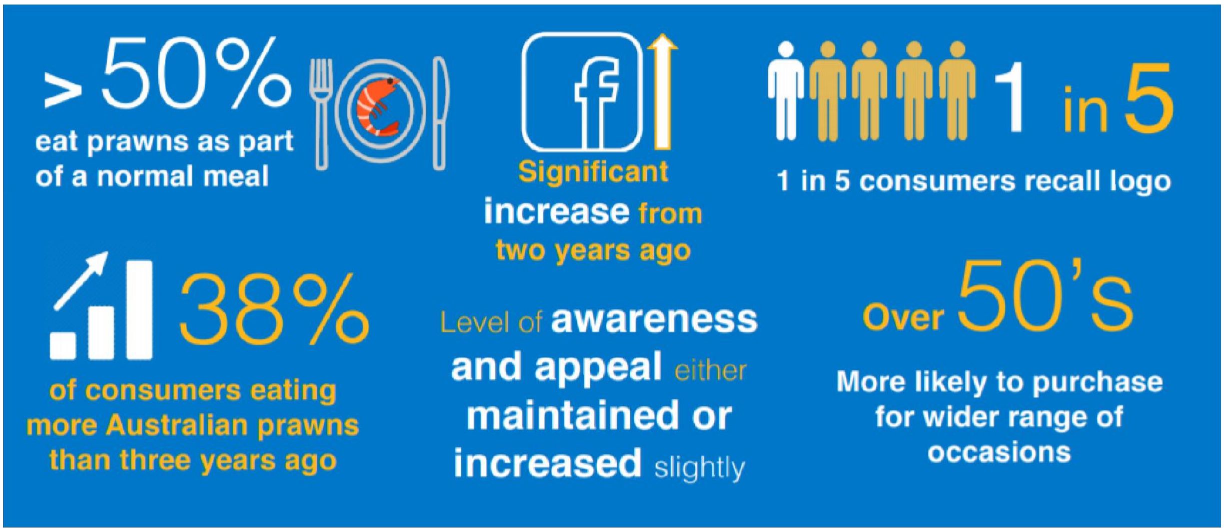
Love Australian Prawns evaluation using consumer research, sales data and market insights

for the IPA ACPF APFA



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Rachel King

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Acknowledgments

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Retired LAP Management Committee members, Phil Bruce, Helen Jenkins.

Co-investigators and project contributors:

Ben Hale, Adpower

Helen Jenkins, Australian Prawn Farmers Association (2007-2017)

Meredith Lawley, University Sunshine Coast

Executive Summary

What the report is about

Having commissioned Brand Council to review Love Australian Prawns (LAP) strategy and outputs and the University of Sunshine Coast to compare LAP consumer perception and awareness to previous years, the Australian Council of Prawn Fisheries Ltd (ACPF) and the Australian Prawn Farmers' Association (APFA) have ascertained that LAP is achieving its original objectives. 1 in 5 Australians now recognise the LAP logo: this sort of awareness usually only achieved via TV campaigns. The industry has experienced an average 20% increase in Medium, Med-Large and Large grades between the start of the LAP campaign until the end of 2016 with statements of recognition from the industry that "You would expect some of this demand can be attributed to the Love Australian Prawns campaign.''

Background

ACPF and APFA agreed to research qualitative evidence of the impact of LAP on consumers in order to continue confident investment from the prawn sectors. LAP contributors were looking to verify their return on investment in LAP. New contributors, such as NSW, Qld and Vic also required this information as they worked out the value of contributing to LAP.

Aims/objectives

To demonstrate return on industry investment and adherence to original strategy, LAP aimed to achieve the following objectives:

1. Love Australian Prawns campaign monitored, evaluated and planned for 2017 and beyond
2. Communicate evaluation results and future campaign plans to the industry (added by variation)
3. Number of LAP financial contributors increased for Year 5

Methodology

The following method was followed:

1. Consumer research. A comparison of consumer perceptions at Year 4 to previous year's results conducted by University of Sunshine Coast (USC) in February 2016

2. Sales data analysis: Sales data could not be acquired that fit the required criteria at a reasonable price. Industry sales data was sought instead.

3. Strategy Review: Brand Council reviewed LAP strategy and outputs against the original strategy.

4. Meeting of LAP (March 2017): Results of consumer research and strategy review tabled.

5. Meeting of LAP (May 2017): 2017-18 Campaign Plan proposed and agreed

6. Contributions requested from industry for 2017/18.

7. Communication materials (from August 2017): An update on the 2016-17 LAP campaign with consumer research results was designed and distributed by email and by video. The 2017-18 campaign plan was also detailed and distributed.

Results/key findings

The original objectives for LAP have been achieved through four years of LAP. This was particularly demonstrated through consumer research.

Objectives achieved.

1. <u>Increasing desire for/ desirability of Australian prawns.</u> Example USC evidence: *38% of consumers report they are eating more prawns than 3 years ago with those consumers being more likely to recognise the LAP logo when they see it*

2. Australian prawns special place Aust eating habits. Example USC evidence: *20% of Australians are still buying prawns for the traditional special occasions such as Christmas and Easter but 25% are now buying prawns for a special occasion or a treat through the year. Over 50% are eating prawns with the family in a meal at home.*

3. Increase value of Australian prawn. Example industry sales data evidence: *20% price increases on average across Med to Large grades between the start of the LAP campaign until now. Some fisheries reported that 20% price increase for larger grades in the 2016/17 year alone, despite having more supply than in past years*

Implications for relevant stakeholders

The implications of this work are directed at industry as investors in LAP.

Industry contributors and LAP need to be aware of;

- Despite only having approximately 50% of the total potential industry funded marketing budget at its disposal, LAP has achieved its objectives.
- In order to maintain the differentiation of Australian prawns in the marketplace, LAP must continue to run as along as possible
- In a competitive market the LAP campaign's front-line content must continue to focus on positioning Australian prawns as special rather than on education
- The continued dominance of supermarkets for prawn sales confirms that LAP needs to cost effectively increase LAP brand presence in major supermarkets
- Without a compulsory marketing levy, communication of campaign achievements along with future consumer research results will be needed to increase industry contribution.

Recommendations

The following recommendations stem from the implications of the evaluation and monitoring of LAP.

1. Subject to the ongoing support and agreement of contributors, the LAP campaign continue, in order to retain consumer awareness of and desirability for Australian prawns differentiated from imported prawns
2. Future LAP campaigns retain the same focus as agreed at the conception of the campaign ie to make prawns 'special' (celebrated, occasion, real, nurturing families and friends – positioning away from convenience and ordinary every day)
3. To protect the brand, all LAP produced items should reflect the 'special' positioning and the promotional focus of LAP, being careful to properly prioritise retailer needs
4. The LAP campaign's front line content to focus on position rather than education.
5. LAP MC to review materials required for 2018-19 onwards that is required to add to LAP appeal eg need for further consumption scenario photography such as friends eating prawns at Christmas in July, Mothers Day, etc to add to LAP's footage
6. The MC instigate 2017-18 initiatives to cost effectively support seafood retailers and supermarkets with collateral to feature the LAP brand, including through appropriate partnerships
7. The LAP MC continue initiatives to spread peak special occasion consumption periods through the year as has proven effective
8. The LAP MC continue to measure campaign effects through RD&E funded-commissioned consumer research, including with the University of Sunshine Coast on a regular basis so that previous existing datasets can be accessed.
9. If possible, obtain sales data using RD&E funds via arrangement with FRDC and Nielsens to at least identify changes in volumes between Australian and imported prawns over time
10. The LAP MC continue to communicate campaign achievements and campaign plans continue in an easy to read, appealing format with full budget transparency.

Keywords

Love Australian Prawns, consumer perception, strategy, results communication

Introduction

LAP needed to provide qualitative evidence of the impact of LAP on consumers in order to continue confident investment from the prawn sectors. This is to include analysis of (LAP) brand awareness, purchase intent and media methods with the results compared against findings from 2012/774.81 *"Year 2 Love Australian Prawns: Consumer Evaluation"*; noting absence of data for 2015-16 (Year 3). The qualitative evidence needed to be documented with quantitative evidence; sales price and volume over the course of the campaign.

CRC project 2011/736: *"National Prawn Market Category Planning"* set the following objectives:

1. Develop an implementable market plan to increase the value of the Australian prawn category on the domestic market, either through higher retail prices or through higher volumes sold.
2. ACPF (Australian Council of Prawn Fisheries) and APFA (Australian Prawn Farmers Association) agree to a collaborative commitment to co-invest in implementing the plan to lift consumer demand for Australian prawns.
3. Encourage investment in marketing by the prawn industry and provide an informed basis for how to invest funds.

The project identified that "Parameters to evaluate the success of the activities will be developed and assessments completed. It seems likely that the results of these evaluations will drive further investment".

Two rounds of consumer research were conducted after Year 1 and then again after Year 2 by University of Sunshine Coast.

Brand Council has been involved each year to review the strategy prior to the coming year and execution has been conducted by Ben Hale, Adpower.

After invoicing for Year 4 the LAP Management Committee became aware that industry financial contributions had fallen below the target for effective campaign reach. Evaluation and monitoring of the campaign was intended through a revisit of the original strategy against current market conditions and LAP outputs along with reviewing consumer research and sales data.

Consumer research and sales data analysis needs to be acquired and reviewed alongside Love Australian Prawns campaign strategies. The information was required as part of monitoring and evaluation, which is an RD&E activity, as set out in the initial campaign. This information then needed to be reviewed against past LAP outputs and proposed future activities in advance of commissioning work for Year 5. LAP contributors are looking to verify their return on investment in LAP. New contributors, such as NSW, Qld and Vic also required this information as they decided to invest.

Objectives

1. Love Australian Prawns campaign monitored, evaluated and planned for 2017 and beyond
2. Communicate evaluation results and future campaign plans to the industry (added by variation)
3. Number of LAP financial contributors increased for Year 5

Method

Description of methods used, including justification are listed below and method change made by variation in May 2017 are marked.

1. Consumer research:
* Commission consumer research in February 2017 including the same questions asked of 1000 of the public after Year 1 and Year 2 for comparison.
* Any additional questions, up to 3, will be added to provide additional information that can be implemented in LAP. These will be decided by the LAP committee with the advice of USC and FRDC.
* USC to manage admin/overheads, analysis of data including comparison with previous two waves and preparation of report

On design of the consumer research the objectives of the consumer research were refined to:

- Measure brand recall for LAP logo
- Measure awareness of campaign
- Explore consumption occasion
- Identify which media were effective in gaining consumer attention
- Identify consumer recall of specific in store collateral
- Evaluate the impact of the campaign on both consumer attitude and behaviour (purchase and purchase intention)
- Identify trends in the above from Year 1 to Year 4

Compared to previous years LAP was interested in researching additional information:

- A measure of change in overall consumption over the period LAP has been in operation
- Overall measure of brand recall over time
- Explore the occasions prawns are being used for eg if for a normal family meal are they being perceived as the new protein, are people using prawns for special occasions outside Xmas /Easter etc

2. Sales data analysis:
* Following receipt of sales data from industry, analyse for trends.
Note: Sales data could not be acquired for a reasonable budget with the detail required and so the budget was redirected.

3. Review:
Review is to involve Brand Council as the original authors of the LAP strategy and include:
* Review all strategy and research documents
* Prepare top line strategy summary and reminder of the plan

* Attendance at a meeting of LAP committee

4. Meeting of LAP (March 2017)
Meeting to hear consumer research results, Brand Council's review, sales data analysis and agree direction.

5. Meeting of LAP (May 2017)
* 2017/2018 activities proposed
* Activities and budget for 2017/2018 strategy agreed by LAP committee

6. Contributions requested from industry for 2017/18 (June 2017)
* Top line results from sales data & consumer research
* Summarised direction for 2017/18
* Invoices issued

7. Communication materials (from August 2017)
* Draft and design campaign summary, 2017-2018 agreed strategy
* Draft and produce summary video (achievements since inception and 2017-18 plans)
* Communicate materials to contributors and industry

Results, Discussion, Conclusion

Objective 1: Love Australian Prawns campaign monitored, evaluated and planned for 2017 and beyond

a) **Monitoring and evaluation results, discussion and conclusion:** Before setting the 2018-19 campaign in May 2017, the LAP MC set out to evaluate the campaign against its initial goal to increase the value and volume for Australian prawns by;
   - Increasing desire for and desirability of Australian prawns.
   - Give Australian prawns a special place in the eating habits of Australians.
   - Increase value of the Australian prawn.

The consumer research results commissioned through and analysed by University of Sunshine Coast were of considerable value in measuring LAP effect on consumers over time. The market strategy review provided by Brand Council reminded of initial strategy and its context in emerging food trends. Brand Council's review of LAP outputs and advice was limited.

Table 1 contains highlights of findings from each of consumer research, sales data and market strategy review that demonstrate delivery against original campaign objectives. Detailed results and analysis are included in the attached reports.

In addition to gauging LAP effectiveness, the consumer research and market strategy review revealed information about how, and amongst who, the effect was taking place. The market strategy provided advice on LAP's position in emerging food trends. Summary points are:

- 45 – 54s are the biggest consumers (and prone to extra occasion impulse buying), 25 – 34s second biggest consumers and 18-24 were more likely to stick to Christmas/Easter.

- Despite the forecasted food trend (Brand Council) favouring growth of smaller specialist retailers, prawns were increasingly purchased in supermarkets and the highest instore recall of the LAP brand is in supermarkets.

- LAP appears to deliver on the forecasted trend (Brand Council) for real, nutritional, fresh, experiential food for use for in home cooking in that Australian prawn purchases are increasing through the year and that recipes are in demand

- Unaided recall of LAP continues to be predominantly via *television*, in store collateral and printed newspaper/magazine with a significant increase in social media.

- 17% of those surveyed recalled the example LAP collateral items

Sales data could not be obtained from supermarkets or via third parties at a reasonable cost or at detail that was needed. It was hoped that LAP could obtain data at a yearly, weekly and campaign related level:

** Fresh Australian green prawns and Australian cooked prawns sold from the seafood deli*

** Fresh Imported prawns sold from the seafood deli (or other location if sold fresh) or 'Total prawns sold'*

** Fresh Australian prawns by species sold from the seafood deli*

** Fresh Australia prawns by production method (farmed vs wild)*

** By state*

** By location; metro vs regional*

In its place data was requested from industry and obtained from one (reliable) source to provide a very conservative measure of sales impact. These figures were further supported by comments from the market of the 2016 year with statements from three fisheries independently quoting market increases of 20% with attributions to LAP "You would expect some of this demand can be attributed to the Love Australian Prawn Campaign".

Consumer research, market strategy review and sales data have shown that, despite the scale of LAP, it has achieved its objectives. Commitment to the original strategy of 'special', increasing the number of prawn occasions and avoiding the educational in positioning will increase positive attitudes to Australian prawns and further LAP's appeal in years to come.

Data source	Finding	Goal		
		Increasing desire for/ desirability of Australian prawns.	Australian prawns special place Aust eating habits	Increase value of Australian prawn.
Consumer research	1 in 5 Australians now recognise the LAP logo. *(This sort of awareness is usually only achieved via TV campaigns.)*			
	38% of consumers report they are eating more prawns than 3 years ago with those consumers being more likely to recognise the LAP logo when they see it			
	43% rated LAP material having positive appeal. 57% rated the material from average or less			
	36% would be more likely to purchase as a result of seeing material with a further 56% saying they would purchase the same amount (levels maintained throughout campaign).			
	Significant overall change from Year 1 to 2 and from Year 2 to 4 as respondents recorded increasingly positive attitudes and decreasing neutral attitudes			
	In 2014 only 20% of Australians bought prawns once a fortnight or more. By the end of 2016 35% bought prawns once a fortnight or more			
	20% of Australians are still buying prawns for the traditional special occasions such as Christmas and Easter but 25% are now buying prawns for a special occasion or a treat through the year. Over 50% are eating prawns with the family in a meal at home.			
Sales data analysis	Industry sources report 20% price increases on average across Med to Large grades between the start of the LAP campaign until now. Some fisheries reported that 20% price increase for larger grades in the 2016/17 year alone, despite having more supply than in past years			
Market strategy review	'Love Australian Prawns' captures the essence of what prawns mean to people and their role in people's lives. They fulfil a unique experiential and emotional space and role.			
	Evidence of success demonstrated by consumer research findings			
	The existing strategic and creative approach continues to be the correct path on the branded prawn journey that carries meaning on both emotional and functional levels			

Table 1: Summary of results against campaign goals. Key: Achieved Focus Not achieved

b) **<u>Planning results and discussion:</u>** Having reviewed the evaluation results and responding to opportunities that presented themselves in 2017, members of the LAP MC discussed what they would like to see in 2017-18 LAP ahead of reviewing the campaign proposal on 31 May 2017:

- 2017-18 should the retain the same focus as held throughout the campaign ie to make prawns 'special'
- The campaign should continue to steer away from engaging in public White Spot Disease (WSD) response (or associating LAP with WSD and a negative connotation) but to focus on positive 'pro Australian prawn' activity
- Target some more activity mid year in the slump of demand and particularly now as the market has flattened in response to WSD (noting that any new material would need to devised for winter 2018 but that the usual Footy Finals, etc social media promotions were important)
- Support investment that results in Australian prawns being seen as a premium product that are displayed (and handled) properly
- Communication of LAP achievements is important to increase industry buy-on
- Engage with the food service sector with the components of the campaign subject to LAP MC discussion (Note - this was a response to 1) shortage in imported prawns and the opened window of opportunity and 2) reaction to the slump in demand at retail experience post WSD)
- Engaging consumer attention at point of sale can be assisted by digital content as a physical presence via demonstrations is probably still cost prohibitive
- Non-marketing proposals be considered as potential RD&E projects on a project by project basis.

