

Case Study of the Eyre Peninsula Seafood and Aquaculture Trail

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Australian Government

**Fisheries Research and
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FRDC Project No. 2006/409

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OBJECTIVES:

1. To document the development and evolution of the Eyre Peninsula (SA) Seafood and Aquaculture Trail.
2. To provide a resource for those interested in developing a similar concept in other States.

NON TECHNICAL SUMMARY:

The purpose of this project was to provide a brief case study on the development and operation of the Eyre Peninsula Seafood and Aquaculture Trail (EPSAT) to assist the establishment of similar schemes in other States.

The EPSAT was an initiative of Tourism Eyre Peninsula (TEP) - a part of Tourism South Australia - and was launched in 2002 as a means of 'packaging' a number of stand-alone, seafood-related tourism activities. These were primarily existing land-based tours of seafood facilities, or boat tours of commercial aquaculture operations. Some were owned by tourism operators, and some were an extension of seafood businesses seeking additional revenues.

Based on a well-promoted map-brochure of the region, the EPSAT aimed to provide self-drive tourists with a 'cellar door' style experience of the seafood industry and its products – similar to self-drive excursions through the State's wine regions.

By the end of the 2005-06 financial year EPSAT operators had conducted over 70,000 paid tours, and seafood operators reported significant associated farm gate sales. However, after a peak of 16,000 tours (per annum) in 2003-04, tour numbers steadily declined. The 2006 the EPSAT map showed 16 tours in operation but by February 2008 there were only eight tours operating. Of these, three were temporarily closed due to weather or other problems.

Despite this decline in tours and tour numbers, it is not the conclusion of this project that the EPSAT concept has in any way failed. Research by Tourism SA indicates that the EPSAT has contributed to an increase in the average length of stay by tourists, and in their appreciation of regional produce, thus meeting tourism objectives. From the seafood industry's perspective, there is evidence that the EPSAT tours have resulted in significant additional revenue from tour fees and farm gate / shop sales of produce; and contributed to promotion of individual businesses and regional brand names. It is also very likely that the tours have resulted in a more positive perception of the seafood industry as a whole.

Nor should the decline in tour numbers imply that the 'trail' concept is now obsolete.

Until 2007, the EPSAT was primarily a marketing umbrella, and participating operators were not bound by any corporate or mutual structure. Consequently there was no built-in mechanism for review and 'rejuvenation' of the tours, or to fund such a mechanism. Although tour bookings and sales are done largely through Visitor Information Centres, inputs such as training, innovation, market research, marketing and promotion, and statistical collection/analysis, were provided by external sources – mainly TEP which was constrained by its own limited resources.

One of the major conclusions of this project is that seafood trail tours should be reviewed regularly, and support given for 'rejuvenation'. This could be as simple as providing up-dated information on core issues such as seafood industry statistics and issues - to more complex tasks such as reviewing consumer feedback and market research to explore better ways to deliver a more rewarding tour experience. Indeed, it seems certain that trails themselves must continually evolve to meet the changing requirements of the travel industry and tourist markets, and the opportunities and objectives of participating tour operators.

TEP recognised this and in 2008 began implementing a major new initiative called *Seafood & Beyond* ⁽¹⁾. This is a rewards card scheme involving other attraction operators such as transport, dining and accommodation providers. The existing EPSAT tours and seafood theme have been retained within *Seafood & Beyond* but are now directly linked with these other services for bookings and cross-promotion.

The former EPSAT trail map has been replaced with a brochure and 36 page guide booklet that includes maps and details of each attraction, of which there are now 37 in all – 13 being previous EPSAT tours. The scheme links operators electronically for easier booking, and for financial and rewards card transactions. (The booklet is packaged with an audio CD describing many of the attractions).

Importantly, this scheme has the potential to provide regular income through commissions paid by participating operators - with the operators themselves being owners of the scheme, along with TEP. This is a unique innovation of the *SmartVisit Solutions* ⁽²⁾ reward card scheme that is already in operation in several States (in other industries), and addresses the important issue of funding on-going trail maintenance. At the time this project concluded, it was too early to assess its success in this context, however.

For the seafood industry, tours (regardless of who owns them – ie. tourism or seafood industry operators) and tour theme trails, have the potential to directly assist individual seafood businesses and to promote their products. When packaged as regional or State-wide tourist trails, these tours present a unique opportunity for the broader seafood industry to promote its products, its importance to communities, its responsible business practices and its cultural heritage.

Given the identified problems of community and consumer perceptions about the seafood industry, and the chronic lack of product promotion, this opportunity to deliver accurate information and to showcase products at their best, is significant.

This study concludes that seafood tour trails should be encouraged and supported, both regionally and at state and national levels, by the seafood industry.

Indeed, a review of existing and potential tour operations directly connected to the seafood industry may reveal this to be a 'new sector' of significant value and with significant growth potential. As such, the involvement of the seafood industry in supporting and growing this new sector may appear much more relevant.

This report includes background information on the development and evolution of the EPSAT, and recommendations applicable to other States, for seafood industry and development/funding bodies to pursue.

Attached is a handbook of recommendations and suggestions for individual operators or seafood bodies contemplating the establishment of a tour, or a tour trail.

As a specific recommendation derived from this case study and subsequent research, it is clear that the Australian seafood industry needs to provide up to date information to existing seafood-related

tourism operators around Australia to ensure that correct information about the industry is being given to the public, and that perceptions created from these tourism experiences are based on fact.

KEYWORDS: Seafood and aquaculture trail, trail, food trail.

