RURAL INDUSTRIES RESEARCH
& DEVELOPMENT CORPORATION

Marketing the Australian Native Food Industry

A report for the Rural Industries Research and Development Corporation

by Vic Cherikoff
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Foreword

The net worth of the Australian Native Food Industry is variously valued at between $10 and $16m and growing in spikes and swings with impetus from food service opportunities provided by the Olympics and a growing awareness by Australians in regional cuisines and a continuing overseas interest in Australia, primarily at retail level. Additionally, the level of food innovation in Australia is at a high with native foods introducing a uniquely Australian signature to otherwise international dishes and products.

The production of native food has steadily grown over the last 5 years. However, demand has not matched this growth and some growers have already been re-assessing their involvement and reducing numbers of plants, scaling down plans or abandoning them altogether. In order to address this imbalance sooner rather than later, research into the broader food industry's awareness, attitudes and current perceptions of native foods was undertaken to ascertain whether the image of the category needed to be re-positioned. Additionally, an industry strategy was to be explored in an attempt to align efforts in addressing the image change and future marketing directions.

This report was developed following interviews, consultation and surveys with relevant stakeholders in the four main native food growing areas of Australia, northern New South Wales, south east South Australia, Victoria; and south east Queensland. The study demonstrates that there is an industry image change required which better suits the sophisticated culinary scene in Australia. There is a range of options available to continue to drive the change and build opportunities for native food growers and the food industry.

This project was funded from RIRDC Core Funds which are provided by the Federal Government and is an addition to RIRDC's diverse range of over 450 research publications, forms part of our New Plants Products R&D program, which aims to facilitate the development of new industries based on plants or plant products that have commercial potential for Australia.

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Peter Core
Managing Director
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About the Author

I have been generously credited with pioneering the post-Aboriginal, Australian native food industry, following my nutritional research into native foods in the 1980s. Working with a loose network of passionate bushfood devotees who were cultivating various local species, it was a matter of identifying and then commercialising most of what is now the available food service range.

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The researcher wishes to thank Liz Dangar of Dangar Research Group, Sydney who, through applying her own knowledge and the resources of her team, kindly donated a significant amount of time and effort above and beyond the contracted consultation.

Abbreviations

AGA	Aridland Growers Association
AQIA	Australian Quandong Industry Association
ARBIA	Australian Rainforest Bushfood Industry Association
DRG	Dangar Research Group
QBC	Queensland Bushfood Co-operative
RIRDC	Rural Industry Research & Development Corporation
SBA	Southern Bushfood Association
SESAA	South East Sustainable Agriculture Association
SVBN	Southern Vales Bushfood Network

Contents

Executive Summary

The bushfood (native food) industry covers plant and animal products which are derived from Australian indigenous species. The main focus in this report is on the plant products. The native food industry is now at a hiatus needing a uniform and firm image and positioning. Several species are in oversupply and cottage users cannot absorb the excess product nor can specialty manufacturers. The current native food range is also generally unsuitable for the fresh fruit market due to the fast ripening times (short shelf-life) and the intensity of taste in most of the products. There is obviously the problem of lack of knowledge of use as well.

Demand must expand to the middle market with some urgency and mainstream products established using the impetus of the Olympics, which provides a strategic link to continued overseas expansion. As identified in RIRDC Research Report No 97/22 and also in the Victorian Food Industry's Indigenous Food Processing Feasibility Study 1999, the determination of the current perception of native food and re-positioning as necessary, is crucial to developing successful marketing strategies.

This study focused upon the two markets of food service and manufacturers, which are the volume areas for short to medium returns. Building these markets indirectly addresses the more difficult (and expensive) task of educating the general consumer. Additionally, a strategy has been presented for consideration by the industry in an attempt to align efforts in addressing the image change and future marketing directions.

The current status of native foods was assessed amongst influencer (chefs and food media) and consumer groups using interviews. Additionally two surveys were conducted, one to chefs and the other to native food industry members to gain data on their perceived status of the category and their preferred industry directions.

The overall outcome of the research is encouraging: All the indications are that native ingredients have considerably more market potential if appropriate strategies are used. The whole category not only needs a new name, it requires a new positioning which must imbue native foods with a number of values for modern consumers: These include prestige, modernity, food interest, flavour appeal and a growing pride in local produce. Additionally, the foods collectively, offer a uniquely Australian dining experience.

Another prime barrier to overcome with native foods is lack of visibility and accessibility. Even though some ingredients may now be impinging upon consumers' consciousness, the perspective on the overall category generally remains very blurred and certainly few would know where to access products.

While some opinion leaders are keen on native ingredients, there is still considerable work to gain more credibility and particularly to fire the enthusiasm and imagination of chefs. The issues are more complex than sheer awareness, although in the final analysis, they basically come down to two fundamental problems which need to be addressed – imparting prestige and furthering the education of use.

Effort is now needed to increase the profile of the native food industry and establish the industry's preferred image.

1. Setting the Scene

1.1 Introduction

Native food includes plant and animal products which are derived from Australian indigenous species. However, the main focus in this report is on the plant products since non-plant foods include the more conventional seafood and less so, the game meats. These industries already have peak bodies and are well advanced in developing policies and plans for their members. Interestingly, the kangaroo industry which has a representative national peak body also provides a warning for the native food industry since the largest processor and exporter of kangaroo meat and other kangaroo products is not a member of the peak body.

To limit the scope of the research, no sectors of the non-plant industry were involved or included in this study. Similarly, no Aboriginal issues of ethics, involvement, opinion or responsibility were addressed. The above notwithstanding, this research into the existing and preferred image for the industry did broach the contribution to image of both, Aboriginal culture and the game meat industry.

Native foods are now an established industry variously valued at $10 to 16m per annum, although the industry has reached something of a watershed in terms of achieving economically sustainable growth. New momentum is required to protect current investments and to warrant on-going research and expanded production. It is therefore necessary to develop an effective strategy to increase demand amongst ‘influencer’ and consumer groups.

While native ingredients are now consistently included in the menu repertoires of a wide cross section of chefs and have featured in a number of new products launched by major food manufacturers, there is a need to broaden the market further into the mainstream. Playback from consumers as well as chefs and media, is required in order to gain clear insights into the status and image of the category and to identify a relevant and powerful positioning which will drive the market forward.

Looking back, the outback feel and gimmicky terminology (bushfood, bush tucker) which was adopted for the initial introduction of products has proven very successful at gaining significant and on-going media attention for the last 18 years. This exposure has been with all forms of conventional media and more recently, the Internet has responded equally well. For example, one informational web site which provides links to many other industry bodies’ sites, consistently receives in excess of 40,000 hits per month, mostly from overseas and presumably from some surfers at least, who have searched using the words ‘bush’, ‘bushfood’ or ‘bush tucker’. This legacy of nearly 2 decades should be handled carefully as the overseas market may still be relating to circulating coverage under established images or following the ‘bronzed-Aussie’ styles of Paul Hogan’s Crocodile Dundee, the ABC’s Bush Tucker Man and more recently, the Crocodile Hunter. Thus, there are still many driving forces from which all industry players can benefit.

However, the goal is now to review the positioning of the industry’s image and if necessary, to re-position it to meet the more sophisticated and informed food market of the new millennium. This applies equally to local and overseas markets. Furthermore this re-branding needs to be effected on a very limited budget in view of the nature of the native food industry. Most native food enterprises are typically, poorly funded, small to micro businesses, often only part-time or a small part of a conventional agricultural or food distribution activity.

The two markets of food service and manufacturers are the volume areas for short to medium returns and building these markets, indirectly addresses the more difficult (and expensive) task of educating the general consumer. Additionally, larger manufacturers will (hopefully simultaneously) leverage marketing exposure in product specific promotions. Trickle-down effects to smaller, cottage or specialty retail product manufacturers will add to this sector of the native food industry and ultimately lead to economies of scale and further industry growth. Volume is the prime constraint for the retail, value-added, native food producers, which results in high prices in comparison to conventional supermarket lines. This is then compounded by use ignorance of the products and the mixed messages of whether these ingredients are bushy, traditional, kitsch, quaint, novelty and faddish or stylish, modern, unique, authentic, distinctive, desirable and sophisticated.

In terms of timing, there have been small but significant wins by several players in the industry. For example, three native food companies' products sold in to Sainsbury's Supermarkets in the U.K. Several other companies have secured markets with equivalent multiples in competition to the aforementioned supermarket. More food media are beginning to recognise and promote the need for Australians to embrace our foods before they are commercialised overseas etc. Additionally, native ingredients are back in vogue with competitors in international culinary competitions as well as in overseas promotions of Australian produce across the board adding to the exposure of our flavour resources and our chefs' creativity. Several manufacturers have also recently and successfully added native twists to products launched in foods, beverages and cosmetics.

Much of the impetus stems from the Olympics but it must be maintained well beyond September 2000. It has been said that the progression for new concepts is firstly, that they are talked about, then ignored or dismissed, then criticised before eventually being adopted. Native food appears to be at the penultimate step and the adoption of findings of this research will assist in realising the many opportunities for the future. On an optimistic note, the adoption of native foods could be considered as a 'grass phenomenon'. Compare the slow penetration of facsimile machines and the widespread dependence on them by business to the meteoric rise of e-mail amidst the fanfare of the wonder of new technologies. Another example is the penetration of Kikkoman's products into the US market. Rather than an explosive introduction as with Japanese automobiles, Kikkoman's food products make a slow and untroubled move in to the market riding food trends of Asian cuisine acceptance and the preference for lighter meals. Native foods are beginning to become ingredients as any other food flavour and are used where appropriate. Unfortunately, the grass phenomenon is so slow a process that many current players in the industry may not survive unless industry action accelerates the uptake of product across the category. This research is aimed at ascertaining the preferred imagery for the native food category to gain the most effective uptake and continued promotion of native foods.

Without native flavours, what do we have to offer anyone wanting to experience the authentic tastes of this country?

2. Methodology

2.1 Consultants research

2.1.1 Food media and chef interviews

To address the need to obtain information from those who are key players in the food industry, telephone interviews were conducted by consumer researchers, Dangar Research Group in Sydney. Participants were chosen as those who were prepared to participate and were a subset from a selection of influential chefs in Sydney and Melbourne who were grouped as either, users or non-users of native food. Similarly, influential food media representatives from both cities were selected as pro or against the concept of native food.

