Section 5

Point of sale consumer messages
5.0 Introduction

There has been much written about the importance of tailoring point of sale (POS) messages for consumers. The main function of POS messages, beyond simply marketing products, is to emphasise points of difference, inform consumers about specific benefits, and increase market share. POS resources may also be used, as in this case, to provide a health message based on current national dietary recommendations and guidelines.

This section reports on a supermarket and media audit of health messages relating to seafood and the development of POS messages for consumers.

5.1 Supermarket and media audit of health messages relating to seafood

5.1.1 Introduction

A brief observational supermarket audit was conducted to determine what, if any, health messages were being displayed near seafood products on supermarket shelves. A research assistant visited a total of 18 shopping districts in the Perth metropolitan area during January 2009 to record the number and type of health messages that were available for consumers, as well as other messages displayed near fish and seafood products. Messages displayed near meat and poultry products were also recorded. In addition, a brief literature search was conducted to determine what seafood related health messages had appeared in locally available print media in the six months prior to the supermarket audit (1 July 2008 to 31 Dec 2008).

5.1.2 Supermarket Audit

5.1.2.1 Methods and sample

Using data from the Australian Bureau of Statistics (ABS), a sample of eight shopping centres were selected, four from economically ‘advantaged’ suburbs and four from ‘disadvantaged’ suburbs. These suburbs were then mapped, and using visual representation a further 10 shopping centres were chosen from other Perth metropolitan suburbs (See Figure 5.1). These centres were grouped geographically and a schedule was developed to ensure efficiency.

The types of retailers visited were categorised into three groups. Large supermarkets such as Coles or Woolworths were grouped as ‘majors’. Large independent retailers, such as Supa IGA or Farmer Jack’s, were grouped as ‘independents’. Fish outlets (stores that sold only fish and seafood products) were grouped as ‘fish retailers’.

5.1.2.2 Audit instrument

Prior to conducting the supermarket audits, a brief audit questionnaire was developed to record any health messages displayed near fish or seafood products, as well as any other messages displayed near these products. Where available, the price of a pre-determined selection of Australian seafood was also recorded.

Figure 5.1 Audited locations in the Perth metropolitan area.
5.1.2.3 Results

5.1.2.3.1 Demographics

A total of 18 shopping districts were visited resulting in 43 retailer audits. Of these, 28 retailers were major supermarkets, five were independent supermarkets, and 10 were fish retailers.

5.1.2.3.2 Health messages

Of the 43 outlets audited, 30% (n=13) displayed some kind of health message near fish or seafood products. Of these 13 outlets, one was a major supermarket, four were independent supermarkets and eight were fish retailers.

There were 20 health messages relating to fish or seafood products observed (see Tables 5.1 - 5.4 in Section 5 - Appendices). Of the 20 messages, almost half (n=9) described specific health benefits linked to omega-3 consumption. A further four messages referred to omega-3 without being specific about health benefits associated with consumption. Six messages made reference to fish or seafood being a healthy food choice, and one resource linked fish consumption to specific health benefits. These messages included information such as:

- ‘It is now well established that, in general, people who eat fish regularly live longer, healthier lives.’ (Major)
- ‘Fresh oily fish is associated with reduced asthma risk in children.’ (Fish retailer)
- ‘Look after your health and treat your tastebuds with these quick and easy recipes’ (Fish retailer)
- ‘Omega 3 helps prevent coronary heart disease, high blood pressure, rheumatoid arthritis and other disorders.’ (Fish retailer)
- ‘Seafood is an important part of a healthy diet and becoming the food of choice for the health conscious.’ (Fish retailer, major)
- ‘Omega 3’s are essential to life and good health. Important for the brain and nervous system. Hence fish really is brain food.’ (Fish retailer, major)

Other, more generic health messages included:

- ‘Healthy heart needs fish’ (Fish retailer)
- ‘Live Longer Eat Seafood’ (Fish retailer)
- ‘Large serves of chicken, pork and fish are a great alternative to red meat’ (Independent)
- ‘Seafood! Eat your way to better health with Omega 3’ (Fish retailer)

5.1.2.3.3 Other messages

Of the 43 retailers audited, 39 (91%) displayed a non-health related message near fish or seafood products. Of that 39, 26 retailers (67%) were major supermarkets, nine were fish retailers (23%) and four (10%) were independent supermarkets. There were 32 seafood related messages and seven non-seafood related messages.

5.1.2.3.3.1 Seafood related messages

Of the 32 seafood related messages, 12 were promotions or messages placed by the retailer. The most commonly occurring seafood related message was generic signage or images designed to promote seafood (n=16 retailers). These included pictures such as cooked salmon or prawns. A further eight retailers displayed other generic fish or seafood images; however these were branded with the retailer’s slogan. Six retailers promoted fish or seafood specials with signage. Three retailers linked fish or seafood items with Australia Day by displaying banners or flags near these items. Only one message promoted a specific branded product (see Table 5.5 in Section 5 - Appendices).

