

Seafood CRC Master Class: Stimulating Consumption of Australian Seafood

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**AUSTRALIAN
SEAFOOD
COOPERATIVE
RESEARCH CENTRE**

Project No. 2010/769

The Australian Seafood CRC now ‘owns’ the most up-to-date and extensive research data on how and why consumers purchase and consume seafood.

In addition to consumer research, considerable research data has been gathered from key stakeholders throughout the seafood value chain, including producers, wholesalers, retailers and chefs.

The challenge was to communicate this knowledge and more importantly help firms to apply this knowledge to achieve improved returns.

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***This Master Class Series was run by the
University of the Sunshine Coast.***



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Table of Contents

1. Non-Technical Summary	- 1 -
1.1 Objectives	- 1 -
1.2 List of Outputs	- 1 -
1.3 Outcomes achieved to date	- 1 -
1.4 Keywords	- 1 -
2. Background	- 2 -
2.1 Rationale	- 2 -
2.2 Target Audience	- 2 -
2.3 Learning Outcomes	- 2 -
3. Need	- 3 -
4. Objectives	- 3 -
5. Methods.....	- 4 -
6. Results.....	- 6 -
7. Discussion	- 11 -
7.1 Promotion.....	- 11 -
7.2 Delivery.....	- 11 -
8. Benefits and Adoption	- 12 -
8.1 Short term benefits	- 12 -
8.2 Medium term benefits	- 12 -
8.3 Long term benefits	- 12 -
9. Further Development	- 12 -
10. Planned Outcomes	- 13 -
Public Benefit Outcomes	- 13 -
Private Benefit Outcomes	- 13 -
11. Conclusion	- 14 -
Appendices.....	- 15 -
Appendix 1: Stimulating seafood consumption in Australia: Pre-course survey-	15 -
Appendix 2: Stimulating seafood consumption in Australia: Post-course survey -	16 -
Appendix 3: Stimulating seafood consumption in Australia: Final survey	- 17 -
Appendix 4: Qualitative feedback from final course evaluation	- 19 -
Appendix 4.1: Why did you not make any changes?.....	- 19 -
Appendix 4.2: Briefly describe the changes you made.....	- 20 -
Appendix 4.3: On reflection, how useful was the workshop in understanding consumers' attitudes toward seafood? For example, did the information reinforce	

what you already knew or challenge any preconceived assumptions you may have had? - 21 -

Appendix 4.4: On reflection, what changes could be made to the Consumer Research Master Class to improve the outcome? - 23 -

Appendix 4.5: Any other comments. - 24 -

Appendix 5: Independent email feedback..... - 25 -

Overview



1. Non-Technical Summary

Seafood CRC Master Class: Stimulating Consumption of Australian Seafood

Project No. 2010/769

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1.1 Objectives

1. Deliver 8 workshops in order to disseminate transformative knowledge of consumers' current behaviour to the seafood industry.
2. By the end of the workshops, to have a minimum of 120 industry participants with 100% of attendees leaving the workshop with an improved understanding of Australian seafood consumers.
3. All participants will leave the workshop with a written plan of changes they intend to make or propose within their organisations as a result of the workshop.
4. Of the 120 participants leaving the workshop with a plan of changes, 20% (approx 25) successfully implementing some or all of the planned changes.

1.2 List of Outputs

The project has delivered the following outputs:

- Consolidation of findings of all CRC consumer research up to and including the 2011 Omnibus according to various themes including drivers, barriers and moderating influences.
- Workshop materials (hard copy and CD) for both one and two day versions, with actual delivery in 9 locations Australia-wide.
- Preparation of 40 short online 'FishBites' highlighting research results under key themes.

1.3 Outcomes achieved to date

The project has delivered the following outcomes:

- 92 people attended workshops delivered in 9 locations throughout Australia (Brisbane, Cairns, Perth, Adelaide, Melbourne, Sydney, Port Lincoln, Gold Coast and Hobart)
- Immediately after the workshop 96.8% (n = 31) of those who attended evaluated them as good or very good.
- Those who evaluated the workshop 1 to 8 months after completion reported a range of outcomes including improved sales, improved profitability and improved relationships with customers.
- Key themes of the workshop were also captured for online delivery as 'FishBites'. These are housed on the CRC website with tracking figures to date indicating 336 people have accessed these files.

1.4 Keywords

Consumer research; education; seafood research; seafood consumption; supply chains; surveys; focus groups; quantitative research; qualitative research

2. Background

The Seafood CRC now 'owns' the most up-to-date and extensive research data on how and why consumers purchase and consume seafood, gathered through a variety of projects including Repositioning Australian Farmed Barramundi, the Omnibus Surveys and the Retail Transformation project to name a few. The challenge was to communicate this knowledge, and more importantly to help firms to apply this knowledge to achieve improved returns.

This project was an Education and Training project with a key purpose being the dissemination of consumer research findings from other CRC projects. This project allowed for wider dissemination by not only relying on face-to-face delivery but also developing an online resources equivalent.

Based on this wide dissemination of results, a key planned output was a change in current operations based on a better understanding of Australian seafood consumers. This was reflected in two outputs: firstly a written plan of proposed changes on completion of the Module by all participants and secondly actual implementation of these planned changes assessed by a 6 month follow up evaluation.

2.1 Rationale

Understanding what consumers' value is the fundamental building block for successful marketing strategies. Without this knowledge, the development of effective marketing strategies based on compelling customer value propositions does not occur. Hence, the purpose of this module was to bring together the considerable consumer research conducted by the Australian Seafood CRC on seafood consumption patterns and behaviour, present a summary of key findings, and then focus on the practical implications of these findings to increase consumption of Australian seafood and improve returns to companies.