	Sydney	Melbourne	Total
Leading chefs – users of native ingredients	3	3	6
Leading chefs – non-users	4	4	8
Total	7	7	14
Food media	4	4	8
TOTAL	11	11	22

2.1.2 Consumer focus groups

The consumer groups researched covered four demographics:

- Males and females, aged 30-50 years, who eat out regularly, have an interest in cooking and regard themselves as ‘foodies’.
- Males and females, aged 25-35 years, who have no children, are working and have a moderate interest in trying new foods.
- Females, aged 25-40 years, non-working with a high interest in trying new foods for home consumption.
- Females, aged 40-55 years, working, moderate interest in trying new foods for home consumption.

In total, 32 consumers were used in the group research. Product positioning statements used in the qualitative work is presented in Appendix 7.4.

2.2 Researcher Surveys

2.2.1 Survey of native food industry members

Each of the associations currently representing the native food industry was sent survey forms to be forwarded to their membership. The associations participating were ARBIA, SBA, SVBN, AQIA and AGA representing most states and territories except WA, NT and northern Qld.

See Appendix 7.1 for the survey form used.

2.2.2 Survey of chefs

Surveys of 200 chefs were sent out via fax and email with a response of 53 returns (predominantly from Sydney, rural NSW and Brisbane).

See Appendix 7.2 for the survey form used.

2.3 Comparative industries reviews

To contribute to a strategy for the native food industry to consider, several similar industries were analysed. These were the mushroom growers (Greg Seymour, General Manager, Australian Mushroom Growers Association, pers. comm.) and the kangaroo industry associations since they provide relevant and recent models to address the issues facing the native food industry. Additionally, by way of comparing a similar food product category, the experience of Kikkoman Australia Pty Limited was used based upon an interview with its then Australian Managing Director, Mr Takehiko Nishizawa and a review of the publication, The Kikkoman Chronicles.

2.4 Discussion of methodology

The scope of the project and what became a limited budget (relative to fully and statistically analysing the entire industry's needs) necessitated some changes to the methods initially proposed in the research application. Research effort was focussed into qualitative research on consumers, influential chefs and food media in Sydney and Melbourne to be conducted by Dangar Research Group (DRG) and the quantitative survey work on industry members and chefs in Sydney and Brisbane. On close scrutiny, the database on Melbourne chefs for survey was found not to be comparable to those in Sydney or Brisbane and so was excluded from the quantitative review. This was on the basis of their general lack of familiarity with native foods and their limited future need for them. There was also a marked difference in the various establishments in which they worked (generally the café market and academics rather than restaurant chefs as in the Sydney and Brisbane databases). However, Melbourne chefs who could be considered as food influencers (along with media) were included in the qualitative research by interview conducted by DRG.

The planned focus group interviews of chefs and food manufacturers needed a modified approach. Chefs were a very difficult population from which to get a representative sampling into one room at a scheduled time. Additionally, under advice from DRG, manufacturers, even from generally different industry segments, would be reluctant to agree to focus group participation where the possibility existed of divulging information on developing concepts or policy in group situations with competitors or outsiders. Hence, focus group workshops or extensive one on one interviews were therefore either inappropriate or cost prohibitive.

The research did not assess the views of manufacturers via direct studies as planned. This part of the study was abandoned due to the small size of the sample population. The uptake of native ingredients by those manufacturers considering their inclusion at the time of the grant application was grossly over-estimated. As a result, native ingredients have not yet penetrated sufficient manufacturing markets to allow feedback of informed opinions. More importantly, two native product ranges, those from Bushells and Norco were deleted in late 1998 due to (in one instance) foreign directives to local management as to ingredient selection policy and a business restructure in the second case, respectively. Still more recently, Goodman Fielder abandoned its Bush Bread range due to changing supply arrangements with Woolworths. These deletions shrank the population of manufacturers available for survey or interview and undoubtedly slowed the development of new native food products by other manufacturers. Fortunately the setbacks have been temporary and there are again, several new native flavoured products as well as several entire native flavoured product ranges appearing on supermarket shelves or in the process of being launched. Overseas supermarkets and multiples have also shown great interest. Some products have been unexpectedly highly successful and supply issues are becoming critical to the on-going vitality of the manufacturers.

However, it is apparent that manufacturers, generally still need to be positively influenced by other high profile and commercially successful collections of native flavoured products appropriately branded to maximise uptake. As the category image changes to the industry-preferred position, it is predicted that a growing number of manufacturers will recognise the value in the new Australian flavours and accelerate the growth of the category and hence, the industry across the board.

The choice of DRG as researchers has had an added benefit in that they are relatively informed about native foods. As a result, other research commissioned by sundry manufacturers has included the concept of utilising native food ingredients. This has provided significant feedback to DRG of market opinions of relevance to this project without the need to fund the work directly. This contribution has not been valued in the project's budget but would amount to an industry contribution in-kind of the order of $50,000 based upon the cost required to independently fund the research to gain this intelligence.

3. Survey Results and Discussion

3.1 Industry Member Surveys

Notwithstanding the small population of participants in the two surveys (one to the members of native food industry associations and the other to chefs), they were highly targeted and could be expected to be motivated to reply. Hence the following analysis and impressions of results are presented. It should be noted that most of the views are those as expressed by respondents without interpretation or qualification by the researchers. Copies of the forms completed were sent back to each of the Associations (ARBIA, AQIA, AGA, SBA, SVBN and QBC) for their own reviews. Only the latter did not respond as a group due to lapsed structure as a representative organisation. It should also be noted that since the time of writing, ARBIA has also disbanded as an association. However, as a by-product of this research there were numerous teleconferences between representatives of each of the then extant groups and the researcher, intended to better involve each of the parties in the research progress. The communication and feedback greatly promoted increased collaboration and a more unified approach to the future of the industry. This suggests that realising the strategies of this report and a general commitment to the recommended tasks will be achievable.

3.3.1 Population and response

There were 74 respondents including 41 growers and 27 intending growers. This response came from a target population of 2300, most being canvassed twice with various covering letters urging the completion and return of the survey form. The population is skewed by the 1500 copies of the survey disseminated through the Australian Bushfood Magazine and perhaps the true target population is closer to the total membership of ARBIA, AQIA, AGA), SBA, SVBN and QFC i.e. approximately 800 (excluding some members being in several organisations). Considering the last total, the overall response to the survey was 10%, which is a very high result from a direct mail/fax survey.

Income from bushfood production was generally small with 34 out of 40 (85%) currently with turnover less than $10,000 per annum and with one member each in the $50-100k and $100-500k groups, being 2.5% each.

Interestingly, 37% (16 out of 43) planned an annual turnover of less than $10k, 18.6% expected between $10 and 50k. 11.6%, 7% and 2.3% corresponded to $50-100k, $100-500k and >$500k, respectively.

The period to which the planned turnover related was not precisely specified. However, it was implied as a short-term projection from current plantings (or planned plantings) reaching maximal yields. This suggests that the industry will continue to grow relatively slowly and remain skewed in the current make-up with several large players and numerous small and part-time producers. With successful creation of market opportunities, the distance between large and small players will widen.

	Less than $10k	$10 to 50k	$50 to 100k	$100 to 500k	>$500k
Current income	85%	0	2.5%	2.5%	0
Planned income	37%	18.6%	11.6%	7%	2.3%

There were roughly equal numbers of growers of less than 2ha as there were more than or equal to 2ha (28:22). 52 of 59 respondents (88%) are using or plan to use organic production methods and 91% are growing multiple species (mixed systems). Environmental benefits were stressed and seen as an important marketing plus along with positively perceived nutritional values, therapeutic uses and distinctive tastes.

3.1.2 Imagery and branding

Over 60% are or plan to be incorporating tourism into their bushfood ventures and the impression was gained from comments that preferred terminology and imagery associated with these ventures was legitimately pioneer, bush tucker, Australiana, Aboriginal etc. This tourist focus could still accommodate other images depending upon locality and target market.

Branding is or will be important, reflecting region, quality and/or organic nature of productions. 50% will or plan to value-add their produce along these lines. Local grower groups and local processor liaisons were considered important fitting in with the greater food industry's marketing push of regionalism.

3.1.3 Markets and marketing

The export potential is considered to be greater than local opportunities where direct selling is preferred (only 20% opting to use distributors). This may change as businesses grow and the simple logistics of growing, value-adding, running a tourist venture and exporting become areas of specialist endeavour. Expectations of e-commerce are high and half the respondents had email addresses. The Olympics were considered as a major opportunity.

More than 85% of respondents would be prepared to contribute to regional co-marketing promotions but less than 60% would support national efforts. In seeking the form of contribution to this supported marketing effort, less than 50% of participants considered a donation as the preferred means to fund these promotions. Less than 30% preferred a marketing fee and fewer still (<20%) a royalty. Considering the typical planned turnover given above, financing any promotion at all will need to be more creative than professionally funded. Additionally, any promotions (in the view of 50% of respondents) are best coordinated through regional associations (43%), a national body (35%), product-specific groups (14%) or allied organisations (organic growers, wholesalers etc) (8%).

3.1.4 Terminology

'Native Australian food' or Australian native food' was the overwhelming term of choice.

Preferred terminology and imagery amongst respondents was very clearly skewed towards native Australian. Considering that 'native' can still have some negative images i.e. primitive, unsophisticated, and the terms, Native American and Native Canadian are already well established in the U.S. vernacular, the form, native Australian food may need further consideration. Perhaps where the link with Native Australians is a benefit the terminology can be used otherwise Australian native food could be the generic term, particularly in Australia. However, for the purposes of this analysis, the term used in the survey was native Australian food.

By ranking the surveyed preferences using 'native Australian foods' ranked as 100, the relative support for each of the terms becomes clear:

1. native Australian foods (ranked as 100)
2. bushfood (42)
3. modern Australian foods (26)
4. bush tucker (22)
5. wild foods (20)
6. vogue (8)

The preferred image was further qualified as not to be aimed too up-market but still focussed on quality and equivalent to the best conventional produce, for example, fine culinary herbs and exotic tropical fruits. The ‘Australian’ in native foods should be clearly used as a marketing tool being one of pride and with value-added products, reasonable pricing. Notably, quality of flavour is important. ‘Customers may buy a gimmick once but will only come back for quality and value’. The point should be made that the advantage of claiming Australian as a qualifier to differentiate native product from imports needs to consider the perception of what is Australian. By way of example, David Jones’ Department stores uses the term ‘Uniquely Australian’ in their hamper catalogue to describe a 12 product hamper where the only truly Australian ingredient is a jar of smoked macadamia nuts. The Ausbuy campaign has not been as spectacular a success as economic logic demands that it should have been. There is little doubt that what is and what is perceived to be Australian is not always concurrent. Similarly, the word ‘native’ has little relevance to the general public who often regard pineapples and mangoes as Australian natives. Pizza Hut occasionally promote an Aussie pizza with the singularly down market image and inclusions of ham and fried egg. McDonald’s and other fast-food and corporate advertisers are no better in this regard, joining in the downgrading in value of a generic ‘Australian’ brand and muddying the concept of what is really uniquely Australian.