Acknowledgments

Funding for this project came from the Fisheries Research & Development Corporation Seafood Industry Development Fund with the application recommended by Seafood Services Australia. Support was given by an ad hoc committee convened by the NSW Department of Regional Development to explore the potential for an aquaculture trail in NSW.

Information and assistance during the project was provided by Paula Aird at Tourism Eyre Peninsula and Nick Carter of SmartVisits Solutions.

Background

In mid-2006, the NSW Department of State and Regional Development invited a group of interested parties to discuss the development of a Seafood and Aquaculture trail in NSW. Bodies represented include NSW Primary Industries (Fisheries); NSW Farmers Association (Oyster Division); Tourism NSW; AusIndustry; and Seafood Australia. The latter invitation stemmed from Seafood Australia previously initiating discussions on the opportunity/benefits of such a trail in NSW.

Subsequently, several potential clusters of NSW seafood and aquaculture operations that might benefit from being linked by a tourism trail were identified through consultation. A preliminary application to the SIDF to fund a Project Officer to initiate and oversee the development of the trail program resulted in an invitation to apply for funding for this case study instead - to be used as a resource for the NSW, and other similar, projects.

The Eyre Peninsula Seafood and Aquaculture Trail (EPSAT) was already operating at that time, having been launched in 2002. It began by linking 14 operators from tourism and seafood industries who were providing public tours related to seafood and/or aquaculture operations. The EPSAT was initiated and supported by personnel at Tourism Eyre Peninsula (TEP) and widely promoted on Tourism SA web-sites and by local Visitor Information Centres. The Eyre Peninsula receives over 400,000 visitors annually (mostly self-drive tourists from South Australia) and the EPSAT was aimed at providing them with a 'cellar door' style experience of the seafood industry and its products – similar to self-drive excursions through the State's wine regions.

The EPSAT 'seafood-specific' trail map/brochure showed details of tour opportunities along the coastal highway between Whyalla, Port Lincoln and Ceduna. The program's objectives included:

- providing additional income streams for the operators through tour fees and farm gate sales, and for other local businesses such as restaurants and motels;
- promoting regional seafood and aquaculture produce; and
- positively influencing community perceptions about these industries.

At the time of the case study in February 2008, the EPSAT had resulted in over 77,000 tours - succeeding in all the above objectives according to tour operators and TEP.

Since then EPSAT has been merged with an expanded trail scheme called *Seafood & Beyond*⁽²⁾. This scheme links the existing EPSAT tours with other attractions such as restaurants, accommodation and transport providers. The former EPSAT trail map/brochure has been replaced with a 36 page guide booklet that includes maps and details of each attraction, of which there are now 37 in all – 13 being previous EPSAT tours. The booklet is packaged with an audio CD describing many of the attractions.

At the core of this scheme is a rewards card allowing tourists to purchase entry to multiple attractions on the trail, at a discount rate. The card can be ‘topped up’ at EFTPOS-type terminals installed at the attractions. Reward points can be earned or redeemed based on usage, providing additional discounts.

Tourists can use the *Seafood & Beyond* website to plan their itinerary, and purchase reward cards / entry in advance.

The direct benefits to operators include more efficient bookings, fast transaction processing and cross-promotion opportunities. The scheme also provides a better ‘package’ for promotion and sale to the travel industry.

Importantly, this scheme has the potential to provide regular income through commissions paid by participating operators - with the operators themselves being owners of the scheme, along with TEP. This is a unique innovation of the *SmartVisit Solutions* ⁽²⁾ card scheme that is already in operation in several States (in other industries), and addresses the important issue of funding on-going trail maintenance. At the time this project concluded, it was too early to assess its success in this context, however.

Need

Aquaculture in Australia is predominantly comprised of small operations - many on a cottage industry scale. Most would benefit significantly from additional income streams (eg. tour income and farm gate sales), and regional promotion of their products. There are also issues of public perception, particularly in coastal areas, that would benefit from positive tourism. Similarly, the fishing industry in some States is in decline (in terms of permitted fishing effort and profitability) and would also benefit from the above.

The establishment of seafood-related tourism such as seafood and aquaculture tour trails meets (or partially meets) the following FRDC research priorities for 2005/08:

- Increase the profitability of businesses supporting the (three sectors of the) fishing industry.
- Develop relationships with community groups that can assist the fishing industry.
- Educate the community about fisheries and aquaculture management and its contribution to Australia.

A case study of the development and evolution of the EPSAT was a logical starting point for those seeking to research and/or initiate such programs.

Objectives

1. To document the development and evolution of South Australia’s Eyre Peninsula Seafood and Aquaculture Trail.
2. To provide a resource for those interested in developing a similar concept in other States.

Methods

No technical or innovative methodology was used in this project. The first stage simply involved desk research to compile background information on the development of the EPSAT, and

communications with personnel at TEP and some tour operators. The second stage involved a four-day field trip over part of the trail to:

- a) experience the drive itself to better understand the context in which tours are offered;
- b) assess the information presented before and during the drive about the EPSAT, in terms of its availability and impact on tourist decision making;
- c) experience some of the tours first-hand to better understand the operational environment, inspect any special facilities, assess how the tours might translate to other situations, and to gauge the impact of the tours on tourist perceptions of the seafood industry;
- d) conduct face-to-face interviews with operators to hear their assessment of the success of tours to their business, and on tourist reactions; and their views on the trail concept and on the 'management' and evolution of the EPSAT to date.

