

*ASMI Report Card 2015
Summary Analysis*

Prepared for:
Alaska Seafood Marketing Institute

October 2015



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Prepared for:

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Executive Summary

This project marks the third “Report Card” survey McDowell Group has conducted for the Alaska Seafood Marketing Institute (ASMI). Previous surveys were completed in 2008 and 2011. The current survey included questions from prior surveys as well as a variety of new questions about the value and workability of ASMI’s Responsible Fisheries Management (RFM) program.

Data was gathered through individual telephone interviews and an online survey (available in the appendices). Consistent with previous surveys, respondents were selected by McDowell Group to represent four major seafood industry stakeholder groups: direct marketers, smaller processors, larger processors, and industry associations. McDowell Group received a total of 50 completed surveys.

In addition to surveying processors and industry organizations, a separate survey of fishermen was conducted. This was the first time fishermen were surveyed directly in the ASMI Report Card (as opposed to interviewing fishing organizations), with the goal of measuring perceived communication effectiveness and performance.

Major Findings from Processors, Marketers, and Association Survey

Achieving ASMI’s Mission

- Collectively, three quarters (74 percent) of the processors, direct marketers, and associations surveyed rate ASMI’s performance in achieving its mission as good or very good. Only 4 percent rate ASMI’s performance as poor or very poor.

Representing the Industry

- Nearly two-thirds (62 percent) of survey respondents believe ASMI is doing a good or very good job representing the major segments of the industry. Very few (6 percent) rate ASMI as poor/very poor in that regard.

Pursuing the Right Programs

- Just over half (54 percent) of respondents believe ASMI has the right mix of program elements to achieve its mission, while 18 percent do not, and the rest don’t know.
- Familiarity with the international and programs was highest (89 percent and 82 percent, respectively). The collateral program was the most used (74 percent), by a wide margin.
- All of ASMI’s programs are seen as important or very important by at least 70 percent of all respondents.

Promotional Efforts and Communications

- Processor satisfaction with ASMI promotional efforts is high, but program/activity communication remains an area of improvement.
- While 84 percent of processors participating in ASMI promotions were satisfied or very satisfied, only 28 percent felt they received promotion and program information far enough in advance to adequately plan to participate in program efforts.

Key Findings about ASMI's RFM Program

Respondents identified relatively few problems with the workability of ASMI's RFM program and RFM Chain of Custody (CoC) certification process. However, participants felt communications/outreach could improve and noted the biggest drawback of the program was its lack of acceptance in Europe.

- Respondents value the RFM program, scoring its importance a 7 on a 1 (not important) to 10 (critically important) scale, but report lower satisfaction with its communication/outreach and overall value.
- The majority of processors surveyed (55 percent) hold CoC certification. Processor size directly correlates with RFM CoC certification, with larger processors being more likely to have certification.
- Larger processors with RFM CoC certification had lower satisfaction scores than smaller processors and other large processors that did not have a CoC certificate.

Aside from its acceptance in the marketplace (particularly in Europe), processors reported few challenges regarding the RFM program and CoC certification process. Benefits of RFM CoC certification include being able to access (some) customers that require certification, providing materials for buyers to document sustainable supply, and offering industry and buyers a choice in seafood certification.

- Respondents indicate the ASMI RFM CoC certification process is slightly easier than other certification programs, but the majority note it is not the only certification needed to sell Alaska seafood to their customers (particularly for large processors).
- 81 percent of processors with RFM CoC certification also hold some other certification (usually Marine Stewardship Council – MSC).

Major Findings from Fishermen's Survey

A total of 187 fishermen participated in the survey. More than 80 percent were active in some type of salmon fishery.

- Slightly more than half (52 percent) of fishermen respondents felt ASMI was doing a good/very good job of meeting its mission. About a quarter (23 percent) said ASMI was doing an adequate job while another quarter (24 percent) indicated the organization was doing a poor/very poor job.
- Slightly less than half (47 percent) of fishermen said they were "very aware" of what ASMI does for the industry, 39 percent were "somewhat aware," and 15 percent were "slightly aware" or "unaware."
- Ratings about ASMI's communications with the commercial fishing industry, media, and lawmakers average 5.0 to 5.4 (on a scale of 1 to 10), with media communications scoring highest.
- Suggestions for how ASMI can communicate better with the fleet include communicating through gear associations, creating a cabinet/group to communicate with fishermen, trade publications, direct email (newsletters/etc.), local radio/media outlets, and "walking the docks."
- The survey asked fishermen to identify what types of information or activities were most useful to them (aside from in-season price tracking). Suggestions generally followed these themes:
 - **Organizational transparency.** Explain how and where ASMI spends its money, and why.
 - **Market transparency.** Many fishermen requested information on wholesale prices, ex-vessel prices by species/area, general market analyses, and the value of the supply chain by segment. In general, there is much confusion over why ex-vessel prices for some Alaska seafood species have declined in recent years.

- **Improving quality.** Several fishermen cited a need for information about chilling salmon and proper handling, as well as the role quality plays in improving the value of salmon.
- **Direct marketer support.** Comments from the fishermen's survey, as well as direct marketer comments from the main survey, suggest ASMI could do more to support direct marketers. This might include sales leads, promotion opportunities, and sales materials/support.

The survey asked fishermen for general comments or suggestions about ASMI. Many respondents offered thanks to ASMI for the work it does. Other comments highlighted a desire to focus on differentiating Alaska seafood, particularly wild Alaskan salmon versus farmed salmon. Several fishermen indicated they would be willing to help promote Alaska salmon to consumers. In addition, 39 percent of all fishermen (77 respondents) indicated they would like to become an Alaska fisherman ambassador.

Methodology

As in 2008 and 2011, four groups of ASMI stakeholders were surveyed: larger processors, smaller processors, industry associations and direct marketers. Smaller processors and direct marketers were randomly selected from ASMI's "Supplier" database. Larger processors and industry associations were drawn from a list prepared by McDowell Group, based in part on the ADF&G "Intent to Operate" database, to broadly represent those two industry components.