3.1.5 Education and information

In regards to some more qualitative questions, industry members expressed their need for more information and projections on demand, accurate technical information, more industry cohesion and generally, wider communication throughout the industry. These issues were also raised in past industry reports. The Australian Bushfood Magazine was mentioned as a valuable means of conveying this information. This last point is pertinent since despite the wide need for information there appears little commitment to funding its accumulation and dissemination.

It was recognised that the availability and familiarity of a range of products was important to the uptake and popularisation of native Australian foods (Native foods). Industry members wanted a greater availability of product, particularly in supermarkets and fresh food markets and identified a need for wide promotions e.g. TV ads and easy recipes frequently appearing in the popular magazines e.g. Women’s Weekly etc. Again, there were no direct indications of who would fund these promotions. In contrast, native foods were an occasional inclusion in the diet of 28 out of 54 respondents (52%) with 33% considering them regular foods. Most, if not all respondents, said they encouraged the consumption of native foods to their friends (5 did not) yet 70% did so only with their own productions. Less than 50% of respondents encouraged trial of branded manufactured products. While the corollary of this is that over 50% did not encourage experimentation with available native food products, there is an important lesson to be learned from the kangaroo industry. Animal liberationists in Europe several years ago, effectively used the argument that if Australians did not all regularly consume kangaroo meat why should overseas markets embrace the product as desirable?

All industry members are in a unique position to test and provide feedback on the currently available manufactured products. If a product is considered tasty (hopefully delicious), convenient, value for money or in other ways positive, it should be promoted as such and feedback provided to manufacturers as support (or criticism, if appropriate). There is clearly a case for the industry needing to pull itself up by its bootstraps.

3.1.6 Sources of information

New ideas on food sources were, in decreasing order of importance, cookbooks, friends and family (recommendations), TV cooking shows, magazines (notably Gourmet Traveller and Vogue), the Internet, other magazines (Good Taste, New Idea, Women’s Weekly) and other sources (recipe cards, point of sale information).

This order was different for chefs (see following) and suggests that promotions will need to be targeted widely given unlimited funds or else highly focussed at niche markets considered significant and resulting in leveraged effort. An example could be the food service market with flow-on down through to early adopters and then to the general consumer. Alternatively or additionally, to influential higher socio-economic consumers and on to niche export markets.

3.2 Chef's Questionary

3.2.1 Population and response

There were 55 respondents from faxed and hand-delivered surveys going to 390 food service outlets in NSW and 97 in Qld. Initial grouping was to be by establishment (hotel, restaurant, caterer, club, colleges, cafés etc) but the small numbers in each group could not justify segmentation. The survey results showed an encouraging return of 11%. This was certainly aided by having a researcher repeatedly asking busy chefs for their completed survey forms. In hindsight, perhaps the number of questions could have been reduced in order to reduce the time needed to fully complete the responses.

3.2.2 Terminology

Native Australian or Australian native food was again the overwhelming term of choice.

More than 70% of chefs chose native Australian foods as the preferred descriptor for the ingredients identifying stylish, modern and uniquely Australian as important qualifiers. Those chefs in tourist-focussed establishments (5%) maintained the terms, bushfood and bush tucker are appropriate, acceptable and desirable.

The group surveyed, could be described as informed on native foods as most had been receiving regular faxed updates on existing and new products, applications and events of relevance to the researching company but not necessarily all were users of native foods. Most were 'comfortable' with some ingredients but still lacked familiarity of regular use, describing themselves as using them occasionally to rarely. Interestingly, more than half thought native foods could become everyday ingredients.

Amongst those chefs who did not currently use native foods regularly, the **influencing factors** over a decision to use native foods as a concept (ignoring the effect of non-use due to unfamiliarity of the ingredients) were ranked as follows, in order of decreasing importance:

1. a perceived conservative customer base (74% of chefs not currently using native foods, considered their customers' attitudes were a significant influence)
2. management and peers had little influence
3. 60% of chefs responded that food media have no influence over their choice of using native foods

3.2.3 Product qualities

The importance of the qualities of native Australian foods and food products were assessed. More than 80% knew of the many value-added native foods available for food service. The qualities chefs consider as most important were rated between 1 (unimportant) and 10 (very important) and averaging the responses rate 8 or higher. Results obtained were as follows:

1. consistency (76%)
2. cost-effectiveness (73%)
3. flavour (69%) and versatility (69%)
4. reputable manufacturer (65%)
5. convenience (64%)
6. labour saving (56%) and
7. consumer tested (44%).

3.2.4 Sources of information

Using a similar ranking of 1 (never used), 5 (used occasionally) to 10 (often used), chef's sources of information on culinary influences and new ingredients were as below. Again, scores higher than 8 were averaged:

1. from their own experimenting (72%)
2. cookbooks (66%)
3. retail magazines (65%)
4. trade magazines and other chefs (63%)
5. specialty stores (58%) and
6. the Internet (20%).

3.2.5 Learning options

The preferred source of experience with new ingredients was from courses by experts, followed by experimenting with samples and then publications. Less than 30% of responding chefs were aware of the TAFE courses on Australian native cuisine and few had staff who had attended them.

There were some noteworthy **comments** given:

- Eating out is becoming more common with diners looking for new tastes.
- Menus should not challenge the diner.
- If native Australian foods are presented as tourist foods they will not be (readily) accepted for local consumption.
- More food establishments (should) take up native Australian foods as after all, we the food industry, should represent this country for what it is and for what it can offer consumers. (Gerhard Rist, Executive Chef Manly Pacific Hotel, Sydney).
- More high profile chefs should use the ingredients in fine dining so the public get used to seeing them and know the flavours. (Jeff Turnbull, ex-Executive Chef, Reds Restaurant, Sydney)
- Bushfood (native food) is now playing a major part in the development of modern Australian cuisine. The flavours are unusual and exciting. I will always use them and highly recommend them to my colleagues. (Jaff Nazim, Executive Chef, Heritage Court Restaurant).

4. Discussion of Interviews

4.1 Positive attributes

All of the chefs and food writers who participated in this study had at least some knowledge of the category and of various individual ingredients. The foods are, after all, thought to have been available for "10 to 15 years".

Those chefs who had tried native foods were mainly introduced to them by suppliers. Those who had not used them were more likely to have gleaned some level of awareness through media publicity of successful users, industry 'osmosis' and the restaurant scene.

While there is an overall recognition of the category and some, if varying, experience with it, few really appreciated the full repertoire or had a truly close working knowledge of its multiple offerings. There is real scope to improve familiarity across the board.

One of the key rewards of native ingredients, highlighted by their supporters, is the opportunity they afford to produce a uniquely Australian food experience. The scope to leverage this further, even amongst non-supporters, is flagged by the fact that all identify strongly with the country's strong and growing reputation on the food scene.

Native foods are praised for their versatility, lending themselves to both sweet and savoury dishes. Wattleseed and lemon myrtle, perhaps the most commonly used of the native ingredients, are the most notable examples here, given their suitability for ice-cream as well as breads and desserts as well as in seasonings, coatings, cheeses, yoghurt and sauces. Bunya nuts also fit this category; their application is sometimes compared to that of chestnuts in desserts and savoury dishes.

There is an opportunity for native ingredients to assume a role in the dynamic and innovative culinary climate in which professionals take such pride. (The strength of Australia's flourishing creativity in the area of food and wine is underscored by the fact that the wider base of consumers is aware of it too.) International kudos, whether personally achieved or derived through mere association with the hub of creativity, is predictably something to which these opinion leaders aspire.

The fact that native ingredients have the capacity to expand their credentials amongst professionals is also implied by the encouraging playback of the response of overseas chefs and journalists to these foods. It is said that top French chefs and critics from the US and Japan have been greatly impressed by taste sensations unique to this country. It is thought that this reaction, if well known, has in itself, the power to influence Australian writers and chefs.

Those chefs who are the most committed to native products perceive them as an important addition to their ingredient repertoire and believe that they offer a genuine and rewarding difference to certain dishes.

The overall outcome of the research is encouraging: All the indications are that native ingredients have considerably more market potential if appropriate strategies are used.

- There is at least a segment of top class chefs and influential food writers who are enthusiastic about and strongly believe in native foods, which they see as underdeveloped. This is critical since it is very clear that there is a powerful top-down impact on the broader market's food adoption trends.
    * Australians are eating out more (and not just fast food). They are particularly frequenting small cafe style restaurants, bistros and brasseries in far greater numbers

and are inevitably swayed by the dishes they encounter. These sorts of establishments are, in turn, alert to the trends amongst the top chefs.

  * Consumers' food tastes and their experimentation with food are also quite significantly moulded by the popular media: Food journalists, both print and television, are one of the bridges between the trend setting chefs and the community at large.

- There is strong interest at the consumer level in "the new bush flavours". Admittedly, this is greatest amongst those with a keener interest in food (the foodies). However, their early adoption of the new often migrates to the broader market, even if sometimes simplified. Many food trends could be used to carry native flavours into the mainstream. Some of these trends are discussed in Appendix 2.
- The category has inherent distinctive and powerful values, which could be further exploited to better advantage; those opinion leaders who support native foods, focus on two essential and strong benefits which should underpin wider marketing activity.
  * A number of the ingredients are perceived to have real food interest. In particular, their flavours, which range from the delicate to the intense, are thought to be distinctive and highly palatable. Other sensory cues are also mentioned (eg. the vibrant aroma of, say, lemon-myrtle or the visual allure of rosella). Once these qualities are discovered, it is felt that they will appeal to the creativity and drive to individual invention amongst chefs.
  * Native foods are also thought to have the capacity to bring another dimension, an exciting and unique Australian flavour to the country's rapidly evolving cuisine. This is widely recognised by both professionals and consumers alike, as innovative and possessing considerable flair.

While some opinion leaders are keen on native ingredients, there is still considerable work to do here and particularly with chefs and food media. Chefs have a critical role in shaping tends as opinion leaders and firmly believe that restaurants are the first vehicle for change. Similarly, food writers play a significant part in moulding public perceptions. The support of these groups will be critical to the success of native foods.