That field trip commenced in Adelaide on 5th February, 2008. Although the EPSAT officially commences at Whyalla where the first tour is located (if driving west) most self-drive tours originate in Adelaide. A recent development impacting on the current EPSAT has been the commencement of a car ferry service from Wallaroo to Cowell – about half way up Spencer Gulf. This two-hour sea voyage provides an alternative to the 400 kilometre drive around the top of Spencer Gulf, thus by-passing Whyalla. This alternative was chosen, both to deliberately shorten the field trip, and to experience that aspect of the trail. (The ferry service is part of the *Seafood & Beyond* program and is thus relevant.) One tour was undertaken at Cowell, and three at Port Lincoln, with subsequent interviews with tour operators. Tours further west at Streaky Bay were not included – again to shorten the field trip, and because some were temporarily closed due to adverse harvest conditions. A previous EPSAT tour (the Seahorse Museum) which has been re-located from Port Lincoln to Adelaide, and is now part of the *Seafood & Beyond* program, was also included as the experience of this operator was considered to be valuable.

The field trip also included interviews with staff at TEP in Port Lincoln. Tour bookings were made during several visits to the Port Lincoln Visitor Information Centre which provided an opportunity to assess the static presentation of EPSAT tour information, hear verbal presentations by staff, and observe the booking and sales process. As some tours required re-scheduling due to adverse weather conditions, interaction with staff at the Centre provided a useful insight into this important aspect of the trail operation.

Results/Discussion

It was not the purpose of this project to critique or comment directly on the operation of tours on the EPSAT, or the management of the EPSAT.

Rather, it was to gauge how those operations might apply to alternative situations, and how the seafood industry as a whole might benefit from the South Australian experience.

Therefore, this report does not detail the observations made or any comments forthcoming from those, except in general terms or as recommendations for seafood industry bodies. In addition, this report provides (in Appendix 1) a handbook of recommendations for potential tour operators and / or trail managers, based on a summary of the observations made, and other information collected from various sources – predominately TEP. Some of the general comments and recommendations are repeated both here (below) and in the handbook.

There is Potential for Trails in Other States

Given that tours on the EPSAT trail do provide opportunities for seafood and aquaculture operators there, it seems certain that potential benefits also exist for operators in other States – as well as the broader seafood industry. Indeed, tours already exist in other States, and during the period of this study, several operators contacted the writer for advice in regard to commencing new tours.

Gauging the Potential Size of the Market

At Port Lincoln (population 16,000), geographically one of Australia's most remote cities, tuna cage tours increased from 2,000 to 7,500 in 2007 (pers. com) mostly due to a new operator who provided a significant increase in capacity with a bigger boat, and a clever innovation - swimming with tuna. The new operator captured 5,000 of the additional tours, although the existing operator also enjoyed a large increase. This appears to show that seafood-related tourism is potentially significant. However, that potential might only be realised by further investment in innovation and capacity. The extent to which market research was useful in identifying that potential in Port Lincoln could not be accurately assessed, but clearly there is a role for market research in assisting trail developers and potential operators.

Regional Clusters

The differences in replicating the trail concept in other States are more likely to be in how tours are linked and managed. EPSAT is somewhat unique in that all the tours are located along one coastal highway, with few alternative routes of interest. However, in the eastern States at least, regional clusters of seafood and aquaculture operations, and ancillaries such as dining and accommodation, probably offer better geographic opportunities for organisation and marketing, than trails extending over long lengths of coastline, or which are based on the entire State. Such clusters would probably offer a better fit with local regional tourism strategies and promotion, and other existing food trails. That approach, however, does not rule out promotion of the trail theme at State or National level.

Basic Requirements

In simplistic terms, the three basic requirements for a self-drive food trail are 1) food-related attractions (may or may not be food production), 2) food (ie. samples of produce, either farm gate sales and/or served as a meal), and 3) accommodation - all within appropriate geographic reach. This implies that a successful trail must go beyond simply aiming to link industry tours, and provide a balance of related services. There may be other elements such as special transport (eg. the Wallaroo-Cowell ferry) that need to be considered in a successful mix.

Diversity

The EPSAT and *Seafood & Beyond* programs provide an example of how diverse seafood-related tours can be, with: a fish hatchery operated by high school students; a fish shop tour; a fishing heritage cruise (primarily targeting older tourists); a 'swim with tuna' cruise (primarily targeting younger 'adventure' tourists); a seahorse museum; and oyster farm tours. These are now linked with restaurants, accommodation and transport options.

Common Objectives

It should be noted that non-seafood tours that might appear to be adversely inclined to promote commercial fishing or aquaculture may well have common issues in terms of what they present to a tourism audience (eg. environmental sustainability, importance to communities, heritage). The SA case study revealed that many of the tours were operated by former seafood industry people, and in some cases employed them. On a broader scale, there may be regular seasonal employment opportunities and other cross-overs with the seafood industry. There may also be common training opportunities.

Starting Up - State and Regional Drivers

Inevitably, regional clusters will be best managed by participants and their own local management bodies. However, competitive rivalries, knowledge gaps (especially between the seafood industry and tourism service providers), local government boundaries, and 'local tunnel-vision', can stifle organic trail development.

The catalyst for the formation of new trails and their management groups probably relies on State organisations such as government departments responsible for tourism and regional development, State seafood bodies, as well as local councils and local industry groups. This was certainly the case in SA where development of the EPSAT was driven by TEP. Based on that experience, and in meetings with other interested parties, local groups might look to State bodies for assistance such as:

- Start-up funding for some aspects of trail development;
- Marketing and promotion through State agencies;
- Launch promotion (with the support of State politicians);
- Business advice and staff training;
- Road signage.