The 2017-18 campaign plan was presented, reviewed and agreed on 31 May 2017. The 2017-18 campaign and its budget is attached. It contains the following key components:

✓ Continued, cost effective support of seafood retailers with items available on demand
✓ Continued support for supermarkets (Woolworths) with an allocated budget
✓ New food service stream
✓ Targeted campaigns and online presence via social/digital media

LAP MC is expected to review the 2018-19 strategy in May 2018 along similar areas of interest.

The LAP MC agreed to keep to the 'special' message of LAP, to continue supporting its core of seafood retailers, allocate budget to support co-promotion activities with supermarkets, to branch out into food service and to complement all activities with targeted online campaigns.

Objective 2: Communicate evaluation results and future campaign plans to the industry

To replace sales data acquisition, some communication outputs were budgeted and the project varied to include:

- Draft and design campaign summary, 2017-2018 agreed strategy
- Draft and produce summary video (achievements since inception and 2017-18 plans)
- Communicate materials to contributors and industry

The campaign summary of achievements and 2017-18 strategy were drafted, designed (attached) and sent to all contributors and to organisation members.

A video form of achievements and 2017-18 campaign was completed, circulated to all contributors, to organisation members, and posted on (ACPF's) website. Members suggested the following;

- "send to members and encourage them to circulate it through their supply chains"
- run a concerted call to arms in the new year (for wild catch non-contributors)
- send to industry headed with a thanks to contributors and to highlight achievements.

  Note that the suggestion was also made to edit the script so that it could addressed to consumers as a thank you to them for their support. However, the script was designed around an industry audience to demonstrate return on investment and to encourage financial contribution, a rewrite would be a significant undertaking and we could deliver a consumer thank you in other ways.

The full budget for communication was not used as all communication was on line rather than face to face.

Campaign achievements and 2017-18 plans were communicated and designed in an appealing, easy to read format for communication to industry and, in some cases, to their supply chain.

Objective 3: Number of LAP financial contributors increased for Year 5

LAP's contributor gaps are summarised in Table 2. While new contributions to the campaign have been received from Victoria and the Qld Seafood Marketers Association, and further positive discussion in NSW to arrive at a multi pronged approach, the subscription rate could not be lifted in Qld wild catch and Exmouth Gulf industry is not contributing in 2017. The contribution from the farmed sector decreased by more than 20% in 2016/17 as a result of the White Spot Disease incursion in December 2016. There are also non-contributors in the farmed sector which will not be remedied unless there is a compulsory levy. RD&E levy funds held in jurisdictions are a potential source of funding for LAP related research.

Sector	Contributor	Year 4	Year 5	Current subscription (% committed vs owing for the fishery/sector)	Estimate outstanding
Wild	Northern Prawn Fishery	Annual payment	6monthly instalments	100%	
	Qld	Contributing individuals making annual payment	Contributing individuals issued 12mth invoice QSMA voluntary contribution	Approx 4%	$175,000
	NSW			0%	$35,000
	Vic		6monthly instalments	100%	
	Gulf St Vincent	Annual payment	6monthly instalments	100%	
	Spencer Gulf & West Coast	Annual payment	6monthly instalments	100%	
	Exmouth			0%	$20,000
	Shark Bay	Annual payment	6monthly instalments	100%	
	Other (Torres Strait, WA)			0%	$20,000
	Total			**56% subscribed**	**$250,000 outstanding**
Farmed	APFA members (invoiced as one entity in 2017)	Annual payment excl WSD effected farms which are not producing	Annual payment excl WSD effected farms which are not producing	Approx 45% of farm production	$50,000 (of farms in production)
	Total			**45% subscribed**	**$50,000 outstanding**

Table 2: LAP contributors and level of subscription

Implications

The LAP campaign was instigated at a time when Australian prawn prices were struggling and there was little differentiation between the Australian prawn category and imported prawns.

LAP delivered on objectives. Despite only having approximately 50% of the total potential industry funded marketing budget at its disposal, it has achieved;

- ✓ an increase to 35% of consumers who bought prawns once a fortnight or more, up from 20% in 2014, which is evidence that intent to purchase (36% saying they would be more likely to purchase as a result of seeing material with a further 56% saying they would purchase the same amount) is converting to sales.
- ✓ 1 in 5 Australians now recognise the LAP logo where this sort of awareness is usually only achieved via TV campaigns.
- ✓ at least a 20% increase in Australian prawn prices

LAP's role in differentiating Australian prawns. In a market with steady prawn importation, the industry must action market strategy and consumer research advice as long as possible in order to retain and increase Australian prawn market share. LAP needs to continue to position Australian prawns as differentiated and special with the ability to satisfy Australia's demand for fresh, unprocessed, real food with a local story.

The LAP campaign's front line content to focus on position rather than education. Consumer research and the market strategy review highlight the need to continue to position Australian prawns as special, feel-good food that also nurtures family/friends on special occasions. This has implications for material and activities commissioned. LAP needs to position prawns as a-cut-above-the-rest and build the experience in all its front line material. Barriers to consumption such as handling, species knowledge, etc are best addressed with material to be kept behind the counter or online.

LAP's need to increase LAP brand presence in major supermarkets. Major supermarket's dominance in prawn purchase and the fall in seafood retailers is incongruous with the forecasted trend to smaller boutique style shopping. To retain brand recognition LAP must work out how to introduce the LAP brand as cost effectively as possible in major supermarkets, understanding that the supermarkets are limited in their ability to display printed promotional material. To support seafood retailers, LAP must also work out how to meet their promotional needs without being drawn in to offering education material instead of LAP promotional material

Increasing industry contributions. There is always the potential for 'leakage' and variance in contributions levels in voluntarily funded, production-based campaigns. There is no consideration for a compulsory levy for the wild catch sector however compulsory levies for promotion activities are being considered in the farmed sector.

Ongoing extension of campaign activities and market research can assist in attracting new contributors to, and/or maintaining ongoing support for the LAP campaign. RD&E levy funds held in jurisdictions are also a potential source of funding for LAP related research to underpin the campaign.

Recommendations

The following recommendations stem from the implications of the evaluation and monitoring of LAP.

1. Subject to the ongoing support and agreement of contributors, the LAP campaign continue, in order to retain consumer awareness of and desirability for Australian prawns differentiated from imported prawns
2. Future LAP campaigns retain the same focus as agreed at the conception of the campaign ie to make prawns 'special' (celebrated, occasion, real, nurturing families and friends – positioning away from convenience and ordinary every day)
3. To protect the brand, all LAP produced items should reflect the 'special' positioning and the promotional focus of LAP, being careful to properly prioritise retailer needs
4. The LAP campaign's front line content to focus on position rather than education.
5. LAP MC to review materials required for 2018-19 onwards that is required to add to LAP appeal eg need for further consumption scenario photography such as friends eating prawns at Christmas in July, Mothers Day, etc to add to LAP's footage
6. The MC instigate 2017-18 initiatives to cost effectively support seafood retailers and supermarkets with collateral to feature the LAP brand, including through appropriate partnerships
7. The LAP MC continue initiatives to spread peak special occasion consumption periods through the year as has proven effective
8. The LAP MC continue to measure campaign effects through RD&E funded-commissioned consumer research, including with the University of Sunshine Coast on a regular basis so that previous existing datasets can be accessed.
9. If possible, obtain sales data using RD&E funds via arrangement with FRDC and Nielsens to at least identify changes in volumes between Australian and imported prawns over time
10. The LAP MC continue to communicate campaign achievements and campaign plans continue in an easy to read, appealing format with full budget transparency.

Further development

Sales data be obtained via RD&E funds via arrangement with FRDC and Nielsens to at least provide Australian vs imported volume change in supermarkets over time and the effect of campaigns on sales.

RD&E activities continue to be considered for RD&E funding, whether the source of funding is IPA or jurisdictions. These activities may include but not limited to;

- ✓ Consumer research on LAP effectiveness with the addition/deletion of survey questions as per University Sunshine Coast recommendation in attached report
- ✓ Analysing sales data
- ✓ Design and/or extending materials addressing barriers to consumption
- ✓ Design and/or extending materials and/or initiatives that improve supermarket product handling and presentation
- ✓ Research and evaluation of efforts to extend LAP in food service and display local prawns on menus

Extension and Adoption

The project produced an infographic of consumer research results, Year 4 update including findings from consumer research and sales data analysis, a 2017-18 campaign plan and a video. These were designed for an industry audience and circulated to LAP campaign contributors and to ACPF and APFA members. Materials were also tabled at a meeting of NSW Co-ops in September.

The video is housed on LAP's Youtube channel and on at least ACPF's website
http://australianwildprawns.com.au/love-australian-prawns-campaign-update/

There was no known media coverage of the project's findings.

Project materials developed

The project produced an infographic of consumer research results, Year 4 update including findings from consumer research and sales data analysis, a 2017-18 campaign plan and a video. All outputs are attached in the Appendix. The video can be found at
https://www.youtube.com/watch?time_continue=5&v=706pdnr_qTQ

Appendices

- University of Sunshine Coast: Year 4 Consumer Evaluation of 'Love Australian Prawns'
- Brand Council: Love Australian Prawns Strategy Recap (2017) and 2017 Love Australian Prawns Strategy Review
- Year 4 Update
- 2017-18 LAP Campaign Plan

USC

YEAR 4 CONSUMER EVALUATION OF 'LOVE AUSTRALIAN PRAWNS'

The research is in… **Australians love their prawns!**

March 2017

>50% eat prawns as part of a normal meal

Significant increase from two years ago

1 in 5 — 1 in 5 consumers recall logo

38% of consumers eating more Australian prawns than three years ago

Level of **awareness and appeal** either **maintained or increased** slightly

Over 50's — More likely to purchase for wider range of occasions

Need to see the full picture by **integrating results** with other sources

Keep doing what you're doing

Increase **social media**

Ensure **easy** links to social media

coles — **Continue working with Coles**

Brand guidelines - consistent 'look and feel'

BRAND

Collateral needs to focus on the **customer experience** and **Love Australian Prawns** message

Drop in purchases from specialty seafood retailers

Single source of data only

Only three points of measurement – patterns still emerging

Findings incorporate comparison to 2014 and 2015 consumer evaluations

Australian Council of Prawn Fisheries

AUSTRALIAN Prawn Farmers ASSOCIATION

FRDC FISHERIES RESEARCH & DEVELOPMENT CORPORATION

Year 4 Consumer Evaluation of ‘Love Australian Prawns’

Incorporating comparison to 2014 and 2015 consumer evaluations

(CRC Project No 2012/774.81)

Professor Meredith Lawley, School of Business

March 2017

Acknowledgements

- Dr David Dean (Lincoln University) for statistical analysis
- Rachel and the LAP 'Committee' for suggestions and input

Key findings

- **Overall consumers continue to be engaged and positive**
- Specifically
  - 38% of consumers report they are eating more prawns than 3 years ago
  - Approx 1 in 5 consumers recall LAP logo (with recognition and purchase frequency correlated)
  - Prawn consumption: over 50% as part of normal meal
  - Over 55's more likely to purchase for wider range of occasions
  - Levels of awareness either maintained or increased slightly

- Of note
  - Significant drop in purchases from specialty seafood retailers (even thought number of specialist seafood retailers was increased by approx. 110 ie from 360 to 470)
  - Facebook significantly increased from previous 2 years (but from a very small base)
  - Instore significantly decreased (but by small margin)

- Limitations
  - single source only and these results need to be combined with others sources eg sales data, social media results, PR outcomes, feedback from retailers
  - 3 points of measurement only – patterns still emerging

Recommendations

- Keep doing what you are doing (and if possible increase)
- After reviewing other feedback/results consider:
    - Increasing use of social media
    - Ensuring easy links to social media
- Continue working with Coles

Background

	Collateral	Evaluation period and no of consumers surveyed
Year 1	• Approx 800 Woolworths stores received recipe/information leaflets • 152 ‘A’ retailers received 9 items of collateral • 226 ‘B” retail stores received 8 items of collateral • Media releases generated a variety of press coverage	Nov/Dec 2013 n = 1030
Year 2	• Approx 800 Woolworths stores received leaflets only • 365 speciality stores received posters and leaflets	March/April 2015 n = 1011
Year 4	• 800 Woolworths stores sent LAP 12 month calendars (Jan 15 and Jan 16) • 470 seafood retailers sent: recipe books (400,000) 3 different posters (from 10 produced), stickers and ice stabbers in last 14 months • LAP logo features in Woolworths catalogue whenever Australian prawns are featured (nearly every weekly catalogue for last two years) • LAP full page magazine advert in Coles magazine in September 2016 • Social media: Footy Finals, Spring Sauces	March 2017 n = 1,015

Background: The Year 4 Evaluation

What's the same....

- Online survey hosted by ResearchNow
- Consumers screened to
  - be over 18;
  - purchased prawns at least once in the last 6 months; and
  - quotas re geographic location/age
- Sample size approx. 1,000
- Timing outside Xmas/Easter
- All questions from Year 2 repeated (all Year 2 questions same as Year 1 with two Year 1 questions deleted)

What's different.....

3 new questions

- Thinking specifically about Australian prawns, would you say you are eating more or less Australian prawns than you were 3 years ago?
  - *A measure of change in overall consumption over the period LAP has been in operation*
- Do you recall seeing this logo (LAP) before?
  - *Overall measure of brand recall over time*
- What is the main occasion you purchase prawns for?
  - *This question was designed to explore the occasions prawns are being used for eg if for a normal family meal are they being perceived as the new protein, are people using prawns for special occasions outside Xmas /Easter etc*

Objectives 2017

- Evaluate the effectiveness and impact of the Year 4 Love Australian Prawns campaign on Australian consumers
  - Measure brand recall for LAP logo
  - Measure awareness of campaign
  - Explore consumption occasion
  - Identify which media were effective in gaining consumer attention
  - Identify consumer recall of specific in store collateral
  - Evaluate the impact of the campaign on both consumer attitude and behaviour (purchase and purchase intention)
  - Identify trends in the above from Year 1 to Year 4

Profile of respondents

Table 1: Geographic location of respondents by city and other state locations

Location	Year 1 n (%)	Year 2 n (%)	Year 4 n (%)
Sydney	217 (21%)	208 (20.6%)	226 (22.3%)
Other NSW	108 (10%)	115 (11.4%)	122 (12.0%)
Melbourne	117 (17%)	199 (19.7%)	205 (20.2%)
Other Vic	79 (8%)	60 (5.9%)	59 (5.8%)
Brisbane	101 (10%)	101 (10.0%)	105 (10.3%)
Other Qld	98 (10%)	105 (10.4%)	103 (10.1%)
Adelaide & SA	87 (8%)	77 (7.2%)	74 (7.3%)
Perth & WA	106 (11.0%)	102 (10.1%)	95 (9.4%)
Tas/ACT/NT	117 (11%)	44 (4.1%)	26 (2.6%)
TOTAL:	**1,030**	**1,011**	**1,015**

In terms of gender and location, Year 4 results were ***not*** significantly different to Years 1 and 2 and were as expected from previous CRC studies.

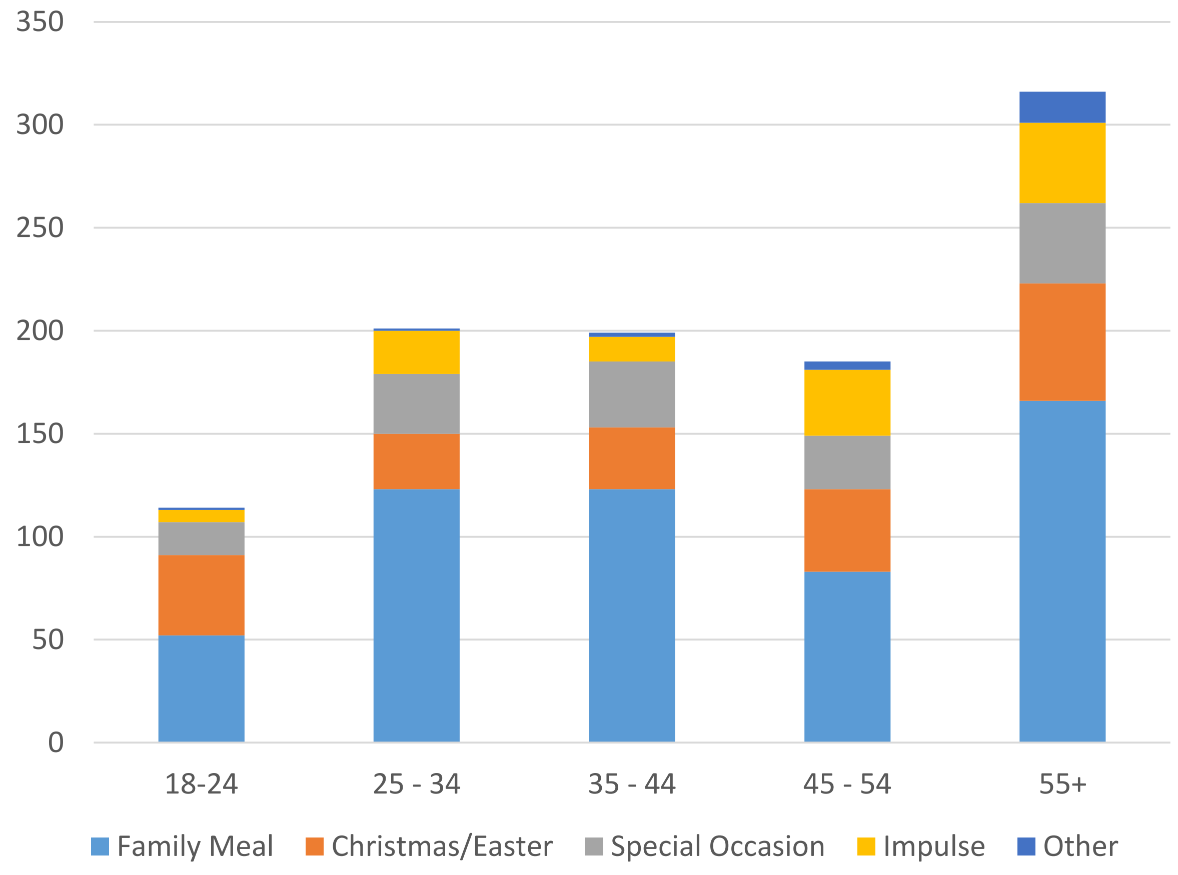
Profile of respondents

Table 2: Respondents by age group

Age Group	Year 1 n (%)	Year 2 n (%)	Year 4 n (%)
18 - 24	110 (11.0%)	115 (11.4%)	114 (11.2%)
25 - 34	178 (17.0%)	179 (17.7%)	201 (19.8.%)
35 - 44	155 (15.0%)	199 (19.7%)	199 (19.6.%)
45 - 54	193 (19.0%)	188 (18.6%)	185 (18.2.%)
55 years and over	394 (38.0%)	330 (32.6%)	316 (31.1%)
TOTAL	**1,030**	**1,011**	**1,015**

Similarly to previous years, those aged 55+ were the largest group of respondents in Year 4 (32.6%), and the distribution of ages was similar to Year 2.