A few of the top echelon chefs claimed to be unfamiliar with suppliers and specialty outlets. Their view was that "it's out there as a term but not a product". Chefs claimed they might be encouraged to experiment more were they approached and offered samples as they are by producers of other foods. Again this is puzzling as many wholesalers have individually, jointly and in association with mainstream and specialty food distributors, participated in trade shows, Master Classes, introductory short courses and demonstrations over past years. Opportunities for chefs to discover, experience and embrace the concept or even selected ingredients have not been rare. Several high profile chefs occasionally use native ingredients but few promote their use. It must be assumed that many top chefs have been influenced more by the positioning of the current image of native ingredients than a lack of knowledge of or opportunity to try them.

The search for new ingredients is driven by a number of needs, both emotional and rational. In a world that is "crying out for new flavours", a fresh taste sensation revitalises creativity and provides the stimulus to develop new dishes. Perhaps the sheer numbers of new Australian native flavours available since the mid 1980s has totally overwhelmed most chefs who may be disarmed at the research they would need to do to discover applications themselves. Interestingly, most native food suppliers provide inordinate amounts of support literature, run courses and offer assistance to make the learning curve as steep yet as simple a process as possible.

Some chefs claimed that if they came across a new ingredient that takes their fancy, they would often undertake further 'research', typically consulting traditional or contemporary books looking for inspiration for the ingredient's use. Comparable information for native foods has always been available but the first step of 'taking their fancy' may have more often been the missing element to precipitate similar commitment.

There are chefs who are highly unlikely to ever have much use for native ingredients maintaining that they have a commitment to a particular style of cuisine and a determination not to stray from what they believe is the path of authenticity (*sic*). This is an interesting stance to make. Not long after kangaroo meat was legalised for consumption in eastern states, numerous Chinese restaurants included various cuts in their menus adapting it to their own style. Other restaurants similarly work new ingredients into the framework of their characteristic cuisine and in effect, do what has always been done over time. Italian cuisine generally, embraces the South American tomato (to follow pasta made from Egyptian wheat) and South American coriander is almost a signature for Thai cuisine. The spread of civilisations around the world has been fuelled by the spice trades as herbs and spices moved from the Orient to Europe and from the Americas out to around the globe as well. Entire industries were then created as these flavours (and fragrances and then medicines) were blended, then enhanced and finally synthesised into today's wide range of industrial ingredients. The spread and incorporation of native Australian foods is simply the next and most modern step. The great chefs of old obviously experimented with new ingredients as they became available and to presume the traditional cuisines were totally rigid is to ignore history. Hence misinformed comments such as:

> *"I'm obsessional about the integrity of Thai ... I've got books that are 150 years old and most of the ingredients you can get here now."*

> *"I really love traditional French and Italian. To put wattleseed in a classic French dessert just doesn't make sense."*

It may be informing as to how these chefs would attempt to explain the use of vanilla originally from Mexico in a classic crème brulée or the wide use of chocolate from the Mayas, Toltecs and Aztecs in French and Italian desserts. Perhaps more could be made from the observation that it took nearly 100 years for chocolate to be accepted by Europeans following Columbus' discovery in 1520. Traditional cocoa bean use by natives was ultimately adopted following the modifications of adding sugar and other flavours and the formulation into its present-day form. Similarly, the Italian obsession with coffee, also from South America adds to dispelling the idea that classic cuisines were limited to local ingredients and regionally static.

The growing Australian chauvinism will greatly assist the acceptance of native ingredients. After all, world cuisines have all borrowed from the spice trade beginning with the Egyptians in 3500 BC with cinnamon, cassia, cardamom, ginger and turmeric. Then the spice trade spread through from the Middle East to the eastern Mediterranean and Europe via Arab, Chinese, Indian, Phoenician and Roman traders and later, the Portuguese, Dutch, French and British. Spices came from Indonesia, Malaysia and other parts of Asia, Sri Lanka and the sub-continent, some parts of Africa and eventually from the Americas post Columbus. Black pepper currently tops the spice market followed by chillies and cardamom. To date, Australia's contribution to this multi-billion dollar industry is insignificant.

Clearly, the resistance to the adoption of native foods is more than simply their difference or newness. Perhaps if native ingredients were to be considered simply as commodities, their image and value could escalate by association. It would then be up to the commodity traders and the huge number of ingredient-hungry, creative chefs around the world to assimilate Australian flavours into dishes rather than depend upon a handful of local devotees pushing the development of an authentically Australian cuisine to an unreceptive audience.

The desire to stay with tradition was not the main deterrent amongst the majority of those interviewed chefs who were bypassing the products. In practical terms, the problem often boils down to lack of motivation to experiment.

4.2 Inappropriate terminology

If native ingredients are to be popularised and flourish, there are a number of inhibitions and barriers to overcome: Critically and fundamentally, an unequivocal finding is that "bush foods" and especially "bush tucker" are inappropriate terms. They inhibit the growth of the industry as they prompt several negative or inappropriate connotations. 'Australiana' is another term with mixed appeal and could be included in the inappropriate term category.

To some, these terms bring up the idea of Aboriginal foods and indeed it is observed that this link is at times, promoted by the media. This association is criticised as misplaced although it is insisted at the same time, that this is not based on ethnic prejudice but possibly more on ignorance. It is unfortunate that there is not an appreciation of the elements of Aboriginal cuisine. The art of cooking in, at the edge of or under an open fire, ground oven cooking, paperbark smoking, the traditional use of aromatic herbs and even the presentation of foods is rarely publicised. The researcher was once served a meal of roasted mud crab claw (cracked and ready to eat), a barbequed catfish steak, a piece of grunter (similar to bream) and a coal-baked tuber all steaming hot and presented on a platter of large fresh leaves. The appearance, freshness and the hint of smoke in the meats from the fire made the dish spectacular and far more interesting than dozens of restaurant meals concocted by chefs. On another occasion, a dish made from paperbark cooked stingray, flavoured with its own coal-cooked liver again provided all the organoleptic qualities considered absent by those ignorant of Aboriginal cooking methods. The growing respect for many aspects of Aboriginal culture is a modern trend but it is apparent that this does not stretch to empathy with diet which, even allowing for misunderstanding and shortfalls in knowledge, is tied to images of witjuties, goanna and "roots and things". Even though chefs and food writers concede, on reflection, that perfectly acceptable foods like kangaroo and fish *(and lobster, oysters, abalone, mussels, cockles, yabbies, eels, native geese, wild mushrooms, macadamia nuts, emu etc)* are actually part of traditional Aboriginal repertoire, the overall lack of affinity remains.

An even more common link with "bush foods" is campfires and the swagman's 'tucker' and this too is a far cry from the desires of a modern, cosmopolitan palate. Moreover, it in no way represents a traditional cuisine steeped in respect as might be the case with say, the simpler peasant dishes of countries like Italy, Greece or France.

There is a low quality, "touristy" overlay on anything "bush" when it comes to food. This in turn has gimmicky and faddish implications that are anathema to the sophisticated tastes of the more elite opinion leaders.

However, some food categories suit the pioneer or outback image, for example, there is the past success of the Bush Breads of Australia. There will no doubt be others. Additionally, tourist markets find these labels entirely appropriate maintaining opportunities for boutique product ranges. Chefs and food writers are familiar with these labels and strongly resist them, insisting that a more contemporary image is needed. Supermarket consumers are no less dismissive of these descriptors when it comes to everyday foods:

- They have a parochial and "touristy" ring, which undermines the integrity of the products and positions them in a backward-looking, gimmicky mould.
- "Bush food" has inherent overtones of "survival in the wild" (underscored by the activities of adventurer, Malcolm Douglas and more recently, the Army's "Bush Tucker Man"). There is a link with survival (I'll eat them when I need to) foods and not to appealing, modern, sophisticated foods.

From a number of descriptors assessed, Native Australian Foods (or Australian Native Foods) appears to be the most positive. It does not necessarily come across as a new term but

still has an authentic ring and readily fits with the idea of natural or wild herbs, spices, fruits and nuts.

4.3 The need to reposition the category

The whole category not only needs a new name, it requires a new positioning. The first area looked at was the opportunity to link the foods to their Aboriginal heritage. However, while there is certainly increasing interest in and respect for many aspects of indigenous culture, this does not extend to food. Mainstream Australia has no affinity with many of the images conjured up by Aboriginal diets – kangaroo, goanna, witjuti grubs and a nebulous array of 'yams and things' – and they have few taste cues and little appeal. Additionally, there is no general knowledge of the culinary styles of the various Aboriginal groups and even less appreciation of the many methods they used to prepare their foods. Unfortunately, it is clear that the association with Aboriginal fare is not the way to go for the broader native food industry. There is undoubtedly still opportunity for Aborigines, themselves, to bring their cuisine styles into the public mind along similar lines to the Maori hungi. Traditional earth oven and paperbark cooking, ingredient pairing (eg. meats with fruits) and so on, will in time, redress the public's complete lack of awareness of Aboriginal culinary history. This study may equally provide some insight to the possible imagery for these endeavours which will probably remain as opportunities for Aboriginal groups in tourist establishments for some time.

If the opportunity for native ingredients is to be seized, according to the influential chefs and food writers, there should be greater cohesion within the native food industry. Fragmentation was thought to be very counterproductive at a time which is ripe for dynamic and imaginative marketing. Opinion leaders also observed that a shift in emphasis was needed in the promotion of native ingredients: Industry figures are too often seen to promote products rather than the creation of a culinary ethos around the category - the much-needed selling of a food experience. These comments are puzzling indeed when most articles and wide publicity gained by the various industry sectors (growers, wholesalers, processors, educators and promoters) over the last decade could rarely be considered as commercial and hard selling. Information, not advertising is what makes editorial coverage free. Too often the criticism could have been that industry aspirations for a widely accepted, native ingredient based, Australian cuisine has found little support from the culinary establishment, probably due to the now well accepted, culinary cringe. The food experience has often been the focus of media coverage but it has not been the exquisite flavours which were highlighted but more the concepts and imagery of the presentation. In some ways, the boredom with the mundane prompted swings towards the outlandish rather than a concerted effort in subtly value-adding the everyday with uniquely Australian ingredients. Even today, the gimmicky bush tucker labels to stories on the creative efforts of upmarket establishments are hard to shake.