Of course, any initiative will fail without local support, and in this regard the importance of identifying and involving local champions can't be overstated. These might be found among current tourism operators, local government officials, industry associations / co-ops or local celebrities such as chefs. It may be possible to include, at start-up, established regional tourism businesses (eg. fishing co-ops, museums, well-known restaurants) which can provide important keystones to anchor a developing trail. In this regard, it may be necessary to combine with an existing food trail to provide the necessary scale (and economies) to launch the seafood theme.

Council tourism and Visitor Information Centres are the 'backbone' of tourism activities, especially in regional locations, and the success of any trail will undoubtedly depend to a large extent on their participation. The role of Visitor Information Centres in marketing tours (promotion, bookings/sales and financial transactions) will almost certainly be pivotal to their success.

Local industry groups including those in seafood, business (eg. Chamber of Commerce) and tourism are normally the source of considerable experience in their respective fields and could be canvassed in the development phase at least, for input and support.

Local newspapers and radio/TV stations are often the first to support new initiatives, and the inclusion of a local media representative on the development group may greatly assist with both initial and on-going promotion.

Entity and On-going Management

From the case study, it is clear that management of the trail is essential to the quality of its offering, and its longevity. Whilst TEP was able to do this to a large extent, constraints on its resources were reflected in the ‘maintenance’ of the trail. It is probably asking too much of any trail model to include a government agency to provide on-going management.

The involvement of a private, specialist management company such as SmartVisit Solutions seems to have addressed this in the Eyre Peninsula, and a similar structure may well be the answer for all future trails.

It is not possible for this report to recommend a commercial model suitable to all potential situations, or to recommend proprietary solutions. However, each potential trail group will have to consider how it addresses the mechanics of its operation (eg. bookings, transactions, etc); how it creates and manages ‘rules’ to ensure the quality of the experience for tourists and compliance with relevant legislation such as OH&S, and how it markets the trail to the travel/tourism industry and public.

Operator Guidelines

The following points have been taken from the *Seafood & Beyond* Operator Agreement and detail some of the guidelines that may be typically adopted by a trail group. Although there are general references to OH&S requirements, there is no specific reference to insurances or public liabilities. Whilst these appear to have been left to individual operators to meet, a management group should consider its own exposure to public liability and any breaches of legislative requirements.

1. *The tour/experience should be available for a minimum of four times a week, 52 weeks of the year, for the contract period as detailed in the guidebook.*
2. *Minimum numbers required to operate tour: 2 for land based & 4 for water based as detailed in the guidebook.*
3. *Pricing is set (period stated) as detailed in the guidebook/motivational brochure.*
4. *Suitable access for elderly, disabled and groups.*
5. *Adequate car parking facilities and spaces.*
6. *Clear signage directing the public while on premises.*
7. *Accident precautionary measures adhered to through Occupational Health Safety and Welfare procedures.*
8. *All tours to be guided.*
9. *Trained tour guide – with a commitment to formal ongoing training.*
10. *Provide interpretation of the facility, related to industry and marine species.*
11. *Comments sheets/ surveys to be distributed whenever possible and copies forwarded to Tourism Eyre Peninsula.*
12. *Work towards National Tourism Accreditation Program accreditation.*
13. *All operators to be registered with the South Australian Tourism Commission database.*

14. The above terms are strictly set for the contract period. Should operational changes within the business affect this, the operator must find a solution to ensure the tour continues - with support of Tourism Eyre Peninsula.

It is interesting to note that TEP itself originally identified the following Threats in its own SWAT analysis of the EPSAT concept.

- Public liability insurance and general safety issues
- Fishing industry quotas / seasons (changes)
- Commercial hygiene laws could change and require major infrastructure
- Staff productivity can be affected by visitor enquiries
- Unhealthy competition on trial

Benefits and Adoption

Almost every sector of the Australian seafood industry could benefit from this research. There would be very few sectors that could not apply a tourism related component somewhere in their production, processing or distribution chain. The benefits might relate to supplementing direct income, and/or promoting fisheries or sector brands, or positively influencing consumer perceptions.

It is impossible to quantify this in terms of price impacts in various markets, or to a generic impact on prices overall. However, the industry has already invested in research into consumer perceptions, with that research identifying the need to develop and broadcast appropriate messages.

It is likely that generic benefits would accrue evenly across the industry. However, in terms of supplementing direct income, near shore or land-based operations such as aquaculture clearly have an advantage.

Nothing in this research contradicts the assumptions made in the original application in regard to the extent or spread of potential benefits. However, this research indicates that the extent of potential benefits (direct and indirect) is significant, and likely to be considerably underestimated by the majority of industry participants at the moment.

The ad hoc committee formed in NSW (referred to in the original application and this report's background) remains eager to pursue development of this initiative, and at least one other State, Queensland, is currently investigating a seafood and aquaculture trial. Members of the current FRDC leadership program are also engaged in a project to highlight the potential benefits of such a trail.

Further Development

1. Engagement With Current Seafood-related Tourism Operators

Regardless of the broader objectives of this project (ie. to provide the foundation for the development of seafood and aquaculture trails) it would seem to be in the best interest of the seafood industry to identify who all the current operators are; what their impact on the seafood industry is (in terms of shaping public perception and/or generating sales), and to develop a strategy to communicate with them.

It may well be that the seafood industry can improve community/consumer perceptions by providing factual and updated information to these operators, and that step could have an important role in improving the quality/profitability of their tours –very relevant if they are directly connected

to seafood industry operations. Further, this has the potential to become a major plank in an overall seafood promotion strategy.

Thus, this project recommends the undertaking of a nation-wide scoping study of existing seafood-related tourism operations (tours and related services) to establish their relevance to the seafood and aquaculture theme. These are likely to include operations as diverse as cruises (including whale/dolphin watching), museums, fish-out ponds (usually associated with an aquaculture operation), market tours, recreational fishing charters, and cooking schools. This project would be the pre-cursor to establishing a communication strategy as outlined above.

