

Louisiana Seafood Promotion and Marketing Board

Request for Proposals

Due Date: April 3, 2011



SCALE IT.



CRACK IT.



SKIN IT.



SUCK IT.



PINCH IT.



SHUCK IT.



**LOUISIANA
SEAFOOD**

Get fresh with us.

Some Legal Stuff

This RFP does not commit the Louisiana Seafood Promotion and Marketing Board (LSPMB) in any way to select a Preferred Proponent, or to proceed to negotiations for an Agreement, or to award any Agreement, and the LSPMB reserves the complete right to, at any time reject all Proposals, and to terminate this RFP process. This RFP is not intended to create, and should not be construed as creating, contractual relations between the LSPMB and any Proponent.

Who are we?

Louisiana Seafood Promotion and Marketing Board was created in 1984 by the State legislature to support their vast historical commercial fisheries industry. Although seafood had grown from a subsistence economy to a world class operation, it was challenged by dramatic changes in the marketplace.

The board was mandated to strengthen and revitalize the Louisiana seafood industry, to identify threats and execute strategic plans to meet them head on and overcome them. The Board's operating budget is derived from license sales to Louisiana commercial fishermen and seafood wholesalers/retailers, as well as state and federal grants.

So what do we do? We have the best seafood on the planet and the hardest working fishermen and processors around. It's our mission to tell the world – consumers and major buyers – domestic and global. We help our industries compete, and find new, creative ways to increase the value of our seafood products and explore new markets.

Ordinarily we have a \$600,000 state operating budget. With creativity, outside the box thinking, press events and alliances with local and national groups - we are able to stretch those dollars to be as effective as possible.

So we have this challenge...

The recent Deep Water Horizon oil spill has caused fishing closures, forced fishermen out of their profession, and tarnished the perception of our seafood - despite thousands of negative tissue samples (and yes that includes dispersant testing). Seventy percent of the country remains concerned about seafood safety. We have lost market share to other protein products and the perception of our seafood is challenged, to say the least. The purpose of this RFP is to select an agency that will help the LSPMB develop and execute a strategy to help regain those lost markets and counter negative public perception. The selected agency must have the ability to get a handle on perception and change those perceptions while delicately balancing the safety message.

...but we got some extra resources

This RFP is an invitation to prospective proponents to submit proposals to aid the LSPMB in our recovery efforts in the aftermath of the Deepwater Horizon oil spill. The selected firm will provide full advertising and communications strategy development services over a three-year period, subject to annual reviews. The LSPMB seeks to retain one service provider for a total fixed contract price of up to \$15 million dollars. This will be in annual increments with an annual review of the selected agency.

So what do we need?

A lot - a list of our own ideas are below, we hope you have some ideas too.

- Strategy / Brand development (local, national and international)
- Provide program marketing communications which include creative design and development,

implementation, production, photography, videography and media purchases

- Design and produce educational materials (consumer oriented)
 - Restaurant, grocery, retail materials
 - Posters
 - Recipe cards
 - Electronic newsletters
- Social network listening, communications and analytics to measure results (Twitter, Facebook, Blogosphere, etc)
- Design and produce educational materials (trade oriented)
- Build email lists and implement an email marketing campaign to correspond weekly with key stakeholders (buyers, chefs, legislators, board members, consumers) each group with unique messaging.
- Design and produce video commercials
- Buy and place media ads
- Web development
- Research to measure effectiveness of marketing efforts, identify baselines and establish an effective strategy
- Perception and messaging research
- Utilization and implementation of food sampling tour vehicle
- Create and execute national and international events
- Micro campaign for the Certified Wild Louisiana Seafood program (program under development to create a premium market for a small section of our seafood products – similar to Certified Angus Beef).

We have included a budget template with this RFP. Rather than submit a draft budget we thought it would be valuable to solicit opinions from the proposing agencies on how they recommend spending budget. We hope that the chosen firm will base the final budget on preliminary research, board member and staff discussions, discussions with key stakeholders, and an analysis of the strategic direction the board is pursuing.

So what's the objective?

Work with the LSPMB to:

- Rebuild lost market share in the aftermath of the BP oil spill by changing Louisiana seafood perceptions and returning buying behavior to pre-spill conditions.
- Increase the value of our seafood products
- Raise awareness of Louisiana seafood products with key audiences, stakeholders and the public at large
- Advertising and communications strategy development
- Create a master brand strategy to develop an innovative and effective marketing communications campaign
 - See the attached marketing research results from phase of our perception and messaging study.
- Create metrics to measure the effectiveness of meeting these objectives.
- In a nut shell: we want to increase demand for our seafood and we want to increase its value.

What do we want from You?

Aside from meeting the objectives outlined above...

Provide a dedicated team to support the LSPMB. We do email, Twitter, FaceBook, Skype, but when we want to talk to a person, let us have a person.

Be able to handle and deliver multiple projects at the same time and be able to operate in a environment with time sensitive deliverables. *We want a firm engaged, driven and passionate. We're not OCD, but if we have a deadline let's keep it.*

We want fun, creative, and outside the box planning, execution and results. We want to make a splash, one that will last beyond this 3-year project. Help us take Louisiana Seafood to the next level and help enhance the rich culture that our industry brings to our

state. If done correctly, we have the potential of receiving funding well beyond this project and extended beyond the 3-year project.

Inspiration Ideas!

Alaska Seafood Marketing Institute

<http://www.alaskaseafood.org/>

Their \$18 million a year annual operating budget has been our envy for a long time. Spend some time on their site and check out their messaging, print materials, ads, use of chefs, etc.

Wild American Shrimp

<http://www.wildamericanshrimp.com/main.html>

Great messaging, beautiful designs, and they increased shrimp values – but ran out of money

We want to invest in materials that can be used in the future. Approach this project as an opportunity to lift the seafood community off its knees. High fuel prices, natural and man-made disasters, low-dock side prices, imports and other factors are threatening the culture and lifestyle of our fishing communities. This is an opportunity to help position our brand outside of the commodity marketplace and into the premium marketplace.

Where do we want to go?

We recently hired a firm to create a new brand identity for the Louisiana Seafood Promotion and Marketing Board – our previous colors of red and yellow conjured up ‘danger’ and ‘caution’ images for consumers. You will see attached some samples of our new identity. This will lay the visual foundation of our brand moving forward.

It may also be useful to take a look at some of the things we have been doing. Spend some time on our newsroom site – it is a

repository of stories for media and industry and provides stories about events that we have orchestrated.

www.louisianaseafoodnews.com

www.louisianaseafood.com

www.facebook.com/LouisianaSeafood

We are anxious about getting started...

Proposal Submission Deadline

Postmarked by

4:30 P.M.(Central time) on April 3, 2011

Submissions of Proposals

Proposals should include a cost and technical section – the two can be combined into a single document. The cost proposal should include rates by task and a budget for the total project.

The technical proposal should include approach and methodology, experience with similar clients, key staff qualifications and total number of team members that will be assigned work on this project, samples of prior work, and a client list with references. Please take time build the case that your firm has the resources, staff and time for an account of this size.

Proposals should be submitted by the following method: A Proponent should submit twelve (12) hard copies of the proposal in a sealed package and one (1) electronic copy of the Proposal in PDF format via email to rene@louisianaseafood.com.

The top 3 scoring firms will be asked to come to the Louisiana Seafood Promotion and Marketing Board and present their

strategy, introduce key team members and meet out staff.

Ship where?

Louisiana Seafood Promotion and Marketing Board
2021 Lakeshore Drive, Suite 300
New Orleans, LA 70122
Attention: RFP Coordinator

LSPMB Contact

Name: Rene LeBreton
E-mail: rene@louisianaseafood.com
Telephone: 504-286-8733

Schedule:

RFP Announcement	March 3, 2011
Questions via email	Before March 17, 2011
Submission Deadline	April 3, 2011 – 5pm CST
Board member review deadline	April 16, 2011
Presentations of top 3 firms	Week of April 18 th
Final Selection and notices issued	Week of April 25 th

Scoring of Proposals

Agency Rates	20 points
Comparable Experience and Qualifications	25 points
Approach / Methodology	20 points
Creativity	20 points
Louisiana Based	15 points

Revisions and Questions:

Any revisions to this proposal will be posted at:
www.LouisianaSeafood.com/pdf/RFPRevised.pdf

All responses to questions will be posted by March 21st at:
www.LouisianaSeafood.com/pdf/RFPQuestions.pdf

Attached Documents:

- New Brand Identity samples
- Phase 1 – National Consumer Perception Research
- Draft Budget template



Brand Evolution

Moving the Louisiana Seafood brand forward



Objective

Evolve to a fresher, more progressive identity system that portrays Louisiana Seafood as fresh, great tasting, vibrant, and premium.

Transitioning a Brand



Starting here

Transitioning a Brand



Get fresh with us.



Transitioning a Brand

LOUISIANA
SEAFOOD

Get fresh with us.