Purchase Occasion (new question)



55+ more likely to purchase prawns across most occasions

Patterns

- No gender differences
- 18 - 24 more likely to purchase Xmas/Easter
- 45 - 54 and over 55 more likely to impulse buy (and bought over all range of occasions)
- Many 'others' were 'a treat' ie like an impulse

Table 3: Main Occasion for Purchasing Prawns

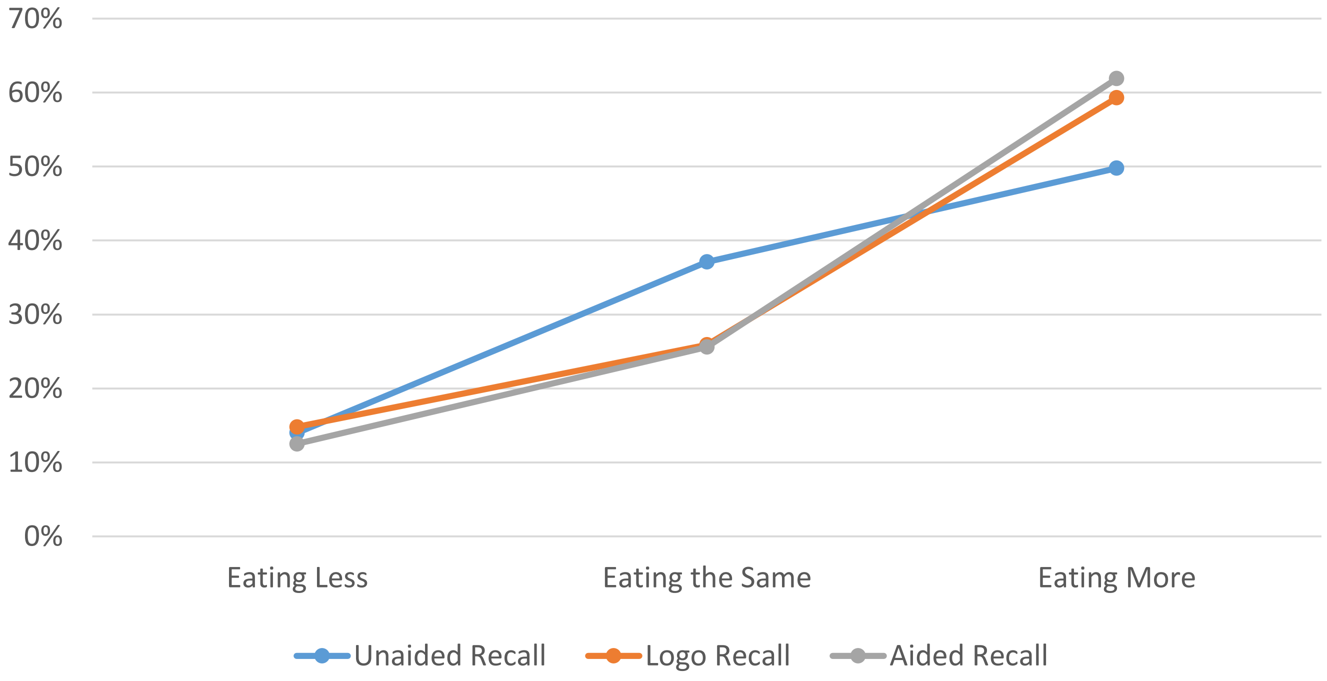
Main Occasion for Purchasing Prawns	Year 4 n (%)
A regular family Meal	547 (53.9%)
Christmas or Easter	193 (19%)
A special occasion	142 (14%)
Impulse buy	110 (10.8%)
Other	23 (2.3%)
TOTAL	**1,015**

Prawn consumption compared to 3 years ago (new question)

Table 4: Prawn consumption changes over 3 years

Prawn consumption compared to 3 years ago	Year 4 n (%)
Eating more Australian prawns now than I was three years ago	384 (37.8%)
Eating less Australian prawns than I was three years ago	171 (16.8%)
Eating about the same as I was three years ago.	460 (45.3%)
TOTAL	**1,015**

Consumers who are eating more prawns had higher unaided recall prawn promotion and aided recall of the logo and LAP promotion



Age patterns
45 – 54s biggest mover
25 – 34s second biggest movers

Purchase Frequency

Table 5: Frequency of prawn purchase

Frequency of prawn purchase	Year 1 n (%)	Year 2 n (%)	Year 4 n (%)
More than once a week	21 (2%)	20 (2%)	36 (3.5%)
Once a week	70 (7%)	102 (10.1%)	124 (12.2%)
Once a fortnight	134 (13%)	140 (13.8%)	198 (19.5%)
Once a month	273 (27%)	227 (22.5%)	228 (22.5%)
Once every few months	315 (31%)	305 (30.2%)	236 (23.3.%)
Two to three times per year	178 (17%)	166 (16.4%)	156 (15.4.%)
Once a year	39 (4%)	51 (5%)	37 (3.6.%)
Total	1,030	1,011	1,015

While the overall patterns are similar across the 4 years, there was a general increase from Year 1 to Year 4 in the percentage of consumers purchasing prawns once a fortnight, once a week and more than once a week.

Conversely there was a general decrease from Year 1 to Year 4 in the percentage of the customers that purchased prawns less frequently than once a fortnight.

Purchase location

Table 6: Consumer current purchase location at time of survey

Current purchase location	Year 1 n (%)	Year 2 n (%)	Year 4 n (%)
Woolworths	590 (57%)	570 (56.4%)	578 (56.9%)
Specialist fish retailer	564 (55%)	543 (53.7%)	465 (45.8%) ▼
Coles	478 (46%)	463 (45.8%)	497 (49.0%)
IGA/Drakes	92 (10%)	68 (6.7%)	62 (6.1%)
Independent supermarket	59 (5%)	73 (7.3%)	79 (7.8%)
Other		45 (4.5%)	41 (4.0%)
Total	**1,783**	**1,762**	**1,722**

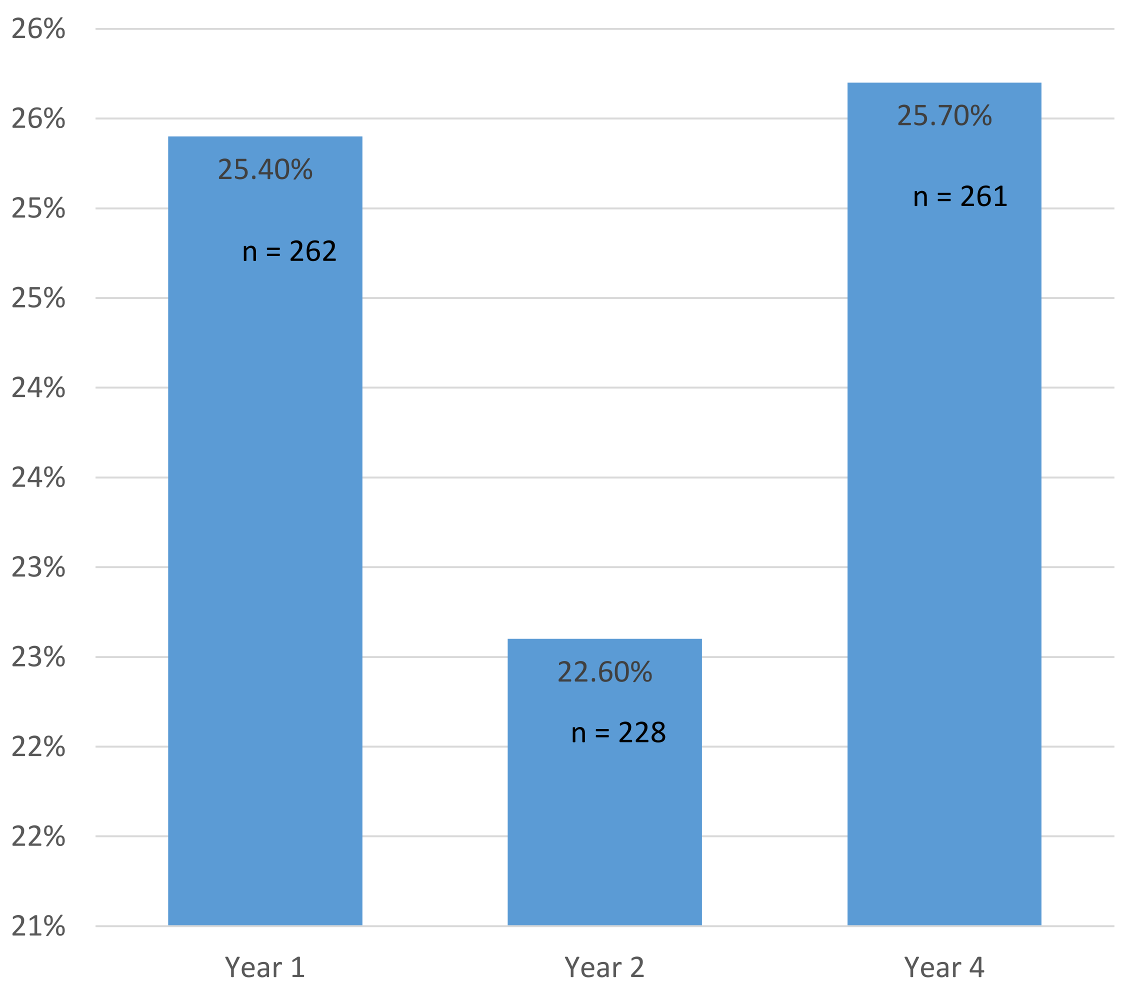
Significant drop in the use of Specialist fish retailers but no other significant changes.

Woolworths, specialist retailers and Coles remained the top three purchase locations. (note increase in Coles – ns but marginal)

The pattern of how many stores consumers buy prawns from was also the same between years.

Significant Decrease ▼

Unaided Awareness of *any* Prawn Promotion



Respondents were asked if they had noticed ***any*** promotion for prawns (i.e. not specific to 'Love Australian Prawns'), before they were subsequently asked if they had noticed the LAP collateral, that is, an indication of unaided awareness was gathered before measuring aided awareness.

In Year 4, from 1,015 respondents, 261 (25.7%) had noticed some prawn promotion. This is consistent with previous years (ie no sig difference).

Where did respondent see prawn promotion

Table 7: Where did respondent see promotion?

Location	Year 1 n (%)	Year 2 n (%)	Year 4 n (%)
Television	149 (14.5%)	94 (9.3%)	146 (14.4%)
In store	105 (10.2%)	138 (13.6%)	108 (10.6%)
Newspaper/magazine	80 (7.8%)	82 (8.1%)	73 (7.2%)
Website	22 (2.2%)	23 (2.3%)	36 (3.5%)
Radio	17 (1.7%)	9 (0.9%)	30 (3.0%)
Facebook	11 (1.1%)	11 (1.1%)	33 (3.3%)
TOTAL consumers noticing	**262 (25.4%)**	**228 (22.6%)**	**261 (25.7%)**

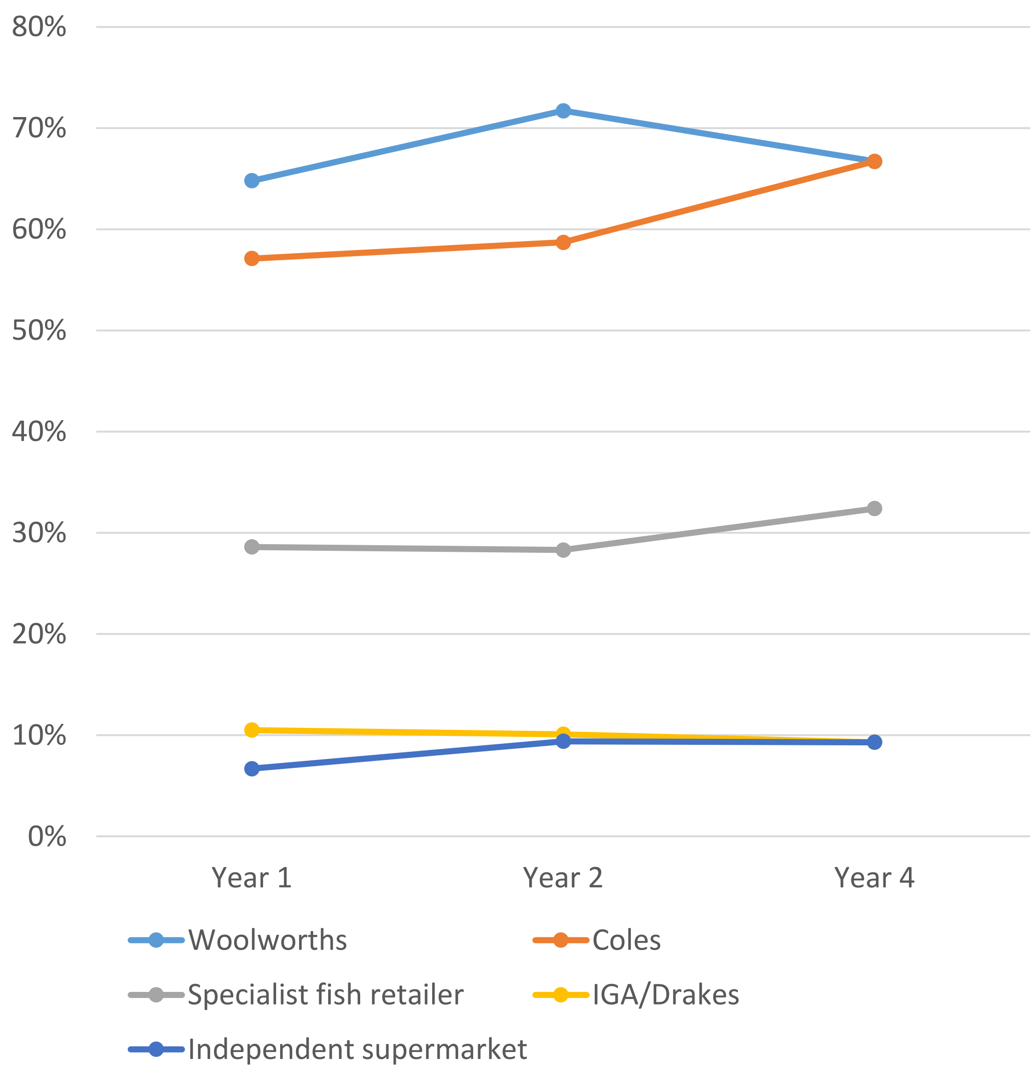
Note: Multiple responses allowed

Regarding where people noticed promotion, Year 4 followed the Year 1 distribution more than Year 2.

In year 4, Television, Website, Radio, and Facebook were more common.

▲▼ *=significant changes*

Store location where promotional material was sighted



Woolworths and Coles shared the highest awareness of prawn promotion, with 66.7% of those who noticed in store promotions doing so in their stores.

Although there were no significant changes, the upward trend for Coles could reflect their overall increasing market share or the higher profile of LAP with Coles, or a combination of both.