2. Identify Potential Seafood-Related Tours/Services.

A further step might extend the above study to identify potential operators / trail participants. The potential to join a trail might prove to be pivotal in encouraging new operators into a seafood tourism venture, as might the prospect of reliable information and other support from the seafood industry. Identifying potential operators could be achieved with the assistance of local tourism offices, local seafood groups and local media.

3. Identify Regional Clusters.

A review of the information collected could then identify logical clusters, in a process that considered tourism patterns, strategic organisational groupings, regional champions, and complementary services and food trails. Doing that would inevitably involve some judgements about what services are relevant to the trail. That may differ from region to region.

4. Identify Drivers.

Identifying regional bodies (eg. regional tourism offices, local seafood industry associations, etc.) or new groups that might be formed would be a logical step towards initiating and assisting development of local clusters. From the SA case study, it is clear that the initial success of the EPSAT was largely (if not entirely) due to the active support of personnel at TEP – as is its development since. Also noted is the role of Visitor Information Centres in marketing and promotion of the trail, and in generating (pre-booked) sales.

The information gained from the above steps would greatly assist those involved in developing new trails, in conjunction with the following recommendations for their establishment, once identified.

From the seafood industry's perspective, it is likely that a dedicated Project Officer with specific knowledge of seafood industry objectives, national (and certainly cross-region) industry structure, importance of operations to industry and communities, history, and theme relevance, would be more successful at this. A person who "speaks the language" of industry, but can keep in sight its context within broader tourism, would best assist in bringing the parties together.

Planned Outcomes

This case study and report will provide a comprehensive background for any industry groups seeking to develop a seafood and aquaculture trial.

The associated handbook will provide a useful starting point for the actual development of a trial.

The duration of this study has also been helpful in understanding the evolution of the trail concept (specifically the EPSAT model) and is able to suggest a proprietary solution based on the South Australian experience to date.

Conclusion

1. There appears to be significant potential for seafood-related tourism in Australia, based on the SA experience.
2. Seafood-related tourism can:
 - contribute significantly to business income
 - promote products and brand names
 - promote seafood and the seafood industry
3. The seafood and aquaculture trail concept, linking tourism operators with other service providers, can enhance the prospects of success, and that approach is recommended.
4. It would be in the interest of the seafood industry to:
 - assess the current and potential market reach of seafood tourism
 - assess the impact of existing seafood tourism on consumer perceptions
5. As the above are likely to be significant, it would be in the interest of the seafood industry to:
 - identify and communicate with tour operators
 - provide core seafood and aquaculture facts
 - provide regular fact updates
 - provide assistance to improve standards (and hence, profitability and impact)
6. New trail development is probably reliant on start-up assistance from State Government agencies.
7. Trail models need to include a mechanism for funding on-going management and regular 'rejuvenation'.
8. Tour operators would benefit from initial training such as:
 - How to be a tour operator/guide (including what not to say)
 - Core/updated industry facts
9. Trails would benefit from regular reviews to:
 - ensure tours are meeting trail objectives / standards
 - ensure tour guides are properly informed
 - suggest new ideas / updates
 - deliver trail 'system' up-dates
 - help revitalise tours, regularly or as needed
10. Trail signage is essential in adjacent towns. For instance:
 - posters at key positions;
 - road signs (eg. large Tourist Attraction signs)
 - cross-promotions with other tours/attractions.

References

- (1) *Seafood & Beyond*. www.seafoodandbeyond.com
- (2) *SmartVisits Solutions*. www.smartvisitsolutions.com

Intellectual Property

Information relating to the operation of Eyre Peninsula Seafood and Aquaculture Trail maybe subject to copyright or proprietary ownership and permission should be sought from Tourism Eyre Peninsula before use or publication.

Design and operation of the Seafood and Beyond rewards card scheme, now incorporating the Eyre Peninsula Seafood and Aquaculture Trail, maybe subject to copyright or proprietary ownership and permission should be sought from Tourism Eyre Peninsula or SmartVisits Solutions before use or publication of related information.

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Case study of the Eyre Peninsula Seafood and Aquaculture Trail

Project No. 2006/409

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Appendix A

Seafood and Aquaculture Trail Development Handbook

Introduction

This handbook was produced from information obtained during a case study of the Eyre Peninsular Seafood and Aquaculture Trail – FRDC Project 2006/409.

This is not a definitive guide to the establishment and management of food trials. It seeks only to provide useful information based on the South Australian experience, and related enquiries.

Disclaimer

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Why, Who and Where

Why do it

There appears to be significant potential for seafood-related tourism in Australia.

Seafood-related tourism can:

- contribute to seafood business income
- promote products and brand names
- promote seafood generically, and the seafood industry

Why a Theme Trail

Based on experience elsewhere, the seafood and aquaculture trail concept, linking tourism operators and other service providers, can significantly enhance the prospects of individual success. That's because a trail can 'package' a diverse range of experiences and services within one theme, which can be marketed (almost as a single entity) more effectively and more efficiently. Cross promotion is a major element of the trail concept. The main markets are self-drive tourists and tour groups.

What type of businesses are suitable

In simplistic terms, the three basic requirements for a food trail are:

- 1) food-related attractions, which may, or may not, be food production;
- 2) food - ie. samples of produce, either farm gate sales and/or served as a meal; and
- 3) accommodation.

All must be within appropriate geographic reach.

This implies that a successful trail must go beyond simply aiming to link industry tours, and provide a balance of related services. There may be other elements, such as iconic local attractions or special transport that need to be considered in a successful mix.