Objectives

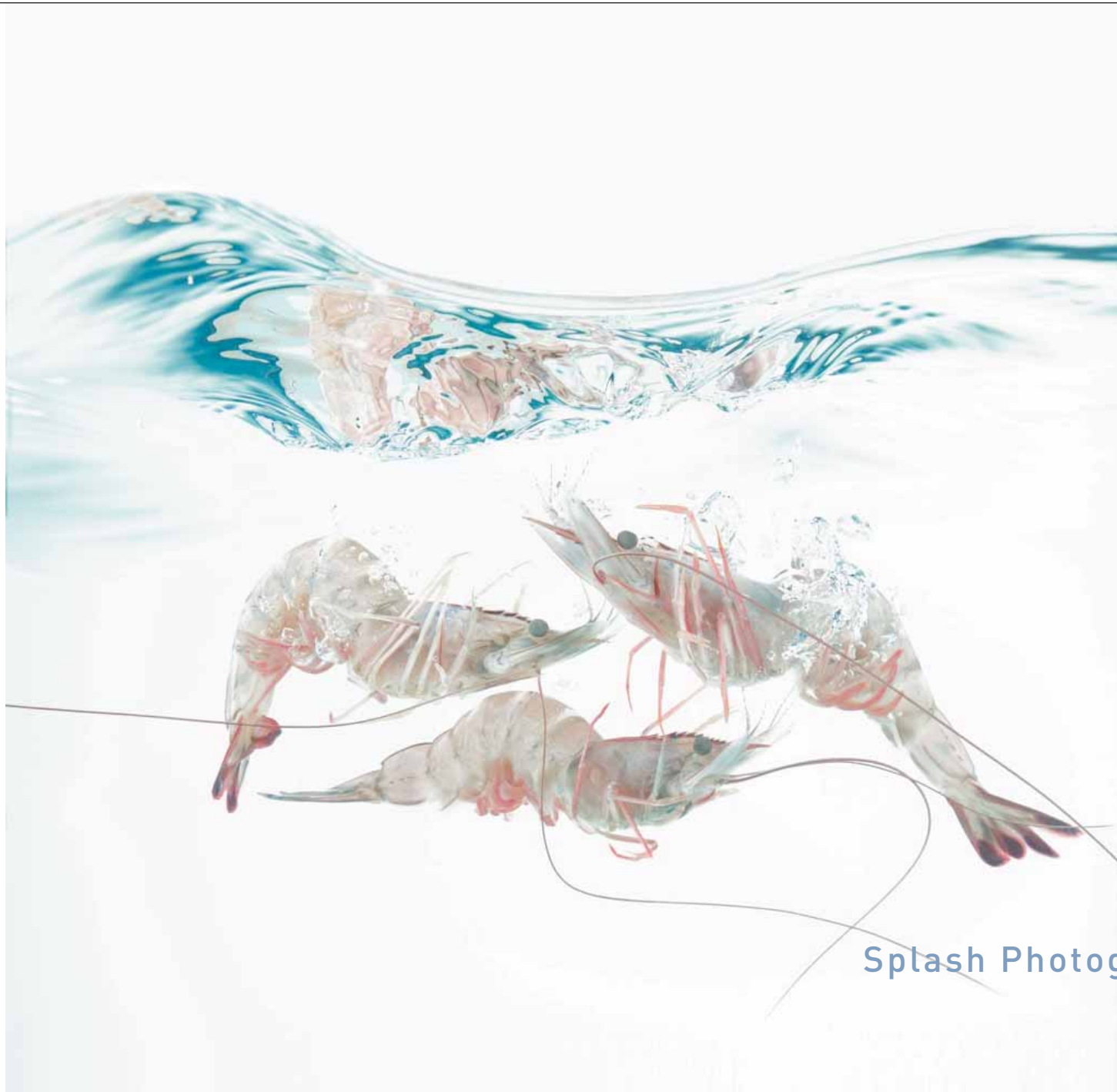
- Instill immediate confidence that LA Seafood is a premium, fresh source.
- Deliver messages via a clean brand style to mirror product quality.
- As in consumer package design, the psychology of a cooler color palette makes an instant fresh impression versus use of hot red and caution yellow.
- Dramatic splash-tank product photography combined with richly-colored cooked photos.



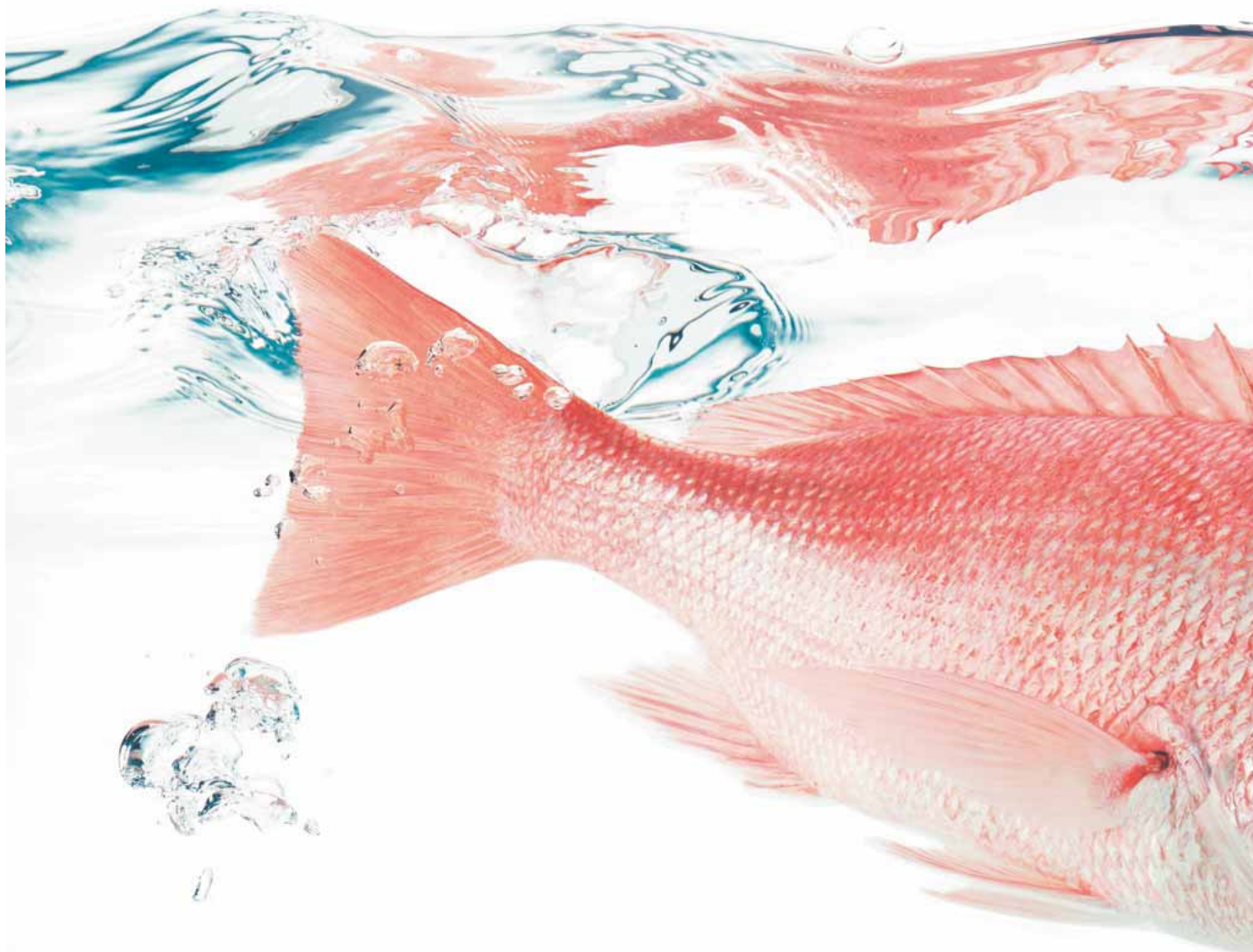
Splash Photography



Splash Photography



Splash Photography



Splash Photography



Splash Photography



Splash Photography

Identity System

Ewell Smith
Executive Director
ewell@louisianaseafood.com

2021 Lakeshore Drive, Suite 300
New Orleans, LA 70122
tel: 504.286.8732 fax: 286.8738
louisianaseafood.com



Business ID



Get fresh with us.



Ewell Smith
Executive Director
ewell@louisianaseafood.com

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Business ID

LOUISIANA SEAFOOD

NEWS FEED | CONTACT


WHY BUY LOUISIANA

SEAFOOD FINDER

RECIPES

FESTIVALS & EVENTS

SEAFOOD HANDBOOK



Get fresh with us.

Suspendisse potenti. Aenean venenatis fermentum est vel pellentesque. Vivamus sollicitudin eros non ante hendrerit condimentum. Mauris sit amet magna purus.