The survey was offered online or via telephone. McDowell Group phoned more than 100 companies and organizations and sent multiple emails to almost all companies listed in ASMI's "2015 Directory of Seafood Suppliers." All surveys were treated as confidential. The methodology was designed to give equal weight to the perceptions and needs of each of the four groups of stakeholders. Several interviews were conducted over the phone, but most respondents completed the survey online. For telephone surveys, McDowell Group interviewers typically spoke with the owners, executive directors, general managers, or marketing managers.

The sample size goal was twenty respondents in each of the four groups for a total of 80 respondents. However, the final total was 50 respondents, including 12 large processors, 17 smaller processors, 9 direct marketers, and 12 associations/agencies. Two factors contributed to lower response rates than in previous surveys. This year's survey was nearly twice as long as previous surveys and it was conducted during a busier time of the year than previous efforts. One advantage of making the survey available online was more time for respondents to consider and answer questions. As a result, many more and lengthier comments were received in the 2015 survey.

Survey of Processors, Direct Marketers, and Associations

Mission Achievement

Collectively, three quarters of the direct marketers, processors, and associations surveyed rate ASMI's performance in achieving its mission as good or very good. Only 4 percent rate ASMI's performance as poor or very poor. Associations tended to give ASMI the highest marks in this regard (83 percent good or very good) while the large processors offered the lowest marks (at 67 percent good or very good, with the balance at adequate, poor, or very poor).

Figure 1. Overall, how would you rate ASMI's performance in achieving this mission?

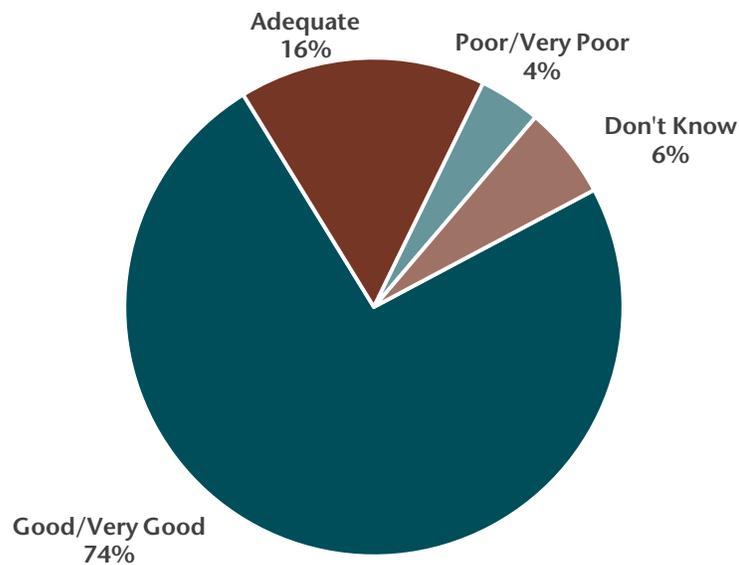


Table 1. ASMI'S mission is to enhance the value of Alaska seafood.

Overall, how would you rate ASMI's performance in achieving this mission?

Industry Group	Good/Very Good	Adequate	Poor/Very Poor	Don't Know
Large Processor	67%	25%	8%	0%
Small Processor	76%	18%	0%	6%
Direct Marketer	67%	11%	0%	22%
Association/Agency	83%	8%	8%	0%
All	74%	16%	4%	6%

With regard to achieving its mission, performance ratings for the 2008, 2011 and 2015 are provided in the following table. Changes between survey periods should be viewed with some caution, as the sample sizes are small and likely include a somewhat different set of respondents in each period.

**Table 2. Overall, how would you rate ASMI’s performance in achieving this mission?
Survey Results for 2008, 2011 and 2015**

Industry Group	Good/Very Good	Adequate	Poor/Very Poor	Don't Know
2015	74%	16%	4%	6%
2011	81%	10%	3%	6%
2008	63%	13%	6%	19%

ASMI’s Representation of the Industry

Slightly less than two-thirds (62 percent) of survey respondents believe ASMI is doing a good or very good job representing the major segments of the industry. Very few (6 percent) rate ASMI as poor/very poor in the regard. Again, associations offered the highest ratings, while large processors offered the lowest.

Figure 2: How would you rate the job ASMI does in representing the major segments of the Alaska Seafood Industry?

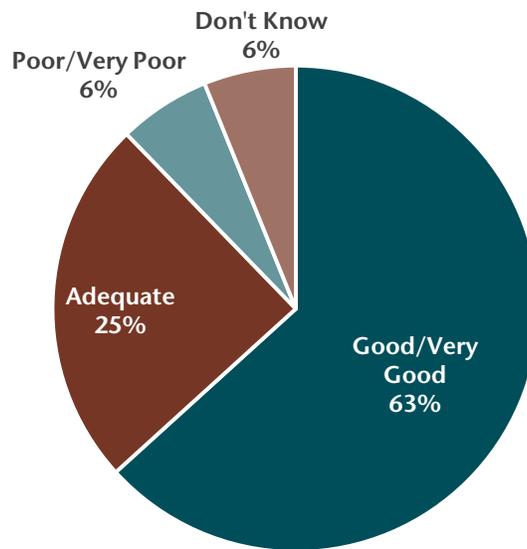


Table 3. How would you rate the job ASMI does in representing the major segments of the Alaska Seafood Industry?

Industry Group	Good/Very Good	Adequate	Poor/Very Poor	Don't Know
Large Processor	42%	50%	8%	0%
Small Processor	65%	12%	12%	6%
Direct Marketer	56%	22%	0%	22%
Association/Agency	83%	17%	0%	0%
2015 Overall	62%	24%	6%	6%

Table 4. How would you rate the job ASMI does in representing the major segments of the Alaska Seafood Industry? Survey Results for 2008, 2011 and 2015

Industry Group	Good/Very Good	Adequate	Poor/Very Poor	Don't Know
2015 Overall	62%	24%	6%	6%
2011 Overall	78%	14%	4%	5%
2008 Overall	51%	18%	11%	20%

ASMI Programs

Table 5 provides responses to three questions:

- How familiar are you with each ASMI program?
- Do you use each ASMI program?
- How important is each ASMI program to your business?