It should be said that it has been the general press who has largely insisted on portraying the gimmicky and unusual for shock value. Certainly, the 'let's see the witjuti grubs for the photo' has been as tiresome as common even up to recent times. It is now time for the industry to actively resist the urge to 'do grubs' and reject the notion that all PR is good PR. However, it is recognised that the free coverage of this emerging industry is what has supported the growth to its current status and there is little doubt that all the fledgling businesses are highly appreciative of the free publicity received from a cooperative press.

4.4 Visibility of the products for consumers

Even though some ingredients may now be impinging upon consumers' consciousness, the perspective on the overall category at a consumer level, generally remains very blurred and certainly few would know where to access products. This has an inhibiting effect on food editors who are reluctant to run articles with ingredients "people can't buy". An interesting comparison is that of Japanese ingredients which grew to become supermarket lines after years as being only procurable through less than a dozen specialty outlets, nationally. Japanese cuisine has also not been as visible as a restaurant choice (except at the top end of the market) until recently and sushi, sashimi and bento boxes have appeared as take away food items of appeal to fat-conscious consumers. Sushi is now a common inclusion in cocktail function foods of many caterers and is supplied both hand or machine-formed, by specialist manufacturers for a wide market. Interestingly, they now enjoy almost fad status and a position reflecting the freshness and quality of our seafood as much as a classic dish in its own right. Soy sauce and wasabi are the traditional accompaniments to sushi and sashimi and few would venture past this pairing today. However, soy sauce has made the leap into other cuisine styles as an all-purpose seasoning. Thus we have seen signature items become mainstream (or more so) and at least one (soy and possibly teriyaki) product move from totally cuisine specific to broad end-use.

For Australian native foods to raise their visibility and galvanise interest in the wider consumer market, a multiple approach must be taken.

- Products should be available in supermarkets and ideally introduced via in-store demonstration and sampling. Here is an opportunity for the native food industry to utilise the advertising expenditure of the larger manufacturers while promoting the category itself.
- In this context, packaging must be modern (ie. not "cute", gimmicky or overlaid with old "bushie" images). It also needs to promise a new and exciting taste experience and suggest simple and obvious product applications.
- This study may be relatively small but, very encouragingly, consumers were attracted to quite a few different products with evocative flavourings like wild lime, native pepperberry and lemon myrtle. However, it is essential that any new products are good quality; some sub-optimal lines, more gimmick than quality, have had a detrimental effect on the category amongst those who have tried them.
- The introduction of "hero" products, which can easily be incorporated into everyday cooking practices. With appropriate publicity, these would give the category impetus.

A new positioning must imbue native foods with a number of values for modern consumers: These include prestige, modernity, food interest, flavour appeal and a growing pride in local produce. Additionally, the foods offer a uniquely Australian dining experience. Something along the following lines would be in order:

> *"Native Australian fruits, nuts and greens, aromatic herbs and pungent spices have tantalising unique flavours ideal for our modern food styles. They offer new, delicious taste sensations and enhance the quality and bounty of the country's produce and the innovation of our talented chefs."*

4.5 Seasonality issues

An interesting consideration is the function of seasonality for chefs. A joy of food is, for example, captured by the first of the season's crop of various fruits and vegetables. An interesting anomaly exists here. Chefs appreciate seasonality, in fact, it is a plus as it flags locally grown food and carries positive associations of the natural food cycles. Yet the interruption of supply of say, bush tomatoes, can raise indignant complaints and comments of "how do you expect me to use them when I can't always have them on the menu?" Undoubtedly, more education on the nature of the ingredients and their availability will assist in providing confidence of use. Unlike more conventional ingredients, for example, mangoes, stone fruits, asparagus and various fresh herbs and wild mushrooms etc., only 2 or 3 of the three dozen native species commercially available ever present challenges of year-round supply. Additionally, those chefs who only want to use fresh fruits and herbs have little understanding of the nature of wild produce. Fruits are picked at their peak and snap frozen to preserve the usually intense flavours and halt the characteristic quick ripening which would rapidly render the produce useless. The supply of fruits which are slow ripening or picked un-ripe and then artificially ripened simply for convenience may still be developments for the future. At the moment, supporting what is currently available means that the industry can grow and later respond to end-users' needs. Ultimately, the use or not of native foods will come down to the perceived benefits for the chef concerned. If recognised as modern, trendy, stylish, innovative and popular then they will be embraced. If the image is counter to preferred outcomes then no amount of logic will convince chefs to use them. We will continue to hear comments of "I'll use them when I can get them at the markets, fresh, glacéed, puréed, blended, bigger, sweeter, juicier" or other numerous justifications.

4.6 A lack of reference

Cookery training has always been via the passing on of the knowledge of generations of similarly trained chefs guiding apprentices through an accepted routine methodology. It has been suitable for imparting the traditions of regional cuisines based upon the use of a limited number of local foodstuffs. New ingredients could be adopted over time and slowly incorporated even to the extent of eventually being integral to that cuisine. Experience for chefs is the accumulated wisdom of recipes and techniques of world cuisines and an understanding of the classic ingredient blends and preparation methods. However, in the early 1980s, a collection of several dozen new Australian native foods was introduced to an unprepared market. There were no widely documented, long-taught methods of using native ingredients such as those which support Western and Asian foods and disseminate knowledge about the traditional harmonies of flavour. In Australia, the TAFE system now has native Australian cuisine course modules available through national curricula and native ingredients are part of commodity coursework in the early years of commercial cookery but educational processes are slow. It is also suggested that the historical, empirical method of learning is fast becoming less appropriate. Now that fusion cuisine is a modern global trend and new ingredients will continue to be introduced ahead of the emergence of a complete cuisine, a more structured approach is needed. A model of the science of taste and flavour interactions with principles of combining flavours considering human physiology and taste perception could perhaps more effectively provide an understanding of the principles of use and any new food. This would facilitate the assimilation of new and cross-cultural ingredients into existing frameworks of culinary methods.

The upshot of the absence of a learning approach and an established knowledge pool is that chefs are thrown back entirely on their own devices in mastering a creative use of these foods by trial and error. A few continue to experiment with using native foods but with diminished enthusiasm and confidence. Others claim to have been put off native ingredients by poor food experience, either from their own serendipitous trials or in restaurants and as a consequence, have simply not bothered to pursue them. There are strong indications that native foods are not always presented to their best advantage. Fortunately, a growing number of creative chefs still persist with learning about applications. They recognise that these flavours present food professionals and consumers with the same potential as a whole new set of colours would to an artist.

Interestingly, the study of the applications of native ingredients if applying a scientific approach can also assist in improving culinary skills across the board.

By way of example, one chef surveyed in this study commented:

> ***"Bush tomatoes add quite an intense dimension but are far too strong on their own. You've got to mellow them back with brown sugar and vinegar."***

This is way off the mark of 'technical correctness'. In order to compensate for the intrinsic bitterness which is characteristic of bush tomatoes, chefs need to understand that salt, not vinegar or sugar, is what mellows these fruits. Sugar and vinegar tend to balance each other on the tongue and would contribute little net taste to the finished product. Salt balances bitterness and can bring out the flavour of many native foods including wild limes, lemon aspen, bush tomatoes as effectively as when used with eggplant, olives, Tequila, bitter greens and bitter melons. Thus, bush tomatoes, for example, are best used as a flavouring, adding a few percent of bush tomatoes or akudjura (the ground form of bush tomatoes) to other ingredients (ordinary tomatoes, polenta, mixed vegetables, sauce base etc). The resultant flavour is then balanced by the judicious addition of salt to mask bitterness and bring out the caramel notes also present in bush tomatoes.

4.7 The role of food distributors and chefs

While opinion leaders are led by their natural curiosity to take the initiative and hunt down new ideas, industry also plays a part. It was said that these foods simply do not have enough visibility and are just not prevalent in the well-worn ingredient supply routes. Chefs are accustomed to suppliers and specialty wholesalers taking a proactive role in approaching them and providing them with samples. Nationally, native ingredients have been available and easily accessible through most large and mainstream food service distributors but native foods are a small range within vast numbers of conventional products and so they get little marketing attention. Creating demand from chefs and a marketing push from distributors are important links in the educational chain as many chefs do rely on suppliers to introduce newly available ingredients and to suggest ways of using them.

It was admitted that 'reps' originally introduced chefs to most new foods which then find their way onto menus. Naturally, new ingredients must deliver if they are to secure on-going use in regular repertoires. Not only do chefs tend to cook what they love to eat themselves but also the dish will not remain on the menu if clients do not respond positively. Chefs must ensure that ingredients marry well with other flavours yet contribute their own individual and distinctive characteristics. Perseverance with ingredients that are expensive or difficult to use will depend upon the relative result compared to the nearest alternative, assuming there is one available. Generally, once the 'rules of use' are understood, native foods are easily made cost-effective, distinctive and totally unique and present no difficulty to experienced chefs. The important point to make here is that an understanding of the ingredients themselves is crucial to their success. Using too many ingredients in the one dish can be confusing to the palate and unnecessarily costly. Most of the ingredients are best considered as flavourings and used as such, in small quantities. Additionally, concentrating the flavours into distinct parts of a dish is an effective usage rather than attempting to create a mono-flavoured, one-pot dish or saucing every component of the dish under the impression that if some is good, more is better. There is little doubt that as chefs learn to use native ingredients well, the image of the category will also improve as consumers will be presented with strikingly flavoursome dishes of well-balanced and complementary components forming part of a unique Australian food experience.

5. Communication Strategy

5.1 Industry critical success factors

To develop a communication strategy to adopt an appropriate marketing image as a contributing factor to the success of the industry per se, it is valuable to consider 12 critical success factors as identified in a RIRDC report on the Marketing of New Animal Products. These factors are relevant to the native food industry which has passed (or is just passing) the speculative stage. This should shed light on the avenues of adoption of a new industry positioning.