Lorem ipsum dolor sit

Morbi Vulputate Venenatis Libero


Etiam sodales laoreet sapien

Donec rhoncus lorem

Ut non velit nulla


FIND A SUPPLIER

Donec mauris arcu, fringilla sed porta ac, vulp utate in risus. Maecenas sit amet lacus



Shrimp Creole

Nam blandit volutpat sem, in feugiat lacus vulputate nec.



- 1/2 lb. shrimp, peeled and deveined
- 1/2 lb. ground beef, browned
- 1/2 lb. ground sausage, browned
- 1/2 lb. ground pork, browned
- 1/2 lb. ground chicken, browned
- 1/2 lb. ground turkey, browned
- 1/2 lb. ground lamb, browned
- 1/2 lb. ground venison, browned
- 1/2 lb. ground bison, browned
- 1/2 lb. ground elk, browned
- 1/2 lb. ground moose, browned
- 1/2 lb. ground caribou, browned
- 1/2 lb. ground reindeer, browned
- 1/2 lb. ground muskox, browned
- 1/2 lb. ground yak, browned
- 1/2 lb. ground zebu, browned
- 1/2 lb. ground kudu, browned
- 1/2 lb. ground topi, browned
- 1/2 lb. ground reedbuck, browned
- 1/2 lb. ground roan, browned
- 1/2 lb. ground eland, browned
- 1/2 lb. ground kudu, browned
- 1/2 lb. ground topi, browned
- 1/2 lb. ground reedbuck, browned
- 1/2 lb. ground roan, browned
- 1/2 lb. ground eland, browned



Galatoire's Restaurant

TAKE THE PLEDGE

Join others in a pledge for Louisiana Seafood

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Pellentesque ut odio ut nisi pulvinar fermentum. Sed accumsan malesuada libero turpis.

LOUISIANA SEAFOOD E-NEWS

email address

JOIN

Facebook

Twitter

E-News

LATEST NEWS

- 09.09 Lorem ipsum dolor sit amet, consectetur adipiscing elit...
- 09.09 Vivamus a lacinia elit. Nulla purus turpis, dictum volutpat cursus...
- 09.09 Class aptent taciti sociosqu ad litora torquent per conubia nostra...
- 08.09 Morbi pretium nulla vel eros eleifend pharetra...
- 08.09 Cras suscipit nibh eget dolor pellentesque congue...

CALENDAR of EVENTS

- OCT 10: Praesent est orci, gravida a
- OCT 23-25: Morbi vulputate venenatis libero, pharetra
- OCT 31: Donec nec sapien dolor
- NOV 7: Quisque ut sem felis.

Web



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LouisianaSeafood.com

*2021 Lakeshore Drive, Suite 300
New Orleans, LA 70122
Tel: 504.286.8736
Fax: 504.286.8738*

Brochure

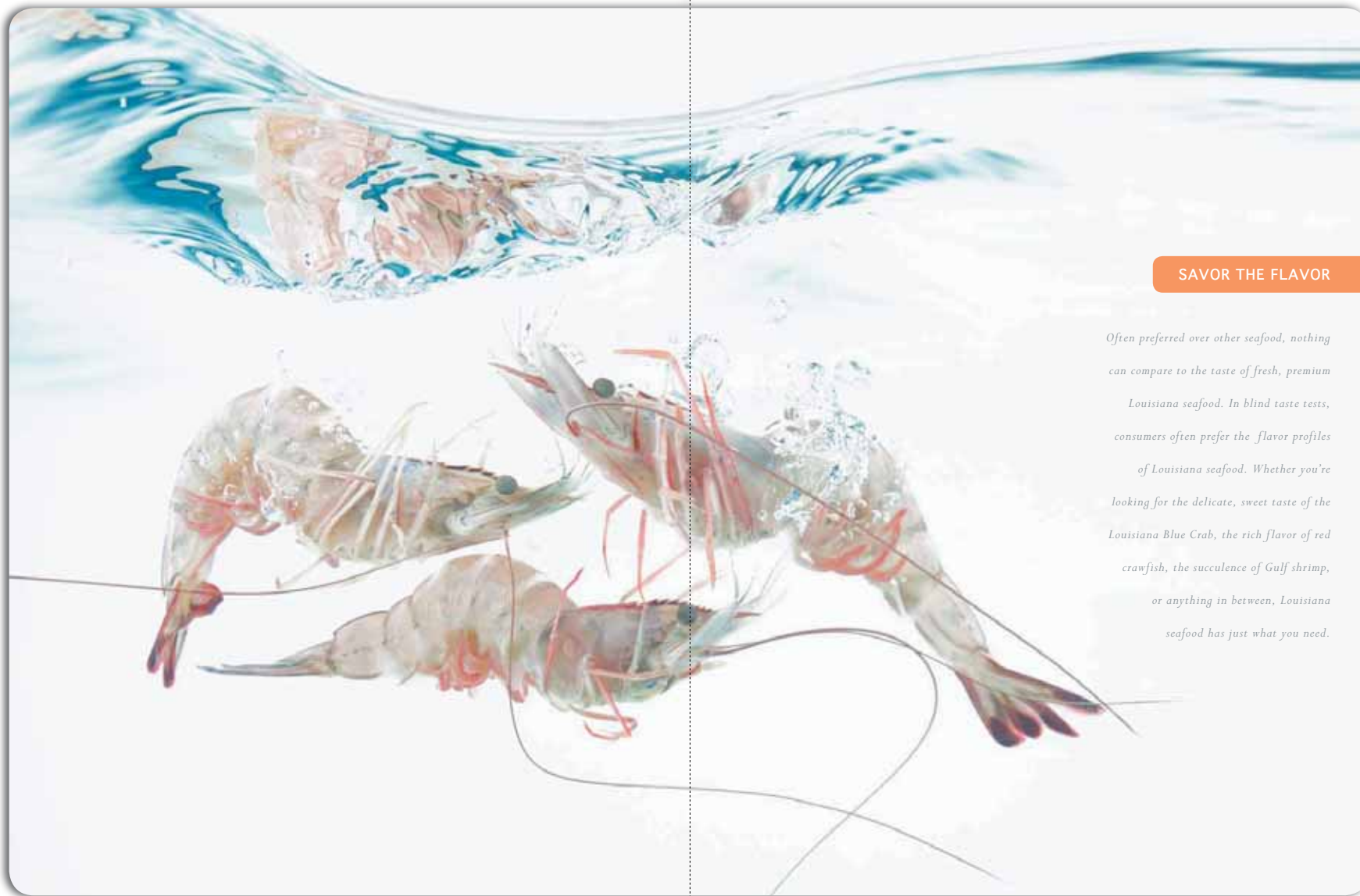
A TRUE SPORTSMAN'S PARADISE

In Louisiana, seafood isn't just what's for dinner, it's a way of life. The coastal marshes, Gulf of Mexico, and freshwater ponds & rivers make it a true sportsman's paradise.

Louisiana is home to some of the freshest ingredients and finest chefs in the United States, and the traditions of catching, cooking, and eating seafood have been passed down from generation to generation. The natural culinary resources and unmatched freshness of our seafood in Louisiana make for extraordinary cuisine. When you choose Louisiana seafood, you not only get a superior product but you're supporting the traditions, lifestyles, and environment that have sustained the people of the region for decades.



Brochure



SAVOR THE FLAVOR

Often preferred over other seafood, nothing can compare to the taste of fresh, premium Louisiana seafood. In blind taste tests, consumers often prefer the flavor profiles of Louisiana seafood. Whether you're looking for the delicate, sweet taste of the Louisiana Blue Crab, the rich flavor of red crawfish, the succulence of Gulf shrimp, or anything in between, Louisiana seafood has just what you need.