In summary, familiarity with the marketing collateral and international programs was highest (89 percent and 82 percent, respectively). The collateral program was the most used (74 percent), by a wide margin. At least 70 percent of respondents said all of ASMI's programs were either important or very important.

Tracking the familiarity and usage of ASMI programs provides information about how well ASMI is communicating its actions/programs with industry and making services available to processors who wish to use those services. In general, ASMI programs are more familiar and used more frequently by larger processors.

(see table on next page)

Table 5. How familiar are you with each ASMI program? Do you use each ASMI program? How important is each ASMI program to your business?

ASMI Program	Pct. Familiar with Program	Pct. Who Use Program	Pct. Rating Important or Very Important
International Marketing			
Larger Processor	100%	75%	100%
Smaller Processor	76%	35%	71%
Direct Marketer	67%	22%	67%
Overall 2015	82%	45%	79%
Food Service			
Larger Processor	33%	50%	75%
Smaller Processor	24%	24%	71%
Direct Marketer	33%	22%	67%
Overall 2015	29%	32%	71%
Domestic Retail			
Larger Processor	50%	58%	83%
Smaller Processor	29%	35%	59%
Direct Marketer	22%	33%	78%
Overall 2015	34%	42%	71%
Technical			
Larger Processor	92%	50%	92%
Smaller Processor	71%	53%	71%
Direct Marketer	78%	22%	78%
Overall 2015	79%	45%	79%
Public Communications			
Larger Processor	42%	50%	100%
Smaller Processor	53%	24%	65%
Direct Marketer	22%	44%	78%
Association/Agency	33%	58%	92%
Overall 2015	40%	42%	82%
ASMI Marketing Collateral			
Larger Processor	100%	67%	83%
Smaller Processor	88%	76%	82%
Direct Marketer	78%	78%	67%
Overall 2015	89%	74%	79%

Surveys with industry association representatives indicated that virtually all are familiar with ASMI programs and most have some involvement with ASMI activities. Because industry associations do not participate directly in most ASMI programs, these responses are not included in the table above. In comparison to 2011 survey respondents, reported usage increased for every program except ASMI marketing collateral.

**Table 6. How familiar are you with each ASMI program? Do you use each ASMI program? How important is each ASMI program to your business?
Survey Results for 2011 and 2015**

ASMI Program	Pct. Familiar with Program	Pct. Who Use Program	Pct. Rating Important or Very Important
International Marketing			
2015	82%	45%	79%
2011	55%	23%	57%
Food Service			
2015	29%	32%	71%
2011	55%	23%	60%
Domestic Retail			
2015	34%	42%	71%
2011	70%	40%	72%
Technical			
2015	79%	45%	79%
2011	60%	37%	62%
Public Communications			
2015	40%	42%	82%
2011	62%	27%	68%
ASMI Marketing Collateral			
2015	89%	74%	79%
2011	98%	78%	85%

Survey respondents were asked if they believe ASMI has the right mix of program elements to achieve its mission. Overall, about half (54 percent) do, while 18 percent do not, and the rest don't know. The high percentage of "don't know" suggests that the question may not be clear enough to illicit an informed response.

Figure 3: Do you believe that ASMI has the right mix of program elements to achieve its mission of enhancing the value of Alaskan seafood?

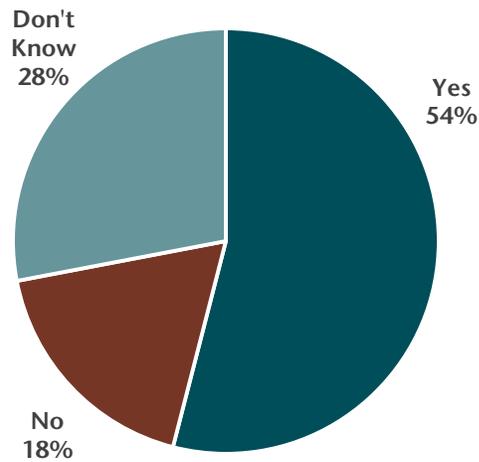


Table 7. Do you believe that ASMI has the right mix of program elements to achieve its mission of enhancing the value of Alaskan seafood?

Industry Group	Yes	No	Don't Know
Larger Processor	58%	8%	33%
Smaller Processor	41%	29%	29%
Direct Marketer	56%	22%	22%
Association/Agency	67%	8%	25%
Overall 2015	54%	18%	28%

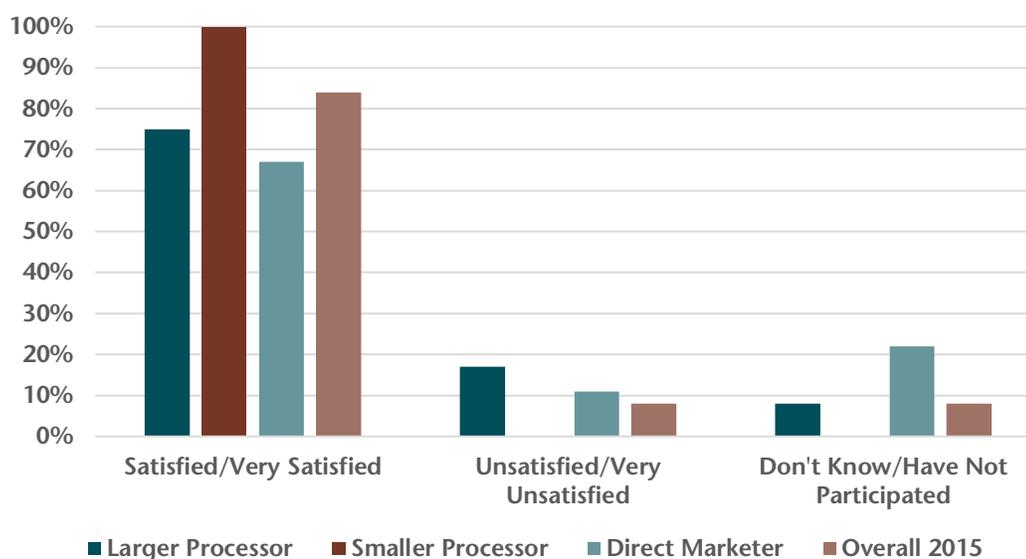
Table 8. Do you believe that ASMI has the right mix of program elements to achieve its mission of enhancing the value of Alaskan seafood?
Survey Results for 2008, 2011 and 2015

Industry Group	Yes	No	Don't Know
Overall 2015	54%	18%	28%
Overall 2011	72%	7%	22%
Overall 2008	53%	10%	38%

ASMI Promotions

A strong majority (84 percent) of survey respondents who participated in ASMI promotions were satisfied or very satisfied. Only 8 percent were unsatisfied or very unsatisfied. Satisfaction among smaller processors was 100 percent.