However, trail developers should not lose sight of the seafood theme, so it is important that a quorum of trail participants (if not all) should always include those who can showcase the following aspects of the seafood industry:

- its products,
- its heritage,
- its value to communities,
- its sustainability and other responsible industry practices.

Diversity

Seafood-related tours can be extremely diverse while still falling within the theme.

Examples of tours already found within a seafood and aquaculture trail include:

- a fish hatchery operated by high school students;
- a fish shop tour;
- a fishing heritage cruise (primarily targeting older tourists);
- a 'swim with tuna' cruise (primarily targeting younger 'adventure' tourists);
- a seahorse museum;
- and oyster farm tours.

These are linked with restaurants, accommodation and transport options.

Common Objectives

It should be noted that non-seafood tours (even those that might appear to be adversely inclined to promote commercial fishing or aquaculture) may well have

common issues in terms of what they present to a tourism audience (eg. environmental sustainability, importance to communities, heritage) and are therefore complementary.

Some of these tours could be operated by former seafood industry people, and/or employ them. Keep in mind that there may be regular seasonal employment opportunities and other cross-overs with complementary industries. There may also be common training opportunities.

Location

In some States, it may be that almost all tours (or potential tours) are located along one coastal highway. However, in the eastern States at least, regional clusters of seafood and aquaculture operations, and ancillaries such as dining and accommodation, probably offer better geographic opportunities for organisation and marketing than trails extending over long lengths of coastline, or which are based on the entire State.

Regional clusters probably also offer a better fit with local tourism strategies and promotion, and other existing food trails. That approach, however, does not rule out promotion of the seafood trail theme at State or National level by government or industry.

Starting Up

New Tour Operators

Many seafood-related businesses could benefit by developing a tourism component to fit within their existing operation. This may be as simple as a tour of land-based production or processing facilities or of a heritage collection related to the business or industry sector. Further value could be added by offering farm gate sales of products, and / or meals. Many tours include video displays, and provide additional facilities to accommodate all these aspects. Some exploration in the local area and, importantly, in other regions, will normally yield a number of tourism-related ideas that might be applied to a current operation. That could be because the basic infrastructure is already in place, or could be added cost-effectively, or because of an identified gap in the tourism market.

As in any business venture, those involved must weigh up the cost of additional facilities and staff needed (if any) against the potential benefit to be gained. In this regard, new operators should be clear about their objectives. For instance, some may rely on direct additional income from tours and sales to offset costs, while others may simply seek an investment in promoting a brand name.

Clearly, operators must comply with local and State government guidelines and regulations in relation to tours and facilities, and this could be a significant capital cost and shouldn't be underestimated.

However, neither should the potential market be under-estimated. Although most small-scale tourism operations seem to have begun with a 'suck it and see' approach, some authentic market research is probably a worthwhile investment where a larger potential is perceived. In a case study associated with this project, tour sales in one region suddenly tripled when a new operator provided an innovative approach to an existing tour idea, and the additional capacity to carry more customers.

When considering a new tourism venture, operators should take into calculation the advantages of participating in a food trail, if that option is available (or potentially available).

Current Tour Operators

Throughout Australia there are many existing tourism operations that would fit within, or complement, a seafood theme.

Many would benefit from the networking and cross-promotion associated with a food trail. Clusters of these existing operations could provide the essential critical mass to enable the development of a new trail.

Current Service Providers

In the same way, some existing service providers (eg. restaurants, accommodation and transport) could benefit from, and complement, a new food trail, filling important gaps in the trail map - geographically, and in the range of services on offer.

New Trail Development

State and Regional Drivers

Inevitably, regional clusters will be best managed by participants and their own local management bodies. However, competitive rivalries, knowledge gaps (especially between the seafood industry and tourism service providers), local government boundaries, and 'local tunnel-vision', can stifle organic trail development.

The catalyst for the formation of new trails and their management groups probably relies on the assistance of State organisations such as government departments responsible for tourism and regional development, State seafood bodies, as well as local councils and local industry groups.

Based on other experiences, local groups might look to State bodies for assistance such as:

- Start-up funding for some aspects of trail development;
- Marketing and promotion through State agencies;
- Launch promotion (with the support of State politicians);
- Business advice and staff training;
- Road signage.

Of course, any initiative will fail without local support, and in this regard the importance of identifying and involving local champions can't be overstated. These might be found among current tourism operators, local government officials, industry leaders or local food celebrities such as chefs. It may be possible to include, at start-up, established regional tourism businesses (eg. fishing co-ops, museums, famous restaurants) which can provide important keystones to anchor a developing trail. In this regard, it may be necessary to combine with an existing food trail to provide the necessary scale (and economies) to launch the seafood theme.

Council tourism offices and Visitor Information Centres are the 'backbone' of tourism activities, especially in regional locations, and the success of any trail will undoubtedly depend to a large extent on their participation. The role of Visitor Information Centres in marketing tours (promotion, bookings/sales and financial transactions) will almost certainly be pivotal to their success.

Local industry groups including those in seafood, general business (eg. Chamber of Commerce) and tourism, are normally the source of considerable experience in their respective fields and could be canvassed in the development phase at least, for input and support.

Local newspapers and radio/TV stations are often the first to support new initiatives, and the inclusion of a local media representative on the development group may greatly assist with both initial and on-going promotion.

Development Strategies

1. Engagement With Current Tourism Operators

Once the potential benefit and conceptual feasibility of a food trail are established and a committee is assembled to progress the idea, a sensible starting point is to canvass existing operators for opinions and support.