Table 8: Store location where promotional material was sighted

Store location	Year 1 n (%)	Year 2 n (%)	Year 4 n (%)
Woolworths	68 (64.8%)	99 (71.7%)	72 (66.7%)
Coles	60 (57.1%)	81 (58.7%)	72 (66.7%)
Specialist fish retailer	30 (28.6%)	39 (28.3%)	35 (32.4%)
IGA/Drakes	11 (10.5%)	14 (10.1%)	10 (9.3%)
Independent supermarket	7 (6.7%)	13 (9.4%)	10 (9.3%)
TOTAL consumers noticing	**105**	**138**	**108**

Note: Multiple responses allowed

Promotional material respondents recalled (unaided)

Table 7: Promotional material respondents recalled (unaided)

Promotional material	Year 1 n (%)	Year 2 n (%)	Year 4 n (%)
TV commercial	81 (33%)	31 (13.8%)	30 (12.4%)
In store ticketed promotion (price)	40 (16.3%)	48 (21.4%)	41 (17%)
Catalogue	27 (11%)	29 (12.9%)	14 (5.8%)
Information leaflet	14 (5.7%)	7 (3.1%)	3 (1.2%)
Flyers and posters	13 (5.3%)	12 (5.4%)	10 (4.1%)
Do not recall	10 (4.1%)	18 (8%)	26 (10.7%)
Sign	9 (3.7%)	16 (7.1%)	26 (10.7%)
Media Advertising	8 (3.3%)	6 (2.7%)	23 (9.5%)
Radio	2 (0.8%)	3 (1.3%)	4 (1.6%)
White Spot	N/A	N/A	24 (9.9%)
Other	42 (17.1%)	68 (30.4%)	40 (16.5%)
TOTAL	**246**	**224**	**241**

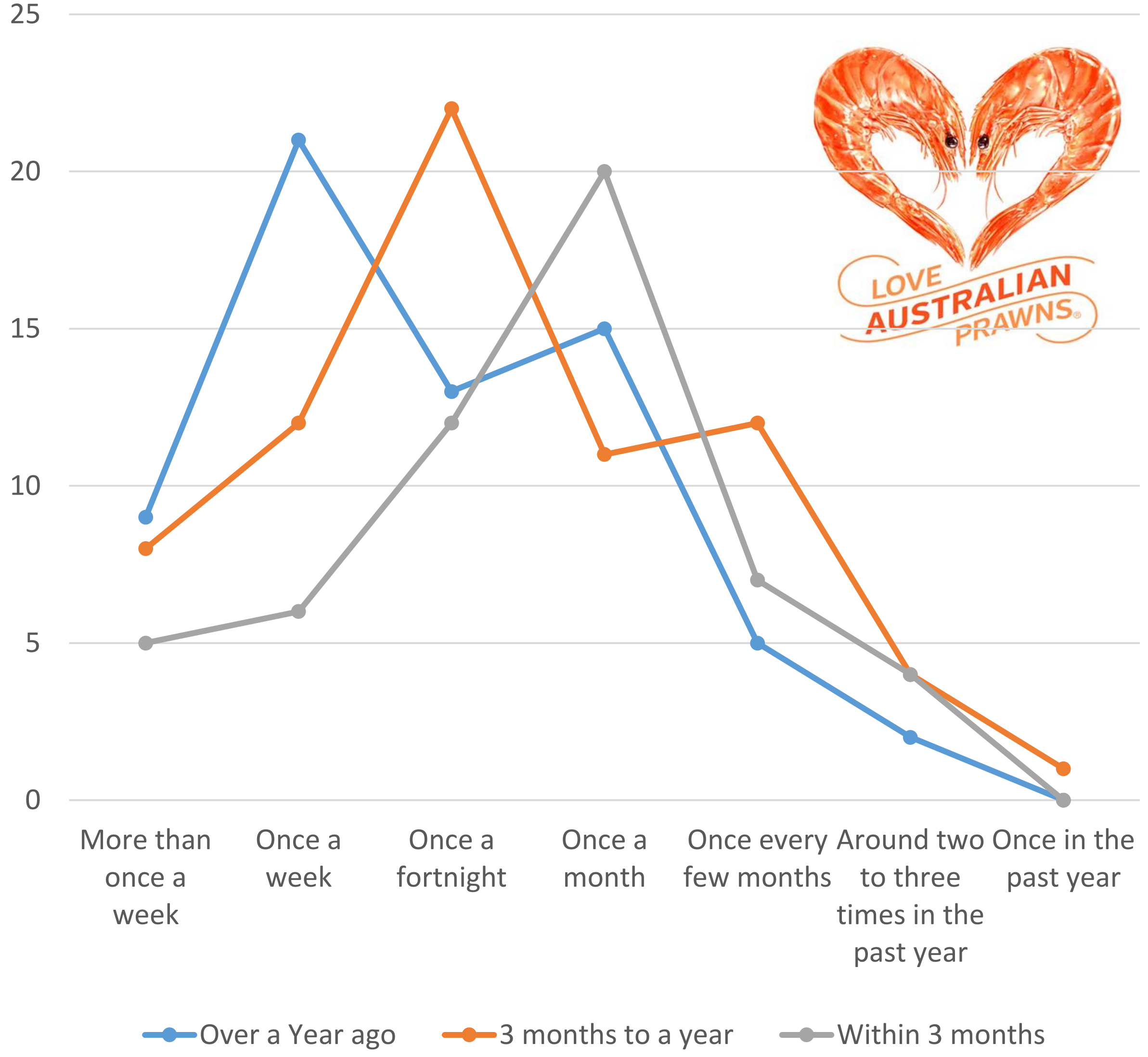
The 261 consumers who had noticed some type of prawn were then asked to describe the promotional material they recalled.

This was an open ended question in both phases so responses (Table 7) have been grouped into the broad themes described.

- 229 respondents offered 1 response,
- 9 provided 2 responses,
- 2 provided 3 responses , and
- 1 remembered 4.

Of note 24 respondents (ie 10% of those who recalled promotion) recalled issue re whitespot. ***(60% of those noting whitespot were from Bne/Qld)***

Consumer Brand Recall (new question)



In a new question for Year 4, respondents were asked if they recalled seeing the Love Australian Prawns Logo, and 189 (18.6%) respondents reported some level of recall.

- 54 (5.3%) reported noticing the logo in the last 3 months, and tended to eat prawns once a month
- 70 (6.9%) noticed the logo from 3 months to a year ago, and tended to eat prawns once a fortnight
- 65 (6.4%) noticed the logo over a year ago and tended to eat prawns once a week.

‘Love Australian Prawns’ aided recall for all respondents

Table 10: ‘Love Australian Prawns’ aided recall for all respondents

Type of promotional material		Year 1 n (%)	Year 2 n (%)	Year 4 n (%)
	None	811 (68.6%)	817 (80.8%)	839 (82.7%)
	Recipe/information leaflet	100 (8.5%)	80 (7.9%)	77 (7.6%)
	Posters	36 (3.0%)	144 (14.2%)	134 (13.2%)
	TOTAL RECALLS	136	224	211

Note: some respondents recalled both items, while other only recalled one item

Respondents were asked if they recalled “Love Australian Prawns” promotional material.

Of the 211 recalls in Year 4, 141 respondents (13.9%) recalled one of the two items of collateral, and 35 respondents (3.4%) recalled both items of collateral. In other words, 176 respondents (17.3%) recalled at least 1 of the promotional items.

In Year 1 and 2 respectively, 21.3% and 19.1% of respondents recalled one or more items of collateral.

‘Love Australian Prawns’ Aided recall (respondents who did not notice any promotional material

Table 11: ‘Love Australian Prawns’ Aided recall for respondents who did not notice any promotional material

Collateral	Year 1 n	Year 2 n	Year 4 n
Recipe/Information leaflet	37	40	41
Posters	8	60	64
Total	45	100	105

From 786 respondents who did not have unaided recall of any promotional material, 86 remembered some form of ‘Love Australian Prawns’ collateral when prompted and 19 of those remembered both the leaflets and posters.

These figures are almost identical to those in Year 2, with the key difference the significantly higher recall of posters than in Year 1.

The impact of the campaign on consumer attitudes and behaviour (purchase and purchase intention)

Table 12: Likelihood of purchase increase as a result of LAP

Likelihood of purchase increase	Year 1 n (%)	Year 2 n (%)	Year 4 n (%)
Same as the past	566 (54.8%)	550 (54.4%)	570 (56.2%)
Very likely	98 (9.5%)	127 (12.6%)	117 (11.5%)
Likely	284 (27.5%)	246 (24.3%)	252 (24.8%)
Unlikely	48 (4.6%)	49 (4.8%)	37 (3.6%)
Very unlikely	34 (3.3%)	39 (3.9%)	39 (3.8%)
TOTAL	1,030	1,011	1,015

Of the 176 respondents who recalled one or more items of promotional material, 63.1% purchased as a result. In Year 4, 75% of the 72 men who recalled some promotional material made purchases as a result, but only 54.8% of the 104 women who recalled some promotional material made purchases as a result. ***(This result is not in the table)***

Results show approximately 36.3% of respondents would be more likely (Likely + Very likely) to purchase as a result of seeing material (38% in Year 1 and 37% in Year 2), with a further 56.2% saying they would purchase the same amount. These results were not significantly different between years.

Rating of the ‘Love Australian Prawn’ promotional material

Table 13: Rating of the ‘Love Australian Prawn’ promotional material

Rating	Year 1 n (%)	Year 2 n (%)	Year 4 n (%)
1 - Appealing	202 (19.6%)	241 (23.8%)	186 (18.3%)
2	283 (27.4%)	266 (26.3%)	247 (24.3%)
3	422 (40.9%)	336 (33.2%)	330 (32.5%)
4	86 (8.3%)	140 (13.8%)	231 (22.8%)
5 - Not appealing	37 (3.6%)	28 (2.8%)	21 (2.1%)
Mean rating	**2.49**	**2.45**	**2.66**

Respondents were asked to rate the ‘Love Australian Prawns’ promotional material by appeal, with 42.6% rating them very positively.

The mean ratings were slightly lower than in previous years, and unlike Year 2, where females rated the ‘Love Australian Prawns’ promotional material higher than males, there were no significant gender differences in Year 4.

Consumer attitude change after ‘Love Australian Prawns’ campaign

Table 14: Consumer attitude change after ‘Love Australian Prawns’ campaign

Rating	Phase 1 n (%)	Phase 2 Total n (%)	Phase 3 n (%)
Very positively changed	39 (3.8%)	52 (5.1%)	68 (6.7%)
Positively changed	290 (28.2%)	322 (31.8%)	359 (35.4%)
No change	695 (67.5%)	632 (62.5%)	580 (57.1%)
Negatively changed	2 (0.2%)	3 (0.3%)	6 (0.6%)
Very negatively changed	4 (0.4%)	2 (0.2%)	2 (0.2%)
TOTAL	**1,030**	**1,011**	**1,015**

Similar to Years 1 and 2, results show that there was a less than 1% negative impact on attitude towards the campaign.

Significant overall change from Year 1 to 2 and from Year 2 to 4 as respondents recorded increasingly positive attitudes and decreasing neutral attitudes.

Attitude change results did not vary significantly between region, age bracket or gender when compared to profile of demographics.

Recommendations

- Need to integrate these results with other sources for full picture however taken by themselves:

  - Keep doing what you are doing (and if possible increase)

  - After reviewing other feedback/results consider:
    - Increasing use of social media
    - Ensuring easy links to social media

  - Continue working with Coles

  - Keep evaluating and maintain the three new questions

2017 Love Australian Prawns Strategy Review

September 2017

brandcouncil

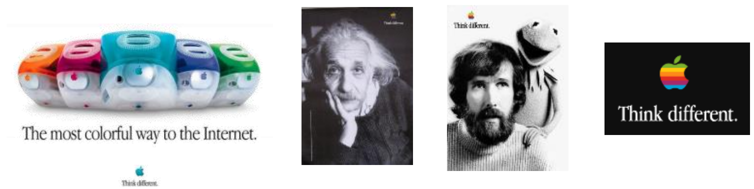
2017 Prawns Strategy Review
Observations and recommendations for future activity

- We strongly believe the existing strategic and creative approach continues to be the correct path on the branded prawn journey.
- The strongest recommendation we could make is not to change tack. To keep doing what we've been doing for the past 3 years for many, many years to come.
- The 'Love Australian Prawns' image is not simply a logo and shouldn't be seen as such. 'Love Australian Prawns' is a brand idea that carries meaning on both emotional and functional levels.
- The strongest, most successful brands in the marketplace are those that have defined a compelling brand idea and stuck with the idea for years.

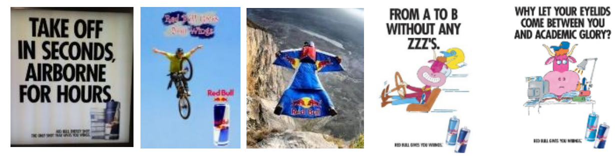
Examples of powerful, long term brand ideas

Singapore Airlines: Singapore Girl
40 years

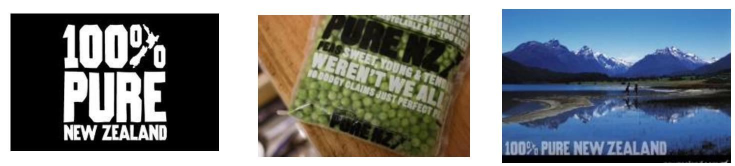
Apple: Think Different
25 years



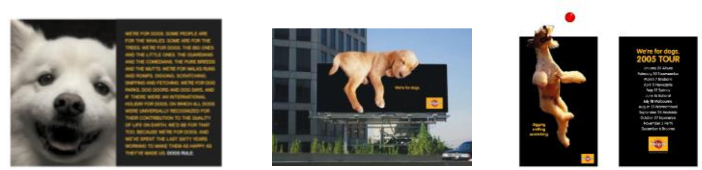
Red Bull: Gives You Wings
20 years



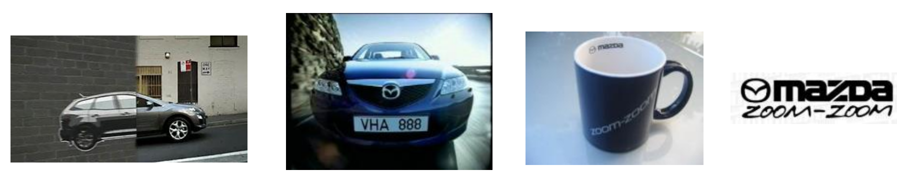
New Zealand: 100% Pure
16 years



Pedigree: We're For Dogs
13 years



Mazda: Zoom, Zoom, Zoom
8 years



2017 Prawns Strategy Review
Observations and recommendations for future activity

- ‘Love Australian Prawns’ captures the essence of what prawns mean to people and their role in peoples lives. They fulfil a unique experiential and emotional space and role.
  - ‘One of life’s simple pleasures, a special treat, a feel good food, a food that lifts spirits, as good as it gets.’
- With very limited marketing funds we still consider focussing on a few things – Point of sale, retail promotions, social media – to be important. The product should be the hero with ‘Love Australian Prawns’ the catalyst.
- We believed the marketplace would respond to the right prompting and the right enticement and its heartening to see the evidence of this.

2017 Prawns Strategy Review
Observations and recommendations for future activity

- Evidence of success
  - One in five people now recognise the logo.
  - 38% of people claim to be eating more prawns than 3 years ago.
  - Over 50% claim to be eating prawns as part of a normal meal.
  - Woolworths have distributed more than 2 million recipe booklets over 3 years.
  - Over 2 million website hits and over 17,000 recipe book downloads over 2016.
  - 350 retailers sent merchandising packs in year1. Retailer list expanded to 468.

Moving Forward

- Moving forward, our biggest fear, and the biggest trap LAP could fall into, is the false economy syndrome of trying to save money by ‘doing it on the cheap’.
- Production values are critical, this is a unique sensory product, photography and food styling are important in delivering this, its not about ‘just taking a shot’ or showing a meal/eating suggestion – the prawns need to look good enough to eat off the page.
- With the budget constraints its hard to think wider than the current focus on the retail environment with independent operators, Woolworths and Coles promotions and an excellent social media approach.
- Other tactical and promotional opportunities will arise – eg the MasterChef/My Kitchen Rules favourite prawn meal ideas, however to stress what was mentioned above, promotional stretch should not be sought at the expense of maintaining excellent quality presentation production values.

Love Australian Prawns Strategy Recap

22 March 2017

brandcouncil

Project Overview

Stage 1
Industry Research Review.
Understanding & Analysis of Market & Industry Issues

Stage 2
Strategy and Creative Brand Territory Development

Stage 3
Research

Stage 4
Refine Strategy and Brand Idea Territory

Stage 5
Development of Strategic Plan

Stage 6
Brand Idea Creative Development Validation

Stage 7
Industry and Retail Trade Program Launch
Consumer Launch

Stage 8
Ongoing Tracking / Monitoring Against Objectives

The Goal

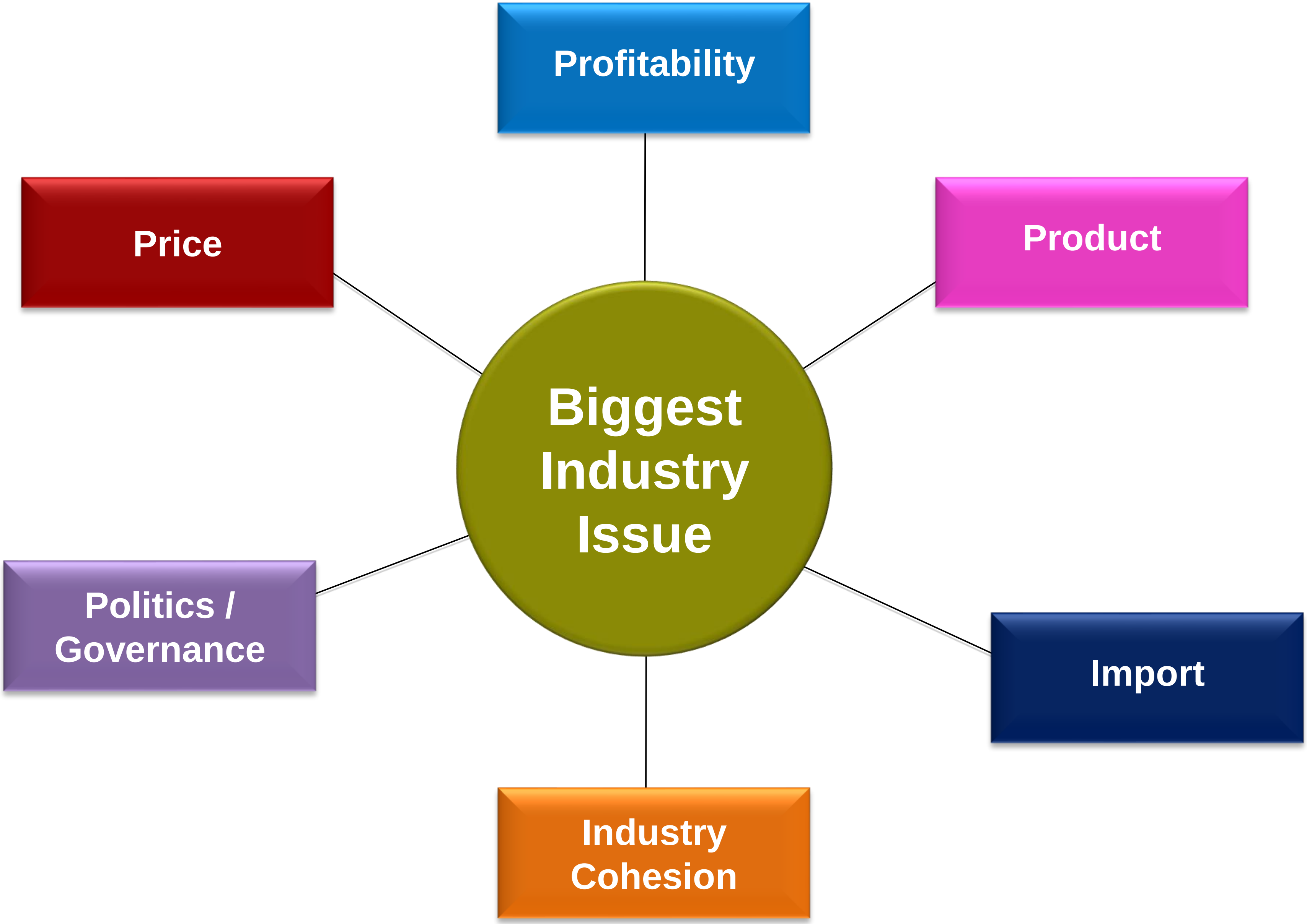
Increase value and volume for Australian prawns by

Increasing desire for and desirability of Australian prawns.