Figure 4: Overall, how satisfied is your company or organization with the ASMI promotions in which you have participated?



Respondents to the 2015 survey indicated a higher satisfaction level with their involvement in ASMI promotions, than respondents to the 2011 survey.

Table 9. Overall, how satisfied is your company or organization with the ASMI promotions in which you have participated?

Industry Group	Satisfied/ Very Satisfied	Unsatisfied/ Very Unsatisfied	Don't Know/ Have Not Participated
Larger Processor	75%	17%	8%
Smaller Processor	100%	0%	0%
Direct Marketer	67%	11%	22%
Overall 2015	84%	8%	8%
Overall 2011	73%	7%	20%

Although many respondents were satisfied with ASMI promotional activities, a large percentage reported that they did not receive information about promotional activities far enough in advance so that the company could adequately plan to participate. Several respondents commented about the need for better communication regarding opportunities to participate in ASMI programs and updates about ASMI activities in general.

However, it is not clear how many of these people receive e-blasts, newsletters, or other ASMI communication, and to what degree those materials are meeting the needs of industry.

Table 10. Do you receive ASMI promotion and program information far enough in advance so that you can adequately plan to participate in programs?

Industry Group	Yes	No	Don't Know
Larger Processor	33%	33%	33%
Smaller Processor	24%	53%	24%
Direct Marketer	11%	56%	33%
Association/Agency	42%	17%	42%
Overall 2015	28%	40%	32%

The need for better program communication was highlighted in previous surveys and has been a point of emphasis for ASMI in recent years.

Table 11. Do you receive ASMI promotion and program information far enough in advance so that you can adequately plan to participate in programs?

Survey Results for 2008, 2011 and 2015

Industry Group	Yes	No	Don't Know
Overall 2015	28%	40%	32%
Overall 2011	40%	25%	35%
Overall 2008	34%	31%	35%

Survey Responses about ASMI's RFM Program

At the request of industry, ASMI created a third-party certification program which verifies Alaska's approach to sustainable and responsible fishery management. The RFM program is ISO accredited and serves as an alternative to other certification programs, such as MSC certification (Marine Stewardship Council). Criteria used in the program are based on reference documents by the United Nations Food and Agriculture Organization. The RFM Conformance Criteria Standard was developed through collaboration with other governments, scientists, and conservationists. Currently, seven of Alaska's major fisheries are RFM certified, including salmon, halibut, black cod, Alaska pollock, Pacific cod, BSAI king crab and snow crab, and flatfish.

The 2015 survey included questions pertaining to industry's experience and opinion of the RFM program. A total of 38 processors completed the survey, ranging from large processors to small direct market operations. Three processors did not complete the RFM questions. Some questions were solicited from all respondents while others only pertained to those which hold RFM CoC certification. Of the 38 processors that responded to the survey, 21 hold RFM CoC certification.

Perceived Importance of the RFM Certification Program

Overall, industry indicated the RFM program is important, rating it 7 on a 10-point scale (with 1 being not at all important and 10 being critically important). More than half of the respondents gave an importance score

of eight or better. Associations and agencies put the most value on the program while smaller and larger processors valued it the least.

Table 12. On a scale of 1-10, with 1 being not important at all and 10 being critically important, please rate the importance of ASMI's RFM certification program to the industry

Industry Group	Average Importance Score	Scored: 1-3	Scored: 4-7	Scored: 8-10
Larger Processor (n=12)	6.7	8%	42%	50%
Smaller Processor (n=17)	6.6	24%	24%	53%
Direct Marketer (n=9)	7.5	0%	44%	44%
Association/Agency (n=12)	7.6	8%	25%	67%
2015 Overall	7.0	12%	32%	54%

Table 13 indicates industry's awareness and understanding of the program. It also shows the percentage of companies (or respondents) which receive RFM communication, along with a cross tabulation of importance scores for different levels of RFM understanding. It is important to consider how the program's perceived importance is impacted by the respondents understanding of the program itself.

Responses indicate that 92 percent of those surveyed were aware of ASMI's RFM program and 86 percent felt they understood it at least somewhat. These results indicate ASMI has done a good job making the industry aware of the RFM program.

Of those who were aware of the program, half (50 percent) said they understood it very well. Not surprisingly, larger processors had the greatest understanding of the program. Those who understood the program only somewhat gave the program a higher importance score than those who understood it very well. This could be because mid-sized to large processors selling into Europe have had the greatest need to utilize the program and learn about it, yet they may give it a lower importance score because European buyers have been reluctant to accept the certification.

Overall, 72 percent of respondents either receive RFM e-blasts or had read ASMI materials about the RFM program. Of those that received ASMI's RFM communication materials, 53 percent said they understood the program very well. Recognizing the RFM program is quite technical and presents a communication challenges, there is clearly room to improve communications both in terms of reaching more of the industry and communication material effectiveness.