2.2 Target Audience

The primary target audience for the Module was producers and processors of seafood. However, as a secondary target audience, it could also inform all involved

in the management of seafood businesses (e.g. distributors, wholesalers and retailers). It was designed to ensure that anyone involved in any aspect of the seafood industry would benefit from a richer understanding and greater knowledge of Australian consumers' attitudes toward seafood, and how and why Australian consumers purchase, store, prepare and consume seafood.

2.3 Learning Outcomes

The proposed learning outcomes were:

- Describe current seafood consumption in Australia;
- Develop a basic understanding of consumer decision making processes for seafood and key influences;
- Gain a rich appreciation of Australian consumers' seafood consumption behaviour including key drivers and barriers;
- Develop strategies for increasing the consumption of Australian seafood by leveraging drivers and minimising barriers to seafood consumption; and
- Plan the implementation of company specific operational changes to improve company returns.

“The CRC Consumer Research Master Class has provided our company with invaluable information on the Australian public’s buying trends. The content presented has enabled us to make key decisions on product development moving forward. I highly recommend future participation for any seafood industry professional to gain a greater understanding of market trends.”

(Todd Crowley
Blue Harvest Queensland)

3. Need

The CRC now has a wealth of current information about various aspects of Australians seafood consumption. The issue was how to get this information out to the various stakeholders in the Seafood industry in such a format that companies could use the results in a very practical way to improve their returns and ensure their continued sustainability.

“We wanted to send you a quick email to convey to you how much we enjoyed the Master Class and just how much we learned!!

Dawn was inspiring. She was a wonderful presenter and she encouraged discussion amongst the group. The class was very interactive. The only disappointing thing was the poor number of participants.

It is unfortunate for the industry overall that there are not more interested persons keen to avail themselves of this outstanding opportunity to learn about all the latest research and how it can be applied day to day in our businesses.

We are extremely appreciative of the opportunity to participate. We missed the class in Sydney and thus decided to attend Hobart, and we most certainly are glad that we did!!

Please pass on to Dawn our feedback and sincere appreciation.”

*(Joanne Howarth
Fishermen’s Wharf Seafoods)*

4. Objectives

The objectives of the project were to:

1. deliver 8 workshops in order to disseminate transformative knowledge of consumers current behaviour to the seafood industry;
2. by the end of the workshops, to have a minimum of 120 industry participants with 100% of attendees leaving the workshop with an improved understanding of Australian seafood consumers;
3. all participants will leave the workshop with a written plan of changes they intend to make or propose within their organisations as a result of the workshop; and
4. of the 120 participants leaving the workshop with a plan of changes, 20% (approx 25) successfully implementing some or all of the planned changes.

“I attended the Seafood CRC Master Class on Tuesday at the SFM on Seafood Consumer Research-stimulating consumption of Australian Seafood. It was a good workshop, run over 1 day rather than the usual 2 days.....I would certainly encourage industry attendance.”

*(Lowri Pryce
OceanWatch Australia)*

5. Methods

This education module was designed to be **practical, flexible and widely disseminated** and so fulfil needs in several ways as follows:

- The Module was designed based on a transformational learning model, that is, a model where participants are required to reflect on their current practices and behaviours and then based on information provided, plan operational changes to maximise firm benefits.
- The Module was designed for delivery in two formats, face-to-face and digitally/online to maximise the potential audience reached. The online material provides access for those who could not attend face-to-face sessions, as well as providing an ongoing resource for those who did attend face-to-face.
- The face-to-face component was delivered in a mix of capital cities and regional locations to maximise exposure to where industry is actually located. This multimodal approach was designed to ensure the widest possible dissemination of results as well as providing face-to-face participants with a resource that they could use within their own organisations.

“I found the workshop to be very informative and captivating, my only suggestion would be to hold them more regularly so that the messages are re-enforced.”

To maximise learning outcomes, the **teaching** team focused on:

- transformative learning based on participants’ self reflection and self assessment; and
- collaborative learning within a socio-constructivist paradigm through group interaction and discussion.

Initially **delivery** was planned to be:

- Face to face - Two one-day workshops, one month apart (accompanied by a CD and workbook of resources) with groups of between 15 to 25 participants per group (8 offerings of each day ie 16 days delivery in total).
- Based on participant feedback (Brisbane, Perth, Adelaide and Melbourne) this two day approach was later modified to a one day workshop (Sydney, Cairns, Hobart, Gold Coast, Port Lincoln), for a total of 13 days delivery.
- Workshop materials were revised and updated after each workshop (based on participant feedback) and each workshop also included information tailored specifically to that market. This required additional time analysing several data sets but feedback confirmed this was critical to highlight how and where state markets differed and where they behaved in a similar fashion.

“It was all good, could have sat through a week of it.”

“I think it is very well set out. It covers a great deal of research and work completed on several different species of seafood.”

“Enjoyed the course immensely. A longer course may be beneficial, as probably had to rush through some information, but overall fantastic.”

Several alternatives were considered for **online delivery** of material with feedback sought from workshop participants on preferences. Participants confirmed they would prefer short snippets (up to 5 minutes) on specific topics of interest. These snippets should include key findings and also direct people to where further information could be obtained if required. The technology should also be easy to use. Based on this feedback online materials comprised:

- 40 topic presentations using Adobe presenter software (PowerPoint with audio). Each presentation runs for about 5 minutes and includes links to resources - public research reports, useful websites, etc.
- Discussion boards to allow interaction were considered but not progressed as participants, while enthusiastic initially, confirmed they would find it difficult to actually participate.

