

National Prawn Market Category Planning

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Project No. 2011/736



**AUSTRALIAN
SEAFOOD
COOPERATIVE
RESEARCH CENTRE**

31 May 2013



AUSTRALIAN
**Prawn
Farmers**
ASSOCIATION



***This project was conducted by the Centre Of Excellence, Science
Seafood and Health, Curtin University***

ISBN: 978-0-9925568-2-2

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Australian Government
Fisheries Research and
Development Corporation



Non-Technical Summary

2011/736: National Prawn Market Category Planning

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PROJECT 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.

ABSTRACT

In an Australian first, prawn farmers joined forces with the wild catch prawn industry to develop a national marketing and promotional strategy. The aim of the strategy was to:

- Increase value and volume for Australian prawns;
- Increase desire for and desirability of Australian prawns; and
- Give Australian prawns a special place in the eating habits of Australians.

In a transparent, industry-driven selection process, Brand Council were appointed to develop the strategy and the aligned implementation plan. The market strategy to 'Love Australian Prawns' and its accompanying logo was launched in October/November 2012 at 16 industry meetings across Australia. There was unanimous agreement at the meetings to collect funds to implement the strategy. A subsequent marketing forum in Sydney in March 2013 prioritised the promotional activities which had been developed by Brand Council, with a decision for an initial focus on independent fishmongers.

Industry participants agreed that funding to support the implementation should be collected by a voluntary contribution from prawn producers across Australia. The minimum funding amount, to have an impact in the marketplace, was set at \$500,000. To raise this, it was calculated that both sectors would need to contribute 0.22% of their Gross Value of Production (GVP) on beach prices, equalling approximately 2.5c/kg based on a rolling three year average using ABARE data. Contribution



calculations were also cross-referenced with individual fishery statistics held by each state.

A supplementary agreement to manage the funding and implementation process was signed between the Fisheries Research and Development Corporation (FRDC), Seafood Co-operative Research Centre (CRC), APFA and ACPF, and a management committee was formed to oversee activities. Invoicing to collect the funds commenced, with the national launch occurring in September 2014. The development and implementation of the national prawn market development strategy now can be used as a model for similar initiatives in other seafood sectors.

OUTCOMES ACHIEVED

- 1) A national prawn market development strategy that has encouraged prawn fishers and farmers to work together to lift the consumer demand for Australian prawns.
- 2) The existence of the plan has enabled leaders in the industry to encourage the establishment of a marketing levy.
- 3) The plan has been used by project participants to build consumer awareness of the Australian prawn category generally; individual companies/groups have then subsequently build their own brand under the auspices of the national category initiative.
- 4) The plan has driven the establishment of a project to develop a consumer-oriented quality standard for prawns.
- 5) Other seafood sectors are now using a similar process/protocol to investigate/initiate market development activities.

LIST OF OUTPUTS PRODUCED

- 1) The Australian Prawn Industry Market Development Strategy.
- 2) Sixteen industry meetings across Australia to launch the strategy.
- 3) A set of informed market development activities that can/have been implemented using an agreed, initially voluntary funding mechanism.
- 4) A joint Australian prawn supplementary agreement and formation of a management committee to oversee the implementation of the market development plan.
- 5) Results have been presented at ACPF Research and Development meetings (2012, 2013), APFA/ABFA conferences (2011, 2012), at WINSO conference (2013), Seafood Directions conference (2013), Refrigerated Warehouse and Transport Operators conference (2014).. Articles have been published in FISH, Qld Seafood News, SEAFOOD magazine and Seafood Stories.
- 6) A successful funding application to develop a through chain quality assurance program for wild capture prawns has been developed and approved. This program will underpin the national prawn market development strategy.

Acknowledgements

The project authors wish to thank the following people for their assistance with the project.

Seafood CRC: Jayne Gallagher and Dr Len Stephens for advice and assistance.

FRDC: Dr Patrick Hone for advice

Ewan Colquhoun from Ridge Partners: for his calculations regarding industry contributions and subsequent presentations to industry.

Industry Steering Committee/Selection Committee members: Graeme Stewart, James Fogarty, Marshall Betzel, Steve Murphy, David Thomason, Warren Lewis, Steve Murphy, Dylan Skinns, Sam Gordon.

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1.0 Introduction

In the last decade, the gross value of production of the Australian wild capture prawn industry has declined from approximately \$364 million in 1998/99 to \$232 million in 2008/09. Although some of this decline can be attributed to a lowered catch (27,871 tonnes to 19,956 tonnes), a gradual lowering of price has also been a significant factor (ABARE 2000; ABARE–BRS 2010). There has also been considerable competition from imported product entering the Australian market due to increased global production, and export earnings have decreased due to the strength of the Australian dollar over this period.

Given the industry-wide economic implications of the decreasing prices and loss in export earnings, the executives of the two Australian prawn producers associations, (ACPF and APFA) agreed to undertake a collaborative research project aimed at developing a national Australian prawn market development strategy and aligned market development plan. The aim of this collaboration was to identify the most effective market development activities that would increase the volume of product sold on the domestic market whilst maintaining or increasing returns to producers. It was also agreed that the industry associations would support the establishment of an agreed funding mechanism to implement the developed plan.

A number of prawn projects had been conducted by the Australian Seafood CRC, providing insight and benchmarks into the rates of consumption of prawns in Australia and barriers/enablers to consumption (Danenberg and Remaud, 2010; Danenberg and Mueller, 2011)). In addition, other research findings around variation in quality, sustainability, saltiness, ease of preparation, fitness for purpose and freshness were available to inform the strategy development.

It was recognised during the development of the project application that the prawn category has different types of prawns that consumers will buy, depending on their need at the time and their personal preference (e.g. whether they're small, large, cooked, raw, frozen, fresh, packaged, loose, farmed, wild caught, imported, local, shelled or whole). Prawns also have a seasonal demand (summer, Christmas, Easter) which may not always correspond with the generally seasonal supply. Therefore, frozen product was a key element of the industry strategy. Consumer research had shown that fresh prawns already enjoyed high awareness and high occasional purchase, so consumers are familiar with, and relatively confident in, purchasing and preparing prawns. Yet barriers (such as attitudinal, emotional and functional) exist which limit them from being a more regular part of the main meal repertoire and / or consumed on more regular occasions throughout the year. Any new prawn market development program would therefore need to build on existing knowledge to better understand these barriers, so that appropriate marketing strategies could be pursued to encourage existing purchasers to purchase more frequently. Further, we needed to better understand how this increased demand might be focussed on Australian produced prawns, thus helping to push up prices for local producers rather than just encourage more imports.