Table 13. Awareness and understanding of RFM program and communication materials

Industry Group	Awareness and Understanding Responses	Receives e-blasts or has read RFM materials	Average Importance Score
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Larger Processor (n=12)			
Aware/understand VERY well (1)	10	10	6.5
Aware/understand SOMEWHAT (2)	2	2	7.5
Aware but do not understand program (3)	0	0	-
Unaware of RFM program (4)	0	0	-
Smaller Processor (n=19)			
Aware/understand VERY well (1)	5	3	5.2
Aware/understand SOMEWHAT (2)	8	8	7.3
Aware but do not understand program (3)	1	0	7.0
Unaware of RFM program (4)	3	0	7.3
Direct Marketer (n=9)			
Aware/understand VERY well (1)	1	1	10.0
Aware/understand SOMEWHAT (2)	6	4	7.5
Aware but do not understand program (3)	1	0	5.0
Unaware of RFM program (4)	1	0	N/A
Association/Agency (n=12)			
Aware/understand VERY well (1)	6	5	8.0
Aware/understand SOMEWHAT (2)	5	3	7.6
Aware but do not understand program (3)	1	0	5.0
Unaware of RFM program (4)	0	0	-
2015 Overall (n=50)			
Aware/understand VERY well (1)	22	19	6.8
Aware/understand SOMEWHAT (2)	21	17	7.4
Aware but do not understand program (3)	3	0	5.7
Unaware of RFM program (4)	4	0	7.3

Table 14 provides data on industry’s satisfaction with specific RFM elements. The survey asked participants to assign a satisfaction score to various RFM elements and the program overall, with 1 representing “extremely dissatisfied” and 10 representing “completely satisfied.” Average satisfaction scores for all elements fell within a fairly narrow range of 5.4 to 6.8. Respondents were most satisfied with the RFM conformance criteria and least satisfied with program communications/outreach. Among larger processors, program communication/outreach had the lowest average satisfaction score of any element (3.9). Those large processors reporting the lowest communication/outreach satisfaction scores tended to understand the program very well. Smaller processors had a higher communications/outreach satisfaction score (6.0), although there was a wide range in scores.

Table 14. On a scale of 1-10, with 1 being extremely dissatisfied and 10 being completely satisfied, what is your satisfaction level with the following RFM elements?

RFM Element (All Processors & Direct Marketers)	Average Satisfaction Score	Scored: 1-3	Scored: 4-7	Scored: 8-10
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RFM Conformance Criteria	6.8	6%	40%	36%
RFM Governance Structure	6.5	10%	40%	32%
Certification Bodies/Auditors	6.1	12%	40%	26%
CoC Audit Process and Cost	6.1	12%	46%	22%
Program Communications/Outreach	5.4	16%	50%	14%
Stakeholder Involvement	6.1	10%	50%	24%
Program Value vs. Company Cost	5.6	14%	48%	20%
RFM Program Overall	5.8	22%	28%	34%

Respondents were also asked to comment if there were specific elements of RFM they were very satisfied or dissatisfied with. None of the comments received from this question addressed specific program elements. Most comments given in this section dealt with the broader sustainability certification landscape and RFM's place in that situation.

Table 15 summarizes the percentage of processors surveyed which have been certified under ASMI's RFM Chain of Custody (CoC) standard. While ASMI's RFM program is relatively new, the majority of processors (especially large and mid-sized processors) hold RFM CoC certification. All but one large processor interviewed has CoC certification. Slightly over half of smaller (and mid-sized) processors have CoC certification, while just one (albeit large) direct marketer has CoC certification. Overall, a total of 21 processors (out of 38 surveyed) indicated their company held RFM CoC certification. Those who hold RFM CoC certification report slightly lower overall satisfaction scores and the same average program importance score.

Large processors with RFM CoC certification generally reported lower satisfaction scores. Of these 11 large processors, three processors reported being "extremely dissatisfied (1)" with the program while two others rated their satisfaction level a 3-out-of-10. One large processor with RFM CoC certification had an overall satisfaction score of 8 and the other five processors scored between 4 and 7.

Most of the processor respondents were executive managers and 57 percent of those with RFM CoC certification were involved with the process.

Table 15. Has your company been certified under the ASMI RFM Chain of Custody standard?

Industry Group	Yes	No or Left Blank	Were you involved in the CoC process? (Pct. Yes)	Average Satisfaction Score	Average Importance Score
Larger Processor	92%	8%	45%	4.0	6.8
Smaller Processor	53%	47%	56%	6.8	6.9
Direct Marketer	11%	89%	100%	10.0	10.0
2015 Overall	55%	45%	57%	5.5	7.0

Table 16 shows the percentage of respondents who hold other sustainability certifications. Most companies utilize multiple certification or assessment criteria. Of the 21 processors with CoC certification, just four use no other criteria. Those who did not use RFM CoC certification or any other criteria tended to be smaller processors or direct marketers.

A total of 25 processors (out of 38 surveyed) indicated they utilized some other type of wild capture certification, either in tandem with RFM CoC or as an alternative. Of that cohort, 18 processors (72 percent) held MSC certification.

Table 16. Does your company utilize other wild capture certification or assessment criteria (e.g. MSC, Monterey Bay Aquarium, NOAA FishWatch, etc.)?

CoC Certification	Utilizes Other Certification Programs (Pct. Yes)
Has ASMI RFM CoC Certification	81%
No ASMI RFM CoC Certification	47%
2015 Overall	66%

Table 17 provides the percentage of processors which use the ASMI RFM Certified Seal and/or the ASMI Alaska Seafood logo. Slightly more than half of processors with RFM CoC certification use the RFM seal on products, marketing materials, or pricing sheets – with the majority (70 percent) of these processors featuring the logo on their products. Of the 10 processors who hold RFM CoC certification but do not use the RFM Certified Seal, seven said they did not use the seal because their customers were not asking for it, while two said they did not have consumer facing products. A total of 20 processors (53 percent) said they used the ASMI Alaska Seafood logo on their products, marketing materials, or price sheets.

Table 17. Does your company use the Alaska RFM Certified Seal or ASMI Alaska Seafood logo on any products, marketing materials, or pricing sheets?

CoC Certification	Pct. Yes
Uses RFM Certified Seal (CoC holders only)	52%
Uses Seal on Products (Pct. of above cohort)	70%
Uses ASMI Alaska Seafood Logo (all processors)	53%

The survey asked respondents to comment about challenges and benefits associated with RFM CoC certification.

McDowell Group asked participants to respond to the following statements about the ASMI RFM Chain of Custody certification.

Statement One: Obtaining Alaska RFM Chain of Custody Certification is an easier process than other certification programs.

Statement Two: In the future, we believe Alaska RFM certification will be the only certification we will need to sell Alaska seafood to our customers.