A comprehensive **evaluation strategy** was also designed to ensure feedback was generated at all stages of the project as follows:

- Participants in early deliveries of the workshop completed a questionnaire before the workshop commenced to assess their current knowledge, attitudes and behaviours relevant to the course content. This feedback allowed presenters to ensure expectations matched planned delivery. (See Appendix 1)
- On completion of the course a further survey was conducted to measure the changes in knowledge, attitudes and behaviours as a result of the course. (See Appendix 2)
- A final follow up survey was conducted in November (1 to 8 months after completion of the module) to measure the results of any changes implemented as a result of the course. (See Appendix 3).

The presenters were:



Associate Professor Meredith Lawley
University of the Sunshine Coast



Dr Dawn Birch
University of the Sunshine Coast



Dr Nick Danenberg
University of South Australia

In most cases two of three above presented the workshop together. This strategy worked well as the different styles broke up the presentation, as well as allowing each presenter to maintain high levels of energy and enthusiasm.

6. Results

Results are presented for each of the initial project objectives next.

6.1 Deliver 8 workshops in order to disseminate transformative knowledge of consumers current behaviour to the seafood industry

Initially, delivery was planned for 8 locations, with two days in each location. As noted above this strategy changed over the period of the project with comments noted as below.

In brief, while changes were made in response to feedback throughout the project, this objective was met.

Table 1 Planned verses actual delivery

Location (Presenters)	No of days	Comments
Brisbane (DB & ML)	2	Good attendance both days
Cairns (DB & ML)	1	Rescheduled due to cyclone. Poor attendance, with 3 participants pulling out on the day.
Darwin	0	Cancelled due to low enrolments. However a full copy of workshop materials was given to the NTSC during a two hour meeting and partial results were reported to a group of 8 participants in a Barramundi promotion, with a further full copy of results given to Humpty Doo Barramundi (who had intended to participate in the workshop).
Geraldton	0	Cancelled due to lack of enrolments.
Perth (ML & ND)	2	Excellent attendance Day 1; dropped off Day 2 (communication issues)
Adelaide (DB & ND)	2	Poor attendance. This was particularly disappointing given CRC is based here.
Port Lincoln (ML)	1	Initially cancelled and then delivered after meeting with Eyre Peninsula Regional Development Board who coordinated recruiting. Good attendance.
Hobart (DB)	1	Average. Again some cancellations on day of delivery.
Melbourne (DB & ML)	1	Good attendance
Sydney (DB & ML)	1	Good attendance
Gold Coast (ML)	1	Scheduled immediately after Seafood Directions. Poor attendance due to conflict with many other meetings. Modified to half day workshop.

6.2 By the end of the workshops, to have a minimum of 120 industry participants with 100% of attendees leaving the workshop with an improved understanding of Australian seafood consumers

As indicated in Table 2 this objective was not fully achieved with 92 attendees (76.7% of goal). However, as noted in Table 1, two registered participants in the cancelled Darwin workshop did receive full copies of course materials and a short overview of results. In addition 3 to 5 extra sets of materials were taken to each workshop and in all cases participants took these extra copies for wider distribution within their organisations, so in total approximately 40 extra sets of materials were distributed.

Table 2 Number of Workshop Attendees

Workshop	No. of Attendees
Brisbane	15
Cairns	5
Perth	24
Adelaide	10
Port Lincoln	12
Hobart	4
Melbourne	10
Sydney	11
Gold Coast	1
Total	92

Of those who evaluated the course on completion the average rating was 4.48 on a five point scale and with only one respondent giving an overall rating of less than good or very good. 100% of those completing the evaluation agreed the workshop met their expectations with 97% (all except 1 respondent) agreeing that what they had seen and heard would help their business (Figure 1 and Table 3). NB the one low response was from a production supervisor in a very large company who had a clear production focus, with the Marketing Manager from the same company awarding a 'very good' evaluation.

"The information was great - our producers that attended have had a very positive response."

Figure 1 Overall evaluation on completion of workshop

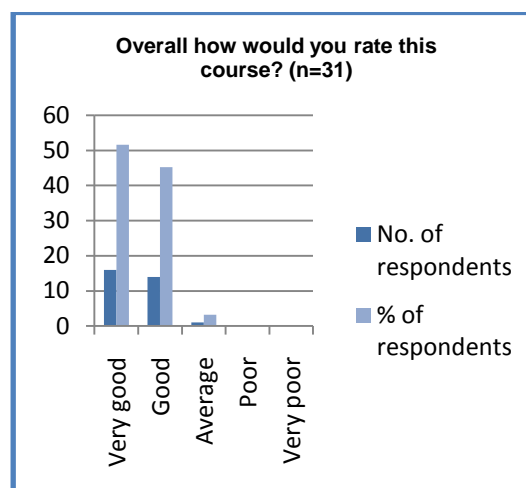


Table 3 Evaluation re expectations

	n	Yes (%)	No (%)
Did the course meet your expectations in terms of what you set out to achieve?	28	29 (100)	0
Will what you have seen and heard during the course help your business?	30	29 (96.7)	1 (3.3)

*Some missing data as not all respondents completed this evaluation

Table 4 below gives a further breakup of attendees based on the industry sector they came from. Interestingly, two of the lowest representations came from wholesalers and retailers, two of the groups that would have benefited the most from attending. In particular small businesses were very underrepresented.

Table 4 Industry Sector of Respondents

Industry Sector	No
Vertically Integrated**	22
Producer	14
Industry Association	11
Government	10
CRC staff/member	8
Retailer/Restaurant	6
Consultant	5
Wholesaler/Agent	3

*Multiple memberships possible

**Performed at least two functions eg producer and retailer

In addition to the workshops, the resources developed have been the basis for two shorter presentations of CRC consumer research results including:

- Lawley, M. 2011. Understanding the Australian Seafood Consumer, presentation to CRC annual research day (February)
- Lawley, M. 2011. Understanding the Australian Seafood Consumer, Seafood Directions, Gold Coast (October). (feedback from conference organisers indicates this session was one of the most highly ranked at conference)
- Forthcoming article in FRDC Fish magazine

In brief, while the target for numbers attending was not met, the information has been widely disseminated through some additional forums and avenues.

