

Development and Implementation of an Industry Education and Market Awareness Program

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(Principal Investigator)



Australian Government

**Fisheries Research and
Development Corporation**

Project No. 2007/235

2007/235

**Development and Implementation of an Industry Education
and Market Awareness Program**

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ISBN 978-0-9873125-0-1

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KEYWORDS: Australian seafood, promotion, SEA.

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OBJECTIVES:

The Project Objectives were to:

1. Develop a vehicle platform for industry to attend post harvest (market and consumer) events that builds capacity and assess the value of research that supports seafood supply chain development
2. Assist industry to gain knowledge of the supply chain for their product.
3. Assist industry to gain knowledge of the key drivers for the key stakeholders (buyers and consumers) in each market.
4. Showcase the Australian seafood industry as a professionally run industry backed by science.

The project was designed to help establish a program that would engage the Australian seafood industry to participate in a trade show program and gain a broader understanding of the market in which they are selling products.

To date the seafood industry has approached this task (marketing – tradeshow and gaining customer information) in a piecemeal, company by company basis. This project sought to draw together the key highly motivated seafood industry companies, who will provide a good example to those companies looking to expand their horizons.

NON TECHNICAL SUMMARY:

OUTCOMES ACHIEVED TO DATE

In overall terms the Program has failed to meet its objectives.

Certainly the program of trade events was constructed and rolled out across Australia. It achieved and surpassed the expectations of those participating with regards both satisfaction and participation. Additionally, the professionalism by which the events were run far exceeded expectations and achieved praise from event organisers, fellow show participants, industry groups (such as WAFIC), the trade and the public attending.

Moreover, while outside the supported Program, SEA undertook, supported and/or facilitated a number of related activities including Australia's participation at ESE '09, additional trade and consumer events, and support of the Sydney Fish Market's consumer education initiative.

The expectation that synergies would arise from complementary and even supposedly competing seafood sharing the events undertaken as part of the Program was proven with participants

reporting attendances and enquiry higher than they would normally expect.

It is hard to place a direct value on this in-kind contribution and partnering, outside the commercial value to reduce cost of running the stand and not having to purchase them. But this should not be overlooked in the context of evaluating the project or for future activities. Many of the companies, continued to seek opportunity with the seafood sector despite the project being completed.

While sales were not a performance indicator, it is nonetheless an important factor that cannot be ignored when looking to engage the industry into the future. It is difficult to ascertain the exact number of sales generated and their value but based on 100-200 enquiries per event from mainstream buyers the amount is likely to be substantial.

However, the Program is considered to have failed to meet its objectives. The platform developed was under subscribed and those participating already had a high level of market and consumer awareness and understanding – they certainly honed their skills and derived immediate and ongoing benefits but the design was for introduction of those that had not participated in such events previously to be educated. The “old hands”, who were willing to support the new comers, were there, the new comers weren’t. The inability to secure higher levels of participation and introduce those who had not participated in such events previously cannot be attributed to any lack of notice and encouragement, and, given the level of subsidy being provided, the cost should not have been a factor; it was.

Regrettably the Program suffered from the seemingly age-old view that what is not understood is not important or necessary, but if it is, then it’s someone else’s issue and someone else should be paying for it.

Noteworthy in respect of engaging with industry is that SEA’s efforts have attracted the interest and support of seafood importers with both individual participants and their industry association signing on. They are unconcerned about SEA’s promotion of Australian seafood as their focus is on the “seafood” and they recognise that even though the promotion of “Australian” is not to their advantage that it gets people consuming for value more seafood then they gain benefit.

Similarly noteworthy, while the program may have failed to achieve engagement with the Australian seafood industry, other industries recognised the benefits and opportunities. High profile sectors such as wine, horticulture, oil, boutique salt and commercial kitchen companies – Breville and Chefs Toolbox were eager to be seen partnering with seafood. These sectors saw the innate value of being seen with seafood. In their view there was enough value to provide produce and products – in some cases providing over \$1,000 each show.

Further Development

In light of the outcomes of this program and the earlier Project (2006/236 - Seafood Industry Market Awareness) it is apparent that developing an ongoing program of general seafood promotion and education at the broad level will be difficult without some mechanism by which companies can contribute to education, promotion and marketing activities.

Advancing the interests of Australian seafood catchers, growers, processors, distributors and retailers as a category is thought to be essential as it is from that base the branding and promotion of regional and species specific can be effectively achieved. Similarly, failing to educate the Australian public on the breadth, quality, health benefits and values of Australian

seafood and seafood consumption in general ignores the opportunity to create enthusiasm and demand that can be built on. These comments are in no way meant to diminish or belittle the efforts of some throughout Australia. Some individual industry players' and regional groups' efforts are, indeed, mighty, but they stand alone and in their efforts to avoid "spillage" to other product the efforts are very specific and do little to promote Australian seafood as a whole. Moreover, there's a limit to the ability and resources of those striving to generate demand and enthusiasm to carry the load for all.

It is the view of the author that the oft held view of developing "champions" and achieving greater co-ordination of effort are worthy but will not deliver sustainable outcomes. The emergence of species and/or region specific marketing and promotional groups, fee for service operators and the growth of internal capabilities of larger industry participants evidences the recognition of need by some industry participants; and it these participants that are the "old hands" referred to earlier and who are already the champions ready and willing to work with others.

Whether it be SEA (re-constituted however required) directly, or SEA as a chapter of a truly national Australian seafood entity the urgent further development is to work with the Government to establish a mechanism for the collection of marketing and promotion funds while concurrently continuing a program of promotional events to create additional "buy in" and ongoing communications with the industry players.

Conclusion

This project clearly demonstrated that a targeted market awareness and education program can deliver tangible benefits to the seafood industry. However, without some long term funding strategy to underpin the ongoing activity industry will not be able to capitalise on and maximise the growth potential for the seafood category.