Desk research might include a scoping study of regional tourist attractions and related services to establish their relevance to the seafood theme. These are likely to include operations as diverse as cruises (including whale/dolphin watching), museums, aquaculture operations and fish-out ponds, fish shops, produce market tours, recreational fishing charters and cooking schools.

An analysis of geographical location and a knowledge of local community 'divisions' should start to reveal logical geographic clusters. The input of local tourism agencies (such as Councils) at this stage will be invaluable in providing accurate tourism data such as tourist traffic patterns, expenditure, overnight stays, etc. that might influence initial perceptions of cluster boundaries. From there, a series of subjective decisions about the mix of attractions and services and the geographic extent of the trail, should lead to a workable outline.

In reality, that outline will be largely shaped by the number and location of participants that are ultimately prepared to join. It may well be that there are existing food trails that the seafood theme could attach to - either as a starting point, or as an inevitable compromise where other food industries are stronger or better established.

2. Identifying Potential Tours and Services

At this stage, it is probably worth extending the above scoping study to identify potential trail participants – to fill gaps in the trail map, or to simply make them aware of the tourism and trail opportunities. The potential to join a trail might be pivotal in encouraging new operators into a seafood tourism venture (as might the prospect of reliable information and other support from the seafood industry, if that can be arranged). Identifying potential operators could be achieved with the assistance of local tourism offices, local business groups, seafood bodies and local media. State fisheries offices might also provide leads and introductions to specifically seafood operators.

3. Confirming a Regional Cluster

At some point, the development committee will have to settle on a logical cluster from the above findings. That process will involve further subjective decisions relying on the experience of the committee. Doing this will inevitably involve judgments about what services are relevant to the trail, and this may differ from region to region.

It will also involve an assessment of objective data such as known tourism patterns, regional development strategies and complementary services and food trails.

4. Participant Selection

At this stage, it is essential that the development committee reviews its own objectives, keeping in mind that the trail and selection of trail participants should **enhance** perceptions of the seafood industry – not simply complete a trail map.

Although the recognition of excellence is generally understood at a professional business level, this is sometimes a complex issue. To summarise this point very briefly, not every attraction or service is a suitable showcase, even if filling an important gap in the trail map, so criteria such as those above, and guidelines on assessing tour or service excellence, should be considered at this stage by trail

developers. External assessment criteria, such as awards for excellence or compliance with standards of excellence, can assist in this.

Entity and On-going Management

As there was only one seafood and aquaculture trail operating at the time this handbook was written, there is little precedent for the type of entity that might be chosen to incorporate an on-going trail management group. As a formation committee and advisory body, incorporation is probably not essential.

However, the South Australian case study revealed that on-going management of trails is essential to their longevity.

In particular, raising funds for marketing, reviewing performance and periodically 'reinvigorating' the trail, is essential, and may require an entity appropriate to receiving and expending money on behalf of the participants – including the engagement of consultants or part-time employees.

It is not possible to recommend here a model suitable to all potential situations. However, the entity might need to accommodate the following components.

- a) An advisory committee consisting of representatives of trail participants,
- b) A capable person authorised to publicly represent the trail entity,
- c) An external or in-house capacity to receive and send mail, to make financial transactions, and to enter into contractual arrangements (eg. marketing the trail) on behalf of the entity.
- d) The capacity to derive commissions or other income from participants to fund activities.

One alternative is to adopt a proprietary solution. At least one company in Australia (SmartVisits Solutions) specializes in providing management tools and strategies to assist in the operation of food trails.

Those tools include swipe card systems for purchasing multiple-entry to food trail attractions – in some cases enabling the user to earn rewards points and other discounts. The cards can be purchased on a trail website that provides maps and details of the attractions on offer. This enables tourists to plan a trail itinerary in advance.

For more information about this, visit www.seafoodandbeyond.com to see the how the ***Eyre Peninsula Seafood and Aquaculture Trail*** (the first such trail to be developed in Australia) has been incorporated into a broader scheme called **Seafood & Beyond** which utilizes many of these tools. This expanded scheme now includes links to accommodation, restaurants and transport - as well as many of the original trail attractions.

You can also visit www.SmartVisitSolutions.com to see how this company has adapted its services to a number of major tourism scenarios in Australia and overseas.

An important innovation currently (2009) being considered by **Seafood & Beyond** participants is the formation of a commercial entity owned jointly by the participants and SmartVisits Solutions which will be funded by commissions collected via the swipe card system. It is hoped that this will provide funds for on-going marketing and trail 'maintenance'.

Operator Guidelines

One of the most important considerations for both the development committee and the ongoing management group or entity is the creation of guidelines or rules (perhaps contractual) that described minimum or preferred service quality levels – in some cases needed to satisfy legislative requirements such as OH&S.

Below are some of the things that might be taken into consideration when devising those guidelines.

Scheduling and Open Hours

Although trails are developed primarily for the benefit of operators, and generally allow some flexibility, there may be some disciplines for participants that differ from existing operations, or those originally planned. Scheduling 'open hours' is among the most significant of these, as it involves balancing staffing availability and other cost issues against value added to, and derived from, trail participation. The optimum and minimum hours of participation in the trail will differ between clusters – but this is one of the major decisions trail developers will have to make in arriving at the best model for their trail.

Service providers (accommodation, dining, etc) normally keep hours that optimally target the requirements of tourists.

Temporary Closures

In considering the above, trail developers and participants should be conscious that some tours will be out of service periodically due to factors such as bad weather, seasonal or other harvest restrictions, and maintenance and repairs (especially with vessels). This can dilute the trail's appeal, and should be taken into consideration when developing the trail model and participant mix. Service providers do not normally close for the above reasons.