Brochure

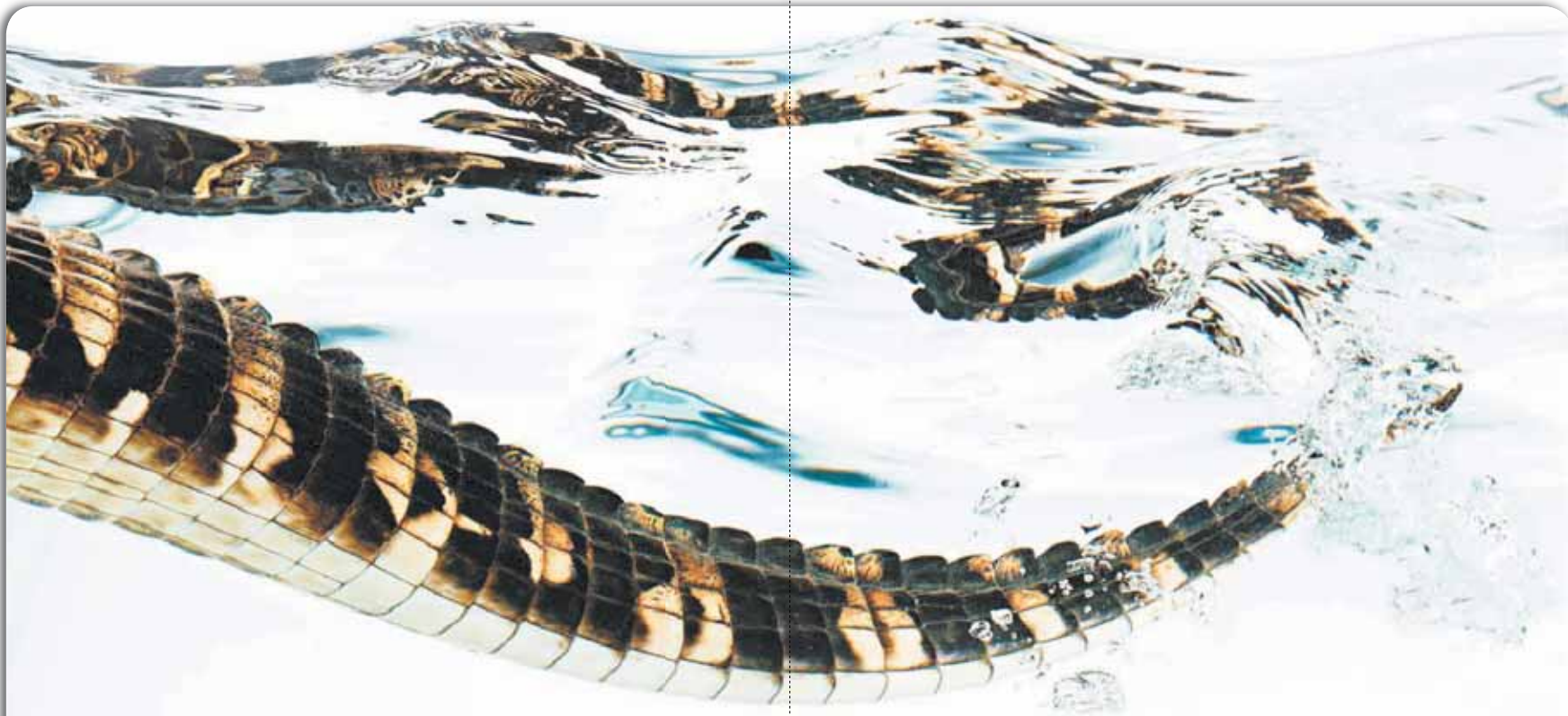


LOUISIANA THE BOUNTIFUL

Louisiana waters are home to some of the most spectacular seafood in the world. Not only is the state the largest producer of hard & soft-shell blue crabs, crawfish, and white & brown shrimp in the nation, but it is also the largest producer of eastern oysters in the world. In fact, in a typical year, 70% of the oysters caught in the United States are from the Gulf Coast and 80% of domestic, United States shrimp are harvested from Gulf waters — 100 million pounds of which are caught in Louisiana per year. This, along with the abundance of wild & farmed alligator as well as Louisiana's plentiful fishing waters, gives you a variety of seafood to choose from.

Source: National Marine Fisheries Service 2009 data

Brochure



QUALITY IS OUR PRIORITY

Louisiana seafood is world-renowned for its taste, quality, and variety. Our seafood has a very short distance to travel from the water to the dinner table, which keeps it fresher and better tasting. But one of the main reasons Louisiana seafood is loved across the United States is the variety of seafood species that inhabit Louisiana waters. There is an abundance of seafood products that are caught daily and delivered to our grocery stores, restaurants, and markets.

Even though Louisiana seafood is top-quality seafood, we are constantly working to go above and beyond. Our Certified-Wild Louisiana Seafood program in particular improves the quality of the seafood sold in our grocery stores and restaurants. Wild-caught shrimp, for example, have a fresher, cleaner taste than farmed shrimp due to their natural eating habits and diet.

Louisiana seafood continues to undergo rigorous testing completed by the Food and Drug Administration, the National Oceanic and Atmospheric Administration, and various state & local agencies confirming that Gulf Coast seafood is safe to eat.

Brochure

A SUSTAINABLE RESOURCE

Louisiana seafood is one of the greatest sustainable resources available thanks to local fishermen understanding the need to provide nourishing, fresh products today while protecting each, individual species for future generations. Fishery management plans have been created to responsibly provide for today's needs without damaging the ability of the species to reproduce and flourish in nature. If you buy Louisiana seafood managed under a United States fishery management plan, be assured that it meets 10 national standards to ensure that fish stocks are maintained, overfishing is eliminated, and the long-term socioeconomic benefits of the nation are achieved.

The fisheries, wildlife, and boating resources of Louisiana are an important part of the state economy. They provide jobs, income, tax revenue, and innovations that protect our beautiful, clean waters. One out of every 70 jobs in Louisiana is seafood related with a total economic impact of over \$2.4 billion. Many of these jobs are in family-owned and operated companies that have worked for generations to bring the finest seafood to the tables of the world. These jobs and natural resources are of great value not only to industry and local businesses, but also to every resident and community in Louisiana as well as the country.



LEARN MORE

Want to learn more about buying and cooking Louisiana blue crab, crawfish, oysters, shrimp, fish, and alligator? Go to the Encyclopedia of Louisiana Seafood at <http://louisianaseafood.com/sfhandbook/>

Brochure

Boston Food Show



20' x 50' Peninsula



20' x 50' Peninsula



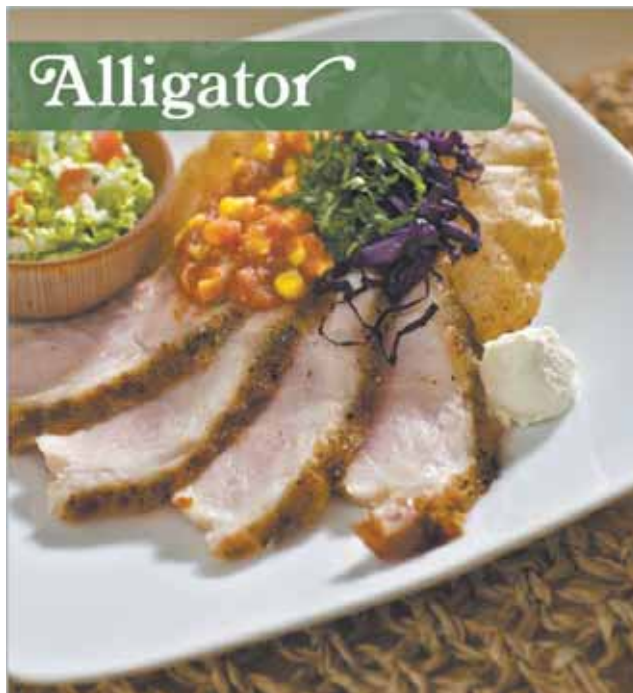
20' x 20' Version



10' x 10' Version



Back-lit center panels



Back-lit cooking station



Back-lit cabinets



Back-lit frame bar



Escalator Advertising



Get fresh with us.

LouisianaSeafood.com
Booth #2233

Trade Show Program Ad

New Orleans Hornets

LOUISIANA SEAFOOD.com



LED Screen



Goal Post Cushions



Tracking Consumer Attitudes Toward Seafood Safety Resulting from the Gulf Oil Spill

START WITH THE
MAIN INGREDIENT™
**LOUISIANA
SEAFOOD**
Promotion and Marketing Board
www.LouisianaSeafood.com

Findings from Base Wave December 2010

Dr. R. Wes Harrison – Louisiana State University © 2011 Louisiana Seafood Promotion and Marketing Board

Dennis Degeneffe – Principal Consultant

1

Consumer Centric Solutions LLC



Overview

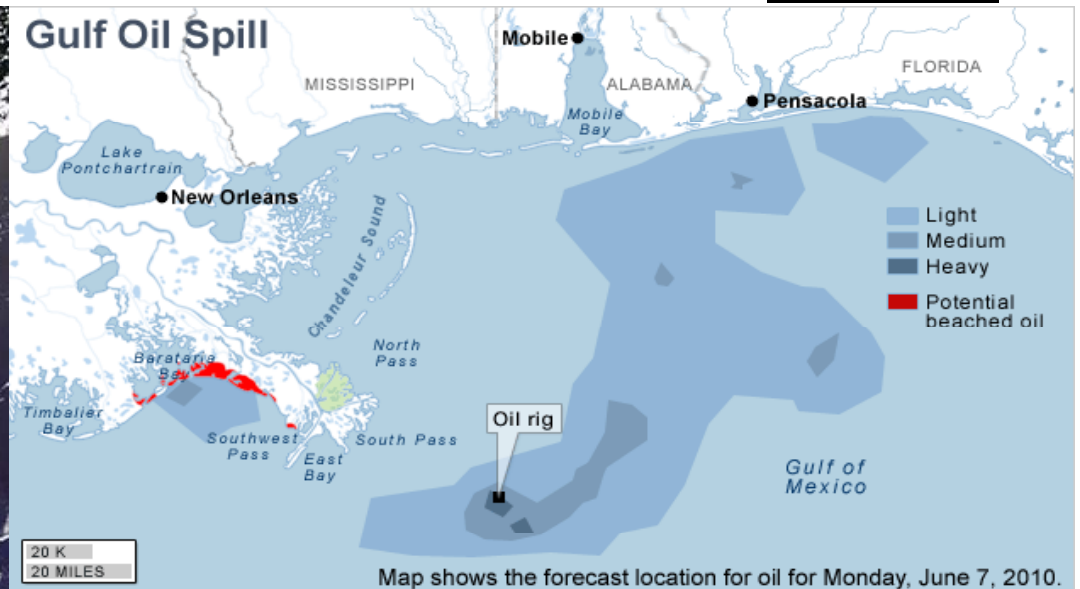


- Background
- Methods
- Management Summary
- Implications
- Detailed Findings
 - A Current Snapshot of Consumer Concern and Behavior
 - Targeting Consumers – Heavy versus Light
 - Messaging – Message Recall and Reassurance
- Next Steps & Timing



Gulf Oil Spill

April – August, 2010



Continuous Food Safety Tracking (CFST) Survey



- Weekly National Survey of 175 consumers over 132 weeks starting May 2008 - Focus on Food Safety and Defense
- Questions inserted in May 2010 about the Gulf Oil Spill:
 1. Have you heard about the recent oil spill in the Gulf of Mexico?
 2. How concerned are you about the risk this oil spill poses to the safety of seafood from the Gulf of Mexico?
 3. How will this Oil Spill affect your consumption of seafood?