The project authors also recognised the need to review previous prawn marketing campaigns (Queensland Prawn Day and Go Bananas) in developing the project application and methodology.

1.1 Need

Due to various local and export market issues the price paid to prawn farmers and fishers has declined in real terms in recent years. Collectively, and in response to these market pressures, the ACPF and APFA committed to plan a collaborative market development strategy to build demand for prawns in the domestic market. It was considered that increasing demand in a market where price is largely fixed should ultimately improve the price paid for the Australian prawn product.

1.2 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 and APFA agree to 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.

2.0 Method

This project was comprised of four main stages, commencing in 2011 and culminating in the Australian prawn strategy launch, which occurred the week commencing 28th August 2013. Figure 1 (below) summarises the four main stages within the strategy development process. It is noteworthy that the entire project was designed around engaging the industry's support and input throughout.

The first stage of the project involved the formation of a Steering Group. Though this group was established to oversee the project and provide advice, a key goal of this first stage steering group formation and membership was to ensure whole of industry engagement and commitment.

With industry support established, the project moved to the second stage in early 2012, with two key tasks being to select a company to develop the national prawn market strategy and concurrently begin developing potential funding models to support the implementation of the plan once developed.

Stage 3 (commencing in late 2012) centred on the development of the marketing strategy by the successful company selected in Stage 2 (Brand Council). This stage also involved communication of the developed strategy and the funding proposal to industry workshops Australia-wide. These workshops sought input and suggestions particularly around potential funding alternatives.

The final stage of the project, Stage 4, then considered the implementation stage of the strategy (in terms of how it should be managed) as well as the development of processes to collect the funds required to implement the plan.

The details and outcomes of each of these project stages are reported next.

Timeline

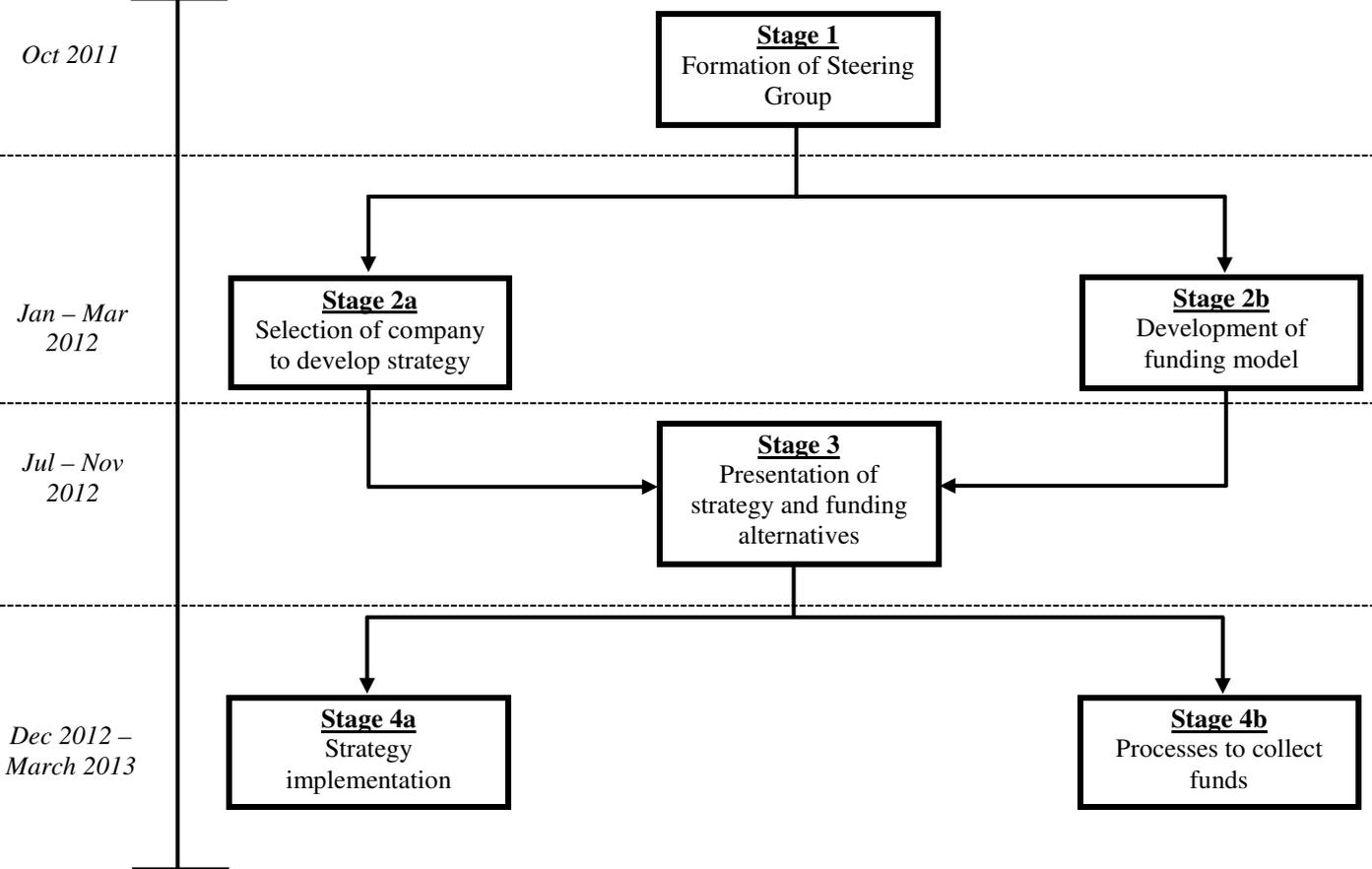


Figure 1: Summary of project stages and timelines

3.0 Results

3.1 Stage 1 – Formation of Steering Group and Whole of Industry Engagement and Commitment

The project began with the formation of a Steering Committee to oversee the project and provide advice to the Principal Investigator, Dr Janet Howieson. Membership was designed to reflect the key stakeholder groups involved.