Give Australian prawns a special place in the eating habits of Australians.

Increase value of the Australian prawn.

Stage 1
Industry research review. Understanding & analysis of market and industry issues


Profitability
Price
Product
Biggest Industry Issue
Politics / Governance
Import
Industry Cohesion


Market Presence
Export
Price / Value Relationship
Biggest Opportunity for Australian Prawns
Consumer Education
Branding
Product

If you could do one thing really well for the Australian Prawn Industry what would it be?


What's Wrong
Imported prawns sold at much lower cost to Australian prawns
Too expensive for weekly repertoire
Main purchase inhibitor (35%)
54% of market imported product
Expensive protein source & choice
A 'once in a while' product
Passive selling of product not active marketing
Farmed prawns haven't grown volume in a decade
Declining market share
High price
Special occasion food
Lack of a language around the taste & enjoyment of the product
Seen as a luxury food item
Not seen as one of the 'every day meal' protein sources
Lack of voice, presence, promotion
Lack of Australian brand identity
Part of the 'dining out' repertoire
Wastage. Much of what you buy ends up in bin
Prawn origin not prominent at POS
High consumer importance placed on Australian grown not supported by behaviour
Limited number of brand attributes held by consumers
Limited perceptual mindset - Prawns = Christmas / Summer
Small share of stomach
Not seen as a filling meal option
Low involvement market
People don't think to eat prawns!
Commodity category (limited use of brand)
Low consumption and purchase level with youth
Mercury
Impact of negative media
Pregnant women cannot eat
Fears about high cholesterol
Limited potential for growth in the wild caught sector
Low awareness & knowledge of health & nutrition benefits
Also limitations for growth in prawn farms
Australian producers not matching the high value add of importers
Seen as a summertime product
Restaurant consumption dropping

What's Strong

- A product people would like to eat more of
- People love prawns
- Brain food
- Much higher than any other protein source (6x more than beef)
- Popular when looking for something ‘different’
- High preference for Australian prawns
- Very high in Omega 3
- High in Selenium & Iodine (lacking in young Australian children)
- Perceived taste difference between Australian & imported prawns
- Wholesome nutritious food
- Much lower than other protein sources
- More affordable than perceived
- Comparable in price per serve to other protein meal bases
- Low in fat & kilojoules
- Seen as an entertaining / luxury celebration food
- Consumers don't differentiate between farmed and wild caught
- 2/3rds of people, female and male don't mind peeling prawns
- Most frequently consumed seafood
- An increasing high consumption with 40-59 (Baby Boomers)
- Nearly all people say they'd be willing to pay 25% more for Australian prawns vs imported
- 80% of the population eat prawns
- Technology developments around snap frozen. Defrosted prawn similar in quality to fresh
- Entrée of choice

Prawn Benefits

- Omega 3 (6X more than beef)
  - Helps prevent the heart from disease
    - And circulatory problems
- High in Selenium
  - Prevents the growth of cancer cells
    - Protects the body from cancer
- Fatty acids
  - Reduces & prevents Alzheimer's & dementia
- High in Vitamin B12
  - Maintains good cardiovascular health
- Calcium, Vitamin E & Niacin
  - Helps maintain healthy skin, teeth & bones
- Proteins
  - Provides body growth & development
- Much lower in fat than other protein sources
  - Beef has 3 times more fat & chicken has 7 times more fat
- High in Zinc & Iron
  - Essential to maintain healthy body. Women often have low levels
- Good source of Iodine
  - Essential for thyroid gland function
- Omega 3 & 6 PUFA's
  - Brain food
    - Helps reduce risk of asthma, MS, pulmonary disease, rheumatoid arthritis

Stage 2
Strategy and Creative Brand Territory Development

Prawn paradox

Iconic Australian food.	But hasn't moved from the raw cooked state & the BBQ plate to the dinner plate.
A major food category.	But people don't know what to do with them – limited meal / usage spectrum.
People love prawns.	But no language around prawns or sensory descriptors.
Huge consumer interest in food & cooking.	But interest hasn't fallen on prawns yet (despite being a loved product).
A natural healthy seafood product.	But doesn't have the healthy halo of seafood.
High in nutritional benefits.	But benefits unknown – negatives more prominent – cholesterol, mercury.
They're versatile.	But our prawn meal repertoire is limited.
Goal to increase use and consumption.	But don't have enough prawns to meet demand.
Desire for a more cohesive united, less fragmented industry.	But fiercely independent, fishermen won't work together.

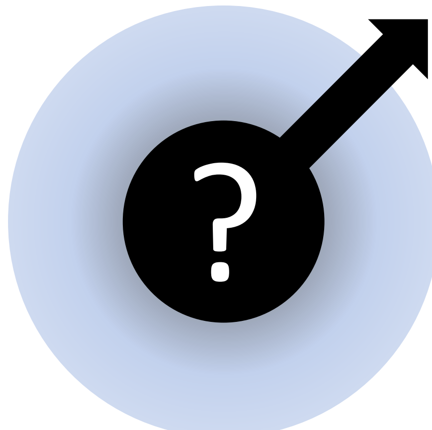
Current meal decision making behaviour

- Most meal preparers have perfected their repertoire.
- Easy, familiar, favourite, convenient & traditional meals are chosen.
- Meal preparers spend just over an hour preparing and cooking the meal - and enjoy it!
- Most people only start to plan what they're having for dinner in the middle of the same day. 40% of meal decisions are made after 4pm..
- Expense does not rate as a key consideration in meal planning. Only 3% of people nominate 'inexpensive' as a key driver of choice.

Positioning and creative territories to explore in research

Celebration Meal

The Communal Food



The Healthiest
Protein Source Around

The Australian Meal.
Australian Produce

Everybody
Loves Prawns

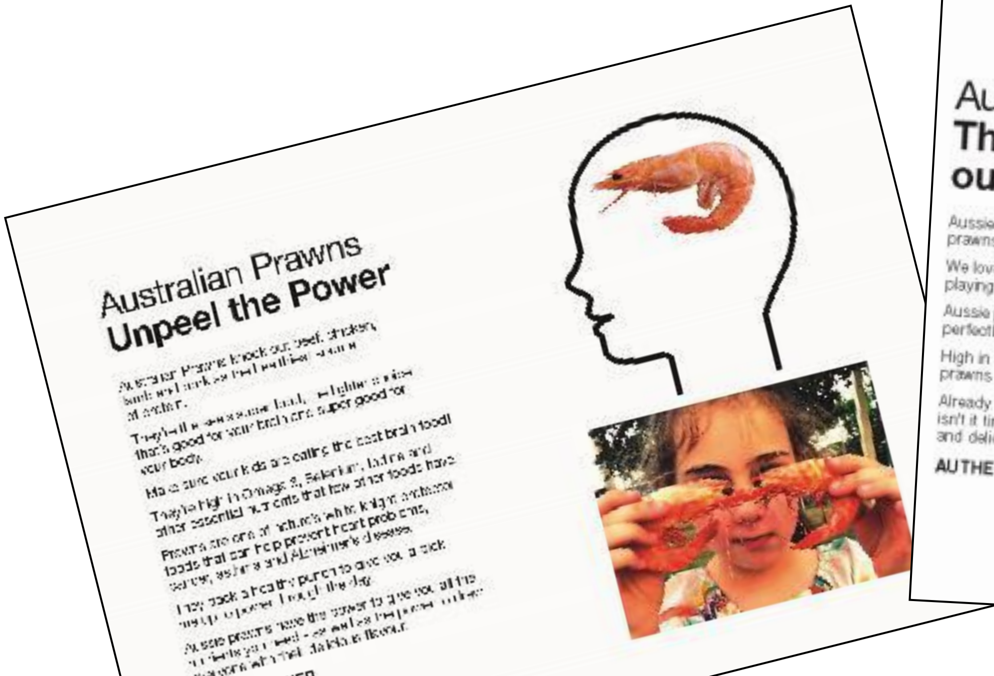
Prawn Personality

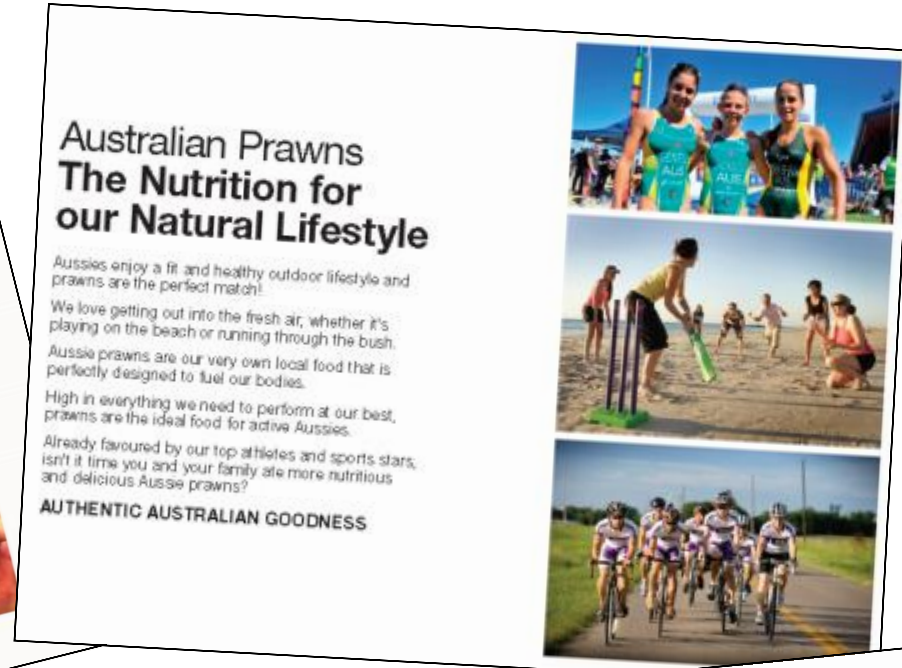
What position is the most compelling
and motivating? Why?

Stage 3
Research

Qualitative Research

- In-depth groups
- Objective:
  - Understand the consumer mindset that impacts on consumption; appeal barriers and opportunities
  - Identify key issues and triggers to changing behaviour
  - Identify values Australian Prawns own and can leverage
  - Evaluate alternative strategic territories
- Stimulus boards to assist discussion and ensure we explore a range of different territories.


Australian Prawns
Unpeel the Power


Australian Prawns
The Nutrition for our Natural Lifestyle
Aussies enjoy a fit and healthy outdoor lifestyle and prawns are the perfect match!
We love getting out into the fresh air, whether it's playing on the beach or running through the bush.
Aussie prawns are our very own local food that is perfectly designed to fuel our bodies.
High in everything we need to perform at our best, prawns are the ideal food for active Aussies.
Already favoured by our top athletes and sports stars, isn't it time you and your family ate more nutritious and delicious Aussie prawns?
AUTHENTIC AUSTRALIAN GOODNESS


Aussies Love Aussie Prawns
Aussie Prawns are a national icon. They're part of who we are and the country we call home.
Right across our land, we love them – grilled on the BBQ, in a pasta, in a crispy salad, on a charred skewer or tossed in a sizzling stir fry.
From summer to winter, east to west, it's hard to think of any other food that we hold in such esteem.
Aussies love the sense of playfulness and enjoyment that prawns bring to a meal.
Chucking 'em on the barbie is what we all love and what we're proud to be known for!
Quite simply, Aussie prawns are the flavour that fits our nation!
AUSSIES ARE PASSIONATE FOR PRAWNS


Aussie Prawns, Happy Days
Every day is a great day for prawns because there's always something to celebrate!
If you're bored of the same old dishes, serving up prawns will bring smiles to the family dinner table and make every meal a special meal.
It's easy to give your family a treat all year round, with delicious prawn salads in summer and sensational prawn and fish pies in winter.
So why not bring out the good stuff more often? Birthdays, weekdays – any days!
Plus, you'll be pleasantly surprised at how economical prawns meals are compared to other proteins such as beef, pork, lamb and fish.
Celebrate with a special prawn meal for your family tonight – any night!
PRAWNS MAKE MAGIC MEALS

Aussie Prawns **Bursting with Aussieness!**

Aussie prawns have everything that's great about our country packed into a little bundle of flavour. Salty, sweet, succulent and packed with sunshine. Aussie prawns are our national food - they tell it like it is! Simple, casual, unfussy – just like us!

They capture our modern Aussie identity.

There's nothing quite as straightforward as prawns. All you need is some crusty bread and a simple salad and you've got one of the best meals you can eat!

There's a special kind of feeling with prawns that brings the sense of summer all year round.

The best food in the best country in the world, how could you you possibly have anything nicer?

MED WITH AUSSIE FLAVOUR

Think Aussie Prawns

For a truly adaptable meal solution – Aussie Prawns are the answer!

Summer to winter, entré and main, backyard or dining room – there's a prawn idea for any occasion.

It's easy to give your family a tasty treat more often with this versatile and flexible protein.

And with prawn's super food health credentials you can't have too much of good thing!

Whatever you favourite kind of meal - stir fry, curry, bbq, salad, pasta, snacks, Asian, tapas, pizza (or simply in a sandwich!) - pick prawns and enjoy the delicious results.

AUSSIE PRAWNS ARE THE ANSWER

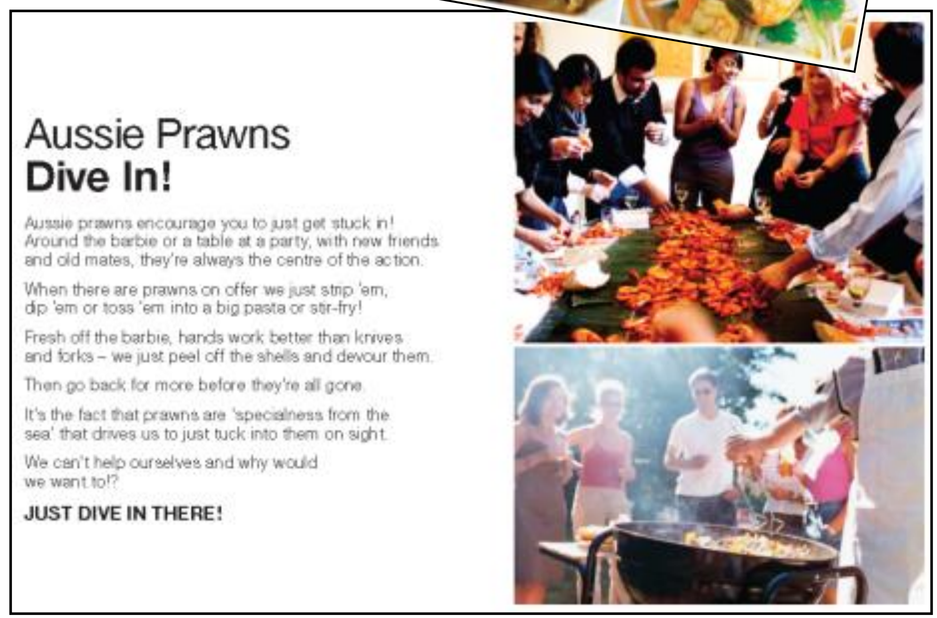
Australian Prawns **Nothing's as Popular as Prawns**

Aussie prawns are at the very heart of our family life. They underpin the casual times that we really value. The quality times when we can truly let our guard down and relax with our nearest and dearest. Fun, laughter, chilled out get-togethers taking it easy in the backyard – no wonder they're so popular.

No other food is as unpretentious or as universally accepted – let's be honest here, who doesn't like prawns?

You know there's no risk with prawns, they've always been popular and always will be!

FOR GUARANTEED GOOD TIMES JUST BRING THE PRAWNS



Aussie Prawns **Dive In!**

Aussie prawns encourage you to just get stuck in! Around the barbie or a table at a party, with new friends and old mates, they're always the centre of the action.

When there are prawns on offer we just strip 'em, dip 'em or toss 'em into a big pasta or stir-fry!

Fresh off the barbie, hands work better than knives and forks – we just peel off the shells and devour them.

Then go back for more before they're all gone.

It's the fact that prawns are 'specialness from the sea' that drives us to just tuck into them on sight.

We can't help ourselves and why would we want to!?

JUST DIVE IN THERE!

Rich Research Findings
Issues impacting usage

- Not top of mind – People currently need a reason to think prawns & that reason is often a special occasion / celebration.

- The prawn paradox – surprises and opportunities

- Seen as expensive.

- Concerned about health / cholesterol level.

Consumer perceptions across the paradox

Cooked or green large prawns

Intact

Australian

‘Fresh’ Prawns

‘Fresh’ owns the sensory territory, the emotional imagery

Celebration

Small prawns

Convenience food, quick & easy, ingredient

‘Frozen’ Prawns

Imported

Packeted & peeled

Commodity

Just another protein

Frozen prawn imagery is the ultimate counterpoint to the sumptuous Australian prawn.

