

# ALASKA SEAFOOD REPORT CARD SURVEY



Prepared by:  
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**All Hands Meeting**  
**10.23.15**



Alaska Seafood Marketing Institute

# Survey History & Methods

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- Third survey of processors, direct marketers, and associations (2015, 2011, and 2008)
- Goal: 20 surveys each from group (80 total)
- Actual 2015: 50 surveys (longer survey/timing)
  - Large Processors (12 surveys completed)
  - Smaller Processors (17)
  - Direct Marketers (9)
  - Associations/Agencies (12)
- Most online and some phone surveys

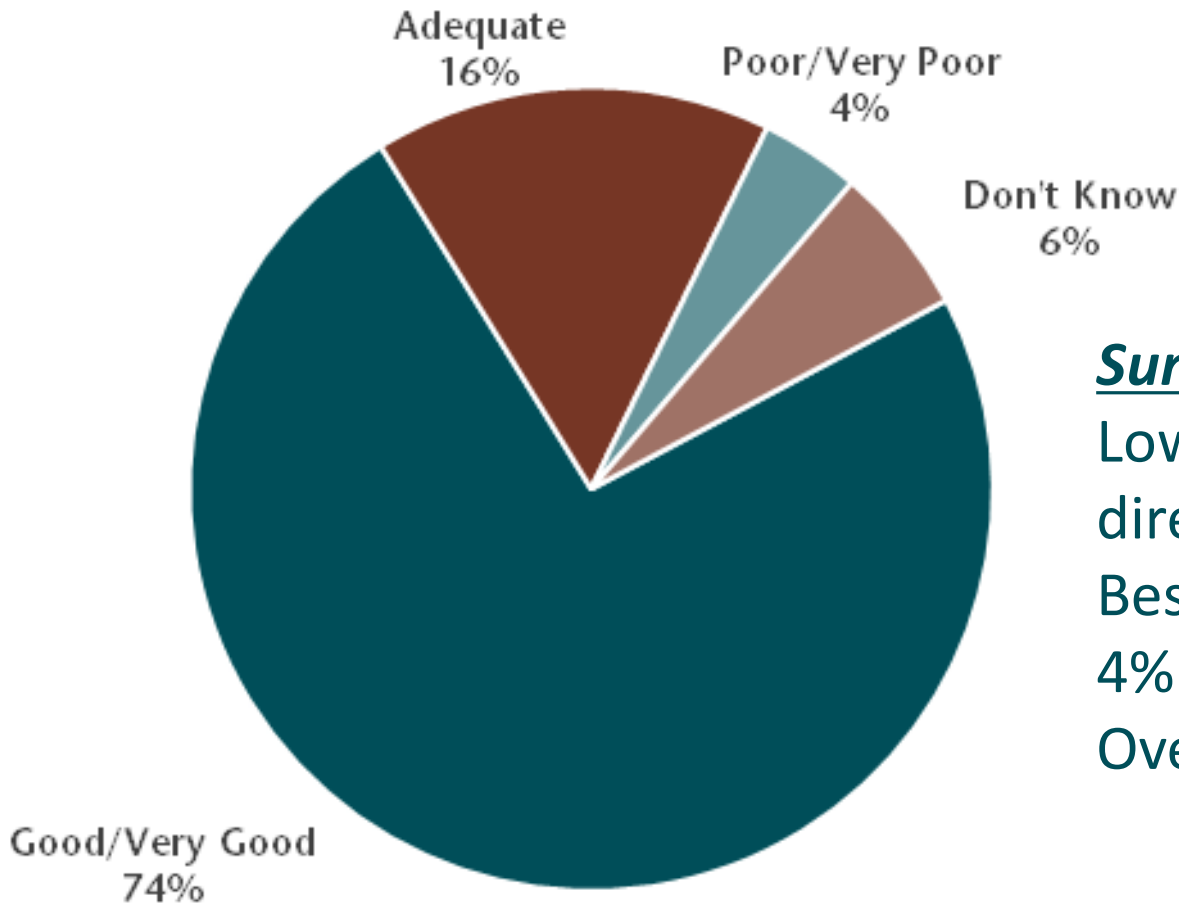
**Processors,  
Direct Marketers,  
and Associations  
Survey Results**