Training and Assistance

Clearly it is in the best interests of the trail if the tour guides and service providers are 'qualified' for their role and present correct information. In the case of service providers, this should be covered by professional qualifications and business accreditations. For seafood tours, those qualifications might not be available or appropriate – with priority given to attributes such as industry experience, communication skills and 'character'.

Tour guide and other appropriate courses are available from TAFE colleges, and the management group might make this information available to participants. It is probably not appropriate to make tourism or communication training compulsory, and it will be self-regulating to a large extent by the degree of commercial success.

However, the delivery of accurate information is essential if the theme objectives of the trail (ie. to enhance perceptions of seafood) are to be met. In this case, the management group should endeavor to make sure the participants are in receipt of up to date information on their field – probably requiring them to identify official sources of such information and a review schedule.

Regulatory Compliance and Limiting Liability

In each State, individual operators will have to comply with regulatory requirements for business operations appropriate to their tour/attraction or service (including OH&S); address any general safety issues for staff and public (especially near machinery or vessels), and assess their need for insurances such as Public Liability.

Operator Guidelines Example

The following points have been taken from the *Seafood & Beyond* Operator Agreement as an example of guidelines that might be typically adopted by a trail group.

- 1. The tour/experience should be available for a minimum of four times a week, 52 weeks of the year, for the contract period as detailed in the guidebook.*
- 2. Minimum numbers required to operate tour: 2 for land based & 4 for water based as detailed in the guidebook.*
- 3. Pricing is set (period stated) as detailed in the guidebook/motivational brochure.*
- 4. Suitable access for elderly, disabled and groups.*
- 5. Adequate car parking facilities and spaces.*
- 6. Clear signage directing the public while on premises.*
- 7. Accident precautionary measures adhered to through Occupational Health Safety and Welfare procedures.*
- 8. All tours to be guided.*
- 9. Trained tour guide – with a commitment to formal ongoing training.*
- 10. Provide interpretation of the facility, related to industry and marine species.*
- 11. Comments sheets/ surveys to be distributed whenever possible and copies forwarded to Tourism Eyre Peninsula.*
- 12. Work towards National Tourism Accreditation Program accreditation.*
- 13. All operators to be registered with the South Australian Tourism Commission database.*
- 14. The above terms are strictly set for the contract period. Should operational changes within the business affect this, the operator must find a solution to ensure the tour continues - with support of Tourism Eyre Peninsula.*

Marketing and Promotion

Launch

By the time the trail is ready for operation the development committee or management entity will (optimally) have developed a suitable marketing strategy. This probably starts with the launch of the trail which provides an excellent opportunity for initial promotion. Government assistance is often available for the start-up phase of community-based initiatives, both in hard dollars and advisory services. Politicians themselves are often keen to be personally involved, and may assist with personal appearances at any launch events, and with media.

Promotion

This probably starts with a web presence, and hard copies of a trail map or brochure distributed among trail participants and other key locations throughout the trail region. Signage is also vitally important. Road signs to indicate attractions not only assist with navigation but provide important ongoing promotion of the trail. The cross-promotional effect of tourists encountering the first attraction then discovering the trail network is probably the core feature of on-going promotion. Thus, good cooperation and networking skills, as well as attractive point-of-sale material at each attraction, should be encouraged. Other signage and/or POSM at key locations such as tourist offices, transport depots, and shops or restaurants where seafood is sold, could be considered as part of the basic trail promotion.

Inviting journalists to experience trail attractions, or encouraging celebrities to tour the trail, are just two of many ideas an active committee could explore to encourage media promotion.

A trail logo is probably a good investment in the early days of promotion.

Marketing

Networking and actual transactions 'at the farm gate' are probably the most basic forms of marketing on any trail, and will no doubt always represent a significant component of the marketing mix. However an increasingly large proportion of sales will emanate from more sophisticated marketing activities. At a regional level, probably at the core of this are the Visitor Information Centres operated by local councils. These are often the first point of entry to the region by many tourists, and their main source of information. More importantly, their staff is trained in marketing and can convert casual interest into actual sales if the booking and transaction infrastructure is in place. This is probably the single most important component the development committee or management entity should address in addition to the establishment of the actual trail.

The VICs might also be able to give advice on how to better package the trail for sale to the travel / tourism industry.

More sophisticated marketing options are also available thanks to modern technology. These might be web-based, with the opportunity to make online sales, as well as promotion. The web-based mechanism might extend to tools such as vouchers or swipe cards. The options are too extensive and complex to explore here, but an example can be seen on the Seafood & Beyond or SmartVisits Solutions websites.

Investment in a proprietary solution such as those suggested above could expedite the development of a sophisticated and efficient technology-based marketing system.

Continuous Improvement

The South Australian case study highlighted the importance of continuous improvement. This is needed to address changing trends in tourism, in the travel industry itself, and to maintain the currency of attractions on the trail and the trail itself. An important tool in this is the collection and interpretation of customer feedback. Whilst word of mouth may have immediate commercial implications, a formal system of customer feedback should keep the management entity appraised of how attractions are faring in the eyes of customers, thus enabling timely intervention if required. Customer feedback forms at each attraction and at Visitor Information Centres, is recommended. This accommodates both positive and negative feedback, but a formal customer complaint system should also be considered. The system should ensure that all feedback (especially complaints) is regularly monitored by the management entity.

Whilst an annual audit of attractions (and service providers) may seem excessive, it is also recommended. This provides the opportunity for trail managers (or someone representing them) to personally visit each attraction or service on the trail map to assess their success or media for assistance. It also provides an invaluable opportunity for regular face-to-face communication, and the input of ideas.