The critical success factors are

1. an effective industry association
2. adequate funding at the commercial stage
3. an efficient production capability
4. an efficient processing and value-adding capability
5. a market-driven product specification and quality assurance regime
6. an effective trading and distribution mechanism
7. an effective market development program
8. a brand oriented marketing and promotion strategy
9. the ability to dispose of all production at economically viable prices
10. managing the transition from speculative to commercial stages
11. an adequately funded and well run R&D function
12. effectively dealing with bioethical (cf cultural) issues

To address these points in turn:

1. The native food industry has effective regional associations but is yet to develop a national representative body. While such a body would provide the vehicle for effective implementation of the findings of this report and future challenges, industry members can still take action, individually. Producers, marketers and the existing associations, via their end products, promotions and terminology could effect the changes outlined in this report. Some areas for action are given in the following section.
2. and 10. Funding is still an issue for nearly all industry members, from associations to processors, marketers and distributors. The industry has already seen the flux of under-capitalised ventures including restaurants, distributors, processors and growers. However, as numerous players are moving from the entrepreneurial to established business structures, the commercialisation of native foods is clearly and irreversibly underway. Funding of R&D in production issues and marketing opportunities is still a matter of urgency and better industry consultation of proposed research projects is needed. Comments from media interviewed in this project were directed at some lack of cohesion in the native food industry in the past. As a means of addressing this issue, it is recommended that all key players be involved in assessing R&D projects in order to maximise the use of limited funds and to better prioritise the industry's commercial needs. This could be effected through teleconferencing which, as mentioned, is effective in enhancing co-operation through better communication amongst industry members.
3. and 4. Production, processing and value-adding capabilities are beginning to enjoy the benefits of economies of scale with the concomitant reduction of end-user prices. Quality issues need to be addressed still but the industry's general adoption of organic methods, economic and ecological sustainability and clean and green concepts can form unique selling positions in competition with non-native produce. These can drive the image change and continue to provide export opportunities following trends in the rising demand for organic produce.

5. The image of native ingredients has certainly been enhanced in industrial markets as manufacturing inclusions meet with standard manufacturing practice. Product standards are also being set by producers through competition on quality and also by authorities in some cases eg lemon myrtle oil. Also, as native foods expand into foreign industrial markets, recognition by other countries' authorities provides credibility to the category, generally. This recognition includes classification as foods or flavourings, per se, imposition of import duty rates, commodity code assignments and so forth.
6. and 9. Most native food products are traded and distributed through existing channels by conventional food distributors and wholesalers. As previously discussed, more effort is needed in promotions by these distributors and the change of image and category positioning can only help in addressing this critical success factor. One threat does exist for the industry concerning distribution and also issues relating to success factor 9. This is that producers should be fully familiar with the elements in the distribution chain when attempting to build markets for their farm produce. For the long term prosperity of the industry, the costs of establishing, promoting and nurturing markets should be realised and adequately costed if product is to move directly from farm to manufacturer.
7. and 8. The outcomes from this project show the image and positioning for future growth of the native food industry. To escalate growth, the native food category, with suitably modern, trendy imagery, should be promoted through leveraged effort and funds from industry members and those in the broader food sector as well. Once a category is established and positioned in consumers' minds then the promotional dollars from retailers and manufacturers along with assistance from renewed media interest can provide significant momentum to expand demand.

This study did not set out to explore overall food trends. Nevertheless, a number of factors did emerge in terms of current product usage and the response to native foods. These findings (backed by other DRG research) serve as useful background for developing marketing strategies and are presented in appendix 7.3.

12. There are cultural issues which will ultimately need to be addressed as the native food industry grows. The prevailing strategy to date, is based upon the moral obligation we have towards the indigenous people of this land while avoiding the paternalistic and disempowering handout. This has been to invest time and resources in making the opportunities afforded by a thriving native food industry clearly accessible to Aborigines and assisting wherever possible. As a result, there are many more Aboriginal chefs now contributing to a modern Australian cuisine. Numerous communities and Aboriginal enterprises are firmly established as food suppliers (both collectors and farmer/horticulturalists). Some are value adding their produce and marketing it widely, conventionally and through e-commerce. Native foods now add value to other cultural endeavours eg art and music presentations. The re-branding, as suggested in this report, of native foods, their image, terminology and positioning can be a significant benefit to Aborigines. The fusion of the unique flavours of this ancient culture with ingredients borrowed from other lands in a contemporary food style, allows for all Australians to participate in the development of a home grown industry.

5.2 Implementation of the image change for the Australian Native Food Industry

Following are some strategic needs to address the evolving image of the native food industry:

To:

- embrace the industry image change and begin to effect the shift as an industry
  * new products, promotions and organisations should reflect the new image
- promote the use of the new terminology e.g. native Australian or Australian native foods, phasing out the old terms and avoiding anything with "bush" unless locally or operationally appropriate (tourist or Aboriginal ventures)
- consider the effect of mixed messages in terminology, consider new names be introduced for the industry associations themselves
- foster active industry participation and support in image repositioning e.g. all communications, promotions and branding should reflect the creative strategy
- reposition the category to reflect the following values:
  * taste appeal, versatility and everyday use
  * innovation, creativity and easy use
  * clean, green, organic, healthy, nutritious
  * pride in Australian produce and cuisine
- build the following image values into the category:
  * prestige and contemporary nature
  * food interest and taste experience
  * sexy and stylish
  * international flavours but unique to Australia
- continue to review current trends – 'Hooks and hang-ups'
  * while the use of native foods in menus can be a subtle incorporation of new ingredients, their flavours must be showcased and not masked through poor or token usage
  * move communications from gimmicky to sophisticated
  * separate the foods from traditional culture i.e. focus upon modern applications rather than traditional ones
  * separate the native food flavours from game meats i.e. co-promote if appropriate but do not share the same category in the consumers' minds
  * stress production by cultivation or managed wild harvesting e.g. promote organic farming methods used, ecological sustainability, clean and green, wide geographical area of source etc
- react to, counter and overcome any negative image makers i.e. *all* industry members should respond to correct local, public criticisms e.g. commentators denigrating the concept, media belittling efforts. Turn each negative into a promotional tool.
- identify and proactively lobby key media image makers at a national level
- gain objective third party endorsement of the native food industry e.g. Meat and Livestock Australia, Australian Pork Corporation, the National Heart Foundation, local wet market instrumentalities (e.g. Sydney Markets Ltd, Seafood Authority), Australian Macadamia Association, wine companies, State and National instrumentalities and allied food associations and use the regional and specific food programs they promote.
- link the new image with the perceived benefits of the products e.g. Australian industry, competitive edge, new tastes, unique food experience, trend-setting, uniquely Australian
- identify the factors which will increase consumption e.g. the image itself, industry champions, chauvinism as Australian, clever concept worthy of support, products mirror other food trends e.g. compare to the explosion of pesto and sun-dried tomatoes, inclusion in home meal replacements, merging with current cooking styles, add-ons to existing trendy lines. All industry members

should also promote and use the currently available products themselves to assist the industry in 'pulling itself up by its bootstraps'

- identify barriers to increased consumption e.g. cuisine, unfamiliarity, difficulty of access. As with all luxury foods, native products suffer their highest competition from the simple effect of not being top of mind. Products need to be continually promoted using the benefits derived from the adoption of the new image.
- make native food simple, accessible and visible for consumers:
    - push manufacturers to include ingredients as innovative, differentiating flavours to existing mainstream products. Industry members to support and recommend these initiatives and potentiate their success.
    - organise national promotions at a retail level e.g. National Australian Native Food Week, Australia Day, Wattle Day, etc
    - participate collectively at trade food shows eg International Catering Trade Fair and the Fine Food Shows and co-operate at international promotions
    - get native ingredients on the food pages in the popular press (chef and media support plus consumer accessibility are pre-requisites to widespread coverage)
- emphasise the quality of the native and native flavoured products.
    - ensure the flavour of processed products is as appealing and distinctive as possible. Pay heed to the preceding recommendations on packaging imagery.
    - get some fresh produce (e.g. warrigal greens) in-store
- recognise health and functionality as important (early) opportunities
- educate consumers i.e. both food service and the general public. Include contemporary, stylish recipes in relevant publications e.g. colour glossy magazines, trade journals, newspapers, supermarket magazines. Strengthen the category's 'authority' (in food terms). Promote the existing training curricula in schools and colleges and other avenues of education on ingredient characteristics and flavour harmonies. Use restaurants and manufacturers as the delivery vehicles to leverage the education of use. The focus should be to demystify native ingredients by pairing uses with familiar foodstuffs or promoting value-added condiments e.g. sauces, dressings, seasonings.
- identify and recruit industry champions – several representatives from different regions and within regions should be enlisted rather than relying upon a single spokesperson in order to avoid problems of loss of authority, credibility or regard etc
- review and reassess the new image and these strategies regularly to maintain their relevance to changing food trends
- support the initiative of forming a peak industry body to ensure that the industry speaks as a dynamic, cohesive and professional unit. Alternatively, maintain the communication between major regional representatives and disseminate the results of these discussions widely eg via regular press updates, continued media exposure and RIRDC's website. Additionally, co-operative marketing between established companies using the imagery as defined, can also be mutually beneficial, particularly in overseas markets where costs of representation are significant.

6 Conclusion

In all, native ingredients are lacking in prestige and it is not just in the name.

- While there may be scope to integrate these products into the new impetus of Australian cuisine, this has not really been achieved to date. At best, the category is on the sidelines which curtails its appeal to the ambitions of many of these professionals.
- Native ingredients are short on authority. While they are actually used to some extent by certain of the most lauded Australian chefs, this is not always recognised and any credibility benefit is diffused. There is no visible tide of enthusiasm amongst peers and there are no dedicated champions amongst the industry acknowledged "greats".

The category lacks authority. This is despite the fact that many of the top opinion leaders can see more potential in it. Moreover, the fact that certain top flight, even revered, chefs do use some native ingredients (but rarely mention it) is still not sufficient. There are still no recognised champions from the "inner circle". As a consequence, some opinion leaders consider the whole category short on prestige.

To gain more credibility and to fire the enthusiasm and imagination of chefs, consideration should be given to the following:

- The appointment of a spokesperson – a highly qualified and well regarded chef:
  - To act as a legitimiser of native ingredients by lending personal authority.
  - To help "educate" chefs and the media. An awareness of the natural companions of the individual ingredients needs to be credibly developed within the broad context of the contemporary 'fusion' cooking style.
- Running a major competition amongst chefs for invention of 'seminal' dishes.
- Setting up regular Master Classes or Chef's Dinners along the lines of the very well attended Le Torque Blanche in Melbourne.
- Mounting joint promotions with other produce suppliers to restaurants.

Despite these problems, the future outlook for native foods is not bleak. A majority (albeit with a few notable exceptions) are able to see beyond their present status and can envisage that, if promoted with sufficient flair and imagination, they could "catch on". It is reasoned that native plants are bound to yield up interest as they have in other countries if only their character can be harnessed.