Consumer perceptions across the paradox

It's a food we love to eat
we don't need to be convinced
of how good they are

Its about enticement
not worthiness

"You feel wow isn't this
great…isn't life great"
It doesn't get much better
than this

Celebration food

Feel / Experience

Nutritional Goodness / Virtuous

A defined health benefit is
absent from prawn language

Benefits from a seafood halo
plus 'light' protein perception

Focussing on nutrition
commoditises the offer

Key health association is
negative – 'High in cholesterol'
a barrier to consumption

Nutrition story is
'good to know' – not 'wow'

Prawns are anchored more in 'feel good' than 'do good' territory and that's how consumers like it!

Consumer perceptions across the paradox

"We all love our prawns"

They're special – don't make them ordinary

Simple pleasures are important, lift our spirits, light up our life

Wonderful taste, feel good experience

Celebration food

Special Treat

Everyday Protein

Not an 'every day' family meal

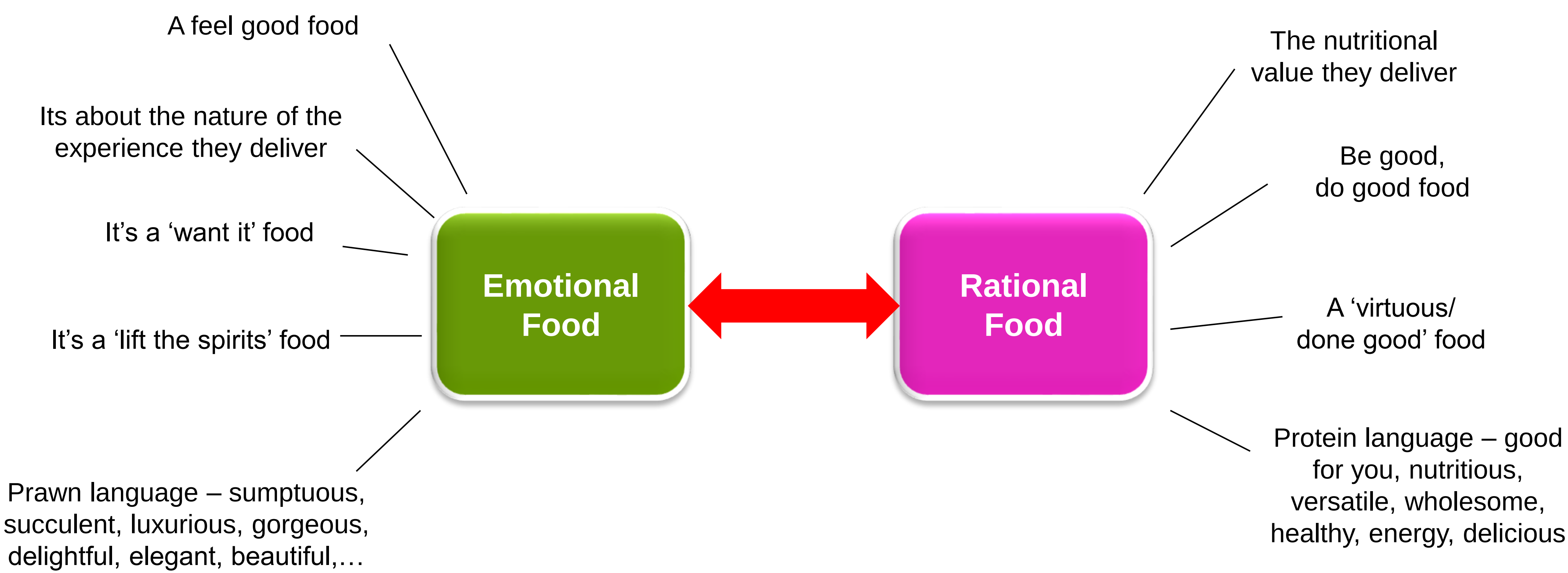
We don't want them to be another plate protein

Don't want to see prawns as mainstream, as an everyday food

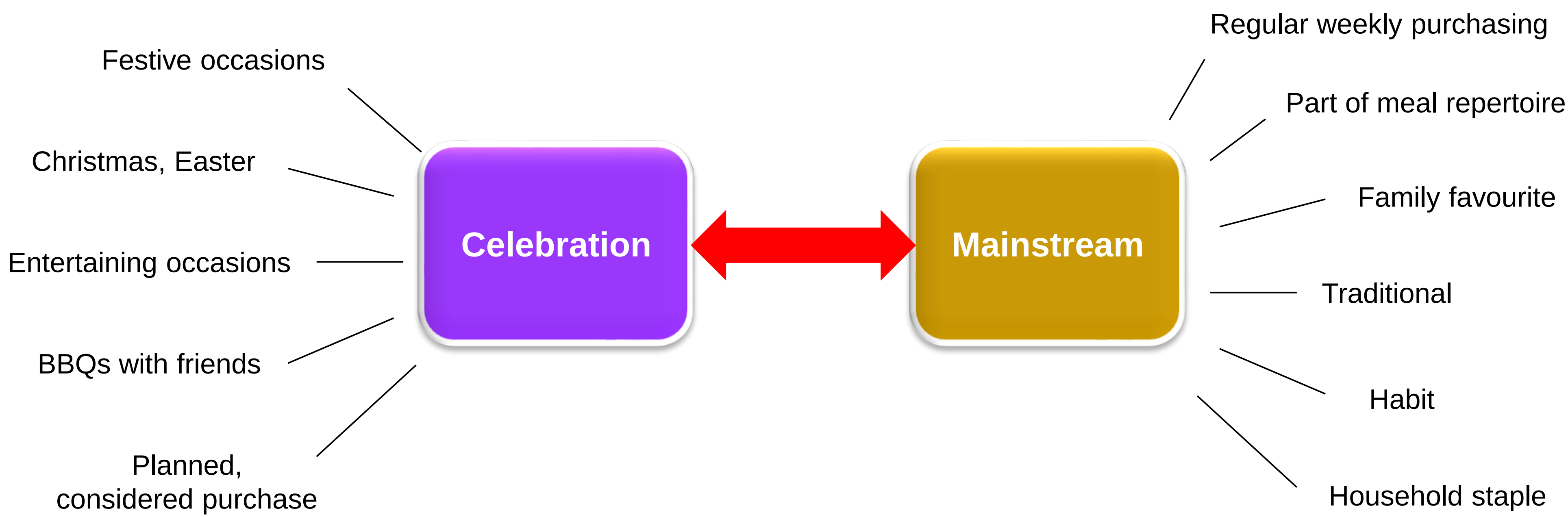
Commodity

Treat experience only has value when its removed from the 'everyday'

Consumer perceptions across the paradox



Consumer perceptions



'Need to redefine celebration'

Redefine celebration

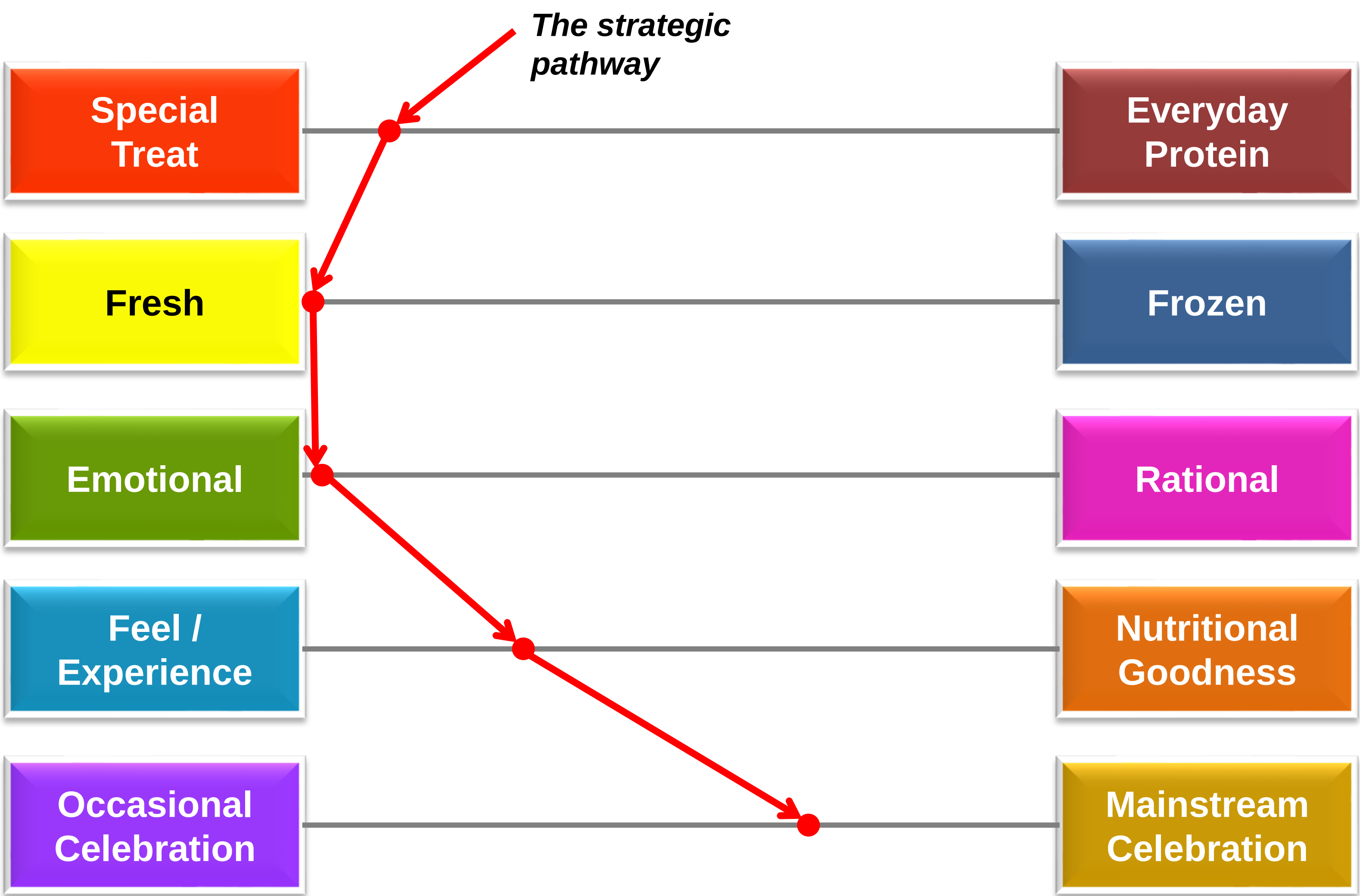
Celebration

- Festive occasions
- Christmas, Easter
- Entertaining occasions
- BBQs with friends
- Planned, considered purchase

- Celebrating what's great in life
- I deserve it – reward myself
- Because I've worked hard
- Simple pleasures are what make life worth living
- Like to treat my family/ partner/friend
- Romance

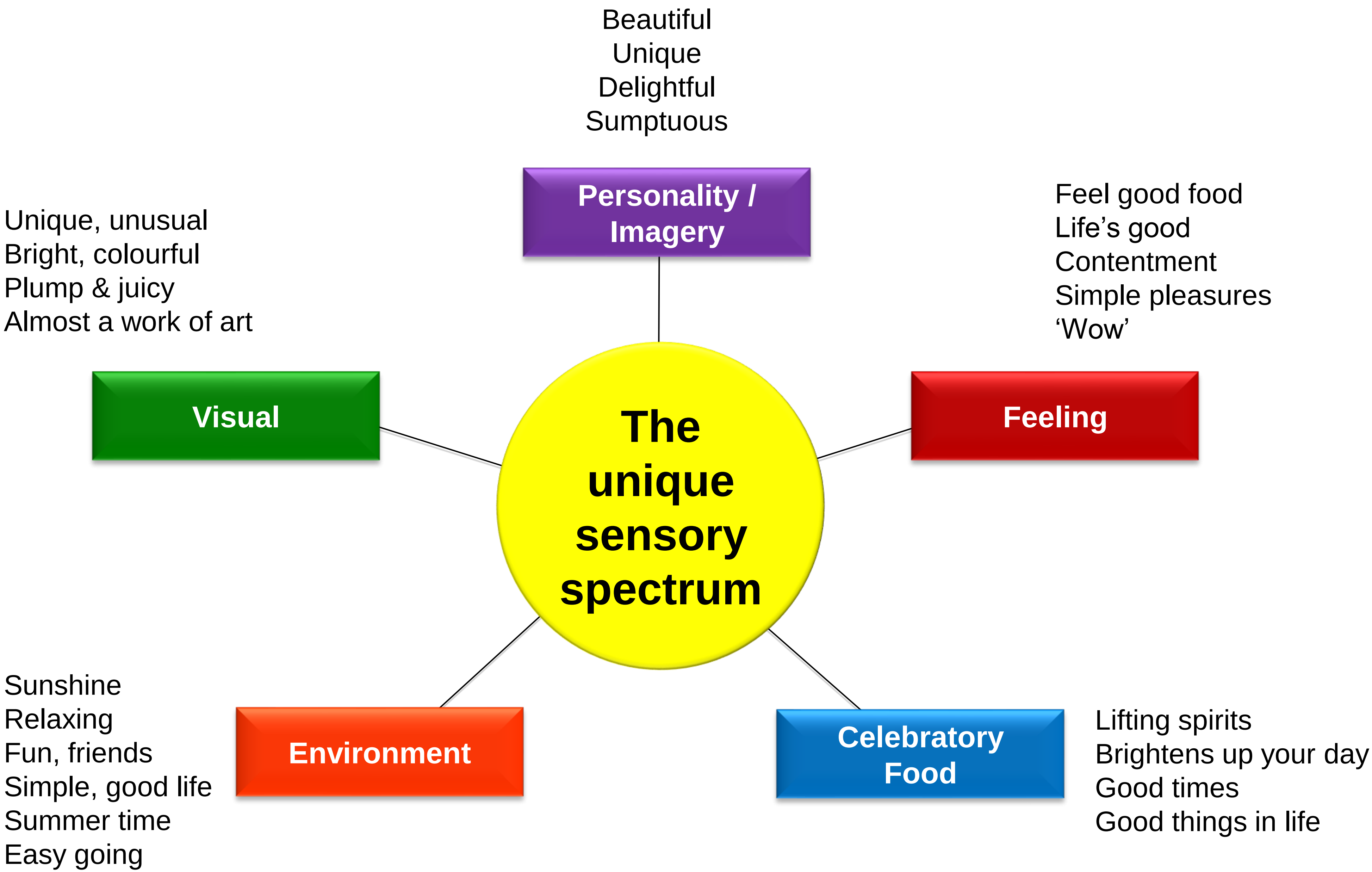
New form of 'celebration' brought to you by Australian Prawns

Fleshing out the prawn paradox – The strategic road to tread



Learnings from the positioning territories

Selling the "Everyday"	• Devalues the brand potency; denies consumers the rich prawn experience
Selling the Nutritional Goodness	• Commoditises the offer • "Just another protein on a plate"
Defining the Health Focus	• Shifts the brand from "feel good" to "do good" • Denies consumers the "feel good" experience that drives enjoyment
Linking to Our Aussie Identity	• Not aligned with brand values • Aussie identity the focus; prawns not front of centre


Beautiful
Unique
Delightful
Sumptuous
Personality / Imagery
Unique, unusual
Bright, colourful
Plump & juicy
Almost a work of art
Visual
Feel good food
Life's good
Contentment
Simple pleasures
'Wow'
Feeling
The unique sensory spectrum
Sunshine
Relaxing
Fun, friends
Simple, good life
Summer time
Easy going
Environment
Celebratory Food
Lifting spirits
Brightens up your day
Good times
Good things in life

The prawn brand essence

'Simply Wonderful'

One of life's simple pleasures
The good life – Life's great
How lucky we are

Special treat
Feel good food
Lifting spirits
As good as it gets

Prawns has this territory on its own.

…. moving forward

- A truly unique product fulfilling a unique experiential and emotional space and role.
- Future growth and value is not about telling the nutrition story or ideas for everyday family meals.
- Its more about a branding presence that focuses on the brand essence and the treat yourself / reward yourself dimension – ‘Give your spirit a lift’.
- There is a compelling emotional position and personality that’s unique to <u>Australian</u> prawns, a position that’s capable of capturing the imagination
- The marketplace will respond to the right enticement.

LOVE AUSTRALIAN PRAWNS


We should do this
more often
LOVE AUSTRALIAN PRAWNS
It doesn't get
much better
than this
LOVE AUSTRALIAN PRAWNS
LOVE AUSTRALIAN PRAWNS
This is
the life

Modern prawn caesar salad

- 32 medium cooked Australian prawns
- 12 thin slices of baguette
- Olive oil for brushing
- 2 cups finely grated Parmesan cheese
- 8 slices prosciutto
- 500g cherry tomatoes on the vine
- 2 baby cos lettuce, cut into quarters

Buttermilk dressing

- ½ cups buttermilk
- 1 teaspoon Dijon mustard
- 1 tablespoon white balsamic dressing
- 1 tablespoon finely chopped chives
- Sea salt and freshly cracked black pepper

To make the dressing place the buttermilk, Dijon, white balsamic and chives in a bowl and whisk to combine.

Preheat oven to 160 C. Brush the bread with olive oil and sprinkle with Parmesan on both sides, pressing down to ensure the Parmesan sticks.

Peel the prawns, leaving the tails intact.

Place the bread, prosciutto and tomatoes on baking trays lined with non-stick paper and bake for 12 minutes or until golden and tomatoes are juicy. Set aside to cool.

Place wedges of cos lettuce on four serving plates, top with prawns, prosciutto, tomatoes and Parmesan croutons. Spoon over buttermilk dressing to serve.

Lime and lemongrass BBQ skewered prawns (Cover recipe)

- 24 extra large green Australian prawns
- 2 stalks lemongrass, white part only, finely chopped
- 2 long green chillies, finely chopped, plus extra for rice
- 1 teaspoon finely grated ginger
- 1 teaspoon sugar
- 1 tablespoon fish sauce
- 2 tablespoons vegetable oil
- 2 cups jasmine rice
- ¼ cup coconut cream
- ½ teaspoon table salt
- Fresh coconut, lime, cucumber and mint to serve

Place the lemongrass, chillies, ginger, sugar and fish sauce in a small food processor and process to a rough paste.