This Steering Committee was composed of the following members:

- Graeme Stewart and Karen Hollamby (ACPF)
- Jim Fogarty (QSMA)
- Helen Jenkins, Warren Lewis, Sam Gordon (APFA)
- Kate Brooks (KAL Analysis)
- Len Stephens, David Thomason, and Jayne Gallagher (Seafood CRC)

Members of the Steering Committee, as well as the supportive Boards of both APFA and ACPF worked to gain support for the project in the wider prawn industry community. An outline of the project and the proposed methodology was also presented at the ACPF Research and Development Forum held at the Gold Coast in late October 2011. Over 60 people attended this forum, and notes from the later discussions were incorporated into the project planning.

3.2 Stage 2 – Process to Select Company to Deliver National Prawn Market Development Strategy and Development of Funding Alternatives

Upon establishing broad industry support, Stage 2 then focussed on selecting a company to develop the marketing strategy. Focus also shifted to concurrently develop funding alternatives to support the implementation of the strategy once it had been finalised.

3.2.1 Company Selection

Dr Len Stephens drafted a brief / tender document in order to facilitate the tender process for choosing a company to prepare the national prawn market development strategy. The draft was then circulated to the Steering Committee for comment. The final version of the Brief is attached as Appendix 1. Following significant consultation and advice, 12 companies were invited to tender for the preparation of the plan. The companies were invited to contact Dr Janet Howieson for further information. The information provided on request included previous relevant prawn consumer and market research as listed below:

CRC Reports

- CRC 2008/779, Danenberg, N. & Remaud, H. 2010, *Omnibus consumer research findings*
- CRC 2008/779, Danenberg, N., Mueller, S. 2011, *Omnibus consumer research findings – Wave 2*
- CRC 2008/793.10, *Optimising quality within domestic prawn value chains:*

Consumer survey questions, Colmar Brunton 2011, QMS quant online field requirements

- CRC 2008/793.10 *Optimising quality within domestic prawn value chains: Consumer Survey draft report*, Lawley, M. & Howieson, J. 2012, *Optimising quality and value in domestic prawn value chains: Consumer survey results*
- CRC 2009/742, Peshanoff, L. & Jaensch, J. 2009, *Consumer research: Australian Prawn Farmers Association*
- CRC 2009/770, Douglas, E. 2009, *Chilled pre packaged seafood category development*
- CRC 2009/786, Johns, C. 2009, *Commercial value chain analysis of the Spencer Gulf and West Coast prawn fisheries – domestic retail and restaurants*

Other resources

- FRDC 2006, *Retail Sale and Consumption of Seafood – Melbourne*
- Market Equity, Principals & Hayden, B. 2004, *Building a world class aquaculture brand for Australia*
- Remaud, H. & Mueller, S. 2008, *Drivers of Australian consumers when purchasing prawns*
- Remaud, H. & Danenberg, N. 2010, *What influences consumer choice in a restaurant context?*
- Ruello & Associates 2002, *Australian Prawn Market Analysis*
- Remaud, H., Peters, K. & Danenberg, N. 2009, *Barriers and drivers of the South Australian food service sector's purchase of seafood*

Appendix 1: Australian Market Development Plan: Call for Proposals – 4 pages

Key issues

A strategy is needed due to the decline of gross value of production of the Australian wild capture prawn industry, combined with a gradual lowering of price and other factors.

Key outcomes

The Seafood CRC is seeking proposals from market strategy and planning firms to develop a plan to integrate into the prawn market to increase volume and value of prawn sales, rather than attracting more imports.

Two Seafood CRC participants are collaborating on this project: The Australian Prawn Farmers Association (APFA), who represent prawn aquaculture, and the Australian Council of Prawn Fisheries (ACPF), who represent the wild harvest sector.

A Steering Committee shall be formed of representatives from Curtin University, the prawn industry and the Seafood CRC to guide the process.

Key findings

The proposal defines three areas of work required. Firstly, the development of a promotional strategy for the promotion of Australian Prawns across Australia, targeted to existing or potential markets. Secondly, that the proposed draft strategy is communicated through the industry for input, adjustment and approval. Lastly, advice shall have to be sought on the process and possible providers for the plan's implementation.

By mid-January 2012, the 12 companies submitted documentation to demonstrate their process for developing the strategy, and these documents were circulated to the Steering Committee along with an agreed evaluation sheet (Appendix 2).

Appendix 2: Assessment Criteria – 1 page

The evaluation sheet detailed 7 criteria that the Steering Committee had to assess, each with their own weighting.

Relevant experience in strategy development (25%), relevant experience in food and protein (15%), knowledge of the seafood category (10%), scale/resources available (20%), apparent desire (10%), understanding of current industry (10%), and would they provide a value for money campaign (10%). These criteria equated to 100%, and prospective organisations were then ranked accordingly.

The separate evaluation scores were combined, and following a teleconference, five companies were selected to give a presentation of their proposal, culminating in the final selection of the successful company. Formal invitation to present came as an amendment of the original brief. This revised document is included as Appendix 3.

Appendix 3: Australian Prawn Market Development Plan: Second Call for Proposals – 5 pages

After receiving an organisation's preliminary expression of interest, this document was sent to invite the organisation to make a full presentation to an industry panel to outline how they would approach the task. The successful firm will be invited to work with the CRC and prawn industry to develop a strategy.

The presentations are planned for the 27th/28th of March. The interview panel consists of Mr David Thomason (chair, Seafood CRC), Mr Warren Lewis (APFA), Mr James Fogarty (APFA), Mr David Crichton (ACPF) and Mr Dylan Skinns (ACPF).

Information identical to Appendix 1 was included within the document, and evaluation criteria were also outlined. The evaluation criteria were discussed within Appendix 2.

It became clear during the first phase of the evaluation that the decision on the company required significant and specialised market expertise. A new 'evaluation' committee was therefore formed to evaluate the presentations and take responsibility for selecting the successful company.