The above framework, based on members' responses and opinion leaders' insights, provides the Native Food Industry with some clear guidelines for positive change. The project has ascertained the current image and the best or preferred alternative image and terminology to lead to a coordinated marketing approach for the industry in order to leverage collaborative promotional efforts of industry members. This image needs to reflect the sophistication and innovation of modern Australian food. Effort is now needed for the native food industry to increase the profile of the new image of the category, to realise many of the opportunities provided by the Olympics and beyond as well as build on the achievements of the past. The implementation of the findings of this research should significantly add to the confidence of mainstream manufacturers.

With the eyes of the world focussed upon us through the Olympics and ensuing promotions of this country as a destination for visitors and a land of opportunity for business, native foods have begun to play a part in contributing to global food resources. Repositioning their image and through the use of appropriate terminologies, native foods will continue to add to the unique character of Australian cuisine. Through some strong cohesive actions, this uniquely Australian industry has the ability to become a significant force in the Australian food scene both here and overseas.

7. Appendices

7.1 Industry member survey form

Dear Industry member,

You may well be all-surveyed out but ….

As you may know, RIRDC has funded a 2-year project titled ‘Marketing the Bushfood Industry’. It is being administered by Vic Cherikoff, from Bush Tucker Supply Australia with support from Gil Freeman of the Southern Bushfood Association and other regional groups. The aims of the project are:

- To determine the market’s awareness and current perceptions of bushfoods to ascertain whether the image of bushfoods needs to be re-positioned
- To determine an industry strategy to align efforts in addressing the image change and future marketing directions
- To define the critical considerations which motivate commercial customers to use bushfoods
- To assess the potential to link marketing strategies to other industries eg. wine, tourism, regionalism, organic produce
- To assess likely sources of support funding from government, private, industry and semi-government organisations

Most Associations (and The Bushfood Magazine) have co-operated to date in the dissemination of survey forms with costs covered by both, grant funds and industry contributions. The response so far, has been very strong. However, we would really like more answers so the timeframe has been stretched to give bushfood industry members another chance to have their say in describing the future of the industry. The results are important in determining our growth as an industry and how we are to become a real agricultural force in the economy. Don’t miss the chance to have your say.

The survey returns to date have been copied to each Association for their reference and to keep all parties informed of proceedings. The same will occur with this next survey release. It is worth mentioning at this stage, that the identification of yourself as respondent is completely optional although your town and state will be useful if you wish to remain anonymous. If you receive a second form and have already completed one then there is no need fill in another unless your situation or opinions have changed.

The surveys are only a part of a broader program which addresses the above aims. Qualitative consumer research has also been completed and reports will be forthcoming soon. The consumer groups interviewed were chosen to reflect the attitudes of their particular socio-economic status being higher influence groups, described as the top tier of experimental, adventurous and creative cooks and ‘foodies’ with a high interest in trying new foods. The results are sure to be of significant benefit to anyone promoting or value adding bushfoods. Even the words we choose to use in describing our native foods are being challenged.

The next areas to be examined in the short term, are the opinions of influential chefs and food media to address current and desired image perceptions of the industry, the foods and the concept. The latter two aims above will be researched next year.

Thank you for your time in replying and making a positive contribution towards a stronger future for the bushfood industry.

Vic Cherikoff

Bushfood Industry Survey (Please complete by 30/11/98)

Please forward the completed survey to P.O.Box B103, Boronia Park NSW 2111 or to the postal address of your association executive. Alternatively, fax it to 02 9817 3587. This survey form can also be found on the Internet at www.bushtucker.com.au

1. Are you a grower (☐ yes ☐ no) or an intending (☐ yes ☐ no) grower? **If no, go to question 9.**
2. What size is your existing bushfood planting? ....ha
3. What was your annual turnover from bushfoods last year (optional)? ☐ < $10,000, ☐ $10-50,000, ☐ $50-100,000, ☐ $100-500,000, ☐ over $500,000
4. What is your planned annual turnover from bushfoods (optional)? ☐ < $10,000, ☐ $10-50,000, ☐ $50-100,000, ☐ $100-500,000, ☐ over $500,000
5. Do you already or intend to incorporate tourism into your growing venture? ☐ yes ☐ no
6. Are you using organic methods of cultivation? ☐ yes ☐ no
7. Are you growing in mixed systems (multiple, integrated species)? ☐ yes ☐ no
8. Do you brand ☐ or intend to brand ☐ your productions individually ☐, regionally ☐, by virtue of quality of cultivation ☐ or processing ☐ or another concept ☐?............................
9. Do you value-add bushfoods to a finished product? ☐ yes ☐ no? If no, go to question 11. If yes, please describe..
10. Do you value-add in-house ☐ or by sub-contract to others ☐ or both ☐?
11. What image are you seeking to portray with your current product branding

☐ unbranded product	☐ country/pioneer/traditional
☐ bush tucker, bushy	☐ symbolically Australian
☐ Australiana	☐ stylish/modern
☐ purely novel	☐ other please specify................................

12. Why did you choose this particular image?
    ....
13. On a scale of 1 (**un**acceptable) to 10 (**acceptable**), what terminology would you like to see used in bushfood marketing in future? Please rank **each** of the following with your opinion.

bush tucker	....	bushfood	....
native food/flavours	....	modern Australian foods	....
wild food	....	vogue flavours	....
native Australian flavours	....	other (please specify)	....

14. What is the ultimate retail outlet you envisage would suit your products ☐ specialty store, ☐ health store or deli, ☐ tourist outlet, ☐ supermarket, ☐ other (please specify) ....
15. Do you plan to ☐ or already ☐ export?
16. Do you sell directly to your customers ☐, use a distributor ☐ or both ☐?

17. Do you have a website ☐ and trade on the web☐, plan to have one ☐ and plan to trade on the web☐, have an email address ☐?

18. Considering the consumption of your own bushfoods or other bushfood products available, are they regular inclusions in your diet ☐, occasional flavours ☐ or only rare additions ☐?

19. What would encourage you, personally to eat more bushfood?

☐ a better understanding of their uses
☐ more ready-made products
☐ better knowledge of what is available
☐ easier accessibility
☐ products with stronger flavours
☐ a better image
☐ other (please specify) ....

20. From where do you get ideas on new ingredients and dishes? (please tick options below)

☐ TV cooking shows
☐ Women's Weekly/New Idea
☐ cookery books
☐ Good Taste magazine
☐ cookery magazines
☐ Vogue Entertaining
☐ friends or family
☐ Gourmet Traveller
☐ in-store recipe cards
☐ the Internet
☐ international magazines
☐ other (please specify) ....

21. Do you encourage your friends to try bushfoods? ☐ yes ☐ no. Are the bushfoods you encourage those which you grow yourself ☐ or branded manufactured products ☐?

22. Would you be prepared to contribute to a regional co-marketing promotion within your region? (☐ yes ☐ no) What about to a national marketing authority? (☐ yes ☐ no)

23. Would you be prepared to pay a set marketing fee ☐, a royalty ☐ or a donation ☐ to fund this role?

24. Who would you like to take on this role? A regional association ☐, a national marketing body ☐, product specific groups ☐ (eg lemon myrtle growers), existing wholesalers ☐, allied organisations ☐ (eg. organic fruit growers assoc), other ☐ (please specify).............................

25. If you wish, please add any comments on the industry, its past, present or future.

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

Please provide your contact details or as a minimum, we do need your town or city and the state or territory in which you operate:

Name:..
Address: :...
email address:...
Phone number:.. Fax number:..

Thank you for your co-operation in returning the completed form by 30/11/98.
You can be sure your efforts will benefit this uniquely Australian industry.

7.2 Chef's Questionnaire

The bushfood industry (which is separate from the game meat industry) is conducting a survey of professional chefs to gain some insight into how native ingredients are currently seen, used and understood. Since their initial commercialisation in the early 1980's, bushfoods have become entrenched in the food service industry being used by restaurateurs, caterers, in hotels, clubs, airlines, cruise ships, railways and many other outlets. In order to keep abreast of trends and opinions and to keep growing this burgeoning food sector, the bushfood industry asks your assistance and contribution towards developing our native foods. Please take the time to complete this questionary and forward the form to P.O.Box B103 Boronia Park NSW 2111, fax it to us on 02 9817 3587. There is also a form for completion on our website at www.bushtucker.com.au/*. The results will be collated and conclusions published in a number of trade magazines and will form part of a report to Rural Industries Research and Development Corporation along with other marketing surveys being conducted.*

1. What best describes your operation?

☐ hotel (4/5 Star) ☐ special venue
☐ hotel (other) ☐ caterer (500pax +)
☐ restaurant ☐ caterer (< 500pax)
☐ café ☐ club
☐ other (please specify) ....

2. Position held:

☐ Exec chef ☐ Sous chef ☐ Owner/chef ☐ Head chef
☐ Apprentice ☐ other (please specify) ....

3. Locality: ☐ Melbourne ☐ Country VIC ☐ Sydney ☐ Country NSW
☐ Brisbane ☐ Country QLD ☐ Other ....

4. What are your major sources of influence for learning about new ingredients? Please rank **each** of the following on a scale of 1 (**never** used) - 5 (used **occasionally**) - 10 (**often** used)

own experimenting .... food magazines (retail) ....…............
other chefs ....……… food magazines (trade) ....….…..........
cookbooks ....….…...... the internet ....…...............
specialty food stores ....…....... other (please specify) ....…..............

5. Do you use recipes to adapt new ingredients to your cooking style? ☐ yes ☐ no

6. When introducing a new ingredient do you

☐ trial it on a 'specials' menu
☐ test it in-house on your colleagues and staff
☐ develop it into a dish and put it on your menu or
☐ do you have another strategy (please explain)?
....

7. Have you used any of the following:

native herbs or spices (akudjura, wattle etc) ☐ yes ☐ no
native fruits or nuts ☐ yes ☐ no
paperbark ☐ yes ☐ no
value-added bushfood products ☐ yes ☐ no
game meats and meat products ☐ yes ☐ no

8. How often do you change your menus?
   ☐ daily ☐ weekly ☐ monthly ☐ seasonally

9. Are you comfortable in using bushfoods as flavourings and ingredients in your cooking? ☐ yes ☐ no ☐ only with some flavours

10. Do you use bushfoods in your cooking?

	Now	In the future
Routinely	☐	☐
Occasionally	☐	☐
Rarely	☐	☐
Only in themed dishes	☐	☐
Only for themed events	☐	☐

11. Could you use bushfoods as flavourings in your typical menus as....

flavours for sauces, dips and marinades	☐ yes	☐ no	☐ perhaps
seasonings, stuffings, coatings and crumbs	☐ yes	☐ no	☐ perhaps
complements to conventional items	☐ yes	☐ no	☐ perhaps
garnishes and highlights eg. relishes, chutneys	☐ yes	☐ no	☐ perhaps
flavouring accompaniments (chocolates, cheese)	☐ yes	☐ no	☐ perhaps
enhancers to beverages (hot, cold, alcoholic)	☐ yes	☐ no	☐ perhaps

12. Do you use ready-made sauces (eg chilli sauce, tomato sauce), syrups or preserves (eg jams, oil marinated vegetables) as flavour bases in your cooking? ☐ yes ☐ no

13. Are you aware of available value-added ranges of bushfood sauces, syrups, preserves, seasonings, dressings, salsas, vinaigrettes etc? ☐ yes ☐ no.