Place lemongrass paste and vegetable oil in a large bowl and combine. Peel the prawns leaving the tails on. Add prawns and toss to coat. Thread onto skewers lengthways.

Cover and refrigerate for 1 hour to infuse flavours.

Rinse rice thoroughly under cold water and place in a medium saucepan with 2½ cups of water. Bring to the boil and cook uncovered for 8–10 minutes or until tunnels appear. Reduce heat to low and cook covered for another 5 minutes. Remove from heat and stir through coconut cream, salt and extra chilli. Allow to stand for 5 minutes, covered.

Preheat a chargrill or barbeque and cook for 1–2 minutes each side or until just cooked through.

Serve with fresh coconut, cucumber, mint and lime.

LOVE AUSTRALIAN PRAWNS

Introducing the new look for Australian Prawns

Prawns have always been a special part of Australian culture and now with the launch of our new branding, everyone can easily choose high quality local product.

Sustainable practices

Australian Prawns are a sustainable choice. Fishing and farming practices are set and regularly reviewed according to the latest scientific findings. This ensures prawn stocks remain healthy into the future. For more information go to australianprawns.com.au

love

free recipes

AUSTRALIAN PRAWNS

Lime and lemongrass BBQ skewered prawns (pictured)

Plus more delicious recipes to enjoy

LOVE AUSTRALIAN PRAWNS

We all love

AUSTRALIAN PRAWNS

How to choose

Australian Prawns are available either uncooked, commonly known as 'green', or cooked, seen as their iconic pinkish orange colour. Cooked prawns are ready to be eaten fresh from the shop and green prawns can be cooked simply in many delicious ways!

When choosing prawns make sure their bodies are complete, they have a natural gloss (not slimy) and there's no discolouration.

Just use your nose, as fresh prawns should only smell like the ocean!

Easy to peel and prepare

A few steps is all it takes...

1. Twist off the head
2. Hold the legs between thumb and index finger and pull away the shell
3. Squeeze the tail and the prawn will pop out – or leave on the tail for presentation
4. Remove the vein by gently pulling it out from the head end or make a small slit along the back

Delicious and healthy too!

It's a fact that succulent Australian Prawns contain more protein, less fat and fewer kilojoules than lean beef, skinless chicken, lamb or pork. What's more, delicious prawns contain zero carbs!

High in Omega-3

Australian Prawns are naturally high in Omega-3 as well as other essential nutrients and vitamins, so they rightly deserve their 'superfood' reputation.

The truth about cholesterol

Most people can eat prawns without worrying about cholesterol. While natural cholesterol is found in prawns, your body doesn't turn it into harmful cholesterol.

LOVE AUSTRALIAN PRAWNS

For more information go to australianprawns.com.au

Salt and pepper prawns

- 2 kilos small green Australian prawns
- 1 cup cornflour
- Vegetable oil for deep-frying

Salt and pepper mix

- 2 teaspoons white peppercorns
- 2 teaspoons Sichuan pepper
- 1 tablespoon sea salt flakes

To make the salt and pepper mix, place the white pepper and Sichuan pepper in a mortar and pestle and grind to a powder. Add the salt and mix to combine then set aside.

Preheat oil in a large saucepan or wok to 190 C.

Place the cornflour and half the salt and pepper mix in a bowl and mix to combine.

Peel prawns leaving tail intact. Add to mix and toss to coat. Shake of any excess flour and cook in batches for 2–3 minutes or until golden and crisp. Drain on kitchen paper and serve with fresh lemon and extra salt and pepper mix.

Australian prawns and bloody mary mayonnaise

- 2 kilos cooked whole Australian prawns
- 2 cups whole egg mayonnaise
- 3 tablespoons tomato juice
- 2 teaspoons Tabasco sauce
- 1 teaspoon Worcestershire sauce
- Fresh lemon and celery salt to serve

Place the mayonnaise, tomato juice, Tabasco and Worcestershire sauce in a bowl and mix to combine.

Serve with fresh cooked Australian prawns, lemons and celery salt.

Garlic prawn pasta

- 24 medium green Australian prawns
- 400g spaghetti
- 80g butter
- 2 tablespoons olive oil
- 4 cloves garlic, sliced
- 2 teaspoons dried chilli flakes
- 1 lemon, zested
- 2 tablespoons lemon juice
- ¼ cup flat-leaf parsley leaves, chopped
- Sea salt and cracked black pepper

Peel the prawns and cut them in half lengthways.

Cook the pasta in a large saucepan of boiling salted water for 8–10 minutes or until al dente. Drain reserving ¼ cup pasta water and keep warm.

Heat the butter and oil in a large frying pan over medium heat. Add the garlic, chilli and lemon zest. Cook stirring, for 2 minutes or until golden.

Add the prawns and cook, stirring, for 2–3 minutes or until the prawns are tender.

Add the pasta, lemon juice, parsley and reserved pasta water.

Season with sea salt and freshly cracked black pepper and toss to combine.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TIGER PRAWNS
SCALLOPS
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It's Friday
celebrate with
Australian Prawns!
LOVE AUSTRALIAN PRAWNS


more often


THE BEST
PRAWNS!
LOVE AUSTRALIAN prawns


WE
LOVE AUSTRALIAN PRAWNS
SUMMER
Ask us about great ways to prepare
Australian Prawns this Summer


WE
LOVE AUSTRALIAN PRAWNS
PICNICS
Ask us about great ways to prepare
Australian Prawns this Summer


WE
LOVE AUSTRALIAN PRAWNS
ROMANTICS
Ask us about an Australian Prawn picnic for Valentine's Day


WE
LOVE AUSTRALIAN PRAWNS
AUSTRALIA DAY
Let us help with your Australia Day celebrations

PEA AND AUSTRALIAN PRAWN FRITTERS WITH LABNE AND MINT

24 medium cooked Australian prawns
1 cup self raising flour
½ tsp baking powder
2 eggs, lightly beaten
1 ¼ cups buttermilk
Sea salt and cracked black pepper
½ cup frozen peas, thawed
1 tbsp finely grated lemon rind
3 tbsp extra virgin olive oil
½ cup store-bought labne
Fresh mint and lemon wedges to serve

Place the flour, baking powder, eggs and buttermilk into a bowl, season with salt and pepper, whisk until smooth. Peel and devein the prawns and halve lengthways. Add peas, lemon and prawns, mix to combine. Heat 1 tbsp oil in a large non-stick frying pan over a medium heat. Cook ¼ cup of the mixture, in batches, for 2-3 minutes each side or until golden and cooked through, adding more oil in between batches. Serve with labne, mint and lemon wedges.

Serves 4

CRISPY AUSTRALIAN PRAWN SLIDERS WITH FENNEL SLAW AND DILL PICKLE MAYONNAISE

24 medium green Australian prawns
Vegetable oil, for deep frying

Dill pickle mayonnaise
½ cup whole egg mayonnaise
½ cup chopped dill pickles
¼ cup dill sprigs, chopped
1 tbsp lemon juice

Beer batter
1 cup plain flour
1/3 cup cornflour
1 tsp baking powder
1 tsp caster sugar
1 tsp sea salt
330ml beer
8 dinner rolls, halved
Butter lettuce to serve
Deli crisps and fresh lemon wedges to serve

To make the dill pickle mayonnaise
Place mayonnaise, pickles, dill and lemon juice into a bowl and mix to combine.

To make the beer batter
Place flour, cornflour, baking powder, sugar, salt and beer in a large bowl and whisk until just combined. Peel and devein the prawns, leaving the tails intact, or remove if desired. Heat oil in a large saucepan over a medium heat until the temperature reaches 180 C on a deep frying thermometer. Dip the prawns in the batter and cook in batches for 1-2 minutes or until golden and cooked through. Drain on paper towel. Spread mayonnaise over the base of the rolls and top with cooked prawns, lettuce and remaining buns. Serve with deli crisps and lemon wedges.

Serves 4

EVERYONE LOVES AUSTRALIAN PRAWNS

HOW TO CHOOSE

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australianprawns.com.au

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LOVE AUSTRALIAN PRAWNS

AUSTRALIAN PRAWN AND DILL TARTS

18 cooked Australian prawns
6 sheets frozen short crust pastry
250 ml cream
100 ml milk
1 tbsp lemon juice
4 eggs
1 tbsp chopped dill
Sea salt and freshly cracked black pepper
Creme fraiche, lemon and baby parsley to serve

Preheat oven to 180 C. Peel, devein and chop the prawns. Line the base and sides of six 10cm x 2cm fluted loose bottom tart tins with pastry, trim with a sharp knife. Line the pastry with baking paper and fill with baking beans or rice. Bake for 15 minutes or until light golden. Remove paper and beans and cook pastry for another 5 minutes or until golden and cooked through. Reduce oven to 160 C. Place the prawns, cream, milk, lemon juice, eggs and dill into a bowl, season with salt and pepper, mix with a fork until combined. Pour mixture into tart cases, cook for 15-20 minutes or until just set. Serve with creme fraiche, lemon and parsley.

Makes 6

A BUCKET OF AUSTRALIAN PRAWNS WITH TEXAS GREEN CHILLI MAYONNAISE

24 large cooked Australian prawns

Green chilli mayo
2 long green chillies
1 tbsp peeled and chopped ginger
2 cloves garlic, roughly chopped
1 tbsp brown sugar
Zest and juice of one lime
1 cup coriander leaves
1 tbsp soy sauce
1 cup mayonnaise

To make the mayonnaise
Heat a small fry pan over high heat and cook chillies turning for 5-10 minutes or until charred. Discard the stalks and roughly chop.

Place chillies, ginger, garlic, sugar, lime zest and juice, coriander and soy into the bowl of a small food processor and process for 1-2 minutes or until finely chopped.

Stir through mayonnaise and serve with buckets of prawns on ice.

Serves 4

AUSTRALIAN PRAWNS WITH VODKA AND LEMON AND PINK GRAPEFRUIT GRANITA

24 large cooked Australian Prawns

Vodka and lemon granita
2 ½ cups water
¾ cup caster sugar
1 tbsp finely grated lemon rind
½ cup lemon juice
2 tbsp vodka

Vodka and grapefruit granita
2 cups water
½ cup caster sugar
1 ½ cup ruby red grapefruit juice
2 tbsp vodka

Peel and devein the prawns, leaving the tails intact.

To make the vodka and lemon granita
Place water, sugar in a small saucepan over a medium heat and stir until the sugar has dissolved. Set aside to cool completely. Stir in the lemon rind, lemon juice and vodka. Place in a shallow metal container. Freeze for 4-5 hours or until completely set. Rake with a fork.

To make vodka and grapefruit granita
Use the same method as above but replace lemon juice and rind with grapefruit juice. Serve with chilled prawns.

Serves 4

GRILLED AUSTRALIAN PRAWNS WITH CORIANDER AND CANDIED LIME PEANUTS

16 large green Australian Prawns
Vegetable oil for brushing
2 tbsp fish sauce
½ cup caster sugar
¼ cup water
2 kaffir lime leaves finely chopped
1 cup peanuts roughly chopped
½ cup coriander leaves, chopped, plus extra to serve
Fresh lime to serve

Preheat a char grill or barbecue over high heat. Remove prawn heads and veins, brush prawns with oil and cook for 2-3 minutes each side. Set aside and keep warm. Place the fish sauce, caster sugar, water and lime leaves into a small frying pan over high heat, bring to the boil, add peanuts and simmer for 1-2 minutes or until thickened. Pour over prawns, add coriander and toss to combine. Serve with lots of fresh lime wedges and extra coriander.

Serves 4

the fresh food people
Woolworths

WE ♥
LOVE AUSTRALIAN PRAWNS
SPRING RACING

- 100g butter, softened
- 2 cloves garlic, crushed
- 2 tablespoons chopped tarragon leaves
- ½ teaspoon chilli flakes
- 24 extra large green Australian prawns
- 2 teaspoons sea salt
- 1 tablespoon finely grated lime rind
- Lime wedges to serve

GRILLED PRAWNS WITH TARRAGON AND GARLIC BUTTER

Place butter, garlic, tarragon and chilli into a bowl and mix to combine. Spread the butter over prawn meat and place on a metal tray.

Halve the prawns lengthways and clean. Cook prawns under a hot grill for 2-3 minutes or until golden and cooked through.

Combine salt and lime rind and sprinkle over prawns. Serve with extra melted garlic butter and fresh lime wedges.

Serves 4

the fresh food people
Woolworths

CHILLED PRAWNS WITH DIPPING SAUCES

2kg large cooked Australian prawns

Peel prawns and devein leaving tails intact.

GINGER LIME AND CHILLI

Deseed and finely chop 2 long red chillies, combine with a tablespoon of grated ginger, the juice of a lime and a pinch of caster sugar. Finish with some chopped coriander to serve.

SMOKED CHILLI MAYONNAISE

Combine a cup of mayonnaise with a teaspoon of smoked paprika, a pinch of cayenne and a tablespoon of lemon juice.

ROCKET AND HORSERADISH PESTO

Blend 2 cups of rocket leaves with a ¼ cup of toasted pinenuts, a tablespoon of horseradish relish, the juice of a lemon and a ½ cup of good quality olive oil.

WE
LOVE AUSTRALIAN PRAWNS
LEAVES ON TREES

PRAWN TACOS WITH PICKLED JALAPEÑO SALSA

- ½ cup sliced pickled jalapeños
- 3 tablespoons pickled jalapeños liquid
- ¼ cup coriander leaves, chopped
- 1 green onion, chopped
- 24 large cooked Australian prawns
- 1 red onion thinly sliced
- 1/3 cup white wine vinegar
- 8 small corn tortillas, grilled
- 2 cups shredded white cabbage
- Coriander leaves and fresh lime to serve

To make the pickled jalapeño salsa: Place jalapeños, pickling liquid, coriander and green onion into a small food processor and process till coarsely chopped.

Peel and devein the prawns, leaving the tails intact or remove if desired. Place ½ the salsa into a bowl, add the prawns and toss to combine. Refrigerate until ready to serve.

Place the onions and vinegar into a bowl and season with salt and pepper, toss to combine. Refrigerate for 30 minutes. Divide the cabbage and prawns between the tortillas, top with pickled onions, coriander and fresh lime juice. Serve with extra pickled jalapeno salsa.

Serves 4

WE
LOVE AUSTRALIAN PRAWNS
FOOTBALL FINALS

CRISPY PRAWN SLIDERS WITH FENNEL SLAW AND DILL PICKLE MAYONNAISE

- ½ cup whole-egg mayonnaise
- ½ cup chopped dill pickles
- ¼ cup dill sprigs, chopped
- 1 tablespoon lemon juice
- 1 cup plain flour
- 1/3 cup cornflour
- 1 teaspoon baking powder
- 1 teaspoon caster sugar
- 1 teaspoon sea salt
- 330ml beer
- 24 medium green Australian prawns
- Vegetable oil, for deep frying
- 8 dinner rolls, halved
- Butter lettuce to serve
- Deli crisps and lemon to serve

To make the dill pickle mayonnaise: Place mayonnaise, pickles, dill and lemon juice into a bowl and mix to combine.

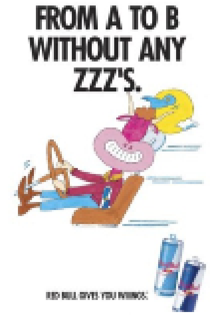
Place flour, cornflour, baking powder, sugar, salt and beer in a large bowl and whisk until just combined. Heat oil in a large saucepan over a medium heat until the temperature reaches 180C on a deep frying thermometer.

Peel and devein the prawns, leaving the tails intact or remove if desired. Dip the prawns in the batter and cook in batches for 1-2 minutes or until golden and cooked through. Drain on paper towel. Spread mayonnaise over the base of the rolls and top with cooked prawns. Serve with deli crisps and lemon.

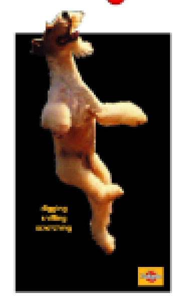
Serves 4

Brand Idea Examples

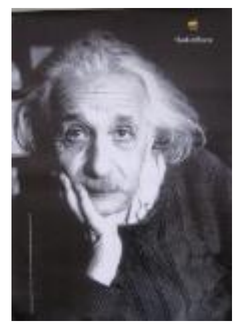
- **Red Bull**: Gives You Wings

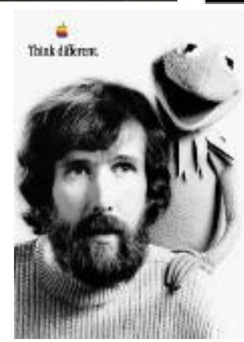


- **Pedigree**: We're for Dogs



- **Apple**: Think Different





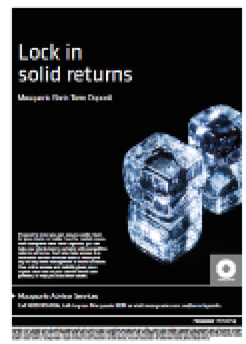
- **New Zealand**: 100% Pure

Brand Idea Examples

- **Coke**: The Real Thing

- **Singapore Airlines**: Singapore Girl

- **Macquarie Bank**: Forward Thinking



MACQUARIE
FORWARD thinking

- **Mazda**: Zoom Zoom Zoom

mazda
ZOOM-ZOOM

Brand Idea Examples

- **Hamilton Island**
  The great, great barrier reef island

- **LG**
  Life's Good

- **Target**:
  100% Happy

Riding The
Food Trend Wave

Riding the Food Trend Wave

The Convenience Health Era

2000 - 2005

The Realness Era

2005 →

The Convenience Health Era 2000 - 2005

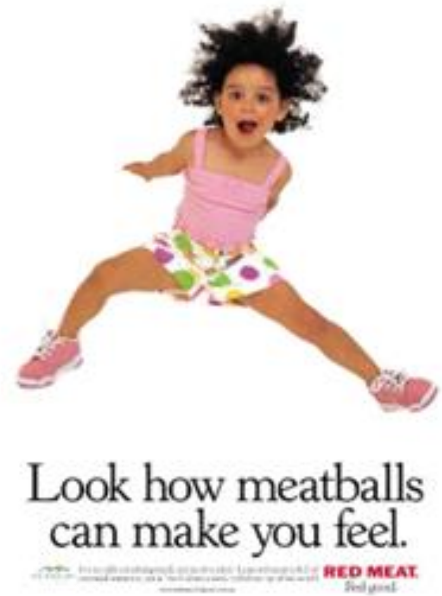
- Era of convenience and health.
- Food 'boosted' with vitamins and minerals that saved having to source nutrients naturally.
- Balance was less about moderation and more about ensuring 'the bad' was balanced out by 'the good'.
- 'Feel good' vitality focus. Focus on maximum enjoyment, maximum nutrition for minimal effort so we could 'live it to the max'.