**Fall 2015**



# Mission Achievement

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



## Summary:

Lowest: Big processors & direct marketers

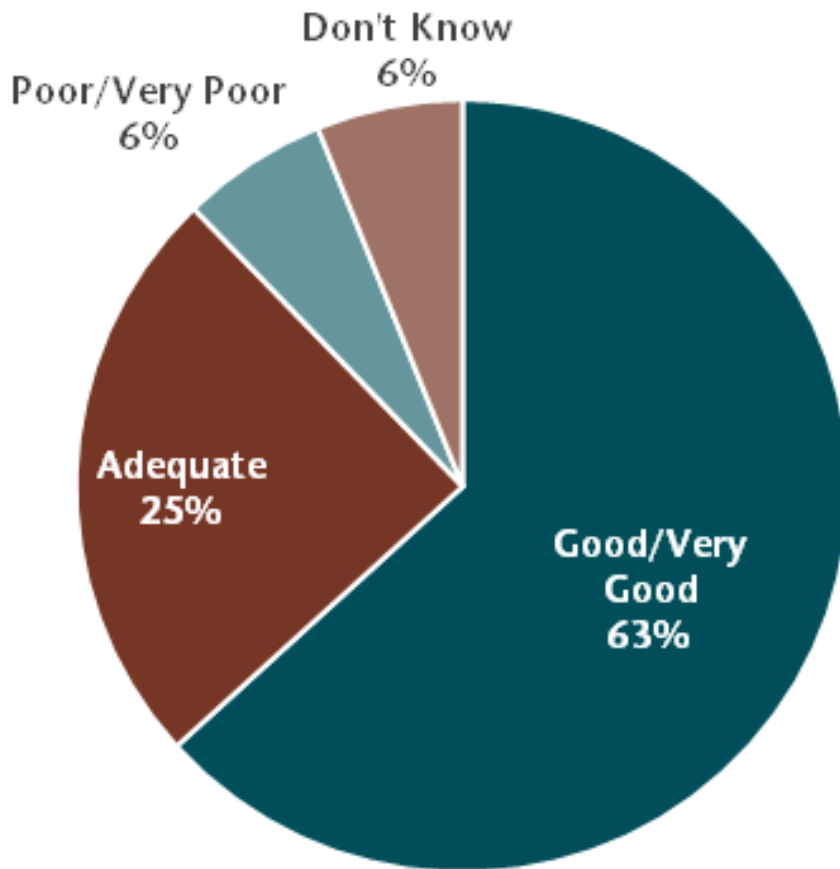
Best: Assoc./Agencies

4% = poor/very poor

Overall, lower than 2011

# Industry Representation

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



## Summary:

Lowest: Big processors & direct marketers  
Highest: Assoc./Agencies  
22% of DM's "Don't Know"  
Overall, lower than 2011

# ASMI Programs

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- Measured familiarity, usage, and importance
- Three questions:
  - How familiar are you with each ASMI program?
  - Do you use ASMI's \_\_\_\_\_ program?
  - How important is ASMI's \_\_\_\_\_ program to your business?
- Marketing collateral and international program are most familiar, communications most important (though all above 70%).

# International Program

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<u>Industry Group</u>	<u>Familiar%</u>	<u>Use%</u>	<u>Important%</u>
Larger Processors	100%	75%	100%
Smaller Processors	76	35	71
Direct Marketers	67	22	67
<b>Total 2015</b>	<b>82%</b>	<b>45%</b>	<b>79%</b>
<b>Total 2011</b>	<b>55%</b>	<b>23%</b>	<b>57%</b>

- Higher ratings for larger processors
- Ratings up from 2011 survey

# Food Service Program

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<u>Industry Group</u>	<u>Familiar%</u>	<u>Use%</u>	<u>Important%</u>
Larger Processors	33%	50%	75%
Smaller Processors	24	24	71
Direct Marketers	33	22	67
<b>Total 2015</b>	<b>29%</b>	<b>32%</b>	<b>71%</b>
<b>Total 2011</b>	<b>55%</b>	<b>23%</b>	<b>60%</b>

- Much higher usage for larger processors
- Reported familiarity down, but usage/importance up



# Domestic Retail Program

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<u>Industry Group</u>	<u>Familiar%</u>	<u>Use%</u>	<u>Important%</u>
Larger Processors	50%	58%	83%
Smaller Processors	29	35	59
Direct Marketers	22	33	78
<b>Total 2015</b>	<b>34%</b>	<b>42%</b>	<b>71%</b>
<b>Total 2011</b>	<b>70%</b>	<b>40%</b>	<b>72%</b>

- Higher ratings for larger processors
- Totals somewhat skewed by smaller processors (n=17)
- Lower familiarity due to more online surveys?