6.3 All participants will leave the workshop with a written plan of changes they intend to make or propose within their organisations as a result of the workshop

The written plan component of the workshop was based on the two day format. When the format was changed to a one day format there was no time allowed to get participants to actually work on their own plan. Even with the two day format it was difficult to find time to get participants to focus on this aspect of the workshop as they preferred to have group discussions with other participants.

“Great opportunity to meet and confer with others in related industry sharing experiences and approaches.”

Given the value clearly obtained from these discussions and networking, the written plan component of the program was dropped. However, results from Objective 4 support the intention behind this objective of behaviour change as a result of the information obtained through the workshop.

6.4 Of the 120 participants leaving the workshop with a plan of changes, 20% (approx 25) successfully implementing some or all of the planned changes

A final follow up online evaluation was conducted in November 2011 to assess this objective (Appendix 3 for a copy of evaluation and Appendix 4 for qualitative responses). While 92 people attended the workshops only 60 useable email addresses were available for this survey. Of the 60 emails sent out, 28 people responded giving a response rate of 46.7%. This response rate is very high indicating a high level of interest by participants, which indeed is reflected in the very positive feedback received.

“Informing the wider team of the CRC and also the research that has been conducted. We will look into some of the research findings for our future NPD programs.”

All workshop locations (except Hobart whom we didn't survey as the workshop had only been conducted one week prior) were represented amongst the responses (see Table 5).

Table 5 Location of Respondents

Workshop Location	No. of respondents
Brisbane	3
Perth	1
Cairns	3
Sydney	5
Adelaide	5
Melbourne	2
Port Lincoln	4
Gold Coast	1
Not given	5

53.6% of those who responded to the final evaluation (n = 15) had made changes within their organisations (see Table 6). Of those who did not make changes reasons given fell into two main categories: first people were attending to simply gain more knowledge to help in their current roles, for example, government employees,

consultants and researchers or secondly, participants were already investigating or making changes that were supported by the workshop content (see Appendix 4.1).

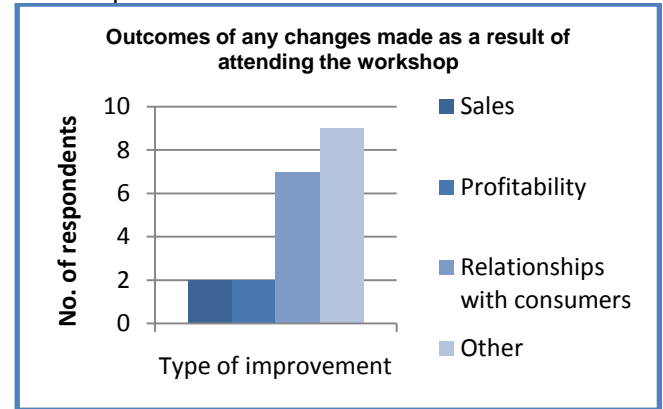
Table 6 As a result of attending the Class did you make any changes within your organisation (e.g. changes to your marketing strategies/activities)? (n=28)

No. of respondents	Response
15	Yes
9	No
4	No answer

Most changes (46.7%) related to the improvement of relationships with customers, however two respondents nominated improvement across all areas which included sales, profitability and customer relationships.

“Implemented smaller portion/packaging of seafood products. Customer survey. Improved company image - logo/retail shop/uniform update/signage update. Implemented recipe cards. Implemented cheat sheet for staff (of seafood products).”

Figure 2 What were the outcomes of any changes made as a result of attending the workshop?

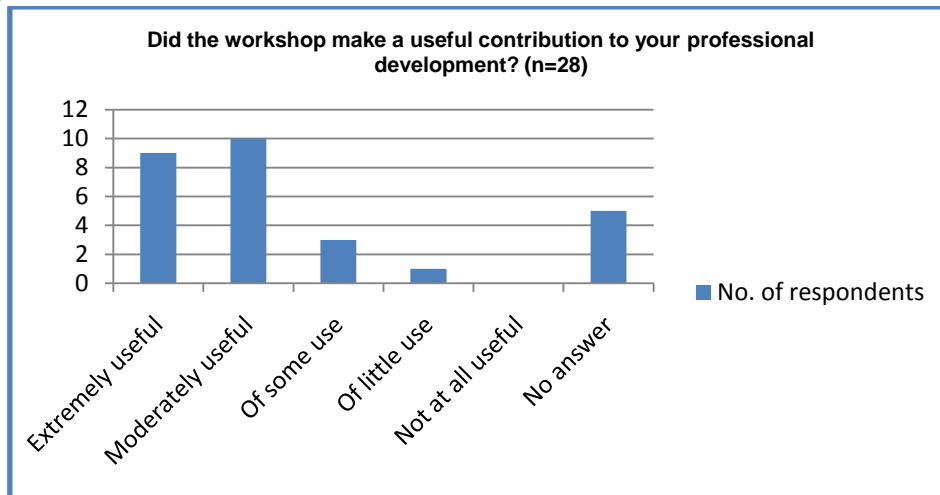


*Multiple responses possible

Further we asked respondents to briefly describe the changes made (see Appendix 4.2). These comments again reflect the diversity of participants with several industry people nominating specific changes in area such as packaging, logos, promotional messages and materials, and government attendees noting assistance with project planning and refining other CRC projects.