This evaluation committee consisted of the following members:

- Dylan Skinns and David Crichton from ACPF
- James Fogarty and Warren Lewis from APFA
- David Thomason as the Independent Chair

Observers present included:

- Karen Hollamby (EO, ACPF)
- Helen Jenkins (EO, APFA)
- Janet Howieson (PI, Curtin University)
- Miles Toomey (Seafood CRC)

The presentations were held over two days in March 2012, at the Sydney Fish Market. The successful company was Brand Council. A report on the Phase 2 selection process including the Brand Council presentation (and proposed strategy development methodology and timelines) is included at Appendix 4.

Appendix 4: Prawn Strategy Agency Selection Panel Report – 16 pages

Key objectives

The objective of the selection panel was to choose an agency from 11 nominated agencies to help develop a National Prawn Strategy.

This CRC project aims to develop an implementable market plan to increase the value of Australian prawns through higher retail prices or sales volumes, exist with collaborative commitment from ACPF and APFA to co-invest in the plan's implementation, and to encourage investment in marketing by the prawn industry.

Key outcomes

The Selection Panel, named in Appendix 3, selected 5 agencies from the original 11 to present their proposal. The Panel considered each agency's strengths and weaknesses and evaluated the agency in relation to the assessment criteria, selecting the proposal from Brand Council.

A copy of Appendix 3 was then attached, as well as an extract of Brand Council's proposal.

What's strong	What's wrong?	Issues to consider	Goal
Seen as an entertaining/luxury/celebration food	Low awareness of health benefits	Hard to break into weekly meal repertoires	Increase desire for Australian prawns
High preference for Australian prawns	People don't think to eat them	Prawns don't have their own occasion	Give prawns a special place in Australian eating habits
People would like to eat more	Lack of Australian brand identity & promotion	Lack of evocative/emotional imagery surrounding prawns	Increase value of Australian prawns
Consumers don't differentiate between farmed and wild caught	Thought of as a seasonal food		Increase top of mind awareness
Consumers would pay more for Australian prawns	Declining market share		Create a memorable brand symbol for Australian prawns.

Subsequently, a separate contract was developed between the Seafood CRC and Brand Council, and work on the strategy commenced in June 2012.

3.3 Development of Strategy and Delivery of Strategy to prawn industry

The Brand Council methodology and timelines are summarised in Figure 2.

Project Overview

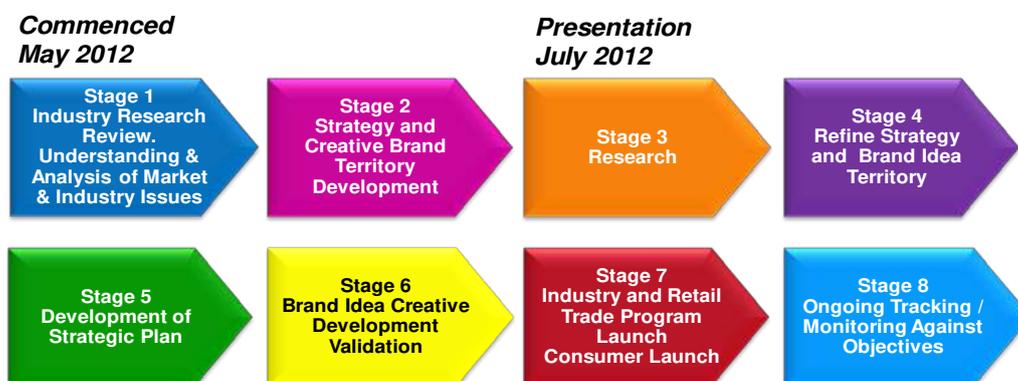


Figure 2: Brand Council methodology for development and implementation of

strategy.

The Brand Council methodology included interviewing key prawn stakeholders in relevant states. The people to interviewed were chosen following advice from key stakeholders and ACPF/APFA Board members. It was decided that an interim presentation of the results of the interviews and the development strategy would be delivered by Brand Council at a meeting just prior to the ABFA/APFA annual conference in Palm Cove in late July 2012. Funding support was provided from the project for ACPF representatives to attend the briefing. The invitation is shown in Appendix 5.

Appendix 5: Invitation for July Launch – 1 page

Sectors governing wild catch and farmed prawn producers have come together to create a strategy which aims to increase the value of Australian prawns through higher prices or higher sales volumes.

An invitation is extended to attend the launch of the industry initiative at the Novotel Palm Cove Resort on the 31st of July 2012. The strategy shall be unveiled by the Directors of Brand Council.



The PowerPoint presentation delivered by Brand Council is shown in Appendix 6.

Appendix 6: National Prawn Strategy Update (July 2012) – 46 pages

Key objectives

The goal of the strategy is to increase value, volume and desire for Australian prawns.

Key findings/outcomes of each stage

The first stage analysed the market and industry. The biggest issues facing the industry were those concerning price, profitability, industry cohesion, import competition and the product. The biggest opportunities identified were exports, consumer education, the product itself, branding, market presence and the price/value relationship. The 'What's Strong/Wrong' analysis was included as per Appendix 4.

The second stage explored strategy and creative brand territory development. Current meal decision making behaviour was analysed, and creative territories/positions were suggested to further explore in research.

The third stage explored existing research and summarised findings. Issues impacting prawn consumption, such as prawns being seen as expensive and not a top of mind purchase were identified. Consumer perceptions between fresh and frozen prawns were explored, as was the feel/experience, their nutritional goodness, and their everyday usage.

The current stage, stage 4, attempts to refine the strategy and brand idea territory. It identifies prawns as a unique experiential product, and its future growth shall come from a brand presence.

Over 100 people attended the presentation, which was very well received. A summary email was sent to all who attended the presentation and the documents provided are attached as Appendices 7, 8 and 9.

Appendix 7: National Prawn Strategy Summary (August 2012) – 1 page

Key outcomes

Brand Council were selected to develop the strategy. The development is expected to be completed by year's end. Once developed, the prawn industry associations shall establish a funding mechanism to implement the recommended promotional activities.

After reviewing previous research on Australian prawn consumption, interviews with over 40 prawn industry stakeholders and focus group research, Brand Council conducted an industry presentation in Cairns on the 31st of July. The presentation attracted over 100 guests, and the update was enthusiastically received.