SEA's efforts, the events themselves, the actual delivery of the supported Program and the supplementary activities were first rate but, notwithstanding exhaustive endeavour to engage with those industry participants not already participating in promotional events, SEA's efforts supported the initiated and not the sought after new comers.

We need a levy, says ASIC

"It's my fervent belief industry must face up to that dirty four letter word – levy" was Australian Seafood Industry Council Chair Bob Pennington's closing message at Seafood Directions. [2005]

He said the bottom-up funding used to date had failed and would continue to do so. *"We need a levy to have top-down funding, where money can be supplied to sector bodies, state bodies, port associations and whoever else needs work to be done."*

"Otherwise, we will struggle forever." He said he envisaged a levy that applied equally to Australian and imported seafood. *"Engage or perish."*

BACKGROUND

Promotion is a key component of increasing the awareness and value of seafood caught, grown and sold in Australia. This Program was developed and aimed to develop human capacity, show that customer education is a vital component of marketing and to be used as a platform for the development of an ongoing education and marketing program for seafood.

SEA is not the first to identify promotion as a key opportunity for the Australian seafood industry. This Program was aimed directly as a vital step in converting work undertaken over the past three years by SEA, and many others over much longer periods, to develop and implement a viable promotional strategy capable of truly addressing the opportunity.

A decade ago industry workshop in Melbourne led to formation of Seafood Export Alliance charged to develop promotional strategy for industry.

Independently the Federal Government Aquaculture Action Agenda program arose from recommendations from industry based Aquaculture Industry Development Committee.

Concurrently these initiatives, together with various species, regional and producer direct efforts, led to major aquaculture, then seafood, market research and positioning strategy. This strategy developed with extensive industry consultation at every level of the supply chain.

The efforts merged into the Seafood Experience Australia (SEA) as an industry wide seafood promotional body which was tasked to develop a detailed seafood promotional plan and take to industry.

The 2007/235 Program was sought to support and underpin the “roll out” by providing industry education through facilitating participation in industry trade events and thereby achieving enhanced market awareness. And in doing so promote to the market place and consumers the high quality and strong attributes of Australian seafood.

NEED

The Australian seafood industry has been experiencing difficult market conditions in varying degrees over the past few years. These difficulties have been characterised by strong import competition, increasing costs, low profitability and a relatively low share of consumer protein consumption.

Part of the industry low profitability, indeed the sustainability of the industry overall, lies with its operational focus and lack of self promotion, especially as compared to its competitors in the Australian protein market and even sectors within the fruit and vegetable production. The success of red meat, chicken and pork in preserving and increasing their market share has left the volume of seafood consumption as relatively low, especially in homes. At the same time, import competition has developed rapidly, exposing the industry to even greater price and volume pressure. For the industry to be successful a range of changes are required, but promotion to improve both volume and price was and remains an urgent need.

The access challenges being experience, predominantly for wild catch but also significant for aquaculturists, must also be recognised given that an industry perceived as iconic and of importance and value to Australia’s economy and Australians’ health and well-being is more influential and worthy in the MPA process, local council approval of land bases, environmental water flows to estuaries, Government support, etc etc. The access to water, quotas, infrastructure, etc are not a direct part of the Program but a by-product worthy of note. An industry held in higher regard will have influence and be better heard than one not known of or

understood. Promotion of product attributes and quality splashes back favourably on the fisher/grower, the processor, the distributor and the retailer.

The need for meaningful and sustainable promotion doesn't apply to all. There are many producers, distributors, retailers and preparers of Australian seafood undertaking very worthwhile and extensive promotional endeavour. However, their efforts highlight the gap to those that are simply growing or catching seafood with the expectation that the market place will accept what is presented and provide a valuable return. It is the latter that this Program is directed but it doing so it is necessary to engage with the former, who do so willingly, to bridge the gap.

PLANNED OUTCOMES

The formal Program milestones were:

1. Employ project officer and assist in running Good Food Show '07 Brisbane
2. Assist in the organisation of the Australian Stand at the European Seafood Exposition in Brussels 2008
3. Running of Restaurant '08 Melbourne
4. Running of Restaurant '08 Sydney
5. Running of Fine Foods '08 Melbourne
6. Running of Good Food Show '08 Brisbane
7. Running of Fine Foods '09 Perth

In addition, Program activities sought to enhance the profile of SEA and pursuit of recognition by industry for, in the longer term, an industry self-sustained promotional program.

APPROACH AND PERFORMANCE

the Program Milestones were:



Richard Arnott recruited as the SEA Project Officer was replaced with Roy



Palmer – with Dr Brendan Nelson – Australian Ambassador in Brussels

Employ project officer and assist in running Good Food Show '07 Brisbane

A delayed start to the program meant that the recruitment process wasn't concluded prior to the show although SEA, with FRDC assistance, was involved.

Regrettably the project office's time with SEA was short lived when the recruit took up another position after six months. Due to the lead time to refill the position and the need to deliver the Program the SEA Board appointed Roy Palmer to take on the promotional role and Bob Cox to take up the administrative side at rates to cost no more than would apply for a permanent appointment but for equivalent time – the SEA Board did very well out of this as the time contributed was massively in excess of the employee equivalent.