As we were aware that many of those attending came from government or were not directly in a position to make changes, we asked respondents how useful the workshops were in terms of their professional development. 78.6% of those who responded to the final evaluation found that the workshops had contributed to their professional development with 67.9% finding the workshops to be moderately or extremely useful (see below).

Figure 3 Did the workshop make a useful contribution to your professional development? (n=28)



We asked three final questions on this evaluation: how useful was the workshop in understanding consumers attitudes? Did it reinforce what you already knew or challenge any preconceived ideas (appendix 4.3); what changes could be made to the workshop to improve outcomes (appendix 4.4) and finally Any other comments (appendix 4.5).

In terms of how the information fitted with current knowledge the general response was that while much of the information reinforced what participants already knew, there were a few surprises.

“The benefit of the presentations were that they unequivocally addressed / challenged some of the long held beliefs of industry in the context of the contemporary consumer and their needs.”

In terms of suggested changes to the workshop to improve outcomes, 7 respondents indicated nothing should be changed. When respondents did suggest changes they highlighted things like:

- Length (everything from 1 day to one week)
- Issues with promotion and the need to find ways to better get to key targets (for example suggesting a workshop for specific industry associations, perhaps held in conjunction with a regular meeting)
- Continuing the workshops on a yearly basis
- Many other comments were not for changes but rather giving further positive feedback.

“I really enjoyed the day although I was overwhelmed at the amount of information. This was a new experience for me. Although all the information was interesting maybe identifying different audiences/suitable info etc could be beneficial. Overall very informative.”

Finally in the ‘any other comments question’ responses were overwhelmingly positive (also reinforced by unsolicited emails included in Appendix 5). Specific feedback highlighted:

- The high quality and standard of delivery by presenters
- Confirmation of the importance of marketing research and
- The desire to continue to see consumer research undertaken and reported by the CRC.

“Well worth the time and money. It will either advise you where you target market is and how to accomplish your strategic goals.”

In brief, we feel confident in reporting that at least 30% of participants (ie 28 out of 92) benefited from attending the workshop, with the actual figure probably being higher than this. This objective has been met.

6.5 Online resources

The ‘FishBites’ series was loaded onto the CRC website in October 2011 and the series has come up in the Top 10 views for October-December 2011.

The actual views/downloads of the series (as at 15-12-11) has been:

- October 2011 = 60 views
- November 2011 = 205 views
- December = 71 views
- Total views in 3 months has been – 336 views/downloads

7. Discussion

While the initial objectives have largely been met, with strong support for the value of the workshops, the following discussion will highlight issues and learning's that may inform the planning of any future workshops.

7.1 Promotion

Effective promotion of the course was perhaps the most problematic issue throughout the project. Several different strategies were used to promote the workshops including:

- Development of a range of brochures that were widely distributed via Emily's weekly newsletter, through personal networks and through key stakeholders (modified throughout the project to better target key audience);
- Use of personal contacts and their personal contacts (of note Richard Stevens from Wafic contributed to the strong attendance in Perth);
- WOM and testimonials from participants;
- Use of WIN to promote in various locations; and
- Personal emails to all attendees at other Masterclasses.

Once people attended a workshop and realised the value, common feedback was that they couldn't believe more people were not attending. The issue remains how best to get the right people to attend. Experience with this project has indicated that the most effective method is to use personal contacts and where no personal contacts exist to find a local champion to promote directly. Several of the participants were individually targeted by one of the presenters. Another success story here was Port Lincoln. The first planned delivery was cancelled as only 2 people had enrolled. On a subsequent visit by one of the presenters to Port Lincoln with another project, contact was made with the Regional Development Board who agreed to promote the workshop. Their local knowledge and personal contacts resulted in a very successful workshop with key regional stakeholders attending. Typically attendance was poor when strong local contacts were not available to presenters. This was particularly

disappointing in Adelaide where it was thought the CRC would be able to draw on stronger networks.

7.2 Delivery

Over the course of the program the presenters sought continual feedback on how the program could be improved and modified to better meet industry needs in terms of content and delivery. While feedback varied from people wanting one day, two day and one week versions, consensus appears to be:

- **One day is best** – while people who attended both days were positive, there was a noticeable drop off in numbers between the first and second day (with the exception of Brisbane where numbers went up).
- In Perth the drop off between Day 1 and Day 2 was particularly noticeable as there was confusion here re the organisation with both Wafic and the CRC accepting registrations. While the CRC sent out a reminder (and all returned for day 2), Wafic had a change of staff and no reminder was sent and subsequently very few of the Wafic registered attendees came back. Phone calls on the day indicated they had forgotten. The lesson here is to ensure only one organisation looks after registrations.
- In terms of **timing**
 - Re day of the week – avoid Mondays and Fridays and weekends. Tuesdays seemed to work well.
 - Do not try to link with events like Seafood Directions as several organisations also try to capitalise on this (anecdotally over 30 other meetings were held in conjunction with Seafood Directions)
- Having **two presenters** worked well. The one day workshop was very intensive and having two presenters allowed the attendees a change of pace and style and also allowed the presenters to keep up energy and enthusiasm.

8. Benefits and Adoption

Benefits and adoption were addressed in detail in section 6.4 with a further brief summary below.

8.1 Short term benefits

- Immediate changes to current strategies
- Professional development
- Confirmed current thinking and approaches

8.2 Medium term benefits

- Basis for future new product development and strategic planning

8.3 Long term benefits

- Improved profitability
- Increased sales
- Improved customer relations

“Great opportunity to meet and confer with others in related industry sharing experiences and approaches.”

“Great presenter and the issues were topical, interesting and on point - Well done we would have you back in a heartbeat.”