Key issues

The prawn industry faces challenges, such as the rising cost of production, loss of export markets and increased competition from imports. Therefore, APFA and ACPF are undertaking the joint development of a market development strategy to increase the value of the Australian prawn segment domestically.

Appendix 8: National Prawn Strategy Summary of July 2012 Launch – 8 pages

Summary

Photos are attached of the launch of the prawn strategy on the 31st of July 2012.

The project overview is shown, which also depicts that the project is in Stage 4 – 'Refine strategy and brand idea territory'. The goal of the strategy is to increase value, sales volumes and desire for Australian prawns. As per Appendix 4, a 'What's Strong/Wrong' analysis was included.

Appendix 9: National Prawn Strategy Launch 2012: Feedback Summary – 4 pages

An extract of positives, negatives, questions and suggestions regarding the presentation are shown below.

Positives about the presentation		Negatives about the presentation	
There is already a very good product perception of prawns	That the perception of the product is accurate and nothing is to change	The ignorance about cholesterol is an issue	Cholesterol fears
Premium product; special food; simply wonderful	Prawns are like wine; Australian prawns are like top quality wines: different tastes and premium price	Heavy consumers eat prawns only eight times a year	It is important that the consumer experience matches or exceeds consumer expectations. This could be a problem.
Message of current view about whole prawns are simply good as they are – don't mess with them	Not a everyday product; Theme; Occasions and own occasions: its Friday	If selling point is "fresh, what happens when consumer find out fresh is often frozen	Maintaining premium quality
Questions and Suggestions from the National Prawn Market Concept Presentation in Cairns			
Questions		Suggestions	
Who will fund the marketing?	How do you incorporate a raw prawn with the emotional campaign? Price/trawler price?	Mechanism/Levy: Government support for funding mechanism	Need for Champion at Government Level (for industry)
How will you drive any increased value generated up the chain to producers? Typically primary producers are price takers and others in the chain take any value added.	When we raise consumer preparedness to pay – how do we make sure that return is spread equally and fairly along supply chain to producer?	It is critical to keep the participants informed!	We need a BIG focus on quality to underpin messages.

In October 2012, Brand Council delivered the completed strategy at workshops in Brisbane (23 October), Townsville (24 October), Port Lincoln (30 October) and Perth (31 October). The Brand Council presentation (Appendix 10) was preceded by the delivery of a 'context' PowerPoint by various industry representatives (Appendix 11). This presentation summarised all other Seafood CRC and other prawn industry research/ activity being undertaken which could support the strategy.

Appendix 10: National Prawn Strategy Final Launch October 2012 – 75 pages

Key objectives

The goal of the strategy is to increase value, volume and desire for Australian prawns.

Key issues

Prawns were being seen as expensive and they were not a top of mind purchase.

Key findings

Consumer perceptions between fresh and frozen prawns were explored, as was the feel/experience, their nutritional goodness, and their everyday usage.

Key outcomes

The appendix includes a report on the new logo. Its strengths are the fact that the logo is more of a brand than a promotional idea, and the brand message is multi-layered. The logo is intended to be used via multiple mediums and upon POS material.

An overview of the project stages is shown. The third stage explored existing research and summarised findings. The fourth stage developed the 'Love Australian Prawns' logo, and saw merchandising/POS material using logo and concepts for health/nutrition ads being drawn up.

Tracking of the selected media should commence 3, 6 and 12 months after launch. Tracking of trade engagement, sales, price, import trends and consumer consumption should also occur. It now remains to finalise the campaign roll-out strategy, finalise the logo design, and finalise Trade, Consumer and Media engagement strategy and budget.

Promotional budgets of \$500,000, \$1 million, \$1.5 million and \$2 million are considered, and the quantity of promotional material available at each of these budget levels is compared.

Appendix 11: National Prawn Strategy Launch Context Powerpoint October 2012 – 8 pages

This document summarises current consumer perceptions towards Australian prawns. Each perception is justified by the inclusion of a supporting certification or study.

Key findings

Australian consumers are confident that Australian prawns are produced/harvested using sustainable practices and that Australian prawns are safe to eat and nutritious.

Australian consumers can be confident in a consistent and high quality Australian prawn purchase.

Australian consumers are interested, better informed and confident about the regional provenance of their Australian prawn purchase.

Australian consumers value the people, product and economic worth of the Australian prawn industry, especially to regional communities, and will preferentially buy Australian prawns more often.

Following the Brand Council presentation, Ewan Colquhoun from Ridge Partners presented on possible means to fund the implementation of the strategy (Appendix 12). There was unanimous agreement at all meetings to immediately commence processes to collect a voluntary levy to fund the implementation of the strategy. There was also support for commencement of a process to enable legislative change to support collection of a mandatory levy. The minimum funding amount required to have an impact in the marketplace was set at \$500,000. To raise this, it was noted that both sectors would need to contribute 0.22% of their Gross Value of Production (GVP) on beach prices, equalling approximately 2.5c/kg based on a rolling three year average (using ABARE data that has also been cross-referenced with individual fishery statistics held by each state).

Appendix 12: National Prawn Strategy Launch “The Buck Stops Here”: Ewan Colquhoun PowerPoint October 2012 – 15 pages

Key objectives

Funds are wanted to promote Australian prawns through the National Prawn Strategy. The effect of funding will be seen through an increase in market prices and volumes and an increase in net returns to fishers and farmers, which will also drive the National Prawn Strategy.

Key outcomes

Based on ACPF’s 3 year catch volume average of 20,533t, GVP of \$236 million, and 2010 beach price of \$11.50/kg, it is proposed that the ACPF provide \$375,000 a year to fund the Strategy.

Based on APFA’s 3 year catch average of 4,300t, GVP of \$60 million and 2010 pond price of \$14.34/kg, it is proposed that APFA contribute \$125,000 a year to fund the strategy.

It is then proposed that once the mechanism is agreed upon between APFA and ACPF, the funds can be deposited into a dedicated National Prawn Strategy bank account to fund the Strategy.