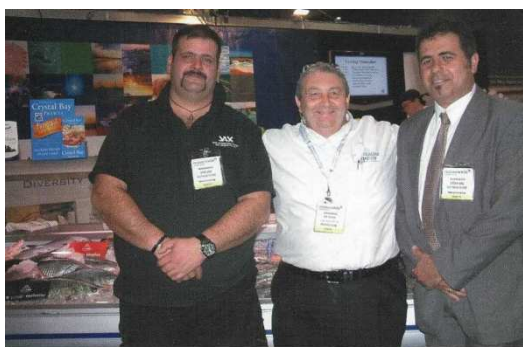
the Program Milestones were:



Assist in the organisation of the Australian Stand at the European Seafood Exposition in Brussels 2008

SEA's participation was very much in an observer, learning about the process. In the transition SEA's Project Officer was working with the WAFIC and FRDC personnel, consultants and chefs; but in the publications SEA's name was being used to smooth the way for 2009 and establish SEA's participation.

SEA did not attend ESE in 2008 due to the change in the Project Officer although it was represented via an associated initiative of SSA, Seafood CRC and SEA, which saw SEA personnel undertaking a survey currently developed by the CRC to gauge buying influencers for Australian product into Europe.



Some men just need a lot of space and Spiro Argyro, left, from SASK, Roy Palmer from SEA and Steven Coas also from SASK, certainly made their presence felt at Restaurant 08 in Melbourne, by showcasing some of the best seafood available.



Gail Spriggs, Events and Marketing Co-ordinator with Clean Seas was trumpeting the company's credentials in seafood



Running of Restaurant '08 Melbourne

Restaurant 08 Melbourne was held on 26 and 27 May 2008 with 4,335 visitors (not including exhibitors and students) attended- this was regarded by Eat&Drink magazine as "bumper".

We had 7 companies represented on our stand – Clean Seas Tuna, Abacus Fisheries, Lincoln Wild Kings, Kinkawooka Mussels, SASK International, Seafarm/Crystal Bay and Cone Bay Barramundi.

They had 89 recorded interested buyers from the tracker used to 'zap' people's entry cards. Of course, there were many other enquiries which were dealt with directly by the people on the stand.

SEA had employed Peter Manifis and Jaysen Smith to do all the cooking on the stand.

This was a 'swansong' for Peter Horvat as he handed the baton over to Roy Palmer, SEA for these type of events.

The stand was busy and there were no operational issues. Feedback from people on stand was good with all of the companies interested in continuing on any other stands we get involved with.

The best report on the event can be found in the participants' comments – to quote Gail Spriggs of Clean Seas:

"The stand looked highly professional and was in a great location (not too close to the opening door that people bypassed us but opposite the 'lounging' area where we could access gathering crowds).

The size of the stand was adequate with plenty of room to move around and crowds moved freely along the thoroughfare.

The display fridge looked amazing, our product looked fresh and impressive for the entire expo.

Roy Palmer and Peter Horvat offered fantastic support, a wealth of experience and information that provided a great

the Program Milestones were:



learning platform for not only potential customers but for myself as well.

The cooking demonstrations were conducted very professionally and showcased our product well. Platters of sashimi kingfish, battered, grilled and fried Kingfish and Mulloway were offered to a very appreciative audience. (Further comment – offered to Peter Horvat – I consider that it may be of benefit to ‘tighten’ the cooking demonstration timeframes where representative companies will be aware of when their product will be offered for showcasing e.g. 30 minute intervals of product on rotation – this way we can be present at specific times and offer more comprehensive presentation to the crowd)

The badge scanning is a unique option (I hadn’t seen this before) and certainly streamlines the necessity for endless gathering of business cards!!



Running of Restaurant '08 Sydney

The second Sydney Restaurant Show was held on Monday and Tuesday 11-12 August 2008. This event was run by SEA's EO, Roy Palmer, but we were appreciative of the support given by both Peter Horvat and Justin Fromm (FRDC) especially with set up and close. Over 5,000 restaurants attended the show and because of the location of our stand (right by the entrance) none were able to avoid us.

We had maximum use of the stand with Clean Seas Tuna, Kinkawooka, Abacus, Port Lincoln Wild Kings, Ferguson Australia, M G Kailis/Aust Ab, Seafarm and Humpty Doo Barramundi in attendance. Yarra Valley Salmon had products/brochures involved but were a late withdrawal with personnel. Marine Product Marketing and Tasea had also committed to attend but were late withdrawals. In addition we had a sponsorship from Seafood Services Australia promoting the Australian Fish Names Accreditation Scheme and Chefs Toolkit (full range of kitchen equipment). The lunches saw us obtain additional sponsorships from Monster Wines (6 wines for tasting aligned with the food), Schweppes (Fuji Water), Parker Organic Juices (Juices), Burragumbilli (Organic Beer), Simon Johnson (Oil, etc), Tomkin Australia (crocery) and Breville (Grill Plates).



In addition to the Restaurant Show we also organised two 14 course degustation media luncheons featuring the companies on the stand and attended the Lexus Young Chef + Waiter of the Year function. The media lunches created a different opportunity for SEA and its clients and the feedback from that has been outstanding. Obviously this will need more follow up but to date we have already had a number of interviews and we hope that the contacts we made will be longstanding. The lunches were organised to enable each SEA member to talk about their products at the same time that it was presented for consumption. In

the Program Milestones were:



in addition to that we gave a small presentation about the seafood industry (Graham Turk on Monday and Debra Ferguson on Tuesday) and a presentation on what SEA was aiming to achieve (Roy). Each of the media received a media kit giving them details of the industry as well individual information on the organisations presenting their products. We engaged PR firm Crossman Communications to assist us with the media work.



Running of Fine Foods '08 Melbourne

Fine Food Australia, one of the larger food exhibition held in Australia, took place 22-25 September 2008 at the Melbourne Exhibition & Convention Centre and SEA had an excellent positioned stand which maximised exposure for SEA members and general seafood promotion. SEA was one of 950 exhibitors from 23 countries taking part.

The exhibition took up the entire Centre and this attracted 23,840 visitors over the 4 days. The visitors were from Melbourne Metro (16,210), Victoria country (2,725), Interstate (3,430) and Overseas (1,414).