Summary of CFST Survey

May – October, 2010



- Level of concern about the Spill's affect on Seafood safety - started out at 88% in the early weeks, increased to a high of 91.4% by July – falling to 75.3% by October - 3/4ths of consumers indicating concern is a high level.
- Extreme concern started out at 47.6% in the early weeks of the spill, increased to 54% by July – falling to 28.2% by October. Also a high level.
- Percent of consumers saying they eat less seafood as a result of the spill - 50.7% in the early weeks increasing to 60.6% by July – falling to 48.3% by October.



Louisiana Seafood Promotion and Marketing Board (LSPMB) Survey



- To delve deeper into the impact the Gulf Oil Spill has had on seafood consumer attitudes.
- A three wave tracking survey was commissioned to analyze ...

...national and regional consumer attitudes regarding food safety risks of seafood consumption following the Deep Water Horizon oil spill.

... the effectiveness of LSPMB communication strategies to recover lost consumer confidence in the safety of Gulf coast seafood.



Methods



- The survey is being conducted on-line by MRops, using the TNS national on-line panel of 2.5MM households.
- Three separate waves will be fielded each with a separate nationally representative sample of approximately 1,000 seafood consumers.
- Design, analysis and reporting of findings are provided by:
 - Dr. R. Wes Harrison – Louisiana State University
 - Dennis Degeneffe - Research Fellow University of Minnesota and Principal Consultant – Consumer Centric Solutions LLC.
- The first wave was launched the week of Dec. 6, 2010. Wave I will serve to set a benchmark for waves II and III.



Summary of Questionnaire



The questionnaire is composed of several questions previously used to track consumer concern since the start of the Gulf Oil Spill (i.e., the CFST study), and augmented to provide further detail regarding ...

- Seafood Consumption before Spill
- Awareness of the Oil Spill
- Attitudes regarding Seafood Safety after Spill
- Changes in Seafood Consumption as result of the Spill
- Messaging and Credibility of Sources
- Consumer Demographics



Management Summary - Wave I

December 2010



- Consumer concerns remain high – with approx. 71% of the respondents indicating some level of concern – down only slightly (4 percentage points) from the October CFST survey.
- Consumers reporting they have reduced their seafood consumption as a result of the oil spill is approx. 23% - also down (25 percentage points) relative to the October CFST survey.
- However, interestingly, consumers admit they don't know where their seafood is caught most of the time, so the extent of actual behavior change is open to question.
- Seafood safety concerns and their reported effects on consumption persist post spill – but at lower levels.



Management Summary

Geographic Differences



- Some notable difference are evident for consumers in Gulf States vs. the remaining U.S.
 - Although high nationally, awareness and attention of the oil spill is somewhat higher in the Gulf States.
 - This may reflect a higher level of industry proximity/familiarity.
 - This higher awareness level may indicate that consumers in the Gulf states are a bit more “tuned-in” ...
 - Although many are still extremely concerned, there is a higher proportion of people expressing less concern than is true nationally.
 - Their higher attention level may have resulted in more positive news getting through to them.
 - The reported impact on consumption is also different – Avoiding fin fish is more of a focus in the Gulf States, while avoiding shellfish is more of a focus in the remaining U.S.
 - And, there is a difference in the substitutes that consumers are eating in place of seafood – in the Gulf States it tends more to be pork/red meat, while in the remaining U.S. it tends more to be chicken and vegetables – but in either case only about a third think the change is likely to be permanent.



Management Summary

Targeting Consumers for Growth



- Seafood consumption is concentrated, and there are differences in knowledge and perceptions between heavy and light users.
- Heavy seafood users tend to be older, and more educated than light users.
- The percentage of consumers indicating concern about seafood safety, and reduced seafood consumption, are about the same for both heavy and light seafood consumers.
- However, heavy seafood consumers seem a bit more focused on avoiding Gulf coast products while light consumers avoid all products regardless of source.



Management Summary - Messaging



- Consumers find the amount, adequacy and credibility of information they have received on the safety of seafood as lacking – particularly the credibility.
- However, heavy seafood users tend to rate the amount, adequacy and credibility of information they have received a bit higher than do light users.
- Negative messages about the Gulf Oil Spill seem to be dominant:
 - Environmental impact
 - Use of dispersants
 - Closure of waters
- However, heavy seafood users appear to be more “tuned-in” with respect to positive oil spill messaging – particularly with respect to:
 - Reassurance from the industry.
 - Testing for safety.



Management Summary - Messaging



- The most reassuring message for all seafood consumers are statements that communicate that “*closed waters are opened only after adequate testing to ensure seafood safety*” – **but consumers report hearing less about these messages.**
- Television is by far the dominant source of news and information on seafood safety for both heavy and light users – however there are some minor differences in channel preferences between heavy and light users. Internet is second and newspaper is third.
- Confidence in all parties involved in protecting the safety of seafood tends to be similar... however heavy users tend to place a little less confidence in all parties across the board with the exceptions of Commercial Fishermen and Seafood Trade Associations in whom they seem to have a bit more confidence.



Implications



- Moving forward in restoring consumer confidence and consumption of seafood from the Gulf the challenges will be:
 - Dealing with the still high levels of concern among consumers.
 - Bringing the rest of the U.S. up to speed with those in Gulf States
 - Providing more adequate and credible information.
- To do this, it is important to get the message out that *“closed waters are opened only after adequate testing.”*
- Recognizing that heavy users and light users may have somewhat different perceptions, levels of understanding and needs, it may be useful in crafting and delivering messages – and therefore should be studied further.
- Given that oil production in the Gulf will continue, and is likely to expand, there is an increased risk that oil spills will occur in the future.
- The Gulf seafood industry needs a long term strategy to manage consumers’ safety/quality concerns associated with oil production in the Gulf.





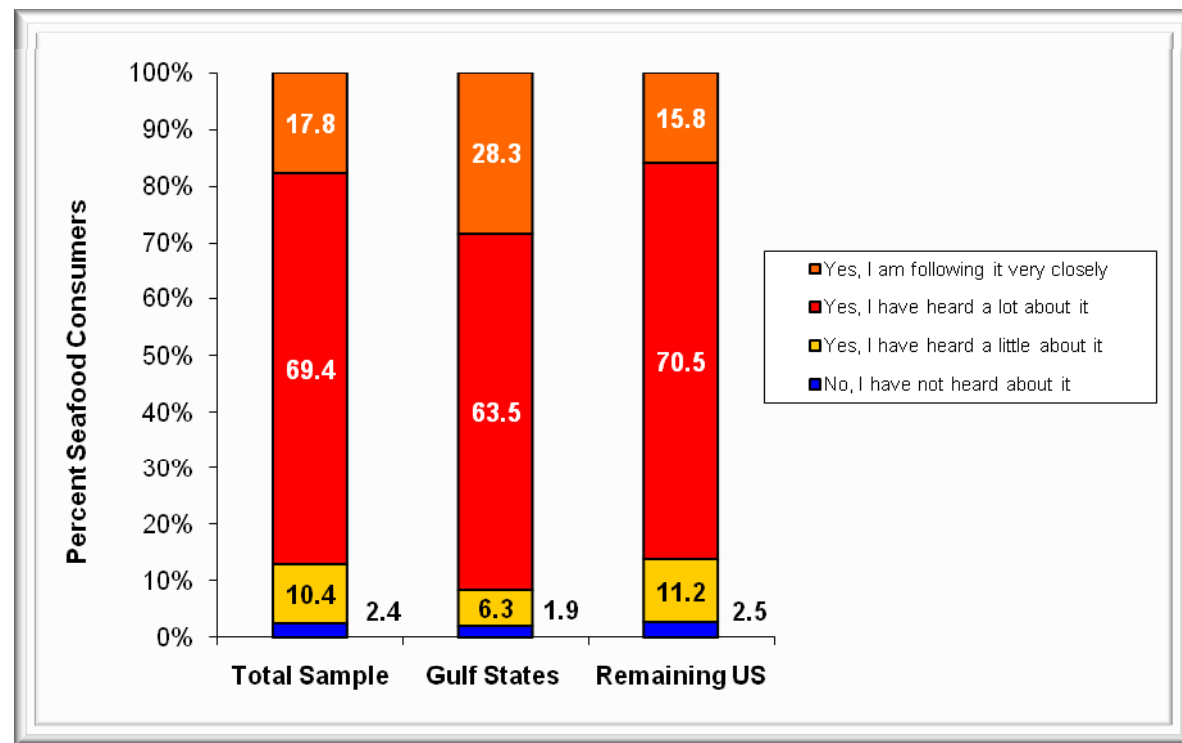
Detailed Findings:

1. A Current Snapshot of Consumer Concern an Behavior



Claimed Awareness of Spill

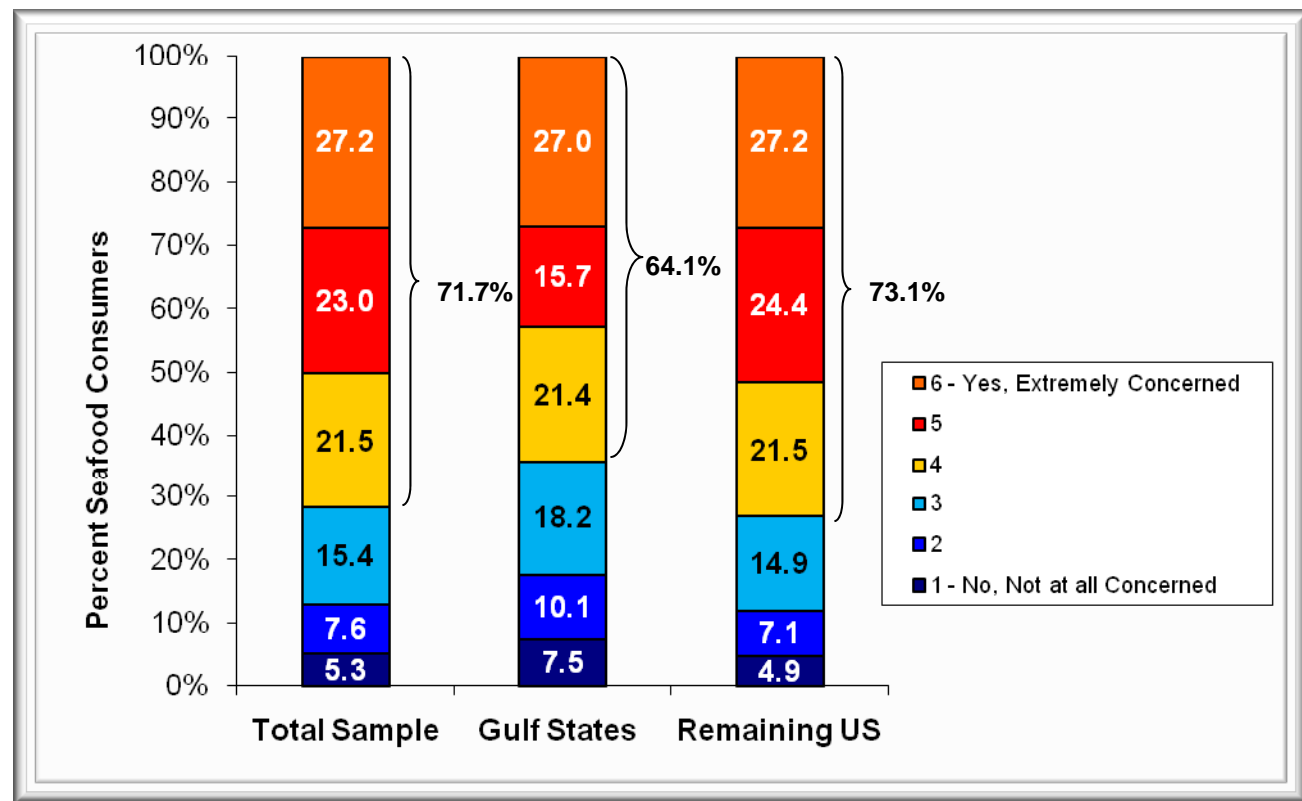
- Awareness of the Gulf Oil Spill remains nearly universal.
- Attention is a bit higher in Gulf states than in the remaining U.S.



Concern Over Seafood Safety



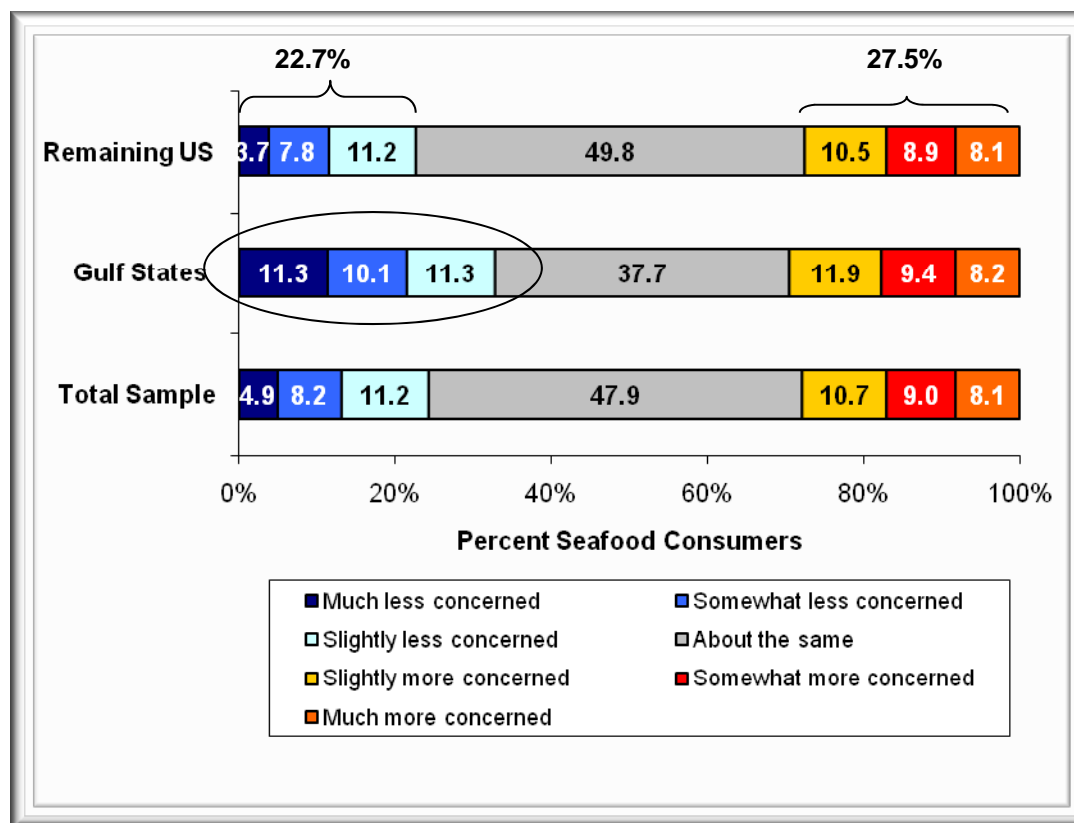
- Slightly less than 3 in four consumers are concerned over the risk the Gulf Oil Spill poses to the safety of seafood from the Gulf, and about a quarter are extremely concerned.
- In the Gulf States, concern seems to be more “bi-modal” the same proportion of consumers are extremely concerned, but there are more who are less concerned.
- This may reflect the higher attention level and receptivity to positive messages.