Nine messages were produced by industry related sources. These messages varied, but included promotions of specific products and recipes which used seafood products (see Table 5.6 in Section 5 - Appendices). A further nine messages related to the promotion of specific fish or seafood products, and were produced either by retailers or fish/seafood companies. The most common of these messages was produced by ‘John West’ (see Table 5.7 in Section 5 - Appendices).
Finally, there were two other messages displayed near fish products. One was produced by an animal rights group, and the other was a newspaper feature which included seafood recipes (see Table 5.8 in Section 5 - Appendices).

5.1.2.3.3.2 Non-seafood related messages

Of the seven non-seafood related messages displayed near fish or seafood products, all were most likely placed by the retailer. The range of products promoted included petrol, credit cards, and deli products and services. There were also several warning messages, reminding customers to watch their belongings or to be aware of security cameras in the area (see Table 5.9 in Section 5 - Appendices).

5.1.2.3.4 Fish oil products

The audit also included a review of resources available near the nutritional supplements section of supermarkets. One company produced three resources which contained information on the health benefits of fish oil and omega-3 and other minerals which occur naturally in seafood, such as iodine and selenium. One resource in particular highlighted the benefits of using a fish oil supplement, as well as outlining the health benefits of omega-3. A health food store was also visited. Resources were available in printed form, as was a poster outlining some health benefits of omega-3 fish oil tablets.

5.1.2.3.5 Cooking demonstrations

A total of five outlets were conducting food or cooking demonstrations at the time of the audit. Three of these were major supermarkets, one was an independent supermarket and one was a fish retailer. Three of the demonstrations involved seafood products. The seafood products were shark, golden trevally and salmon.

5.1.2.3.6 Other foods

Twenty-nine outlets (67%) displayed prominent messages near meat or poultry products. Of those 29, 24 outlets were major supermarkets and five were independent supermarkets. The types of message varied by retailer; as with the seafood messages, some were specifically promoting a certain food product, and other messages bore no relation to the product near which they were placed. Figure 5.2 shows a seafood health message placed near meat products:

![Figure 5.2: Seafood health message placed near meat products.](image)

In particular, certain brands or products were promoted at particular outlets. In addition, outlets also promoted certain items with their own branding, for example, meat for Australia Day (see Figure 5.3). Another common message was the ‘Buy West Eat Best’ campaign, observed at 10 outlets.
Figure 5.3: Australia Day promotional materials placed near meat products.

Messages near other foods found in major and independent supermarkets are presented in Tables 5.10 to 5.12 presented in Chapter 5 - Appendices.

5.1.2.3.7 Price comparison

Where possible, prices were recorded for Australian salmon, Australian mussels and Australian prawns. Results are presented in Table 5.13.

Table 5.13: Cost comparison of Australian Seafood (price/kg)

<table>
<thead>
<tr>
<th></th>
<th>Salmon</th>
<th>Prawns - Banana</th>
<th>Prawns - Tiger</th>
<th>Prawns - King</th>
<th>Mussels</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent Supermarket</td>
<td>n/a</td>
<td>$17.99</td>
<td>$26.95 - $38.99</td>
<td>n/a</td>
<td>$4.99 - $5.99</td>
</tr>
</tbody>
</table>

5.1.3 Media review

5.1.3.1 Methods

The Factiva database was searched for articles that appeared in The West Australian (TWA), Sunday Times (ST) or The Australian (TA) newspapers between 1st July 2008 and 31st December 2008 containing the terms ‘seafood’ or ‘fish’. The search retrieved 244 matches, with 11 articles related to health risks and benefits associated with seafood (in general or a specific variety/species). The same newspapers were searched for articles containing the term ‘omega-3’. A total of 22 articles were retrieved, 18 of which related to health.
5.1.3.2 Results

5.1.3.2.1 Risks/Negative messages

The risk/negative messages identified were:

- Fish farmed in China may contain melamine. (TWA)
- Eczema sufferers should avoid seafood, as these may be reactive. (TWA)
- Esperance shellfish may be contaminated with lead. A Conservation Council spokesman is concerned contamination may have spread to other seafood. The Health Department stated that it had a longstanding warning against people eating shellfish collected in developed areas. (1xTA, 1xTWA)
- Hemp oils contain a better balance of fatty acids than fish oil. (TWA)
- Fish at seafood van at Royal Show is cooked in vegetable oil - which contains essential omega-3 fatty acids. (TWA)
- Children may be deficient in omega-3. (TWA)