14. On a scale of 1 (**un**important) to 5 (**very** important), please circle the qualities you regard as essential before you would consider using value-added bushfood products?:

	Unimportant				**Important**
consistency	1	2	3	4	5
convenience	1	2	3	4	5
preservative-free	1	2	3	4	5
distinctive bushfood flavour	1	2	3	4	5
versatility	1	2	3	4	5
reputable manufacturer	1	2	3	4	5
consumer tested	1	2	3	4	5
labour-saving	1	2	3	4	5
cost-effective	1	2	3	4	5

15. With the wide range of tastes and the versatility of native fruits, herbs and flavours, do you see them ever becoming everyday ingredients in the dishes you prepare? ☐ yes ☐ no

   If no, is it because they are:

   ☐ too niche ☐ hard to get
   ☐ too costly ☐ hard to use
   ☐ too unfamiliar ☐ other (please specify)...................................

16. Do you think the bushfood industry should present its products as (tick one or more):

☐ bushfood ☐ stylish, modern
☐ bush tucker ☐ native Australian
☐ Australiana ☐ other (please specify)...........................

17. What would be your preferred method of learning more about bushfoods?

☐ day courses by experts ☐ from your distributor
☐ half-day courses by experts ☐ from books, magazines etc
☐ TAFE or other college courses ☐ chef's tables
☐ trade shows ☐ from samples
☐ the Internet ☐ other (specify) ....

18. Are you aware of the TAFE course on native Australian cuisine offered in Year 4?
☐ yes ☐ no. Have you or any of your staff attended? ☐ yes ☐ no.

19. If you do not currently use native flavours, would you use them if you could overcome objections from conservative customers, management, peers and colleagues or the food media?
☐ yes ☐ no ☐ undecided

20. Which of the following have some influence over your decision in using bushfoods?

conservative customers	☐ yes	☐ no
management	☐ yes	☐ no
peers and colleagues	☐ yes	☐ no
food media	☐ yes	☐ no

21. In your opinion, how are the above sources of objection to using native flavours best approached and influenced?
....
....

22. Are there any comments you would like to make on bushfoods, their use and their future etc:
....
....

Please provide your contact details:

Name:...
Address:...
email address:...
Phone number:.. Fax number:...

Thank you for your co-operation in returning the completed form by 30/9/98.

You can be sure your efforts will ultimately benefit this uniquely Australian industry and significantly advance the future of authentic Australian foods and their culinary applications. Fax back completed form to 02 9817 3587

7.3 Relevant Market Background

7.3.1. Overall Food Trends

- *Eating out.* The trend towards eating out continues to rise to the point where, amongst young singles and DINKS, meals from restaurants and takeaways appear to almost outnumber those prepared at home. Cafe culture continues to grow and while its heartland may be the fashionable inner city quarters, it is now spreading well beyond these boundaries and penetrating suburban life.

  Eat out food has strong influences on tastes such that local restaurants and cafes can serve as a major focal point for general food inspiration. Many newly "discovered" foods and even dishes added to the home repertoire are often originally experienced in eateries. Opinion leaders and high profile chefs of course, influence the latter.

- *Fresh and Real*. The thrust towards real food, by which is meant fresh or less processed has been strong for some time. Not only are consumers exposed to an ever-broadening range of vegetables and herbs but there has also been an explosion and marked improvement in the quality in many packaged foods, both off the shelf and out of the chiller. New meal bases and semi-prepared food are often superior to home cooked meals.

- *New Flavour Interests.* The growing number and variety of "ethnic" restaurants, allied with the increasing proliferation of fresh and packaged products, is leading to more sophisticated food demands. It is not only chefs who recognise this. Consumers themselves are well aware of this trend and many identify with it. To succeed in today's market it is necessary to capture people's imagination. Native ingredients, with the appropriate publicity, are well poised to exploit this - they can readily enough be positioned in the consumer market as an exciting new discovery.

- *Time pressures.* People seek out quickly prepared food. Even the most ardent cooks want something during the week that is simple and not too time consuming. This is one of the reasons that the traditional "meat and 3 veg" is giving way to a tide of stir-fried rice or noodle dishes and pasta meals. The call for convenience has also lent thrust to quality improvements in packaged food products. This is the accepted way of the world and there is no guilt attached to these "short cuts" in view of product quality and relatively high nutritional content. "Simple and quick" with maximum taste appeal needs to be accommodated in any promotion of native foods.

- *Health.* For several years there has been a growing correspondence between health considerations and sensory gratification in food choice. At the most basic level, a healthy diet is no longer equated with compromise or self-denial. Food that is fresh and light with authentic flavours, aromas and textures, is typically identified as both wholesome and enjoyable.

  The basic "rules" are moderation, avoidance of fat and a high carbohydrate intake although functional foods are emerging more strongly in health considerations. Functional foods (sometimes referred to as nutriceuticals) focus on nutrients, ideally sourced in whole foods, which promise a specific health benefit. Amongst the better known are: Iron in red meat for protection against anaemia (and tiredness) and good mental function: Calcium from dairy food to ward off osteoporosis: Anti-oxidants found in certain fruits and vegetables as anti-aging agents: Omega 3 from cold water fish to help reduce cholesterol: Acidophilus in yoghurt to enhance digestive health. Functionality is a trend to watch since it represents on-going opportunities. (It is pertinent that women in particular spotted and showed interest in, the high vitamin C content of Kakadu plums flagged on the label of a sample product.)

7.3.2. The Appeal of New Foods and Ingredients

One of the prime hallmarks of dietary changes is the drive for variety. Within the context of regular meals consumers are keen to vary themes for heightened pleasure and to reduce “boredom” on the part of the cook. Two popular “dishes” are particularly amenable on this score, pasta and stir-fries. Pasta is extremely popular and consumers look to add to its diversity via different shapes and sizes and the new flavoured versions. Moreover, people have access to a vast array of sauces and an increasingly wide range of pesto from which to choose. Stir-frying, possibly the most revolutionary advent ever in the Australian home menu, also provides scope for almost endless variety. Dishes range across the entire spectrum of Asian cuisines and household cooks extend their options with their own versions of fusion cuisine.

> *"We have so many stir fries. You’ve got to make it interesting. I’ve been trying different rices, jasmine and wild rice and there are so many noodles you can buy now.”*

The improved quality and the very wide range of meal bases on sale are starting to beg the point of starting many meals from scratch.

> *"I used to go to a lot of trouble making the different pasta sauces but now we just use a ready-made product and my family all love it. I wouldn’t go back to making my own.”*

> *“I wouldn’t have thought I’d be making laksa. I thought I wouldn’t have time to make it but the laksa paste you can now get is really good.”*

The Australian diet is in a state of flux straddling the old and the new which people happily mix in their menus. Meats and seafood still play a pivotal role in narrowing the regular repertoire although people often look for ways of pepping these up.

A number of new products and ingredients have particularly captured the imagination of consumers in more recent times.

- Attracting a lot of attention, as already implied, are meal bases like marinades, curries, stir-fry and other Asian sauces, pasta sauces. Interest is reinforced by sheer numbers and the generally high quality is impressive.

- Auguring well for native foods, the extended range of herbs available, both fresh and in “wet” form, are creating some excitement.

- At the “foodie” end of the spectrum, there is some experimentation with the “new meats”, including kangaroo, emu and crocodile, with cues taken from restaurant experiences.

In this changing environment, awareness of “bush herbs” is just beginning to filter down although this mostly stems from exposure in restaurants.

Despite the introduction of a number of products with these flavourings in supermarkets, their presence in the grocery trade is very low key.

7.3.3. Sources of Inspiration

The role of restaurants in prompting widening food choice is clear. However, consumers also take inspiration from a number of other sources.

- Food articles, restaurant reviews on recipes in newspapers and magazines are read with many consumers pulling out the page for storage in a filing system of sorts.
    * The weekend newspapers keep consumers up to date with food trends and both men and women claim to read these pages with great interest.
    * Of the magazines, Good Taste tends to be particularly singled out. It highlights seasonal foods which are easily accessed within the supermarket and the recipes are "simple and different".

- Television celebrity chefs have their following and names such as Peter Howard, Gabriel Gate, Geoff Janz are very familiar. The Better Homes & Garden's cooking segment also has a strong following since the dishes featured meet the overriding need for things that are "tasty but not too complicated".
- Cookbooks, covering the gamut of the most basic to the exotic and glamorous, are browsed with relish although "investment" reference books, such as Margaret Fulton and Stephanie Alexander, as well as Women's Weekly themed publications form the benchmarks. Many are read for sheer pleasure and stimulation although they must include recipes with accessible ingredients and consider the time and effort required.
- The Internet is a growing source of information about food, recipes and restaurant reviews.
- Some mention the allure of new sophisticated specialty shops which provide exposure to all sorts of interesting new foodstuffs.
- Obviously enough, a strong presence in the supermarket has an impact on trial of new products and ingredients with people reporting that demonstrations and tastings are an effective prompt to purchase.

  "That's how I discover most of my new foods, I taste it at the supermarket and then I get it off the shelf ... I like to taste it before I actually buy even if it is advertised on television."

7.4 Positioning Statements

Positioning statements used in consumer interviews:

1. Innovation and creativity, and experimenting with new flavours is really exciting.
2. Australian produce, our foods and wines, can compete with any in the world for quality, flavour and variety.
3. The mystery of the Dream Time, the indigenous Aboriginal heritage and culture is fascinating. (2 groups).

   This concept was rephrased after two groups, as it did not capture a food experience. The second concept was …

   We bring you the traditional recipes of the elders, using the wild fruits and greens, root vegetables and aromatic spices of ancient tribes. (2 groups).
4. The difference in foods from different regions within Australia is really interesting to me.
5. It's important to me that I choose food that is natural and organic.

8. References

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