

# **Maximising Opportunities for Scottish Seafood in Asia**

## **Industry Feedback and Strategy Review Aug 2013**

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# Scottish Seafood in Asia – Industry Feedback

## Methodology

- **Research with a cross-section of Scottish Seafood Industry representatives conducted during the period 5 – 16 August, 2013**
- **12 face-to-face interviews (using pre-agreed discussion guide)**
- **5 telephone interviews (as above)**
- **Survey Monkey questionnaire (37 responses)**

# Scottish Seafood in Asia – Industry Feedback

## Current Programme

- Early days – but broad support for the initiative
- Targeted at appropriate audience
- Widespread recognition that Scotland is too small to have a fragmented approach
- Reasonably successful programme for salmon but still relatively low awareness in market – a huge amount of work still to be done
- Recognition for the need of a mechanism to convert increasing awareness into actual sales – implications for HIE / SE / SDI
- Only about 50% of the Scottish Seafood sector aware of the current programme – improved marketing within Scotland required

# Scottish Seafood in Asia – Industry Feedback

## Positive Aspects

- **Work with chefs**
- **Exhibitions (particularly when a kitchen and whisky tasting are also included)**
- **Learning Journeys (as part of SDI's Asia Strategy which provides direct support for these activities)**
- **Inward visits by key influencers (although these visits would be even more successful if participants represented all aspects of the supply chain)**
- **Team attitude at exhibitions / trade shows**

# Scottish Seafood in Asia – Industry Feedback

## Negative Aspects

- **Communication of programme and future events – provide companies longer lead times to enable future planning**
- **Not meeting ALL key sales influencers (see previous slide)**
- **Political interface not as strong as it could be**
- **Awareness of cultural issues e.g. cooking methods at exhibitions; retail pack sizes etc**
- **Future events should include a wider representation of the supply chain (Industry more aware of the complex import and distribution networks in Asian markets)**

# Scottish Seafood in Asia – Industry Feedback

## Suggested Changes

- Introduction of Industry-led joint awareness raising committee
- Engage in more “pull” activities e.g. PR (which may be better undertaken by local agencies who have a better feel for the market in which they are located)
- More political support, particularly for China
- Target ALL sales influencers
- Establish a commercial presence in target markets

# Scottish Seafood in Asia – Industry Feedback

## Impact of WACs

- Relatively low cost to develop global awareness
- Chefs have massive power in Asia
- Broadly supportive but no identifiable impact to date
- Need more PR in both Asia and Scotland
- Waste of time from pelagic perspective
- Bring finalists to Scotland en route to / return from Stavanger

# Scottish Seafood in Asia – Industry Feedback

## Effectiveness of Current Activities (Survey Monkey responses in priority order)

Exhibitions / Trade Shows	1	Social Media	2
Seafood Weeks	3	Tastings	4
Marketing Toolkit	5	Inward Visits	6
WACs	7	Point of Sale Materials	8
PR	9	Networking Receptions	10
Web Presence	11	Consumer Advertising	12
Educational Events	13	Trade Advertising	14

- The results above broadly represent the views expressed during the personal interviews with the exception of Social Media (rated lower)



# Scottish Seafood in Asia – Industry Feedback

## Target Countries in Priority Order

### Country

China

Hong Kong

Japan

Singapore

Malaysia

South Korea

Vietnam

Taiwan

### Comments

Shanghai (best logistics)

Chengdu (processors)

Very price driven

Not as price sensitive

Good marketing hub

- Target emerging markets to achieve penetration before Norway

# Scottish Seafood in Asia – Industry Feedback

## Target Sectors

- **High-end Food Service**
  - **High-end Retail**
  - **Processors**
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- **in-store / restaurant tastings will prove important**
  - **Scottish Weeks (possibly in conjunction with other food and drink products)**
  - **utilise both “push” and “pull” marketing activities**
  - **needs to be Industry-led**
  - **possibly needs a certification scheme**

# Scottish Seafood in Asia – Industry Feedback

## Meaningful Uniqueness

**dependably excellent seafood from the cool, clear waters around Scotland**

- What does Scotland mean in Asian markets?
- Must consider political and cultural influences
- Certification could help – one poor exporter can spoil things for everyone else