Key findings

The joint industry contribution of \$375,000 (ACPF) and 125,000 (APFA) creates an annual funding total of \$500,000. The contributions shall be acquired through a levy of 2.5c/kg of beach or pond price. This funding is expected to see a 5 – 10% increase in sales price of Australian prawns.

It is also noteworthy that a number of other industry meetings to deliver the strategy were held with key stakeholders in Cairns, Mooloolaba, Hervey Bay, Gold Coast, Clarence River, Newcastle and Sydney in November 2012.

3.4 Implementation of Strategy and Development of Processes to Collect Funds

An implementation subcommittee was formed, and a meeting held in Canberra in early December 2012. The attendees were Janet Howieson as the Chair (Curtin University), Warren Lewis (APFA), Alastair Dick (APFA), Helen Jenkins (APFA), Karen Hollamby (ACPF), Terry Richardson (South Australian Prawn Cooperative), Ewan Colquhoun (Ridge Partners), Patrick Hone (FRDC), Len Stephens (Seafood CRC), Jayne Gallagher (Seafood CRC), and Miles Toomey (Seafood CRC). Abridged minutes of that meeting are included as Appendix 13. Some members of this group subsequently met with DAFF officials to seek changes to the PIERD Act and inform them of the prawn industry marketing activities.

Appendix 13: Implementation Steering Committee Minutes December 2012 – 3 pages

Summary

A Supplementary Agreement was suggested to be implemented within the CRC Participants agreement to facilitate the National Prawn Strategy. The Agreement would include 4 signatories (CRC, FRDC, APFA and ACPF), who agree to and acknowledge the Agreement's content.

The main areas of content included the calculation of equity to fund the Strategy, proposed to be a levy set at 2.5c/kg or at an equivalent 0.22% (ACPF) and 0.16% (APFA) of the beach/pond price. Another main area within the proposed Agreement was to determine governance arrangements for strategy implementation. This included the proposal for a Management Committee to implement the marketing strategy, as well as the creation of a Marketing Group.

The Minutes of the meeting also included the discussion of the CRC Legacy Plan, including that the CRC/FRDC Boards have supported \$950,000 in principle as contribution to create a long term marketing capacity for the Australian seafood industry.

The Implementation Plan by Brand Council was also discussed, and it was noted that the plan was to be presented at the mid-January marketing forum for industry feedback and prioritisation.

It was noted that by mid-December, all workshop participants to receive information of the next steps. This information shall include the outcomes from the workshops and the action to be taken, proposed arrangements by the CRC, reporting on the Implementation Plan and that the delivery of the Strategy shall need to be tendered.

Following that meeting, a summary was sent via email by Dr Janet Howieson to all participants at the strategy launch workshops – to further inform and update industry about the implementation approach and processes to collect funds. Key points included:

- Nine workshops/meetings were attended by over 140 Australian prawn industry stakeholders, with unanimous agreement to support Brand Council's strategy implementation and the voluntary contribution of a levy. It was noted that the contribution calculations were still subject to approval by the ACPF and APFA Boards.
- An agreement between the APFA/ACPF to collect funds could be developed as a Supplementary Agreement to the Seafood CRC Participants Agreement and Constitution. This Agreement still needs to be approved by the APFA/ACPF Boards, which will also include the development of a CRC bank account, which shall be independently managed by an APFA/ACPF industry Steering Committee.
- The Agreement, bank account and governance protocols addressed the concerns of the industry in four ways:
 - a. ensuring appropriate expenditure of industry funds,
 - b. reducing fund collection costs (therefore increasing available marketing funding),
 - c. establishing a central collection point for all funds, and
 - d. reducing set-up costs by using existing CRC legal structures.
- Brand Council has developed and costed an implementation plan, covering strategies for major supermarkets and independent seafood retailers, and details of promotional activities.
- Industry feedback is required regarding the plan, in addition to activities which require priority funding; therefore Brand Council is planning an industry workshop in mid/late January to go through the plan. A goal of these workshops is to form an Industry Marketing Committee to assist

implementation, with tenders for potential company committee members currently being developed.

- The CRC and FRDC are preparing a marketing 'legacy project', which shall include funding for the strategy's implementation. A Project Officer shall also be provided to oversee the company selected to implement the strategy and manage other related tasks. The project officer's appointment is planned for early 2013.
- When the Supplementary Agreement is approved, the bank account developed and the Steering Committee formed; industry members can be invoiced for contributions in January 2013.
- Within the meetings, industry advised that the voluntary levy be made an equitable compulsory legislated approach as soon as possible. Meetings have been held with DAFF to make this transition a reality.
- Two issues raised which could impact the success of the strategy are concerns regarding product substitution, and ensuring effective retailer/supermarket engagement.

The supplementary agreement to support the strategy implementation was developed and then signed by representatives of the four partners (ACPF, APFA, Seafood CRC and FRDC) (see Figure 3). A management committee was formed to oversee the processes outlined in the agreement and the implementation of the strategy (see Appendix 14).



The supplementary agreement is signed by Helen Jenkins (APFA), Karen Hollamby (ACPF), Dr Patrick Hone (FRDC) and Dr Len Stephens (Seafood CRC).

Appendix 14: Prawn Market Development Commercial Pilot Program Funding and Management Agreement – 6 pages

Summary

It is acknowledged that the CRC entered into an agreement with APFA and ACPF to achieve objectives with the funds provided by the participants. A Program Management Committee shall be formed to oversee Program activities, and the functions and members of the Committee are outlined.

Financial contributions by both APFA and ACPF are then disclosed, whereby signing the document grants authorisation by the CRC to invoice the parties amounts equivalent to 0.22% of their Gross Value of Production. Information regarding the creation of an account to merge the funds is provided, as are the protocols which shall be implemented to authorise and document the expenditure of these funds. There is no obligation placed on any of the parties to provide these funds. The financial contributions to be made by both the Seafood CRC and the FRDC are also detailed.

Intellectual Property is to be managed as per the Participants Agreement.

Key objectives of the Program

To conduct a pilot commercial implementation of findings ascertained within Seafood CRC Project 2011/736. Approval is needed from prawn industry to implement a levy.