SEA members involved were Ferguson Australia, SASK, Australian Ocean King Prawn Company, M G Kailis, Mariner International and Seafood Services Australia.

We engaged William Angliss Institute (WAI) to provide chefs and apprentices for the stand and this worked exceptionally well. Over the event we had 3 teaching chefs involved and 6 apprentices. This was the beginning of a long term relationship with WAI – see below under Extracurricular Activities for further details.

The overseas contingent was from 53 countries and consisted of a number which had been engaged by Austrade. We organised with Austrade to present to their overseas managers and their clients for 2 hours. This enabled all our members to talk about their businesses and their products and for Roy Palmer to give an overview of the Australian seafood situation. This went over exceptionally well with Austrade and the people present, especially as we made the presentation with an array of fine seafood for tasting.

The stand was constantly busy and at times excessively so, especially when, Steve Kons from SASK organised Con the Fruiterer (Mark Mitchell) or should that be Con the Fish Monger to be on the stand – a great hit with everyone!



the Program Milestones were:



Running of Good Food Show '08 Brisbane

The Brisbane Good Food & Wine Show is held annually, and is one of Australia's larger consumer exhibitions. The 2008 event was held 7-9 November at the Brisbane Convention and Exhibition Centre. It featured more than 250 exhibitors of the latest products, ideas and trends in the food industry, and a host of attractions and entertainment, including celebrity cooking shows, a cooking school and the Riedel Wine Theatre. The official attendance was 18,380.

SEA's stand was 36m² where we informed and entertained well over 1,000 people over the 3 days.

Besides seafood on our own stand we also obtained seafood for the Gourmet Garden Cooking School and the Diners Club Celebrity Theatre. The Celebrity Theatre involved Ainsley Harriott, Tobie Puttock, Ben O'Donohue and Matt Moran. We need to thank Clean Seas Tuna & Kinkawooka (through Blue Harvest), Petuna Fisheries, QSIA, QSMA, A. Raptis & Sons, Seafarm. Seatraders/Poulos Bros for organising and supplying the product. The chefs who shared their knowledge and especially the stand participants who supplied volunteers to share their passion of seafood with the consumers.

The stand participants were QSIA, QSMA, Seafarm and SSA. Additionally Chefs Toolbox, our sponsor of Cookware also got involved by offering a Wok to a lucky consumer.

We organised the stand around shows every hour on the 45 minutes – these were the daily shows – they were headed up as 'Elaine's Kitchen'

Hi Roy

Just a quick note to say thank you for a great weekend at the Good Food and Wine Show in Brisbane.

The stand was great and the response from punters was exceptional. The QSIA enjoyed the experience and benefitted from the opportunity to showcase our fabulous Queensland seafood alongside Crystal Bay Prawns and the variety of Australian seafood products on display.

On behalf of the QSIA we thank you for the invitation to join with SEA at this event and we look forward to continuing to work with you to showcase our industry into the future.

We extend a big thanks to Martin Perkins, Scott Walter, the TAFE students for their assistance with preparation and assisting the chefs, to Andrew Mirosch from Sirromet and Kim from Morgans Seafood who are so well received by the crowds who come to sample our fantastic seafood, a big thank you to Tony Hurley from Raptis for the quality seafood.

All of industry benefits from these events so thank you to all who supported the show and we look forward to next year.

Warm regards

Winston Harris

Queensland Seafood Industry Association

the Program Milestones were:



Running of Fine Foods '09 Perth

Fine Food Perth, the largest food exhibition held in Western Australia, took place 22-24 March 2009 at the Perth Exhibition & Convention Centre and SEA had an excellent positioned stand which maximised exposure for SEA members and general seafood promotion. SEA was one of 150 exhibitors taking part.

SEA members involved were WAFIC, M G Kailis Group, Red Chamber Australia, Marine Produce Australia, West'n'Fresh and Abacus Fisheries. Additionally Chefs Toolbox and Seafood Services Australia were involved through signage and equipment without actually being there.

We engaged Don Hancey and Peter Manifis as our chefs and they obtained a different apprentice each day for the stand. This worked exceptionally well as both Don and Peter are well known within seafood circles. We tried to get the WA apprentices involved through the WATAFE college (Patrick O'Brien) but as he was running the 'Oceanafest Culinary Competition' he was utilising most of them in that area.

The exhibition was the largest ever held in Western Australia being about 7pct larger than the last Show 2 years previous. FFP attracted 5,570 visitors over the 3 days.

There was an overseas contingent at FFP who had been sponsored through the WA Government Agriculture & Food Department. Most of our stand members were invited to the cocktail party they put on at Frasers on the Monday evening.

Peter Jecks/Abacus particularly got a lot of coverage about his new Crab Mornay product.

The quality of the SEA facilitated participation was also recognised with the SEA stand being the runner up for the best custom stand.



In support of the above Program, but outside its budget, SEA embarked on a number of associated initiatives in support of industry education and market awareness.

Separately funded Extracurricular Activities

Nutrition Society event participation

SEA continued its liaison with the Nutritional Society of Australasia (NSA) following up on the 2008 work with a visit to the National Conference in Newcastle in December 2009. This was preceded by an Omega-3 organised event involving a number of the overseas speakers from the NSA meeting.

SEA's 2008 "admission price" was a very modest contribution towards sponsorship of a Postgraduate Student which has ensured a focus on fish and seafood being the focus of the Omega 3 focus as opposed to fish oil.

Many contacts continue to be made and was interesting to note the increasing presence of other groups such as MLA, AFGC, Diary Australia etc.



Seafood Night Parliament Hoses, Septembers 2007 & 2008

Our Chairman, Ron Edwards, has been involved in this event for a few years. With his background knowledge of Parliament and connections he has been integral in keeping this event on the calendar and with SEA operating he ensured we played a role.