Concern Since the Well Was Capped



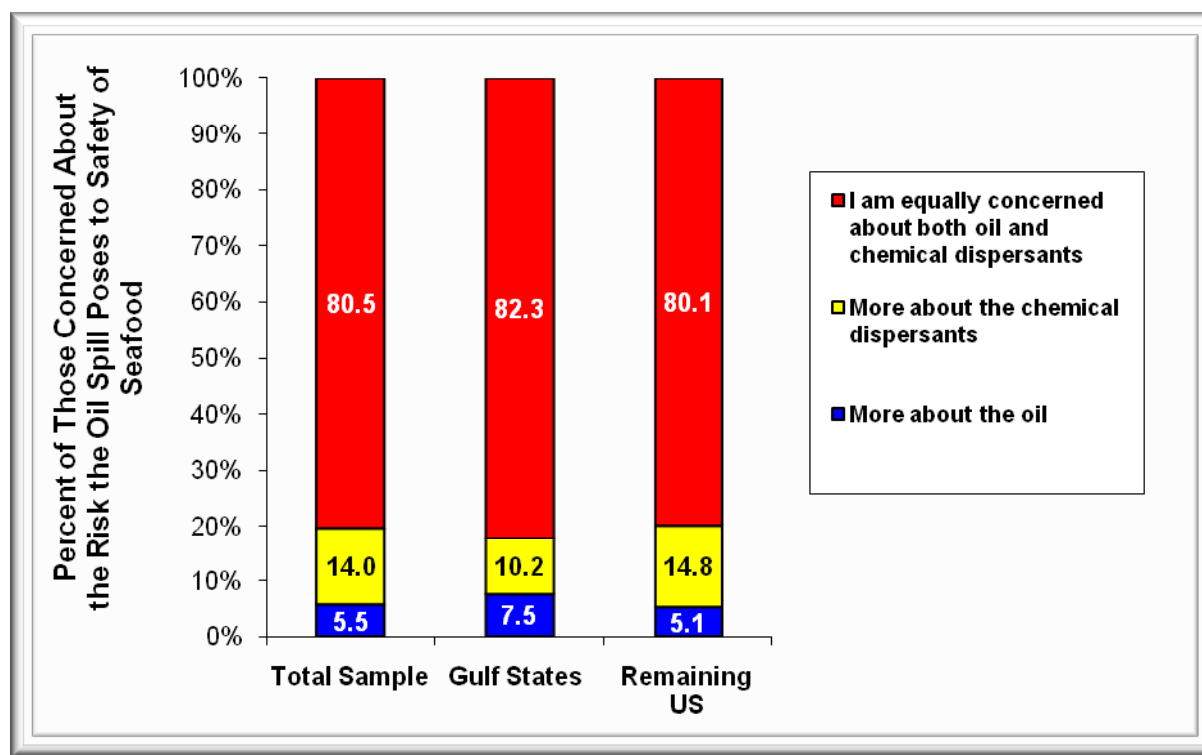
- Since the Oil Spill was capped, slightly more consumers indicate their concern has increased, but concern seems to have waned a bit more in the gulf states versus the remaining U.S., again probably reflecting a longer attention level and reception of positive news.



Subject of Concern: Oil or Dispersants



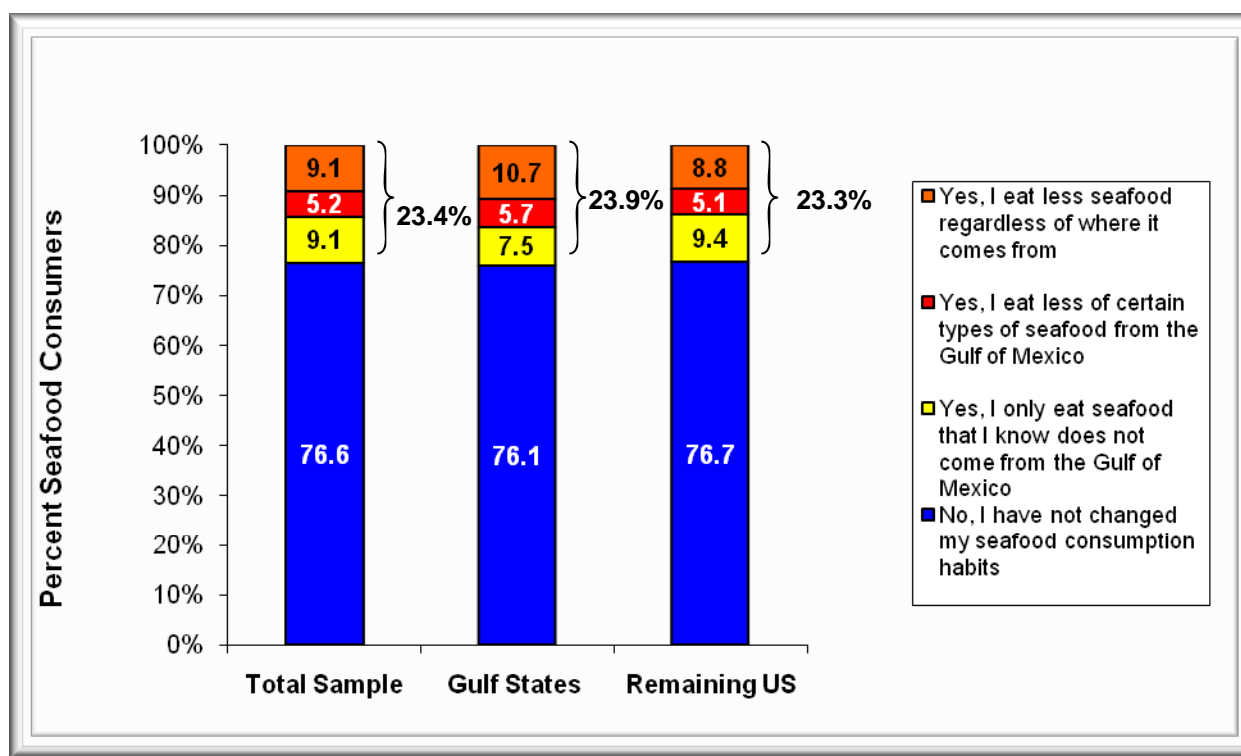
- Those concerned about the risk to seafood safety are concerned both about the oil itself and the dispersants.



Affect of Spill on Seafood Consumption

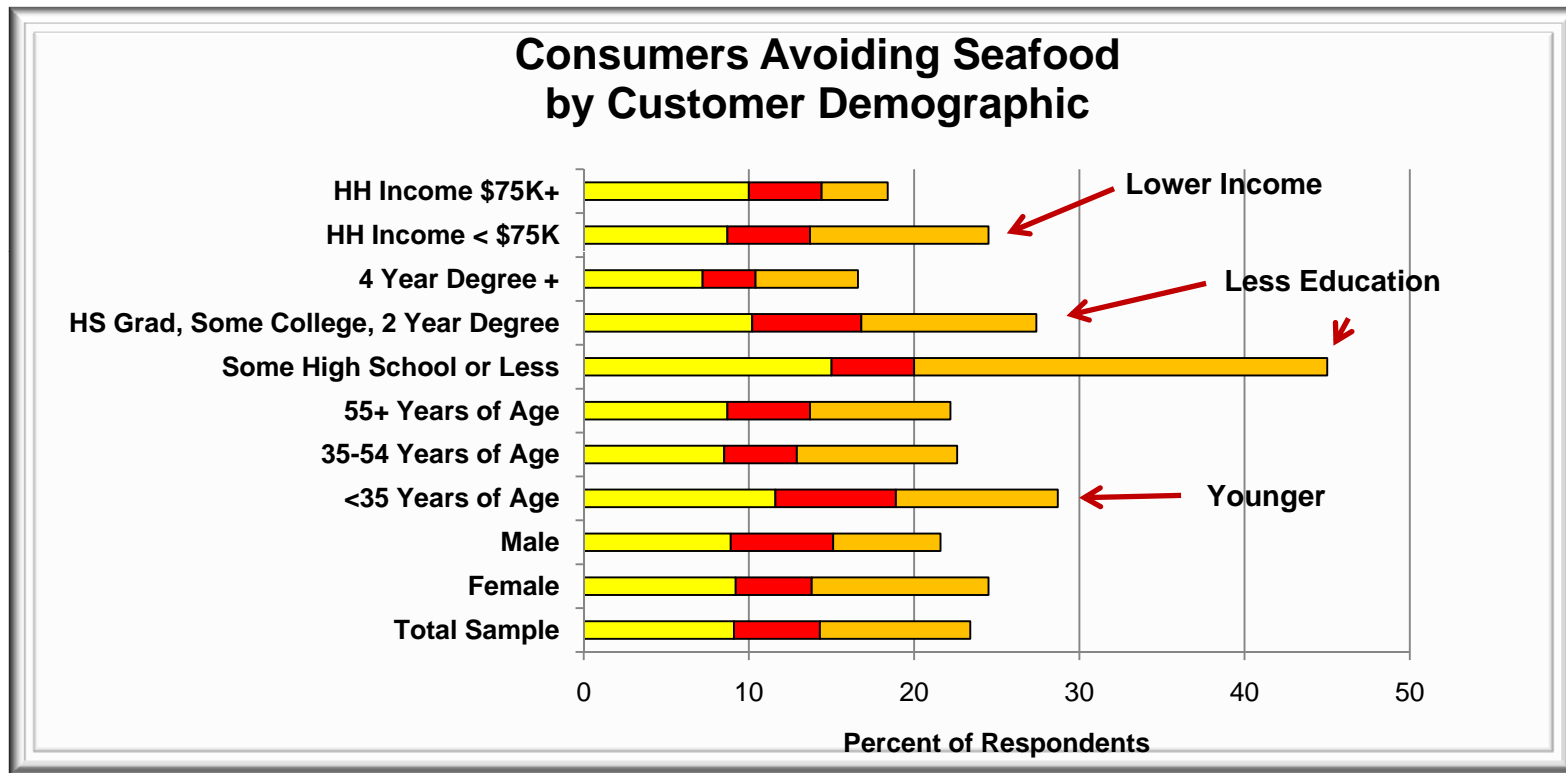


- Slightly less than a quarter of consumers say they have changed their seafood eating habits due to the Gulf Oil Spill – both in gulf states and the remaining U.S.