# Technical Program

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<u>Industry Group</u>	<u>Familiar%</u>	<u>Use%</u>	<u>Important%</u>
Larger Processors	92%	50%	92%
Smaller Processors	71	53	71
Direct Marketers	78	22	78
<b>Total 2015</b>	<b>79%</b>	<b>45%</b>	<b>79%</b>
<b>Total 2011</b>	<b>60%</b>	<b>37%</b>	<b>62%</b>

- More smaller processors using program
- Higher ratings than prior survey

# Public Communications Program

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<u>Industry Group</u>	<u>Familiar%</u>	<u>Use%</u>	<u>Important%</u>
Larger Processors	42%	50%	100%
Smaller Processors	53	24	65
Direct Marketers	22	44	78
Assoc./Agencies	33	58	92
<b>Total 2015</b>	<b>40%</b>	<b>42%</b>	<b>82%</b>
<b>Total 2011</b>	<b>62%</b>	<b>27%</b>	<b>68%</b>

- Increased usage by direct marketers
- Higher usage/importance ratings than prior survey

# ASMI Marketing Collateral

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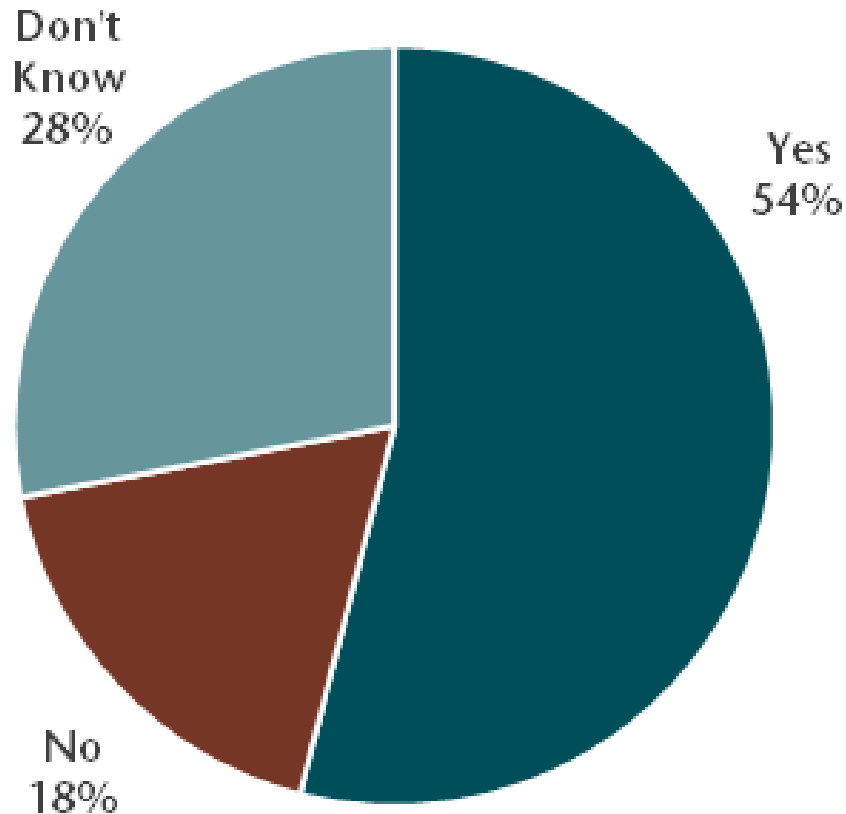
<u>Industry Group</u>	<u>Familiar%</u>	<u>Use%</u>	<u>Important%</u>
Larger Processors	100%	67%	83%
Smaller Processors	88	76	82
Direct Marketers	78	78	67
<b>Total 2015</b>	<b>89%</b>	<b>74%</b>	<b>79%</b>
<b>Total 2011</b>	<b>98%</b>	<b>78%</b>	<b>85%</b>