“Its all great work that needs to be continued with the goal of producing an even clearer picture/understanding of how the Aus seafood industry can become overall optimal in terms of i) maximum value from a consumers perspective, ii) maximum sales revenue and iii) maximum supply chain efficiency (ie cost/revenue) at all levels.”

9. Further Development

Feedback gathered throughout the workshops and through the final evaluation (reported in section 6 and appendix 4) highlights several possible further developments that may be worth pursuing including:

- Possible **annual updates** highlighting research results done since this project and how these results fit with past research.
- **Sector specific** workshops (ie prawns, oysters, finfish) to be run in conjunction or as part of regular industry events. These could range from full day workshops to half day updates to suit specific sectors.
- **Value chain specific** workshops eg one for retailers, one for wholesalers etc.
- **Organisation specific** workshops (for example discussions have been held with Deedi in Brisbane about the possibility of delivery a half day or even two hour overview at Deedi premises)
- **Location specific** workshops, the success of the Port Lincoln workshop highlighted the potential of working with local organisations that are active and in touch at a grass roots level.

10. Planned Outcomes

The identified need was to disseminate knowledge gained through CRC research widely to industry in such a manner that industry make changes in their operations that have a positive impact on profitability. The Module is available to all Seafood CRC participants. The key planned outcome was to make the seafood industry aware of how and why Australians consume seafood, in a transformative format ie in a way where practice is changed as a result of knowledge gained.

This Module had the following planned outcomes and benefits (as per the stated learning outcomes):

- ❖ Economic impact: as per learning outcomes 3 and 4, individuals attending or completing the module considered operational changes to improve the profitability of their firms. See Figure 2
- ❖ Educational impact: attendance at this module contributed to the professional development of the individuals through achieving the stated learning objectives. See Figure 3
- ❖ Social impact: by improving the marketing of Australian seafood, the consumption level of seafood should be positively impacted with all the associated health and well-being benefits associated with such an increase. Given the long term nature of this benefit, to date this outcome has not been evaluated. However given the positive feedback to planned outcomes re economic and educational impact, this should flow through.

The aim was to have 120 participants either completing the face-to-face delivery of the workshop - or reviewing the online version of the workshop. It was also expected that participants would disseminate such knowledge into their organisations, with this dissemination facilitated by the electronic resources available. This aim has largely been met.

Public Benefit Outcomes

Public benefit outcomes are reflected in the educational and social impacts outlined above, that is, a better educated

workforce and the health benefits of increased seafood consumption.

Private Benefit Outcomes

Private benefits are reflected in all three impact areas, with more profitable seafood companies, the professional development of individuals and the health benefits to Australians who increase their consumption of seafood as a result of strategies implemented as an outcome of attending the workshop.

Linkages with CRC Milestone Outcomes

The Seafood CRC Master Class: Stimulating Consumption of Australian Seafood has successfully contributed to the following CRC Milestone Outcomes:

CRC Output: 3.7 - Knowledge from Research Program 2 converted into education and training tools

CRC Milestone: 3.7.1 - Outputs from Research Program 2 customised to develop education and training tools and processes, training conducted and suitability of tools and processes evaluated

“There should be more.”

“Thank you for the opportunity to do the workshop. We would love to attend any future workshops. We have definitely implemented some of the ideas discussed and will keep continuing to understand what our consumers want. Thank you.”

“The workshop was extremely informative and gave a lot of food for thought regarding consumer’s behaviour and the need for informative marketing at point of sale.”

11. Conclusion

The Seafood CRC has undertaken significant consumer research into a diverse range of consumer attitudes and behaviours both for seafood in general and across specific species. In addition, the behaviour of various significant stakeholders throughout the value chain have been explored. The key purpose of this project was to consolidate and then disseminate these research findings widely to industry to inform decision making.

“Job well done. Would be interesting to hear if any sectors of the industry have taken up and incorporated any of the learnings into their business practices.”

This project has met and/or exceeded all objectives, with the exception of face to face attendance at workshops (76% of target).

Continual evaluations throughout the project were consistently positive and also informed modifications to format and content of the subsequent workshops.

Evaluations at the completion of the project further supported the high quality of delivery and the high value of the content to participants, with over 20% of respondents reporting improvements to their business as a direct result of their participation in the workshop.

“I enjoyed the master class. The educator was focusing on the material that was of interest to me. I enjoy learning about how consumers think and it points out important points to focus on when making decisions.”

Materials were put online in October 2011. The online materials appear to be well

received with the resources now accessed regularly.

Recommendations have been made that may assist in making future workshops more effective, as well as suggestions for the focus and content of future workshops.

“The information has been invaluable - it has also identified other research that needs to take place to support it (which has / is happening). This will underpin much of the work now undertaken. Presenters of the Master Class need to have a complete and full understanding of what they are delivering to the audience to be able to provide on the spot feedback at the time.”

In brief the project achieved its outcomes and provided a model for the design and delivery of future CRC workshops.

“It was a really good one day course that provided a lot of interesting insights into consumers and the research that has been conducted is excellent.”

“Thank you for the workshop – its fantastic to know that this information is available to us and has confirmed for me the importance of market research.”

Appendices

Appendix 1: Stimulating seafood consumption in Australia: Pre-course survey

Name:

Organisation:

Job title:

Q1. What was your main reason for registering to do this course?

.....
.....
.....
.....

Q2. What are the three main outcomes you are hoping to achieve from this course?

1.
.....
2.
.....
3.
.....

Q3. What do you most want to know about seafood consumption in Australia?

.....
.....
.....
.....

Appendix 2: Stimulating seafood consumption in Australia: Post-course survey

Name:

Organisation:

Job title:

Q1. Overall how would you rate this course?

