTok, and Facebook are used to provide behind-the-scenes visuals and storylines

Gen Z and Millennials have a strong preference for digital communication platforms, largely due to their familiarity with technology and its role in their daily lives (Arundhathi and Mini, 2024)

7. Communication Channels

Shelf Labelling and QR Codes



Source: Google Image.com,2025

Colour design on shelves can represent a category or type of seafood

QR codes will provide information on the country of origin, Seafood Consumers Association certification, health benefits, recipes, and package type

7. Traditional communication Channels

- Traditional Media for Older Generations
 - Television
 - Radio
 - Print media (newspapers & magazines)
- These mediums are more relevant to older demographics
- The older and less educated individuals tend to rely more heavily on traditional media

8. Conclusion

The Australian seafood industry faces a growing disconnect between consumer expectations and market realities. While demand for sustainable, traceable, and clearly labelled seafood continues to rise, the current landscape remains fragmented, opaque, and often confusing to the average shopper.

Through detailed analysis of retailer types, supply chain dynamics, labelling regulations, and consumer behaviour, this report identifies a critical trust gap that must be addressed to ensure long-term industry resilience and public confidence.

The Trusted Seafood Partnership (TSP) provides a practical, scalable solution. By promoting transparent labelling, ethical sourcing, and staff education, TSP can empower consumers to make informed choices and offer participating businesses a point of competitive differentiation.

We recommend that the Seafood Consumers Association (SCA) pilot this initiative with metro retailers, engage in targeted communication campaigns, and position itself as a leading voice for integrity in the seafood sector. In doing so, SCA can drive systemic change and help build a more trusted, sustainable future for Australian seafood.

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