- Why lower usage and importance for direct marketers?
- Survey instrument did not solicit reasons for/against usage or importance

# Program Mix

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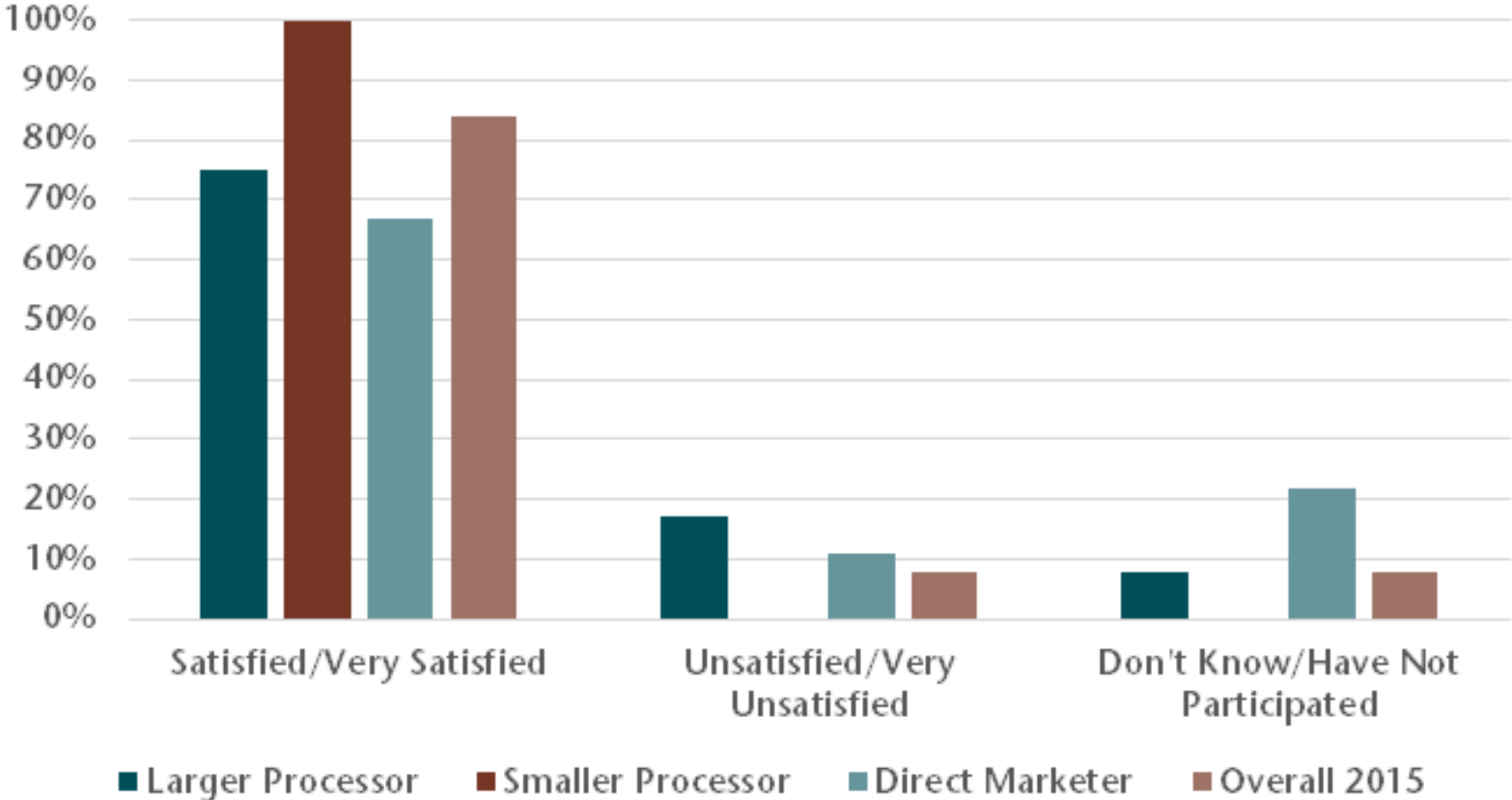
*Do you believe that ASMI has the right mix of program elements to achieve its mission?*



**Comment Summary (p.21):**  
Relatively few suggestions (22)  
Most were specific requests

# ASMI Promotions

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



*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%
<b>Overall 2015</b>	<b>28%</b>	<b>40%</b>	<b>32%</b>

- Several respondents commented about the need for better communication.
- Unclear how many receive ASMI communications and to what degree those materials meet industry needs.