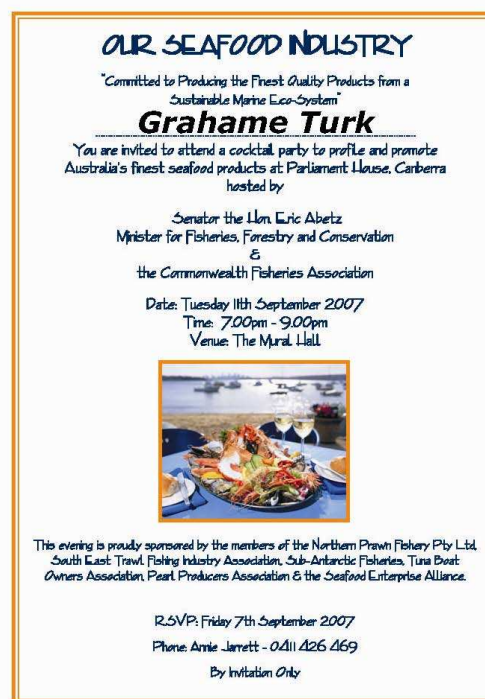
In 2007 we held a SEA Board Meeting at Parliament House prior to the event. We had organised '2 serves per week' promotional bags and had then filled with our information as well as information from FRDC and SSA. Reluctantly the person in charge at CFA did not see the value in this so our work was going to be in vain. Fortunately Senator Nigel Scullion came to our aid and ensured these were distributed the next day to as many politicians as possible.

Additionally SEA, through Ron, had been instrumental in organising a meeting with the Minister. An agreed structure for that meeting soon went out of the window when the meeting started so little was gained.

In 2008 the event was low key and not as many politicians turned up and due to the issues of the previous year SEA just went with the flow.

This event offers so much – the politicians mingling in their own space with seafood people. Regrettably the industry does not plan much around this so the few minutes of glory are quickly forgotten in the hurley-burley of Canberra life.

Being kept on the periphery SEA was never allowed to make something more out of the event, something it really needs.



Separately funded Extracurricular Activities

Celebrity Theatre presented by LifeStyle Food Channel, Good Food & Wine Show '08 Sydney

Also known as the Gordon Ramsay show where the 2008 Sydney Show set a new record attendance for the event attracting 53,135 visitors over the course of three days. The Fresh demonstration programme facilitated by SEA feature Petuna Ocean Trout (prepared by Michael Moore Saturday 21st June) Lincoln Wild Kings (prepared by Pete Evans Friday 20th June) Kinkawooka Mussels (prepared by John Susman & Pete Evans Friday 20th & Saturday 21st June) Abacus Crabs (prepared by Thy Bellingham Sunday 22nd June) Clean Seas Kingfish (prepared by Steve Hodges Sunday 22nd June)



Oysters in the House – Customs House Sydney Oct '08

The event took place on 13 November at Customs House Restaurant at Circular Quay – there were 5 shows starting at 1pm and finishing at 6.30pm. The first show was for Government and Industry (about 40 people), the second for Restaurant/Catering industry (about 30 people) and the last three for the general public. The general public was charged \$30 per head and there would have been 350/450 in total who turned up for the event. Two years ago the event attracted about 180 people. ABC Radio host, Simon Marnie, was the MC for the event.

SEA Directors John Susman and Nick Ruello were in the audience for the first session and John spoke to the first 2 audiences as part of the program.

Everyone had to vote for the "People's Choice Oyster" Award with the winner announced at the end of the last show. Chair of the New South Wales Farmers' Association oyster committee, Mark Bulley, says the oysters were judged on several points. "It's all about the firmness of them, the texture, the after-taste, the sweetness of it, also the saltiness of it, how they feel in the mouth. That was all part of it." The winners were the growers in the Hastings River on the New South Wales north coast.

Additionally the Pacific Oysters being grown in the Hawkesbury were promoted. When QX disease hit the Hawkesbury River three years ago, it destroyed the region's Sydney Rock oyster production. The small group of remaining growers joined forces in an attempt to redevelop confidence in the Hawkesbury region and get its oyster production back on track. Broken Bay Oysters began farming Pacific Oysters there for the first time, as well as adopting the latest technology to create a QX resistant crop of Sydney Rock Oysters. Broken Bay are SEA Members.

SEA's role was to present on the Storage, Handling and Health Benefits of Oysters. Originally SEA was just asked to do the first two shows but when commencing the packing up the SEA banner and computer Mark Bulley said that they had



NOW FEATURING
Sydney Rock & Pacific Oysters



OYSTERS RETURN TO THE HOUSE IN 2008!

BOOKINGS NOW OPEN FOR THE NEW DATE



Following postponement of this event in February due to bad weather (not good for oysters), Oysters in the House will now be held on:

Thursday 13 November
Barnet Long Room
Customs House
31 Alfred Street
Circular Quay

Each session runs for an hour and the 2008 event will feature:

OYSTER BAR: Taste and rate 6 Sydney Rock Oysters from various NSW coastal regions, to determine the People's Choice Award. Tastings of the Pacific Oyster will also be featured.

LIVE OYSTER PREPARATION DEMONSTRATION: A taste sensation will be created by Jared Ingersoll of Danks Street Depot and Ready, Steady, Cook!

REGIONAL SHOWCASE: featuring at least 6 more oysters prepared in a variety of ways by up and coming young chefs from each region, matching wines from the region and local tourist information.

THE ROCK SALT BAR: continue the experience overlooking spectacular Circular Quay. (cash bar basis).

3 sessions available: 4.30pm, 5.30pm or 6.30pm.
Tickets just \$30 per person.
Limited seats available in all 3 sessions.
Got a group? Tables of 8 can be reserved for the discounted price of \$218.00.