Following extensive consultation, Ewan Colquhoun completed a detailed spreadsheet for calculating the individual contributions of each prawn industry sector/licence holder. Individual negotiations were undertaken with each group in regards to invoicing procedures. By March 2013, over 70% of the Australian prawn industry has agreed to the customised invoicing arrangements, with invoices despatched to those industry members.

A marketing forum was held in Sydney in March 2013. The forum was attended by over 20 prawn industry representatives. At this forum, Brand Council presented a detailed implementation plan for the strategy (see Appendix 15), and that plan was subsequently discussed, reviewed and timelines agreed. The launch date was set as the week beginning 28th August 2013. Minutes of that forum are attached as Appendix 16.

Appendix 15: Prawn Market Development Rollout Strategy: March 2013 – 70 pages

Summary

The project is now at Stage 7 – ‘Industry and Retail Trade Program Launch & Consumer Launch’.

The proposed approach towards merchandising and POS material is outlined. The main targets for merchandise were said to be independent seafood retailers, larger retailers and retail chains, Woolworths, Coles, IGA and other independent retailers. The method of choosing the most effective outlets is outlined, as is the list of merchandise that shall be provided to participating retailers. The strengths of each item of merchandise are discussed, and the number of items which can be provided to each retailer in relation to varying budget sizes is displayed.

Proposed promotional activities within various retailers are also outlined, as is the funding required.

Key objectives

The goal of the strategy is to increase value, volume and desire for Australian prawns.

The term ‘celebration’ should be redefined to include a new form of celebration – Australian prawns.

The next step in the Strategy’s implementation is to confirm the budget, confirm timing and target area, and revise recommendations based upon findings.

Key issues

Prawns were seen by consumers as expensive and were not a top of mind purchase. There were also concerns regarding cholesterol.

Appendix 16: Prawn Marketing Development Marketing Forum Minutes: March 2013 – 9 pages

This document shows the minutes from the National Prawn Strategy Marketing Workshop held in the Sydney Fish Market Boardroom on 05 March 2013.

Key outcomes

The NPS’s current status is that APFA and ACPF has signed the Seafood CRC’s Supplementary Agreement. The Strategy can continue until 20 June 2015 at the latest.

A Marketing Manager position is being created to assist the seafood sector, but primarily for the Strategy.

Reg Bryson from Brand Council overviewed the options available for spending funds on marketing and promotion.

There were group discussions held to determine how the Strategy would be implemented; particularly regarding merchandise rollout and timeframes and when the Strategy launch would occur. The importance of traceability and legislating against product substitution was also discussed.

It was agreed that merchandising material would be focussed on in the first year. Marketing activities would be a long term element within the Strategy, and the SCRC are currently looking for companies who can provide an economic evaluation of increases towards fishers/farmers to quantify investment returns.

Other discussions included the identification of product mislabelling issues, and ensuring that a firm budget was agreed upon before retailers/supermarkets are approached.

Timelines for the Strategy’s implementation were also agreed upon, and it was agreed that the Strategy should be launched in the first week of September in every capital city and in some regional areas.

A Marketing Manager position was to be created at FRDC, and once appointed, one of the main responsibilities of this person was to assist with the implementation of the National Prawn Strategy. The FRDC marketing manager was also to be tasked to work with the various seafood industry sectors and also the government, to facilitate changes to the Primary Industries Enabling Research and Development (PIERD) Act;

allowing collection of a marketing levy by the seafood industry. To assist this process, ACPF and APFA wrote a joint letter outlining the strategy to all (>230) Federal Members of Parliament (see Appendix 17). However the FRDC position proved difficult to fill, so alternative staffing arrangements were organised through the Seafood CRC.

Appendix 17: Letter to Ministers – 3 pages

Key issues

The high Australian dollar has resulted in the loss of export markets, and farmers and fishers must compete between themselves and the cheaper imported product.

Australian prawns are of high quality, taste and are ecologically sustainable. However, these elements aren't noticed in the marketplace, and prawns are also not a top of mind purchase.

Key objectives

APFA and ACPF are writing to seek support for enabling a levy collection for promotional activities for the prawn industry.

A voluntary levy is a priority for the prawn industry, and support is needed to make an amendment to the PIERD Act to allow expenditure of levies collected for marketing and promotion. Assistance is needed to get the amendment of the PIERD act onto the Parliamentary agenda. The legislation's amendment shall ensure that the prawn industry shall continue to remain be a strong and viable sector of the Australian economy.

Key outcomes

Brand Council was chosen to increase the desire for and desirability of Australian prawns, integrate Australian prawns into eating habits, and increase the value of the product. These objectives shall be achieved through a National Marketing Strategy.

This strategy has been finalised, and it has been agreed to establish a Supplementary Agreement to the Seafood CRC Participants Agreement to enable the voluntary levy's collection.

3.5 Additional Research

The initial research proposal incorporated some new areas of research associated with the project. These new areas of research included the following:

- a) Identifying all different prawn species produced/sold in Australia and their economic value/share.
- b) Economic value chain modelling (developed at CESSH) to work out value added contribution (i.e. inputs, outputs, labour) of each prawn fishery/sector to the Australian economy (including region/fishery specific value added contribution at regional, state, national level).
- c) Better understanding of retail and distribution channels: identifying exactly how many retailers there are, where they are and an idea of their importance, including volume of prawns sold. The same information was required from supermarkets (e.g. how many of them sell prawns in their delis, and which supermarkets sell the greatest volume).
- d) Reviewing and evaluating the effectiveness of all previous prawn promotion campaigns (e.g. Australian Prawn Promotion Association, Banana Prawns, Queensland Catch, Queensland Prawn Lincoln Wild Kings).
- e) Analyses of communication channels options: e.g. at point of sale, food advertising in magazines, niche vs. mass media, advertising on buses and radio, TV vs. sponsorship, events/festivals, social media and public relations.
- f) 'Fit for purpose' information based on sensory and culinary analyses,

recommending some end-use for different prawns species and form based on sensory and culinary attributes (e.g. whether they're frozen, thawed, various sizes, peeled/not peeled etc.). An end user education strategy should be developed.

- g) Background analysis for development of a quality assurance standard for Australian prawns. The need for a standard was identified and will be developed as a separate project aligned with the present project.