5.1.3.2.2 Benefits/Positive messages

The benefits/positive messages identified were:

- A low GI diet which includes seafood may reduce acne. (1xTWA, 1xST)
- Fish oil (in combination with other ingredients) is recommended for babies delivered by caesarean section to prevent eczema. (TWA)
- Seafood Lovers website article - states that people at risk from health problems such as heart disease, rheumatoid arthritis, diabetes, obesity and hypertension could benefit from eating seafood. (TWA)
- Diabetes Australia recommends seafood as a source of dietary protein for diabetics. (TWA)
- Seafood is a source of iodine, which is good for the thyroid. (3xTWA)
- Omega-3 will reduce the body's level of reactivity to allergens. (TWA)
- For general health, two 1000mg capsules of omega-3 supplements once a day will suit most people. (TWA)
- Omega-3 was suggested as part of a remedy for blepharitis (an ocular condition). (TWA)
- Fish and omega-3 fatty acids named as 'superfoods' by The CSIRO Healthy Heart Program. (ST)
- Health experts urge more consumption of the essential fatty acids, omega-3, after preliminary research found Australians are not consuming enough of the oils, putting them at a higher risk of heart disease. The Omega-3 index is a biomarker for heart disease. Omega-3 will protect against heart disease. National Heart Foundation recommends 500mg daily dose of omega-3 for all adults to protect against heart disease. Fish oils reduce the risk of heart disease by boosting good cholesterol, lowering blood pressure, keeping blood vessels supple and maintaining a stable heart rate. The recommended weekly dose of 3,500mg can be achieved by having two to three 150g serves of oily fish, such as salmon, blue-eye trevalla or canned fish, or by taking 500mg a day in fish oil supplements or omega-3 enriched foods and drinks. Those who have signs of heart disease need double the dose, or 1000mg a day. (TWA)
- Omega-3 is recommended for itchy skin/allergies. (TWA)
- Omega-3 is essential for healthy skin (x2) and hair. (TWA)
- Eating fish could help prevent memory loss and stroke as we age - but not if it's fried. (TA)
- A recipe with egg and salmon states that omega-3 will keep your heart healthy. (ST)
- For expecting mums - Fish oil is rich in omega-3 fatty acids. Special fats found to protect the heart and improve neurological function. Fish oil helps alleviate inflammation such as sore muscles and back. (TWA)
- Omega-3 products will improve your pet's skin and coat. (TWA)
5.1.4 Discussion and recommendations

5.1.4.1 Locations

Of the 43 outlets visited, only 13 retailers displayed a health message for consumers near seafood products. Fish retailers and independent supermarkets were most likely to promote the health benefits associated with seafood consumption to consumers. Only one of 28 major supermarkets visited displayed a health message near seafood products. There are opportunities to promote the health benefits associated with seafood to consumers in retail settings, particularly major supermarkets.

5.1.4.2 Health messages

Twenty health messages were observed during the audit. Half of these referred to specific benefits of omega-3 or seafood consumption. Messages were mostly produced by industry or manufacturers. Half of the messages were in the form of a pamphlet. These messages were not ‘eye-catching’ and often placed on the back of printed materials requiring the consumer to read them in their entirety. The health messages were often secondary to other information, such as recipes. There is an opportunity to promote specific health benefits of seafood consumption to consumers with clear messages, in ‘eye-catching’ formats.

5.1.4.3 Other messages near seafood

Most outlets displayed some kind of non-health related message near seafood. Thirty nine messages were identified. These messages were mostly produced by industry, manufacturers or the retailer and mainly in formats such as shelf tags, posters or A4 placards placed on a counter. Messages included shopper warnings, recipes, and promotions for particular products and events. Australia Day was linked to seafood as a promotion at three retailers. Seafood as a choice for barbeques was promoted at one retailer. Non-health related messages were often in more ‘eye-catching’ formats than the health messages.

5.1.4.4 Other foods

Two thirds of retailers displayed messages near other food products. These messages were mostly produced by the retailer or manufacturers. Messages often promoted specific products, and linked products to events, such as Australia Day and barbeques. Promotions linking meat and barbeques were observed at 20 locations, and Australia Day was used to promote meat products at 12 locations. Meat and poultry products used health messages at only three locations.

Although meat products were linked to special events or activities on more occasions than seafood, meat and poultry were linked to health benefits less often than seafood. Seafood could create a ‘niche’ position in marketing for health benefits.

5.1.4.5 Fish oil

Resources near fish oil products specifically promoted the health benefits of seafood consumption, including intake of omega-3 and other nutrients. Fish oil is a direct competitor to fresh fish for health benefits. Seafood products may be able to market health benefits in the same way fish oil does.