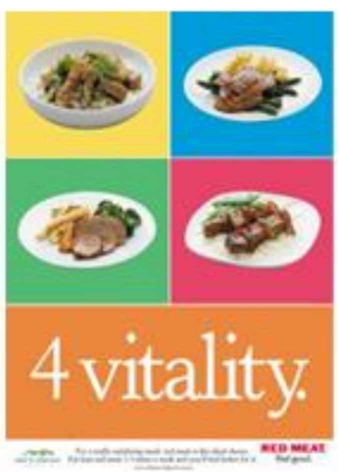
- **Shift in social values**
- **Re-evaluation of consumers' 'good health' belief system**

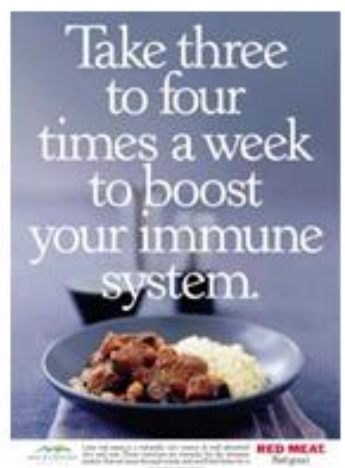
The Realness Era 2005 →

- Moved from 'living it to the max' to 'keeping it real'.
  Growing belief that our affluence is making us sick.
  Need to live a rich life – not a life of riches.
- Where values are real, pleasures simple but real. Experiences rich and nourishing (life the way it was meant to be lived). A quest to '<u>feel real well</u>' (fulfilled).
- Growing identification with the health concept of 'keeping it real'. "Real" acknowledged today as the true passport to genuine wellness.

Red Meat - Feel Good







The Realness Era

‘What and where’ food wise is increasingly being put under the microscope as we assess ‘real’ food value

Issues

- Questioning the reliability of our nutrition sources.
  ‘How good is good’, ‘How fresh is fresh’, Does it contain the nutritional goodness and value nature intended to deliver genuine wellness.

- Questioning role & value of convenience in meeting the need for genuine wellness. ‘What are we sacrificing when we access convenience foods? Can we expect to feel ‘real well’ and fulfilled if we choose convenience food over the real deal?

- Popular perception of being time poor, pace of life too fast, demands on our time ever increasing, and thus ‘convenience’ is a key need governing our approach to meals,
  - is wrong (only 19%).

- The proportion of people who buy take away food to eat at home for the evening meal declined from 25.2% in 2002 to 20.9% in 2006.

The Realness Era

‘What and where’ food wise is increasingly being put under the microscope as we assess ‘real’ food value

Trends

Growth of independent retail sector

- Clear move away from the supermarket for fresh produce towards independent food retailers – butcher, green grocer, deli.
- (Real fresh vs gassed up fresh) 77% worry about what is done to produce in supermarkets to ensure it lasts longer.
- Rise in growth of fresh produce markets / growers markets / organic (concern for life <u>in</u> our fresh food – not life <u>of</u> our fresh food).

The Realness Era

'What and where' food wise is increasingly being put under the microscope as we assess 'real' food value

Focus on		Instead of
Real Fresh	vs	Long Life Fresh
In Season Eating	vs	All Year Round
De-Junking	vs	Junking Up
(Real) Nutrition from the Source	vs	Fake Fortification
Home Cooking	vs	Take Out
Traditional Meals (From Scratch)	vs	Meal Assembly
Sit Down Meal	vs	Eating on the Run

The Realness Era

'What and where' food wise is increasingly being put under the microscope as we assess 'real' food value

Trends

Focus on quality & food integrity in meal preparation

- Thinking more about quality of food. Focus is on fresh food..
- 54% buying more fresh or chilled food than they used to.
- Reflected in household expenditure – fresh meat +40%, fresh fruit & veg +33%
- Significant lift in people seeking additive free food (colourings, flavourings, preservatives) – additives / chemicals in food is burning issue for 87% of parents.

The Realness Era

'What and where' food wise is increasingly being put under the microscope as we assess 'real' food value

Trends

Increase in importance of nutrition and health in meal choice

- Increasing trend to home cooking and traditional meals – a 'back to basics' philosophy & approach. Aligned with notion of 'turning back the clock' to a time when we ate 'real food, real fresh'.

- Traditional meals defined as meat & veg meals (72%) eaten with family around the table.

The Realness Era

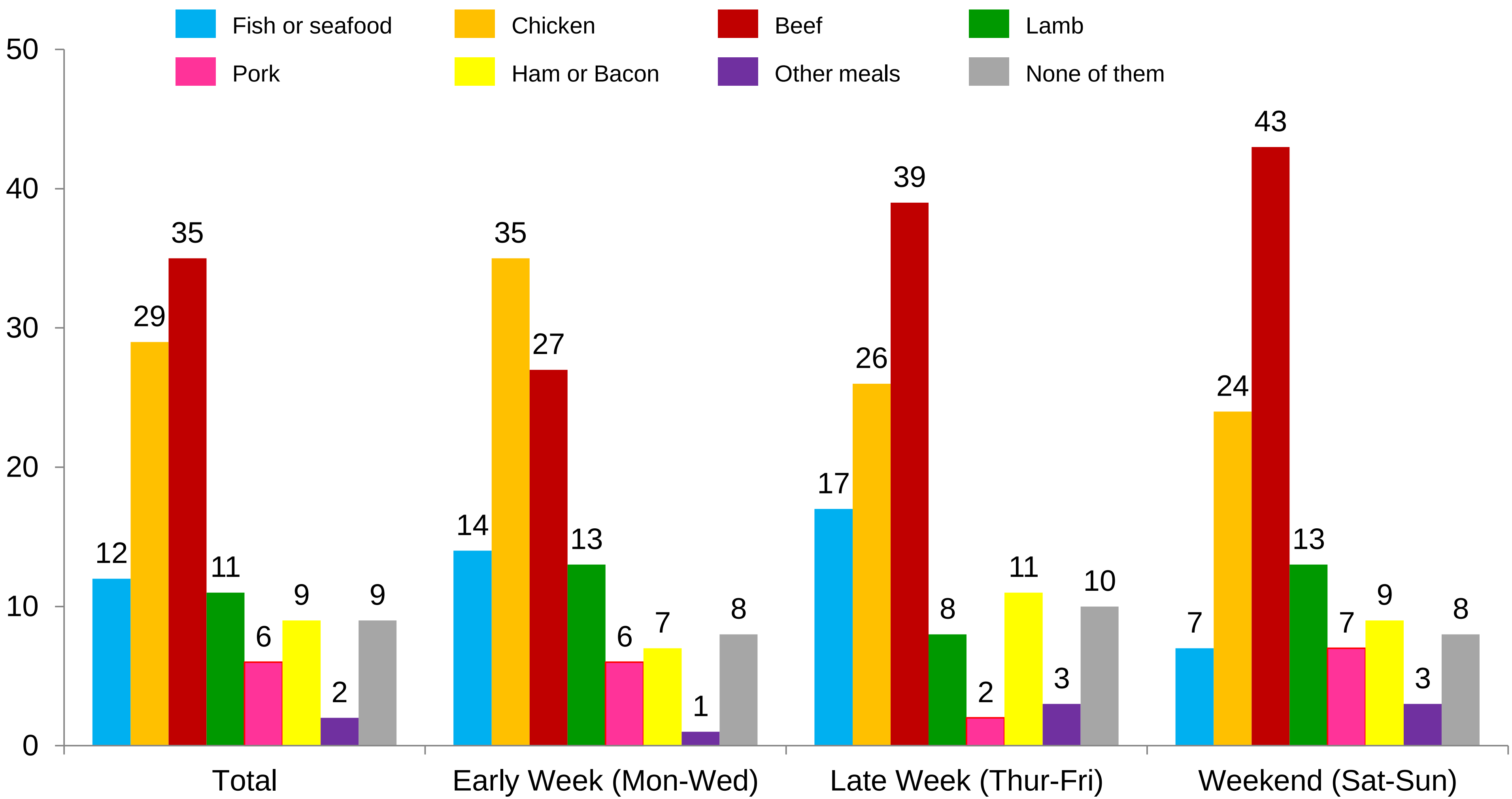
'What and where' food wise is increasingly being put under the microscope as we assess 'real' food value

Trends

Increase in enjoyment of cooking

- 60% of population love to cook.
- We are prepared to spend the time cooking, we are moving away from our use of convenience / ready prepared take away meal options, we are cooking more traditional meals – and loving it.

Freshly prepared meal eaten at home



The Realness Era

'What and where' food wise is increasingly being put under the microscope as we assess 'real' food value

Trends

Healthier choices when purchasing convenience food

- While there has been a decline in take away meal options, a third of meal preparers (32%) are making healthier choices when purchasing take away.

The Realness Era

'What and where' food wise is increasingly being put under the microscope as we assess 'real' food value

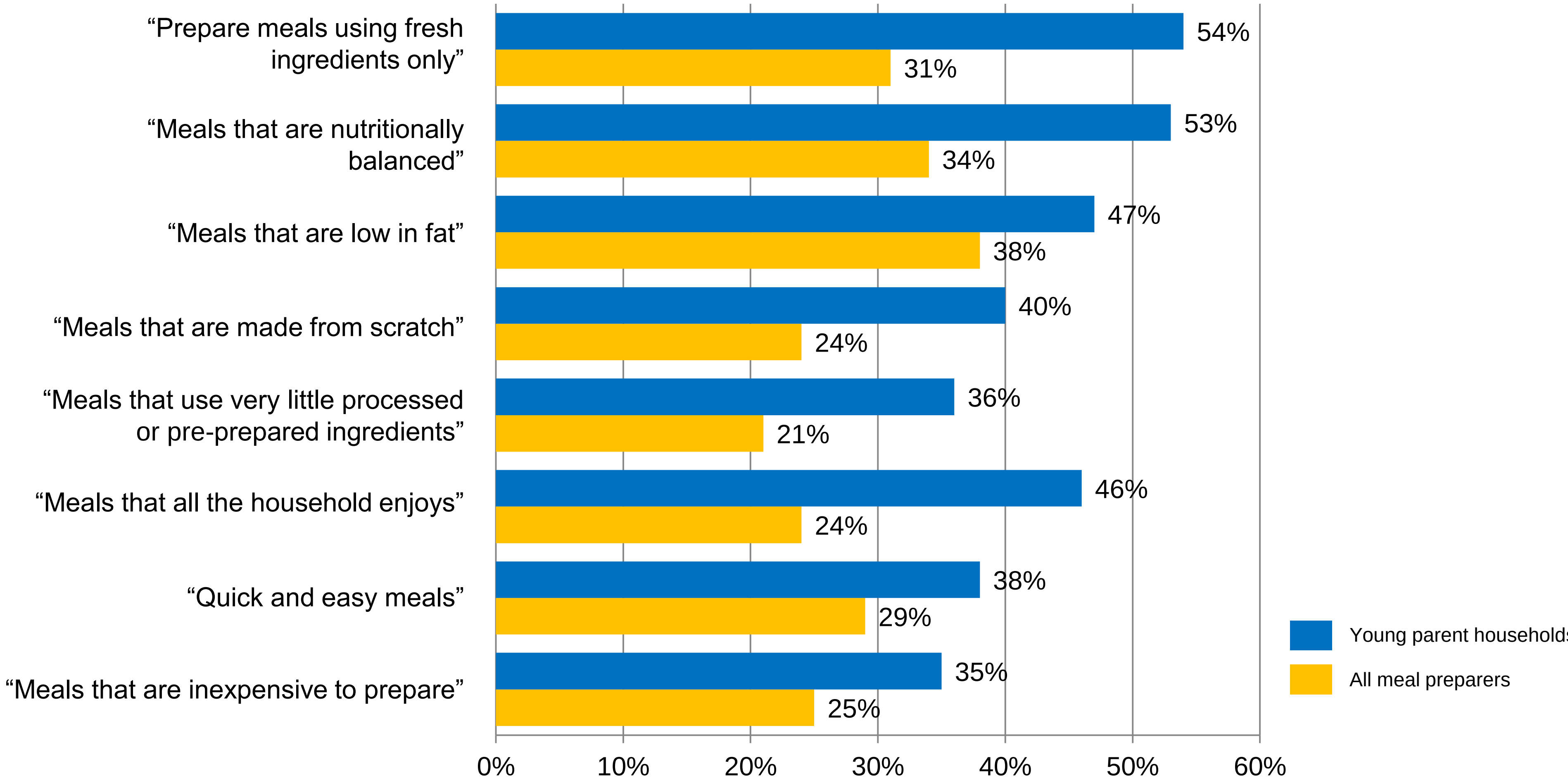
Trends

Focus on fulfilment

- Meal time nurtures and nourishes the family bond, so worth the effort. 84% of households are eating meals together, 50% of households turn off the TV.
- "Eating together remains the most potent symbol of a happy, secure, household" – Hugh Mackay.
- The family meal ranked No 1 on the happiness index for women (No 4 for men).

Main meal drivers

"Comparing now to 5 years ago …. preparing more meals that are…"



Base 1 = All respondents; n = 804 Base 2 = Young parents households; n = 116

Last night's dinner

- 9/10 dinner meals are eaten at home, 7/10 freshly prepared and cooked at home.
- 2/10 meals eaten at home include pre-cooked or pre-prepared meals, frozen meals bought from a food outlet, and take away or home delivered meals.
- Greater efforts are made to include more and more fresh healthy ingredients. Over 60% of meals included 3 or more vegetables (not including potato). Whilst there are few surprises about the most popular vegetables, Australians are nevertheless consuming across an impressive array with over 28 different vegetables eaten.
- Australians favour familiar traditional style dinners. Of the top 10 favourite meals, 4 are chicken. Roast chicken and vegetables at No 2, chicken stir fry at No 5, pan fried chicken and vegetables No 6 and chicken casserole/curry at No 9.
- 32% of Australian households have roast chicken and vegetables at least once a week (8% on Saturday night).
- The dishes we cook have not changed greatly in the last 20 years. They are easy, familiar, favourite, convenient and traditional.

Last night's dinner

- Contrary to the popularly held belief that people find cooking a chore, most meal preparers take pleasure in it. 74% claim they love to cook. The majority of the meal preparers (63%) prefer to start a meal from scratch. The dinner meals less likely to be made from scratch are chicken meals.
- Most people only start to plan what they're having for dinner in the middle of the same day. 40% of meal decisions are made after 4pm.
- Price is not the driving factor when it comes to meal choice. The two most popular, favourite dishes – steak and vegetables and roast chicken and vegetables are popular because they require little planning, are fast and simple to prepare, flexible and fulfill the desire amongst Australians to use fresh foods.

  Convenience and taste, nutritional value and acceptability to the whole family are what determine most choices. 'Value' involves much more than price in the minds of Australian consumers.

Source: Last Night's Dinner, The Clever Stuff – Julie Dang, May 2009

Food trends

Consumer interest in cooking – Media emphasis

MasterChef Australia

Since 2009, Channel 10 has provided 8 seasons and 5 spinoffs (Junior, Celebrity, Pros) screened across 5 nights. Currently the 4th highest rating TV show in Australia. It's achieved the highest number of viewers for a non sporting event. The first series finale peaked at 4.11 million viewers.

My Kitchen Rules

Started in 2010 on Channel 7 – won Logie for most popular reality program. Into it's 7th series. Among the highest ranking programs on Australian TV. Average number of viewers across the whole 7 series is 1.6 million viewers with finals averaging 2.4 million.

Food Safari

SBS. Across 5 seasons has covered 32 cuisines – Moroccan, Lebanese, Danish, Brazilian …

Good Food Guide

Food trends

Headlines

- Restaurants are full. Need to book well in advance. Can no longer book when you want to eat. Now 2 sittings 6:30 and 8:30.

  Bernard Salt's 'Smashed Avo' comment was appropriate.

  53% of 18 to 29 year olds claim they have increased their restaurant frequency over the last 12 months.

  1 in 3 Australians ate out yesterday.

- Food for many has become a life priority – 'Food is one of life's pleasures that I don't want to compromise on' but taste is still a lower priority than healthiness or food safety.
- Restaurant quality fast food – delivery has become an industry – Deliveroo etc.
- Focus on organic everything – meat, eggs, milk, coconut …
- Gluten now mainstream.

Food trends

Headlines

- Sugar is the new target. Australians consume more than 20 teaspoons of sugar every day – 53 kilograms a year.

  One in two adults strongly agree packaged products have too much sugar in them. 1 in 10 have tried to implement a no sugar diet. With sugar through, taste is still winning the battle between ‘Better for you’ and ‘Taste’.

- Pancakes were the most widely Googled recipe.

- ‘Upmarket’ well presented retail food outlets growing – Harris Farm, Delis, Cheese shops