ALL GUESTS WILL RECEIVE A TABLET OF OYSTERS, FORK AND OYSTERS IN THE HOUSE RECIPE BOOKLET.

"I would like to thank all of you that voted for my oysters last year, and I hope to see you at this year's exciting event."

Mark Bulley, Russell Oysters
2007 People's Choice Winner



Tickets just \$30.00 p.p.
BOOK NOW!

Oysters in the House	Oysters in the House
 <p>STORAGE</p> <p>Pacific Oysters (<i>Crassostrea gigas</i>) Less than 10°C after no more than 24 hours from harvest - no colder than 5°C Duration 6-7 days</p>	 <p>STORAGE</p> <p>Sydney Rock Oysters (<i>Saccostrea glomerata</i>) No more than 25°C for 72 hours, and colder than 15°C after that period. Duration 9-10 days</p>
 <p>HANDLING</p> <p>Oysters need:</p> <ul style="list-style-type: none"> Careful handling (Fragile) Kept stress free Correct Storage 	 <p>HEALTH BENEFITS</p> <p>Zinc</p> <ul style="list-style-type: none"> Digestion Wound healing Maintain sense Taste/Smell Supports development in pregnancy, childhood Helps fight ageing

Separately funded Extracurricular Activities

all enjoyed the presentation and that they had learned more about their own product and asked SEA's CEO to stay for the public shows. This meant that Roy was there from 12.45pm until 7.45pm.

After the oysters had been eaten and judged the audiences were asked to take their oyster fork and empty wine glass into another area where 4 wineries were promoting their wines. There were more oysters served and people were able to mingle with the oyster farmers.

The event was well run by the NSW Farmers Assoc and the restaurant. SEA was very pleased with the number of people who thanked Roy for the presentation and the interest shown by the public.



William Angliss Institute Melbourne – Seafood Showcases and Chef introductions

As part of Fine Food '08 in Melbourne we had engaged William Angliss Institute (WAI) to provide chefs and apprentices for the stand and this worked exceptionally well. Over the event we had 3 teaching chefs involved and 6 apprentices. This was the start of a much longer relationship with WAI – the concept is that we will get seafood more on their scope and they will have stronger connections with seafood for the young chefs coming through the system. From this a number of user pays events have been undertaken:

- Optimising the health of your business, your products and your customers
- appreciation of oysters
- mussels and scallops



ESE '09

Participation by:

A Raptis & Sons Austral Fisheries
Australia Bay Seafoods Clean Seas Tuna
Ferguson Australia Geraldton Fishermen's Co-op
Pristine Oyster Farm Tweed Fisheries International

Product only:

Seafarm Marine Produce Australia

As you look around you have to say "Where is the Financial Crisis?" because the amount of money expended at these shows is simply staggering and despite all the gloom and



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doom that you read here, at least, companies and countries are putting on a great show. People are flowing in and in our area there is not much spare time as everyone moves on from one discussion to another.

It is great that the stand was busy, companies who made the commitment to make this happen all had good days and the cocktail party went well. As the day comes to a close there are feelings of excitement, and contentment.

It is important to note that participants meet all the costs, including those of the SEA facilitation – SEA actually made a very small profit due to a favourable currency exchange.

DAFF support had been sought but the decision making processes within the Department and between it and the Minister's Office meant that the event had happened before the approval came through and therefore we were ineligible to take up the support as there's a prohibition on retrospective funding.

It was a difficult process trying to do everything on the cheap and getting favours but at the end of the day things have gone well - maybe lets even say better than well. Yes the stand can be better but with what we had I think we have done well. Australian Government in Brussels came good with Aussie Flag and WA Government group with Minister for Fisheries, Hon Norman Moore, have funded a cocktail party on the stand and allowed the ESE group to join the Ministers group on the Monday evening pre ESE. We even allowed Seafood Choices Alliance to enjoy our stand by letting have their cocktail party on our stand.

After ESE it was onto London. An early tour of Billingsgate followed by the tour of Fishmonger House at London Bridge and some excellent speakers engaging the group that attended. The WA Minister organised a terrific function at Australia House and we were allowed to promote the International Seafood & Health Show and have Professor Michael Crawford make a speech.



Featuring product at Culinary Skills presentations at Restaurant '09 Melbourne

This event was a problem but we worked our way through this. The new owners of the event changed the dates. The dates were not workable for many of our clients. We actually walked away from the event but after discussions and negotiations we operated a stand in order that they did not have a free space.

We convinced Urangan Fisheries, Seafarm and Clamms Seafood Supply to get involved in our stand. We secured people from Box Hill TAFE to run the cooking on the stand.

We also conducted Culinary Skills sessions (3 sessions x 45 minutes) over the 2 days where we engaged the Box Hill TAFE to promote seafood – we did all the sessions on Prawns one aquaculture product (Seafarm) , one wild catch product



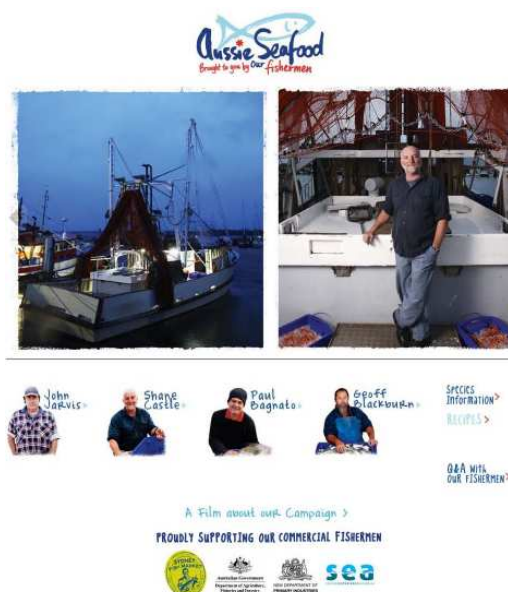
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(Urangan) and one import (Thailand). This gave us an audience of approx 80 chefs/buyers (plus standing room).