Participants were given the choices of agree completely, agree somewhat, not sure, disagree somewhat, and disagree completely. Answers from processors holding RFM CoC certification are summarized in Table 18.

In general, respondents felt that ASMI’s RFM CoC certification was a slightly easier process than other certification programs. Most processors do not believe that ASMI RFM certification will be the only certification

they will need in the future to sell Alaska seafood to their customers; however, there were a few processors who agreed with the statement. Most of the companies that agreed with Statement Two sell primarily into the domestic market.

Table 18. Statement One: Obtaining Alaska RFM Chain of Custody Certification is an easier process than other certification programs.

Processor Size	Agree Completely	Agree Somewhat	Not Sure	Disagree Somewhat	Disagree Completely
Larger Processor (n=11)	0%	36%	36%	18%	9%
Smaller Processors and Direct Marketers (n=10)	10%	40%	30%	20%	0%

Statement Two: In the future, we believe Alaska RFM certification will be the only certification we will need to sell Alaska seafood to our customers.

Processor Size	Agree Completely	Agree Somewhat	Not Sure	Disagree Somewhat	Disagree Completely
Larger Processor (n=11)	0%	10%	10%	40%	50%
Smaller Processors and Direct Marketers (n=10)	10%	10%	20%	30%	30%

The survey also asked participants if they had any questions, comments, or suggestions related to the RFM program that they would like ASMI to address. These responses were forwarded to ASMI staff.

Survey of Fishermen

McDowell Group and ASMI developed a short survey for commercial fishermen to gauge the fleet’s opinion about ASMI performance and communication efforts. Fishermen were not directly included in previous *Report Card Survey* projects, except through questions answered by fishing associations/groups. The fishermen’s survey includes a total of 197 respondents. The survey was posted online and promoted by industry press, gear groups/associations, and ASMI’s website. A copy of the survey instrument is provided in the appendix.

ASMI Overall Performance Ratings

Table 19 summarizes fishermen’s opinions about how well ASMI is meeting its mission of enhancing the value of Alaskan seafood versus the fishermen’s understanding about what ASMI does for the industry. Nearly half of respondents were “very aware” of ASMI, and 85 percent were at least “somewhat aware.” Fishermen who had a better understanding of ASMI tended to assign the organization a higher performance rating.

Overall, slightly over half (52 percent) of fishermen who provided an answer felt ASMI has done a good or very good job in meeting its mission in recent years. Slightly less than a quarter (23 percent) felt ASMI did an adequate job while the balance (24 percent) rated ASMI’s performance as poor/very poor. On the extreme ends, fishermen who felt ASMI had done a very good job outnumbered those who felt it performed very poorly by nearly 3-to-1. On average, Alaska fishermen feel ASMI has done a slightly better than adequate job of meeting its mission. A total of nine fishermen (5 percent of all respondents) said they didn’t know how well ASMI had done in meeting its mission.

Table 19. ASMI Performance Ratings by Fishermen’s Knowledge of ASMI activities

Knowledge of ASMI	Pct. (n)	Performance in Meeting the Mission					Avg. Performance
		Very Good (4)	Good (3)	Adequate (2)	Poor (1)	Very Poor (0)	
Very Aware	47% (92)	29%	32%	20%	12%	8%	2.6 (Good)
Somewhat Aware	39% (77)	9%	42%	22%	18%	5%	2.2 (Adequate)
Slightly Aware	10% (19)	0%	16%	32%	32%	5%	1.4 (Poor)
Unaware	5% (9)	0%	0%	33%	33%	0%	1.0 (Poor)
2015 Overall	(197)	18%	34%	23%	18%	6%	2.3 (Adequate)

The survey asked participants which fisheries they participated in. More than 80 percent were active in some type of salmon fishery. Responses were grouped by fishery, to determine whether there is a difference of opinion based on different fishery type. Salmon fishermen tended to rank ASMI’s performance slightly lower than other fishermen. Lower performance ratings may be related to significantly lower salmon prices witnessed in 2015. Groundfish fishermen, including those who target pollock, cod, and flatfish, rated ASMI’s performance the highest of any fishery category. Although prices are generally lower over the last five years for most groundfish species as well, these fishermen tend to operate larger businesses and were slightly more aware of ASMI’s activities than other fishermen.

Table 20. ASMI Performance Ratings by Fishery Category

Knowledge of ASMI	----- Performance in Meeting the Mission -----						Avg. Performance
	Pct. (n)	Very Good (4)	Good (3)	Adequate (2)	Poor (1)	Very Poor (0)	
Salmon	82% (161)	16%	32%	25%	19%	8%	2.2 (Adequate)
Halibut/Black Cod	9% (17)	18%	41%	29%	12%	0%	2.6 (Good)
Groundfish	5% (10)	40%	40%	10%	10%	0%	3.1 (Good)
Other or N/A	5% (9)	25%	50%	0%	25%	0%	2.3 (Adequate)
2015 Overall	(197)	18%	34%	23%	18%	6%	2.3 (Adequate)

ASMI Communications

A key goal of the survey was to find out how well Alaska fishermen think ASMI communicates with key stakeholders, including the commercial fishing industry, media, and lawmakers. Participants were asked to assign a communications score of 1 to 10, with 1 representing communications that were “not effective” and 10 representing “very effective” communications. The results are summarized in Table 21.

Communication scores varied dramatically; every rating in each stakeholder category accounted for at least 5 percent of total responses and no rating accounted for more than 17 percent of total responses. The average scores for each category fall very near the middle, signaling adequate effectiveness with a substantial variance in opinions. Fishermen generally felt ASMI does a better job communicating with the media than the fishing industry or lawmakers; however, average scores for each stakeholder category were relatively close.

Fishermen who had more awareness about ASMI tended to view ASMI communication efforts as more effective than those who had less awareness about ASMI. Readers are cautioned that frustration with prices in recent years – particularly for salmon in 2015 – may be reflected in the performance ratings.