# ASMI's RFM Program

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- First time industry surveyed about RFM program and Chain of Custody (CoC) certification
- Out of 38 processors, 35 completed questions and 21 held CoC certification
  - Large Processors (11/12 have RFM CoC cert.)
  - Smaller Processors (9/17)
  - Direct Marketers (1/12)



# RFM: Perceived Importance

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<u>Industry Group</u>	<u>Score/10</u>	<u>1-3</u>	<u>4-7</u>	<u>8-10</u>
Larger Processors	6.7	8%	42%	50%
Smaller Processors	6.6	24	24	53
Direct Marketers	7.5	0	44	44
Assoc./Agencies	7.6	8	25	67
<b>Total 2015</b>	<b>7.0</b>	<b>12%</b>	<b>32%</b>	<b>54%</b>

- Most important to Assoc./Agencies and DM's
- Over half rated it a 7/10 or better

*Note: Figures may not sum to 100 percent because not all respondents provided an answer.*

# RFM: Awareness & Understanding

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- Most are aware of program (92%)
- Varying degrees of understanding
  - Understand VERY well: 44%
  - Understand SOMEWHAT: 42%
  - Aware but do not understand: 6%

# RFM: Program Elements (p.15)

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- Questions measured satisfaction level (1-10) with specific RFM program elements
- Responses varied widely, but averages fell within a fairly narrow range (5.4 to 6.8)
- Highest: Conformance criteria & Gov. structure
- Lowest: Communications & Value/cost

# RFM: CoC Certification

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- Majority of large and mid-sized processors hold RFM CoC certification
- Larger processors generally reported lower satisfaction scores (avg. 4.0)
- Mostly executive respondents, 57% were involved in CoC process
- 81% of those with RFM CoC utilize other certification programs, compared to 47% of those with no ASMI RFM CoC certification.

# RFM: Ease of Use & Future Role

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## Statement One:

Obtaining Alaska RFM CoC certification is an easier process than other certification programs.

- Results: Slightly easier

## 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.

- Results: Most disagreed

# RFM: Final Thoughts

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- “Program itself actually works quite well. It just isn’t widely recognized or respected by customers.”
- Value and importance functions of acceptance
- Industry wants better communication/outreach
- Program has been mostly effective in markets outside “MSC-only” European segments

# Fishermen's Survey

Fall 2015



# Fishermen's Survey (p.18)

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- First direct survey... asked gear groups in past
- Open online survey... sample selection difference
- Goals:
  - Measure communication effectiveness
  - Solicit feedback from the fleet
  - Sign up fishermen ambassadors
- Received 197 responses, 82% salmon fishermen



# Performance & Awareness

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<b>Knowledge of ASMI</b>	<b>Pct.</b>	<b>Avg. Performance in Meeting the Mission (0-5)</b>
Very Aware	47%	2.6 (Good)
Somewhat Aware	39%	2.2 (Adequate)
Slightly Aware	10%	1.4 (Poor)
Unaware	5%	1.0 (Poor)
<b>Total 2015</b>	-	<b>2.3 (Adequate)</b>

- 52% of fishermen felt ASMI had done a good/very good job meeting its mission in recent years.
- Ratings were lower, on average, for salmon fishermen – likely due to low prices.

# Communications (p.19)

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- Asked fishermen how well ASMI communicated with the fleet, media, and lawmakers.
- Average scores (1 = not effective to 10):
  - Fishing industry: 5.1
  - Media: 5.4
  - Lawmakers: 5.0
- Scores were slightly higher among more aware fishermen, wide variance (p.20)

# Comments

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- 20 pages of comments (starts p.27)
- General angst over low salmon prices, but many appreciative of ASMI's work
- Improving communications:
  - Working through gear groups or a cabinet
  - Articles in trade press
  - Emails/newsletters
  - Local radio/media

# Comments (cont.)

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- Asked fishermen about what type of information would be most useful, general themes:
  - Organizational transparency
  - Market transparency
  - Improving quality
  - Direct marketer support/tools

# Questions?



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