Very Poor Poor Average Good Very Good

Q2. What were the three most useful things you gained from this course?

1.....

2.....

3.....

Q3. What could have been left out?

.....
.....

Q4. Did the course meet your expectations in terms of what you set out to achieve?

Yes

No

If not, why not?

.....

Q5. Will what you have seen and heard during the course help your business?

Yes

No

Q6. How could the course be improved for the future?

.....
.....

Q7. What else do you need/want to know about seafood consumption in Australia?

.....
.....

Any other comments?

.....
.....
.....

Appendix 3: Stimulating seafood consumption in Australia: Final survey

Name:

Q1. Where did you attend the workshop?

- Brisbane Perth Adelaide Melbourne
Sydney Cairns Port Lincoln Gold Coast

Q2. As a result of attending the Consumer Research Master Class did you make any changes within your organisation (e.g. changes to your marketing strategies/activities)?

- Yes **Go to Q3** No **Go to Q5**

Q3. If yes, briefly describe the changes you made?

.....
.....

**Q4. What were the outcomes of any changes made as a result of attending workshop?
Go to Q6.**

- Improved sales
Improved profitability
Improved relationships with consumers
Other (please state)

.....
.....

Q5. If no, why did you not make any changes?

.....
.....

Q6. Did the workshop make a useful contribution to your professional development?

- Not at all useful
Of little use
Of some use
Moderately useful
Extremely useful

Q7. On reflection, how useful was the workshop in understanding consumers' attitudes toward seafood? For example, did the information reinforce what you already knew or challenge any preconceived assumptions you may have had?

.....
.....

Q8. On reflection, what changes could be made to the Consumer Research Master Class to improve the outcome?

.....
.....

Q9. Any other comments?

.....
.....
.....

Appendix 4: Qualitative feedback from final course evaluation

Appendix 4.1: Why did you not make any changes?

- Because my organisation is not involved in producing seafood but the management of the industry.
- I found the information valuable to inform decision making but have not seen the need to significantly change the strategy.
- Well a lot of the ideas that the talkers mentioned of were already being targetly investigated and assessed by GFB Fisheries.
- I was there in a professional capacity to learn more and identify how key learnings could be translated and packaged for industry members so as to add value to their existing business strategy.
- I was present as an observer (on behalf of the Seafood CRC magazine, 'Australian seaFOOD') rather than a fully fledged industry participant.
- I am a researcher, and run the SSRCP. It was not appropriate to make changes in my program as a result of the knowledge, rather this knowledge assists in our direction and underpins future actions.
- I work for a government organisation that has influences on the seafood sector (primary producer) and not consumer focused.
- No immediate changes have been made but with the knowledge gained from the workshop, different approaches will be taken in future, especially with regard to new product development.

Appendix 4.2: Briefly describe the changes you made.

- Informing the wider team of the CRC and also the research that has been conducted. We will look into some of the research findings for our future NPD programs.
- We will alter the descriptive wording on our products to get max. dollars. We will provide recipes on our website. We will endeavour to make advertising sexy and fun.
- It helped us design a new logo and helped with marketing our fish to the consumer and retailer.
- No real changes, but more awareness-discussion with staff about customer perceptions and drivers.
- Review/discussion of Division structure/focus on these issues.
- Slight changes to messaging regarding buyer motivations.
- Government Department - informed project planning.
- The information was great - our producers that attended have had a very positive response.
- Looking at previous studies completed on fish. We are farming Cobia and I wanted to see the outcomes and arrange marketing accordingly.
- Refined the approach to value-chain development initiative for the Moreton Bay Trawl Fishery.
- Implemented smaller portion/packaging of seafood products. Customer survey. Improved company image - logo/retail shop/uniform update/signage update. Implemented recipe cards. Implemented cheat sheet for staff (of seafood products).
- Positive support for Seafood CRC project 2011/736 and development of project 2011/749. Support and working together with the Australian Prawn Farmer's Association, including sponsoring the Seafood Directions 2011 'Largest Australian Prawn Cocktail' and a Restaurant and Catering billboard advertisement.

Appendix 4.3: On reflection, how useful was the workshop in understanding consumers' attitudes toward seafood? For example, did the information reinforce what you already knew or challenge any preconceived assumptions you may have had?

- I found the information interesting and it challenges some assumptions. Particularly the issues of sustainability.
- I thought that they were pretty spot on with the target market as it did reinforce what GFB's predictions would be to value add and increase profit margin.
- Both. The benefit of the presentations were that they unequivocally addressed / challenged some of the long held beliefs of industry in the context of the contemporary consumer and their needs.
- Helpful
- Good backgrounding
- Helped to reinforce what consumers' thoughts were.
- Largely it reinforced what we already knew with hard data, however there were a few surprises but not in the overall picture. I would have thought it very useful for producers, processors and retailers.
- It was v. useful - reinforced a lot, but the most important point it identified that nationally Australians are eating less seafood than recommended. Shows great need for seafood industry to advertise and promote.
- It was useful and highlighted the challenges that face the industry.
- It helped me understand peoples perception of fish and what they require and what they think is good for them.
- Reinforcement, some surprises in consumer motivation and preferences.
- Some new and interesting info.
- I think the information did both. However, for the insights that we had previously suspected/known it was beneficial to have some evidence as support.
- Greater suite of information.
- Surprising that so many people purchase seafood from supermarkets.
- The information reinforced most of what I knew. There are some new things I did learn and I would like to put in practice in the coming months.
- Reinforced and allowed greater focus on priority areas.
- The workshop was very useful. As someone returning back into our business after some years away, with small children, was great to refresh. I liked the way the information was explained, & yes it helped with understanding consumers attitudes toward seafood. I found the info did both of the above.
- The workshop introduced new information, but also supported some existing ideas. Of particular interest (apart from the obvious: prawns) was the relationship of the consumer to food.
- There was a lot of information given on the day and I believe I have forgotten much more than I have remembered. I was alarmed as to the attitude or lack of thought for the actual fisherman. I would have thought consumers cared a little more about who caught their product. There were many interesting facts that surprised me.
- The information provided at the workshop gave me an extremely different view of what I assumed were customers attitudes towards seafood. A very good learning experience.