Table 21. ASMI Communication Effectiveness

Fishermen’s Knowledge of ASMI	---- Avg. Score for Communicating with Selected Stakeholders ---- (1 = Not Effective and 10 = Very Effective)			
	Pct. (n)	Fishing Industry	Media	Lawmakers
Very Aware	47% (92)	5.6	6.0	5.5
Somewhat Aware	39% (77)	5.3	5.6	5.1
Slightly Aware	10% (19)	3.0	3.3	3.4
Unaware	5% (9)	2.8	2.9	2.7
Overall	(197)	5.1	5.4	5.0

Table 22. ASMI Communication Effectiveness (continued)

---- Performance Scores in Communicating with Selected Stakeholders ---- (1 = Not Effective and 10 = Very Effective)			
Communication Scores	Fishing Industry	Media	Lawmakers
1 (Not Effective)	7%	7%	9%
2	12%	8%	11%
3	14%	11%	14%
4	12%	12%	10%
5	14%	17%	17%
6	8%	8%	8%
7	12%	9%	11%
8	12%	14%	7%
9	5%	7%	7%
10 (Very Effective)	5%	7%	5%
No Response	0%	1%	2%
Average Scores	5.1	5.4	5.0

The survey also asked participants for suggestions about how to communicate more effectively with Alaska’s commercial fishing industry, as well as several other open-ended questions for fishermen ranging from suggestions/comments for ASMI, what information would be most helpful for commercial fishermen, and the impact of higher ex-vessel values for salmon. Verbatim responses were forwarded to ASMI staff.

Appendix 1: Processors, Marketers, and Associations Survey Instrument

ASMI 2015 Industry Report Card Survey

PHONE # _____

Company Name _____

Contact _____

Interviewee Name _____

Date _____

Introduction:

The Alaska Seafood Marketing Institute has contracted with McDowell Group, an Alaska research and consulting firm, to conduct confidential interviews for ASMI's 2015 "Report Card" Survey. ASMI wants to know what you think about its programs and performance. The information you give will help ASMI be as effective as possible. Is now a good time?

1. ASMI's mission is to enhance the value of Alaskan seafood. Overall, how would you rate ASMI's performance in achieving this mission?

01 Very good

03 Adequate

05 Very poor

97 Don't know

02 Good

04 Poor

99 Refused

2. How would you rate the job ASMI does in representing the major segments of the Alaska seafood industry?

01 Very good

03 Adequate

05 Very poor

97 Don't know

02 Good

04 Poor

99 Refused

- 2a. Is there a particular segment of the seafood industry you believe is over or under represented?

A. over represented? _____

B. under represented? _____

3. How familiar are you with each of the following ASMI programs?

3a. [For each program ask "Does your company use this program?"]

	Q 3.				Q3a.		
	01 <i>Very familiar</i>	02 <i>Somewhat familiar</i>	03 <i>Not familiar</i>	99 <i>Refused</i>	01 <i>Use program</i>	02 <i>Don't use program</i>	99 <i>Refused</i>
a. International marketing program The international marketing program works to increase trade and consumer awareness of the Alaska seafood industry and its products in international markets. It conducts various promotional activities, including provision of overseas ASMI market representatives.	01	02	03	99	01	02	99
b. Food service programs The program provides information and training to the food service industry, helping operators handle, menu, and promote Wild Alaska Seafood.	01	02	03	99	01	02	99
c. Domestic retail program The domestic retail program works with the Alaska seafood industry and with domestic seafood retailers, to support sales and marketing programs.	01	02	03	99	01	02	99
d. Technical program The technical program is a resource for education and training on the health benefits and safety of Wild Alaska Seafood. The program addresses issues such as purity/contaminants, sustainability, food safety and certifications.	01	02	03	99	01	02	99
e. Public communications program The public communications program provides centralized communications and information about Alaska's seafood	01	02	03	99	01	02	99

resource for media, policy makers, and other key parties.							
f. ASMI Marketing Collateral, such as brochures, point-of-sales materials, fact sheets, product guides, or other print or electronic materials.	01	02	03	99	01	02	99

4. How important is each of the following to your company or industry activities?

	01 <i>Very important</i>	02 <i>Somewhat Important</i>	03 <i>Not important</i>	97 <i>Don't know</i>	98 <i>N/A</i>
a. International marketing program	01	02	03	97	98
b. Food Service Programs	01	02	03	97	98
c. Domestic retail program	01	02	03	97	98
d. Technical program	01	02	03	97	98
e. Public communications program	01	02	03	97	98
f. ASMI Marketing Collateral	01	02	03	97	98

5. Do you believe that ASMI has the right mix of program elements to achieve its mission of enhancing the value of Alaskan seafood?

- 01 Yes 97 Don't know
02 No 99 Refused

5a. What, if any, changes would you like ASMI to make to its list of major programs? _____

5b. Overall, how satisfied is your company or organization with the ASMI promotions or programs in which you have participated?

- 01 Very satisfied 05 Not at all satisfied 97 Don't know/Have not participated
02 Satisfied 04 Not satisfied 99 Refused

5c. What promotions or programs, if any, stand out in your memory as particularly successful or unsuccessful? *(Either recently or at any time in the past.)*

Successful: _____

Unsuccessful: _____

97 Don't know/not applicable

5d. Do you receive ASMI promotion and program information far enough in advance so that you can adequately plan to participate in programs?

01 Yes

97 Don't know/not applicable

02 No

99 Refused

7. Do you have any additional comments or questions about ASMI programs or performance?

Next, I have some questions about ASMI's RFM Program, which I will briefly summarize.

At the request of industry, ASMI created a third-party certification program which verifies Alaska's approach to Responsible Fisheries Management. ASMI's RFM program is ISO accredited and serves as an alternative to other certification schemes, such as MSC certification (Marine Stewardship Council). Criteria used in ASMI's RFM program are based on reference documents by the United Nations Food and Agriculture Organization. The RFM Conformance Criteria Standard was developed through collaboration with other governments, scientists, and conservationists. Currently, seven of Alaska's major fisheries are RFM certified, including salmon, halibut, black cod, Alaska pollock, Pacific cod, BSAI king crab and snow crab, and flatfish.