5.1.4.6 Media audit

Information published in the media can be confusing, conflicting or incorrect; however some articles are specific about the health benefits of seafood. The community are exposed to a wide range of messages about the health benefits of seafood. It is important to present clear informative messages to help educate and guide health behaviours and decision making.

5.1.4.7 Other considerations

Existing codes, regulations and practices that govern the development and display of consumer ‘point of sale’ resources in Australia should be reviewed to ensure compliance. For further information please refer to the Industry Guidelines for Seafood Health and Nutrition Messages developed by CESSH.208
5.2 Development of point of sale consumer messages

5.2.1 Initial development

A number of potential point of sale messages were designed in February 2009 based on the findings of the literature review and known barriers and facilitators to seafood consumption (see Figure 5.4).

![Figure 5.4 Potential Point of Sale messages](image)

An overarching message of Fish twice a week plus a series of by-lines were developed. An Advisory Panel of key stakeholders (CESSH Industry Advisory Group, CESSH Advisory Panel and consumers) were invited to comment on the concepts, and preliminary feedback was used to modify the health messages. The by-lines included:

- **A healthy heart** - fish twice a week
- **Smart Choice** - a healthy diet includes fish twice a week
- **A hearty meal** - fish twice a week
- **Love your heart** - fish twice a week
- **Hooked on fish** - twice a week
- **Time for a sea change** - fish twice a week
A hearty diet includes fish twice a week

*Food for thought* - Fish Health - twice a week

For better health top up to 2

2 serves a week for heart health

*No bones about it* - canned fish twice a week

For the BBQ - fish and salad - twice a week

Steam, grill or BBQ - Fish twice a week

*No bones about it* - TUNA twice a week

*Feed 'em fish* - twice a week.

The results of the review of possible consumer messages found that a block design and a fish design were the most popular choices. Messages favoured were: Brain Food, Feed'em Fish, Love your Heart, Smart Choice and Smart Heart.

5.2.2 Consumer evaluation of the seafood shelf tags

5.2.2.1 Aim & Objectives

The aim of this component of the project was to evaluate the messages on the shelf tags with consumers. The main objectives of the evaluation were to:

- Determine the preferred shelf tag design format (block design or fish-shaped design); and
- Determine the most appealing descriptor for the shelf tag: Brain Food, Feed'em Fish, Love your Heart, Smart Choice and Smart Heart.

5.2.2.2 Methods

The shelf tags to be tested were developed by inserting the selected messages: Brain Food, Feed'em Fish, Love your Heart, Smart Choice and Smart Heart onto tags in both block and fish designs (see Figure 5.5).
Figure 5.6 shows examples of shelf tags placed in supermarket shelves:

Once the shelf tags were developed, an independent marketing company conducted the evaluation of the shelf tags and consumer messages using a sensory research design.

5.2.2.3 Consumer sample

Respondents from locations across Australia were recruited using computerised Sensory Software through personalised mail invitation. The survey was rolled out on 7 May 2010 and 422 respondents participated in the online research.

5.2.2.4 Sensory research design

The computerised sensory tool EyeQuestion was used. Consumers were initially shown two shelf tag designs (block design and fish-shaped) and asked to rank their preferred shelf tag design format. They were later asked to rank the most appealing descriptor for the chosen shelf design format. Respondents who voted for the fish-shaped shelf tag were shown five different descriptors on the fish-shaped design while those who selected the block shelf tag were shown five different descriptors on the block design.

5.2.2.5 Research findings

A higher percentage (61%) of the respondents voted for the fish-shaped design to be their preferred shelf tag design format (95% confidence level).

As shown in Figure 5.7, Smart Choice was ranked as the most preferred descriptor for the fish-shaped design shelf tag, statistically significant at 95% confidence level.
Those who selected the block shelf tag also ranked Smart Choice as their most preferred descriptor, statistically significant at 95% confidence level (see Figure 5.8).

The outcome of the independent evaluation of the POS resources found that a fish-shaped tag was the preferred design, and Smart Choice Fish Twice a Week was the preferred descriptor to promote seafood.

The preferred promotional design and wording are sufficiently generic to be used in any campaign that promotes seafood in general. It would also work as a ‘brand’ or ‘logo’ on products to increase recognition or individual campaigns across a number of ranges and promotions (e.g. shelf tags, in-store branding, information pamphlets) as a trigger for purchasing and to draw attention to seafood displays.

5.3 Conclusion

The results of the supermarket audit identified opportunities to promote the health benefits associated with seafood to consumers in retail settings, particularly major supermarkets. In particular, using more ‘eye-catching’ formats and marketing health benefits. Presenting clear and informative messages will be critical.