The show attracted about 4,000 people as well as much food publicity but overall was not lots of quality buyers. This year is the first under the new management of Diversified and with their strong management in such events they are expecting to have a larger targeted audience in the future.

Sydney Fish Market – Fishing Community Assistance Program - The Australian Seafood Consumer Education Initiative

SEA committed most of its received sponsorship support towards the initiative of the Sydney Fish Market and its Aussie Seafood project. SEA enjoys a close working relationship with SFM and SFM's ability to succeed in its application for DAFF support was conditional of there being wider industry contribution. SFM and SEA share a view on the absence of consistent and comprehensive education and support has means consumers are not being told to buy seafood, they are not consistently and comprehensively being educated about seafood, and therefore it is being passed over in favour of other promoted proteins. SFM's initiative was a meaningful contributor to addressing the promotion of premium Australian seafood through consumer education and was therefore in accord with what SEA was trying to achieve but beyond SEA's capability to take on.



Web presence management



Built on 5 “pillars”:

- **Live Better** (Health Benefits)
- **Sea friendly** (Sustainability)
- **Great Tasting** (Recipes, Attributes)
- **It's Easy** (Demystifying Seafood)
- **Australian Made** (Heritage, Provenance)

Maintenance of a web presence is considered essential for the ongoing “presence” of SEA. It's operating under two names – *australianseafood* and *seafoodpromotion*. It is linked to other industry participants such as SSA, FRDC and the Seafood CRC.

PERFORMANCE INDICATORS

1. Successful development and implementation of a vehicle/platform that allows industry to attend post-harvest (market and consumer) events. Further this platform should be robust and transferable to allow it to be used at events across Australia
2. Industry support and attendance at events – a baseline figure of 10 industry participants for each event would indicate good industry support
3. Increase in new business for participants
4. Increase of positive media (trade and general news) of the seafood industry

RESULTS

In overall terms the Program has met its intent albeit that a number of other performance indicators were not fully met.

1. Successful development and implementation of a vehicle/platform that allows industry to attend post-harvest (market and consumer) events. Further this platform should be robust and transferable to allow it to be used at events across Australia

The program of events has shown itself to be “portable” even though the earlier descriptions of the events shows that each was at least partially unique and there was a split between consumer and trade events. Moreover, the adaptability of the program and adding extra features was achieved.

The extracurricular activities also demonstrate the adaptability of the core program. For example, where resources or opportunity did not allow a full stand type attendance effective promotional activity was achieved.

2. Industry support and attendance at events – a baseline figure of 10 industry participants for each event would indicate good industry support

The following table shows that the 10 per event has not been achieved. Not shown is that of the 42 attendances over six events many of the participants participated in more than one event – the old hands – with there being only 22 actual participants. In addition, of these 22 participants four were “facilitated” through a marketing agent and it may well be that they wouldn’t have participated unless it was the agent that saw the benefit.

The inability to secure higher levels of participation and introduce those who had not participated in such events previously cannot be attributed to any lack of notice and encouragement. There was no lack of effort in pursuing additional and new attendees. Likewise the cost of participation should not have been an issue given the services provided and substantial subsidy provided via the project. No-one disagreed the opportunity and that they were getting good value, few saw any issue with sharing a stand and most saw benefit from cross promotion attracting attendance and product exposure that may not otherwise arise. Unfortunately it was because when it came time to commit many of those expressing interest fell away.

<i>Attendances at the SEA directly controlled events</i>	<i>Participant numbers</i>	<i>Rate</i>
Restaurant '08 Melbourne	7	\$1,000
Restaurant '08 Sydney	11	\$1,000
Restaurant '08 Sydney, degustation media luncheon	10	\$600
Fine Foods '08 Melbourne	5	\$1,000
Good Food Show '08 Brisbane	3	\$1,000
Fine Foods '09 Perth	6	\$1,000

3. Increase in new business for participants

Without exception all participants reported that their attendance had improved business at trade events or they were well pleased with the impact on brand recognition and future support at consumer events.

While sales were not a direct performance indicator, it is nonetheless an important factor that cannot be ignored when looking to engage the industry into the future. It is difficult to ascertain the exact number of sales generated and their value but based on 100-200 enquiries per event from mainstream buyers the amount is likely to be substantial.

4. Increase of positive media (trade and general news) of the seafood industry

While put forward in the original Program support application assessment, SEA has lacked the resources to objectively measure achievement or otherwise on this indicator nor does it have the baseline data to determine whether there has been a move either way.

Other

The aim of achieving industry exposure for SEA has been achieved and there's no lack of plaudits and "about bloody time"; what has been lacking is the ability to overcome the seeming in ground cynicism of the Australian seafood industry and the expectation that it's someone else's role to embrace and fund promotion. However, we are starting to see more "champions" emerge and a good example of this is the participation at the European Seafood Exposition where those present fully funded their involvement. ESE '09 and again in '10 is outside this Program and was undertaken by SEA as a separate activity and it is therefore not appropriate to report to the details here it is appropriate to recognise that the opportunity and commitment by some to ESE arose in major part from the current Program.

Of special note is that the participation in events beyond the current Program as well as the extracurricular activities and events described earlier have been on a full cost recovery basis with no external support or cross subsidy.

Again outside the current Program but in part attributable to the recognition of SEA and the part taken in promoting and educating both industry and consumers on Australian seafood is Australia and SEA being awarded the Seafood and Health Conference and Expo for Australia which has as its conference theme - *Seafood: Benefiting Health and Wellbeing*. Through the good work of our CEO, Roy Palmer, SEA has been successful in bidding for this prestigious conference for Australia. The conference was awarded by the Seafood and Health Alliance organised through National Oceanic & Atmospheric Administration (NOAA) of the, United States Department of Commerce.