# Scottish Seafood in Asia – Industry Feedback

## Suggested Activities

(Survey Monkey responses in priority order)

Activity	Comments
1 Exhibitions / Trade Shows	HOFEX most important include learning journeys introduce to potential customers kitchen / chefs on stand include Seafood Bars
2 Inward Visits	bring key influencers to Scotland
3 Web presence	messages must be clear web links to producers
4 Seafood Weeks / Roadshows	will need careful co-ordination generate more PR more commercially focused

# Scottish Seafood in Asia – Industry Feedback

## Suggested Activities

Activity	Comments
5 In-store / Restaurant Tastings	sampling vital Chef's Tables
6 Point of Sale Materials	
7 PR	increase expenditure
8 Marketing Toolkit	
9 Social Media	establish LinkedIn Group may need presence in China
10 Networking Receptions	
11 Trade Advertising	
12 WACs Sponsorship	drive to achieve more PR spread use of species

# Scottish Seafood in Asia – Industry Feedback

## Suggested Activities

### Activity

- 13 Consumer Advertising
- 14 Educational Visits
- 15 Other

**NB** Sponsorship of WACs received a much higher rating in the face-to-face and telephone interviews, the result above reflecting the profile of Survey Monkey respondents.

The table which follows highlights the broad agreement with the current programme of events as the means by which to promote Scottish Seafood in future programmes

# Scottish Seafood in Asia – Industry Feedback

## Current Programme

Exhibitions

Social Media

Seafood Weeks

Tastings

Marketing Toolkit

Inward Visits

WACs

Point of Sale Materials

PR

Receptions

Web Presence

Consumer Advertising

Educational Events

Trade Advertising

## Proposed Activities

Exhibitions

Inward Visits

Web Presence

Seafood Weeks

Tastings

Point of Sale Materials

PR

Marketing Toolkit

Social Media

Receptions

Trade Advertising

WACs

Consumer Advertising

Educational Events

# Scottish Seafood in Asia – Industry Feedback

## Suggested Activities - Comments

- **Need to understand supply chain better**
- **Commercial manager / team located in market (Industry prepared to provide financial support)**
- **Ministerial visits key in China**
- **Wider / earlier communication of activities required so that companies can build into their promotional plans**
- **Raise commercial awareness of Scottish companies**
- **Target ALL sales influencers and help Scottish companies get in front of them**



# Scottish Seafood in Asia – Industry Feedback

## Potential New Activities

- Consolidation of shipments to help smaller companies
- Develop flagship Scottish restaurant in each target city and promote heavily
- Piggy-back on success of whisky companies in Asia
- Develop “Doing Business in.....” bible for each target market
- Help companies build and maintain relationships (Scotland is better at relationship marketing than Norway)

# Scottish Seafood in Asia – Industry Feedback

## Measures

- **Collect export statistics directly from companies on a monthly basis – an “honest broker” will be required**
- **Measure “churn” of companies exporting to Asia and associated growth trends**
- **Regular perception studies – chefs / wholesalers / distributors**
- **LinkedIn polling**
- **Media exposure in each target market**
- **Subjective feelings of SDI Executives in target markets**
- **Set specific objectives for each activity to enable subsequent measurement**

# Scottish Seafood in Asia – Industry Feedback

## Wider Implications for Future Consideration

(Comments outwith the remit of the current project)

- **Produce Industry Structure report for each target market and make available to companies; update annually**
- **Push innovation more, particularly for aquaculture**
- **Provide more help with implementation of export plans**
- **Developing direct transport links with China would prove symbolically important**
- **Help smaller companies address the risks associated with export credit and currency exposure**

# Scottish Seafood in Asia – Industry Feedback

## Wider Implications (continued)

- **Provide commercially-focused reports following trade shows – identify potential customers**
- **Help qualify enquiries from Asian markets**
- **Explore logistics opportunities through Glasgow Airport**
- **Develop smaller pack sizes for Asian consumers**
- **Personalise mailshots / presentations to qualified customers**