However, as the strategy development costs were underestimated, little of this research has been undertaken. Project (a), information on all Australian prawn species was completed and draft information sheets were developed (see Appendix 18).

Appendix 18: All Prawn Species: Preliminary Summary - 14 pages

A summary of all prawn species is listed, including:

Banana Prawn, Black Tiger Prawn, Blue Endeavour Prawn, Brown Tiger Prawn, Eastern King Prawn, Greasyback Prawn, Greentail Prawn, Grooved Tiger Prawn, Red Endeavour Prawn, Redleg Banana Prawn, Redspot King Prawn, School Prawn and Western King Prawn.

Ethics approval was granted for the economic assessment project and the economic value chain model developed for finfish in CRC 2009/709, and was modified to make it suitable for collection of data from the prawn industry. This project is now ready to commence, however due to funding was not implemented as part of the current project.

4.0 Discussion

Unlike other primary industries, the Australian seafood industry has limited co-ordination on a national level. The industry is fragmented with several hundred seafood industry organisations. A national marketing and promotion body, national peak council or a national service body for seafood do not currently exist. The Australian seafood industry is characterised by a predominance of small businesses who tend to focus strongly on production with little interest or expertise in marketing their catch after harvest. These factors combine to limit the industry's ability to capitalise on market development opportunities and make any attempt to do so extremely challenging.

Against this background, in an Australian first, this project succeeded in bringing together two major industry associations, Australian prawn farmers and the Australian wild catch prawn industry to not only develop a national marketing and promotional strategy for Australian prawns, but also to voluntarily contribute funds for the implementation of the strategy. This collaboration and commitment to co-invest, is a turning point for an industry previously unwilling to work across sectors and provides a model for other sectors of the seafood industry to follow.

The project has been successful in developing a joint marketing and promotional strategy that industry has been prepared to support. Several factors contributed to the success and support of the project, notably:

- The independent management of the project through Curtin University by a Principal Investigator, who was well known and respected by both industry sectors, ensured the process was transparent and all members were well informed. This prevented any misinterpretation and circumvented any tension that may have arisen from perceived conflicts of interest and favouritism.
- Strong leadership from the Executive Officers and Boards of both ACPF and ACPF was invaluable to the success of this project.
- The entire project was designed to be inclusive and both seek input from industry and keep industry informed throughout the project
- The appointment of an expert in market strategy development, through a rigorous selection process, ensured there was a tangible and well-informed promotional product that the industry was confident to invest in.
- Finally, the provision of independent CRC funding which allowed industry contributions to be used solely for implementation activities contributed to the success of the initiative.

One of the key comments during the consultation was the need to deliver a quality product to underpin the 'Love Australian Prawns' messages developed as part of the strategy. As a result, a new CRC project (2011/747): 'Quality assurance standard for wild capture prawns' has now been funded. Quality assurance parameters and best practice prawn handling will be developed and extended throughout the supply chain as part of this new project.

The project has also resulted in other seafood sectors (e.g. barramundi and oysters) undertaking a similar strategy development process which may be funded by voluntary contributions. Similarly, the appointment of a marketing manager endorsed by both the FRDC and CRC Boards will not only support different sectors to implement market development strategies, but shall also grant the ability to facilitate changes to the PIERD Act, enabling mandatory collection of a marketing levy for the seafood industry.

5.0 Benefits and Adoption

The full extent of the success of this project can only be evaluated after all invoices are paid, and all promotional activities and the market impact are completed.

However, the benefits to date can be summarised as:

- Collaboration between the prawn farmers and the wild capture industry.
- Commitment by all members of the Australian prawn industry to work together to raise the profile of all Australian prawns.
- The project created a driver to further support the introduction of a mandatory seafood marketing levy.
- The project created a template for other seafood sectors in regard to market development activities.
- Confidence from the CRC to provide further funding for the Executive Officers of ACPF and APFA to support the implementation of the strategy.

6.0 Further Development

Further development included the collection of funding, and then based on the funds made available, the implementation of the strategy from August 2013. 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.

7.0 Planned Outcomes

Public Benefit Outcomes

A national prawn market development plan has been developed, with prawn fishers and farmers now working together to raise the consumer demand for Australian prawns.

The existence of the plan and the processes/protocols developed during the project has enabled leaders in the industry to encourage the establishment of a mandatory marketing levy.

The plan has driven the establishment and funding of a Seafood CRC project (2011/747) to develop a through chain (including consumers) quality assurance program for wild capture prawns.

Private Benefit Outcomes

The plan can be used by the Australian prawn industry to build consumer awareness of the complete range of prawn products (frozen and fresh) so that individual companies can build their brand, as well as support the whole category.

Linkages with CRC Milestone Outcomes

2.7 - Removal or reduction of barriers to seafood consumption

2.7.1 - Barriers to and drivers of seafood consumption identified in at least two new domestic or overseas consumer groups annually

2.7.2 - Individually tailored approaches to overcoming barriers trialled and evaluated in at least two new domestic or overseas consumer groups annually

8.0 Conclusion

The project resulted in the development of a national prawn market development strategy to be implemented using a voluntary levy. The aim of the marketing strategy was to:

- Increase the value and volume for Australian prawns
- Increase desire for and desirability of Australian prawns
- Give Australian prawns a special place in the eating habits of Australians.

In a transparent industry-driven selection process, Brand Council were appointed to develop the strategy and the subsequent implementation plan. The strategy was launched during October/November 2012 and a subsequent marketing forum in Sydney in March 2013 prioritised the promotional activities, with an early focus on independent fishmongers.

It was agreed at the industry meetings that funding to support the implementation should be collected by a voluntary contribution from prawn producers across Australia. The minimum funding amount, to have an impact in the marketplace, was set at \$500,000.

A supplementary agreement to manage the funding and implementation process has been signed between FRDC, CRC, APFA and ACPF, and a Management Committee has been formed to oversee activities. Invoicing to collect the funds has commenced, with the national launch occurring the week of August 28th 2013.

Management and governance protocols are in place. The project has resulted in prawn industry commitment to support changes to the PIERD Act to enable collection of a mandatory levy. Other sectors have also used the model to develop their own market development strategy.

In brief, this project has successfully completed its ambitious objectives and delivered both a strategy and the funds to implement it.

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