This will be the first time it has been held in the Southern Hemisphere. There was strong international competition to host the 2010 conference and being awarded to Australia is a real feather in the cap for both Australia and SEA, and an enormous opportunity to showcase Australian seafood and the benefits of seafood overall.

SEA has also done itself no harm in successfully achieving the withdrawal of the Department of Foreign Affairs and Trade's "Dodgy Prawn" travel insurance advertising although recognition and acceptance of SEA's role in achieving the withdrawal is mixed; with there being some dismissing the effectiveness of SEA's program and relegating that to mere support to the threatening letter they wrote.

The concept and possibility of levies into the future is generating much interest, positive and anti, little in between. This is proving positive for creating awareness of SEA but seemingly doing little to generate increased membership.

FURTHER DEVELOPMENT

While Perth Fine Food concluded the supported Program of events, it has not been the end of SEA's working with beneficiaries whether those beneficiaries be industry itself in achieving improved recognition and demand for their product (domestically and in the export market), food processors and preparers in the quality and reliability of Australian seafood, or consumers and the recognition of the health, well-being, taste, quality, usability and value of seafood

The combination of SEA's promotional and education endeavours and, to a much lesser extent, the excitement/threat (depending on who you're talking to) of a Seafood Promotion Act has seen a steady, but certainly not spectacular, increase in memberships and contacts. SEA's financial membership has passed 100 and covers both the breadth and depth of the seafood industry – fishermen and aquaculturists large and small, processors, retailers and we even have a restaurant that has signed on and is a minor sponsor.

Unilateral further development on industry education is, however, inappropriate. In many ways single issue/single directional efforts by many groups in the past lay as the cause of the current inertia and cynicism being experienced. SEA has developed a strategic plan that recognises SEA as part of a complex jigsaw puzzle with advancement dependent on the efforts of us all. Rather than try and summarise very complex issues here SEA's strategic Plan is attached; but it is highlighted that this Plan is a living document – SEA does not hold that it has all the answers nor does it pretend to be fully across all issues but it does recognise that the challenges ahead of us only have resolution in co-operation.

We welcome the input of any readers of this report. Please contact:

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CONCLUSION

Yes, the Program by and large achieved what it set out to do. However, it lacked the penetration that was intended - the message was being got out but industry was not engaging as had been hoped. The expectation that somebody should be picking up the tab was often unassailable.

Those that did participate advised that they were both well satisfied from their participation and very happy working with SEA. The “migration” of many of those participating into full cost recovery events is also important as it demonstrates that, for some, the benefits are recognised as far outweighing the costs. The issue however remains that it is only the “old hands” engaging and the valiant efforts to encourage others were oft in vain

At the beginning of the body of this report a quote from ASIC’s Chairman in 2005 is provided - save industry from itself through the four letter word “levy”. Developing a Seafood Promotion Levy via a Seafood Promotion Act (SPA) that would allow sectors to contribute to marketing and promotion activities for mutual benefit, industry position and public and Governments’ perception is no less critical now then it was then and before then.

Levy idea floated to promote seafood

An industry levy to promote seafood in a similar way that meat and vegetable produce is marketed is being considered to boost seafood's profile and sales.

Seafood Experience Australia (SEA) executive officer Roy Palmer told delegates at AA08 that a steering committee had been established to consider and develop a proposal for a levy to create a Seafood Promotion Act, providing the seafood industry with a unified voice to advance its products in the marketplace.

"We have a few choices," he said. "We can continue to do what we do now, which is nothing – relying on voluntary donations. Or we can do what the meat (Meat and Livestock Australia) and horticulture (Horticulture Australia) sectors do, and that's clearly an opportunity for us."

Roy Palmer said the seafood industry needed a uniform, positive message. "There have been a lot of reports done through the FRDC and government about what people think about our industry – be it aquaculture or wild fish – and, generally, they're not really good reports," he said. "We've got to do something about that."

To counter misinformation about the industry and its products,

nationally consistent information for consumers and positive media messages were required, he said. "And we need somebody to do that because no one's generally doing it."

The steering committee, made up of SEA board members, would take advice from a representative, industry-wide reference group to consider and develop the industry's proposal for a marketing and promotion levy and guide the implementation process, he said.

"We are starting with a blank sheet of paper: the goal is to develop a framework that suits our industry. We know it needs some degree of flexibility because our sectors are not the same," he says.

The levy development process would be open and transparent, he said. Meetings would be announced and inclusive, information posted on the SEA website and there would be an opportunity for members and industry to have their say.

Among its first tasks would be to prepare a strong business case



for the levy and obtain government support and approval, he said.

Roy Palmer said key messages incorporated into SEA activities, including the levy proposal and a consumer-driven website, were based around five platforms:

- Live Better – promoting health benefits;
- Sea Friendly – promoting sustainability;
- Great Tasting – promoting recipes and attributes;
- It's Easy – demystifying seafood; and
- Australian Made – promoting heritage and provenance.

Meanwhile, plans for internationally consistent messages are also afoot, with the UK's Sea Fish Industry Authority (Seafish) recently giving permission for SEA to use its '2 a week' logo to boost the number of fish meals people eat.

"We eat less than one seafood meal a week, on average, and we need to lift that to two and that's our goal," Roy Palmer said. "It's up to us how we handle it from here."

"We are starting with a blank sheet of paper: the goal is to develop a framework that suits our industry. We know it needs some degree of flexibility because our sectors are not the same."

– ROY PALMER,

EXECUTIVE OFFICER SEAFOOD EXPERIENCE AUSTRALIA