8. On a scale of 1-10 with one being not important at all and 10 being critically important, please rate the importance of ASMI's RFM certification program to the industry: _____

9. Do you receive RFM eblasts or have you read ASMI materials relating to the RFM program: Yes / No

10. Which of the following choices best describes your awareness and understanding ASMI's RFM program:

01 ___ I am aware of it and understand it VERY well

02 ___ I am aware of it and understand it SOMEWHAT

03 ___ I am aware of it but I do not understand the program or know much about it

04 ___ I was unaware of ASMI's RFM program.

(If 01-03) How did you learn and educate yourself about the program? (Prompt: ASMI brochure, RFM Newslettter, presentation, RFM website, eblasts, personal communication, other)

11. On a scale of 1-10 with 1 being extremely dissatisfied and 10 being completely satisfied, what is your satisfaction level with the following RFM elements. If you are very satisfied or dissatisfied with something specific in these elements, please let us know – not applicable(not sure or refused = 99):

_____ RFM Conformance Criteria Standard (Fisheries Assessment Criteria)

_____ RFM Governance Structure (e.g. Conformance Criteria Committee, RFM Committee, and ASMI Board of Directors.)

- _____ Independent Certification Bodies and Auditors
- _____ Chain of Custody Audit process & cost
- _____ RFM Program Communications & Outreach (including eblasts, newsletters, website, brochures, and media coverage)
- _____ RFM Stakeholder Involvement ; during the fishery audit process and in governance process and operations.
- _____ Value of the RFM program versus the cost to your company
- _____ The RFM program overall

12. Has your company been certified under the ASMI RFM Chain of Custody Standard? (If yes, got to next question, if no, go to last question, circle)

Yes / No

13. Were you involved in the Chain of Custody certification process? Yes / No

14. Does your company utilize any other wild capture certification or assessment criteria (e.g. MSC, Monterey Bay Aquarium, NOAA FishWatch, etc.) Yes / No

If yes, which additional certifications does your company hold or sell product under:

15. Does your company use the Alaska RFM Certified Seal on any seafood products? If no, can you elaborate on why your company doesn't use the Alaska RFM Seal? (Mark those that apply with an 'x')

- I wasn't aware there was an Alaska RFM Certified Seal
- My customers aren't asking for it
- We don't have 'consumer facing' products
- We currently use the Alaska Seafood logo instead
- Not sure
- other:

16. Does your company use the Alaska RFM Certified Seal on any marketing materials or pricing sheets?

Yes / No

17. Does your company use the ASMI Alaska Seafood logo on any products, marketing materials or pricing sheets? Yes / No

18. What benefits does your company receive from holding a Chain of Custody certification through ASMI's RFM program certification?

19. Have you encountered any challenges with the Alaska RFM Chain of Custody certification process?

20. We would like your response to three statements, please choose one response from a list for each statement. (1 – Agree Completely, 2 – Agree Somewhat, 3 – Not Sure, 4 – Disagree Somewhat, or 5 – Disagree Completely)

Obtaining Alaska RFM Chain of Custody certification is an easier process than other certification programs: _____

In the future, we believe Alaska RFM certification will be the only certification we will need to sell Alaska seafood to our customers: _____

21. Do you have any questions, comments, or suggestions related to Alaska’s RFM program that you would like ASMI to address?

22. Would you like an ASMI representative to contact you about any of the issues in this survey or any other matter concerning ASMI?

Interviewee's Name and Company: _____

Date and Time: _____

Thank you for participating in this important project! The results of this survey will be presented to the ASMI board of directors at their fall “All Hands” meeting.

Appendix 2: Fishermen's Survey Instrument

ASMI 2015 Industry Report Card Survey: Commercial Fisherman Survey

PHONE # _____

Fishermen's Name _____

Interviewee Name _____

Date _____

Introduction:

Hello, is this _____ ? (fisherman's name)
The Alaska Seafood Marketing Institute is surveying commercial fishermen to understand their opinions about ASMI. As a commercial fishermen, a portion of your harvest value is used to support ASMI marketing operations. May we have 10 minutes of your time to conduct a brief survey?

What commercial fisheries do you participate in as an active permit owner, quota owner, or hired skipper?:

Where do you reside when you're not fishing: _____

1. Use the following choices to describe your knowledge of the ASMI organization and your understanding of what they do for Alaska's seafood industry:

01 ___ Very Aware 02 ___ Somewhat Aware 03 ___ Slightly Aware 04 ___ Unaware
99 ___ Refused

2. ASMI publishes information about its operations on its website, attends trade shows, works with media outlets, coordinates promotions, holds an annual fishing photo contest, and provides information to lawmakers. On a scale of 1-10 with 1 being not effective and 10 being very effective, please rate how well ASMI communicates with the following groups:

_____ Fishing Industry

_____ Media

_____ Lawmakers

Do you have any other suggestions about how ASMI can efficiently communicate with the Alaska Fishing Industry:

3. ASMI's Mission is to enhance the value of Alaskan seafood. Overall, how would you rate ASMI's performance in achieving its mission in recent years?

01 ___ Very Good 02 ___ Good 03 ___ Adequate 04 ___ Poor 05 ___ Very Poor
97 ___ Don't Know 99 ___ Refused

4. ASMI publishes bi-annual seafood market bulletins and provides other marketing tools and information on its website. Have you ever visited ASMI's website at www.alaskaseafood.org? Yes / No

(If yes) How many times per year do you think you visit the site?

Aside from tracking in-season price activity, which is not feasible for most fisheries, what other types of information would you like to see ASMI provide to commercial fishermen?

5. (For Salmon fishermen Only) The value of Alaska salmon has increased substantially since the mid-2000's, primarily driven by higher prices. How have better salmon values impacted you, your fishing business, and/or your community?

6. ASMI is looking for commercial fishermen to be ambassadors for the Alaska seafood brand. Fishermen must be willing to interact with media, share social media content, do interviews, provide basic information about themselves, and participate in photo shoots. In return, fishermen ambassadors will receive a custom Alaska Fisherman hat designed by the Aurora Projekt. Would you like to be added to our list of ambassador fishermen? (if yes, get address, best phone number, social media handles, and email address)

7. Do you have any final comments or suggestions regarding ASMI you would like to make?