- The most important outcomes, personally, was the information about customers assumptions with regard to frozen seafood, the results of in-home consumption and primarily for our business at present, findings within the food service sector; our current target market.

Appendix 4.4: On reflection, what changes could be made to the Consumer Research Master Class to improve the outcome?

- I found the research definition of seafood a little strange and believe it biased the outcomes. The business that we are in is the fresh fish business and lumping all things even canned fish threw up some interesting things.
- I thought the results were more relevant to seafood processors with respect to the information displayed and the positive scenarios presented. In the more regional centres, a strong emphasis on how adaptive marketing practices, cognisant of consumer behaviour, can deliver financial benefit to the PRODUCER, is critical to attaining greater attendance.
- No suggestions.
- Extend the class over 2 days
- There was a lot to take in for a one day course.
- None that I can think of at this time.
- None
- I feel that the CRC did not promote the workshop as well as it could. The promotional flyer for the workshop was lost within all the other information that was included in the same email.
- As there was a low attendance you might like to run it as a work shop at one of the association meetings(ABFA, APFA) it was a lot to cram in one day, if there could be a follow up presentation that might help or a refresher course at a later date.
- Try to ensure more industry participation.
- Shorter - more focus on key info.
- It was all good, could have sat through a week of it.
- I think it is very well set out. It covers a great deal of research and work completed on several different species of seafood.
- None that I am able to detect.
- Enjoyed the course immensely. A longer course may be beneficial, as probably had to rush through some information, but overall fantastic.
- Targeted Master Classes for sectors. For example, for the prawn industry have a particular industry organisation arrange the Master Class with their members.
- I really enjoyed the day although I was overwhelmed at the amount of information. This was a new experience for me. Although all the information was interesting maybe identifying different audiences/suitable info etc could be beneficial. Overall very informative.
- None that I can think of
- I found the workshop to be very informative and captivating, my only suggestion would be to hold them more regularly so that the messages are re-enforced.

Appendix 4.5: Any other comments.

- Well worth the time and money. It will either advise you where your target market is and how to accomplish your strategic goals.
- Job well done. Would be interesting to hear if any sectors of the industry have taken up and incorporated any of the learnings into their business practices.
- The move to a 'one day' format is positive. Otherwise the MC was a worthwhile effort.
- It was a really good one day course that provided a lot of interesting insights into consumers and the research that has been conducted is excellent.
- There should be more.
- Great opportunity to meet and confer with others in related industry sharing experiences and approaches.
- Appreciate efforts put in by those involved.
- Great presenter and the issues were topical, interesting and on point - Well done we would have you back in a heartbeat.
- I enjoyed the master class. The educator was focusing on the material that was of interest to me. I enjoy learning about how consumers think and it points out important points to focus on when making decisions.
- It's all great work that needs to be continued with the goal of producing an even clearer picture/understanding of how the Aus seafood industry can become overall optimal in terms of i) maximum value from a consumer's perspective, ii) maximum sales revenue and iii) maximum supply chain efficiency (ie cost/revenue) at all levels.
- Thank you for the opportunity to do the workshop. We would love to attend any future workshops. We have definitely implemented some of the ideas discussed and will keep continuing to understand what our consumers want. Thank you.
- The information has been invaluable - it has also identified other research that needs to take place to support it (which has / is happening). This will underpin much of the work now undertaken. Presenters of the Master Class need to have a complete and full understanding of what they are delivering to the audience to be able to provide on the spot feedback at the time.
- The workshop was extremely informative and gave a lot of food for thought regarding consumer's behaviour and the need for informative marketing at point of sale.
- Thank you for the workshop – it's fantastic to know that this information is available to us and has confirmed for me the importance of market research.

Appendix 5: Independent email feedback.

<p>Todd Crowley - Blue Harvest Queensland</p>	<p>“The CRC Consumer Research Master Class has provided our company with invaluable information on the Australian public’s buying trends. The content presented has enabled us to make key decisions on product development moving forward. I highly recommend future participation for any seafood industry professional to gain a greater understanding of market trends.”</p>
<p>Lowri Pryce - OceanWatch Australia</p>	<p>“I attended the Seafood CRC Master Class on Tuesday at the SFM on Seafood Consumer Research-stimulating consumption of Australian Seafood. It was a good workshop, run over 1 day rather than the usual 2 days.....I would certainly encourage industry attendance.”</p>
<p>Joanne Howarth – Fishermen’s Wharf Seafoods</p>	<p>We wanted to send you a quick email to convey to you how much we enjoyed the Master Class and just how much we learned!!</p> <p>Dawn was inspiring. She was a wonderful presenter and she encouraged discussion amongst the group. The class was very interactive. The only disappointing thing was the poor number of participants.</p> <p>It is unfortunate for the industry overall that there are not more interested persons keen to avail themselves of this outstanding opportunity to learn about all the latest research and how it can be applied day to day in our businesses.</p> <p>We are extremely appreciative of the opportunity to participate. We missed the class in Sydney and thus decided to attend Hobart, and we most certainly are glad that we did!!</p> <p>Please pass on to Dawn our feedback and sincere appreciation.</p>