Who's Avoiding Seafood?

- All groups are affected, but less education, lower incomes and younger consumers appear more affected.



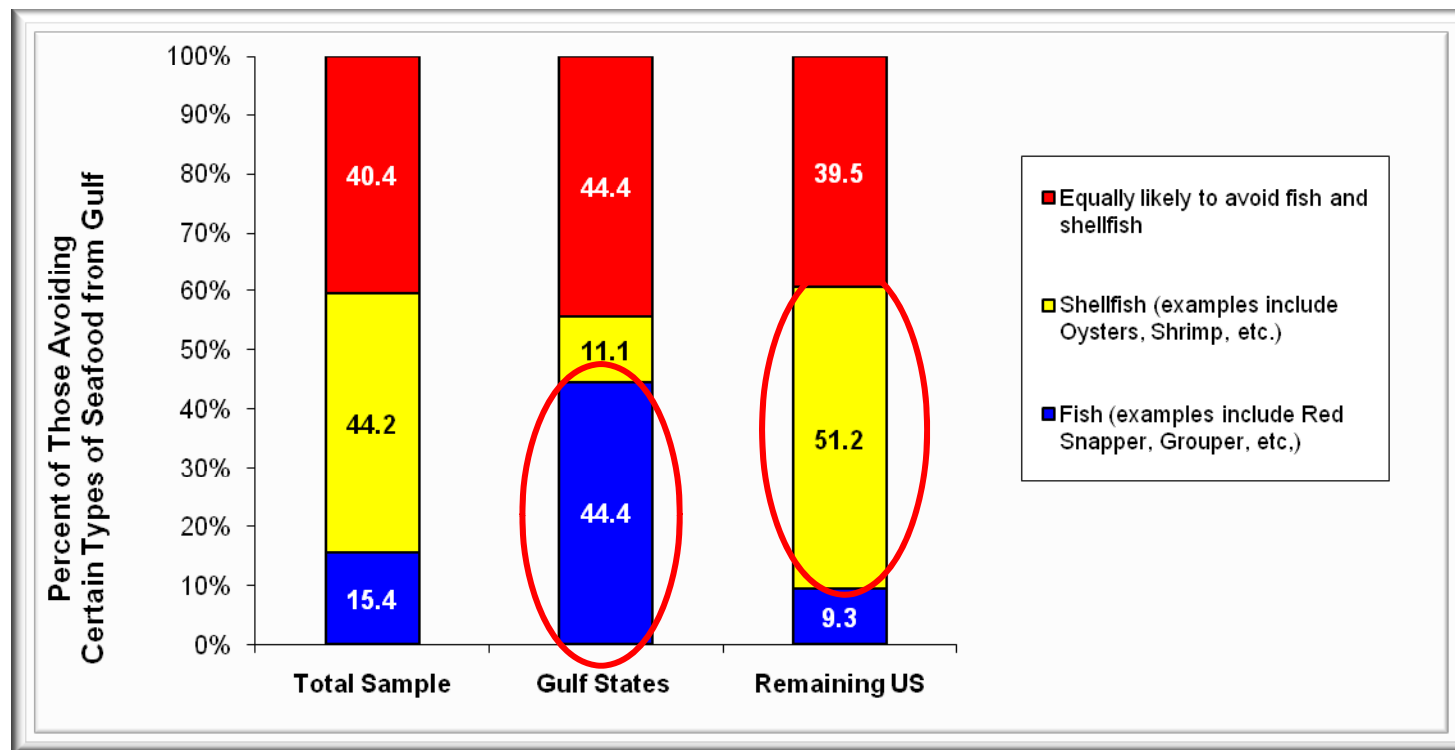
- Yes, I only eat seafood that I know does not come from the Gulf of Mexico
- Yes, I eat less of certain types of seafood from the Gulf of Mexico
- Yes, I eat less seafood regardless of where it comes from



Types of Seafood Avoided



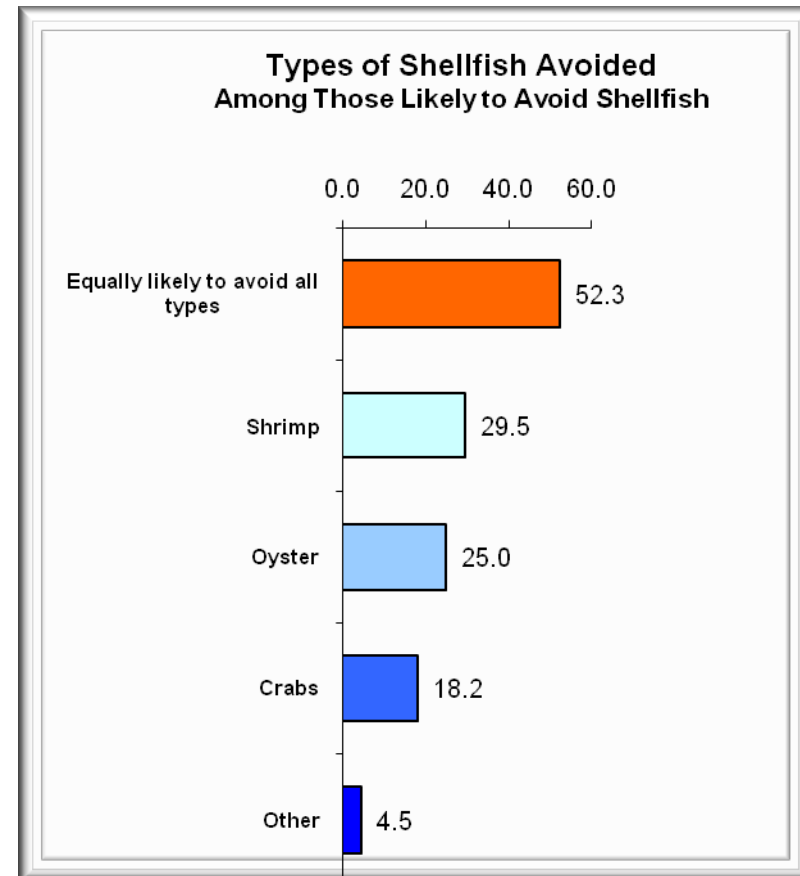
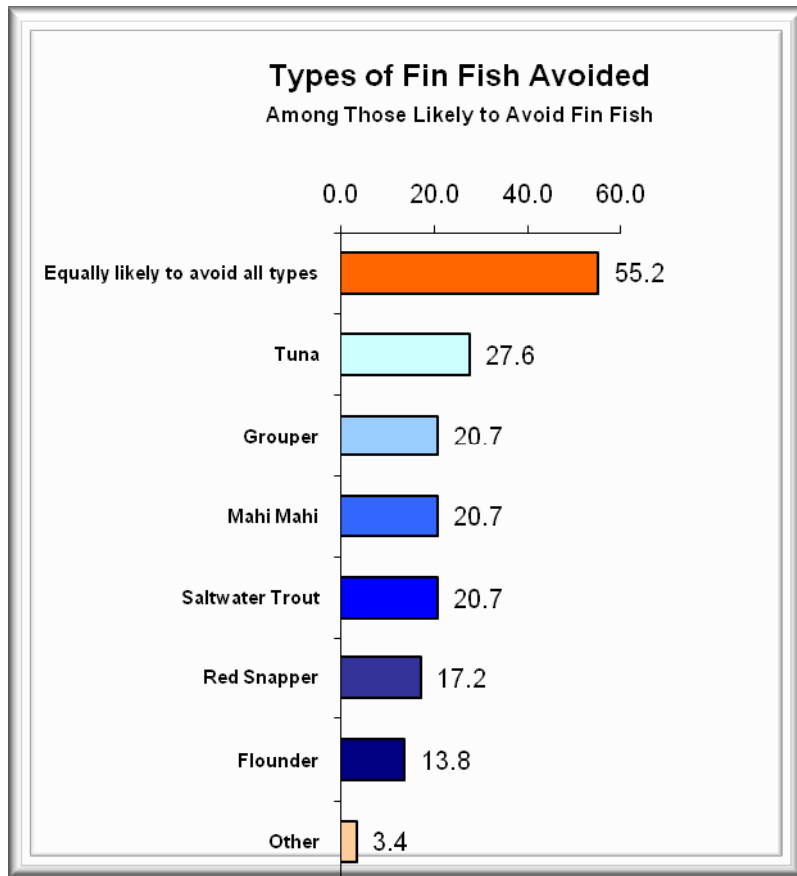
- Of those avoiding certain varieties of seafood from the gulf, those in gulf states are more focused on fin fish, while in the rest of the U.S. the focus is more on shellfish.



Varieties of Fin Fish & Shellfish Avoided



- Of those avoiding fin or shellfish, the majority indicate they are avoiding all types.



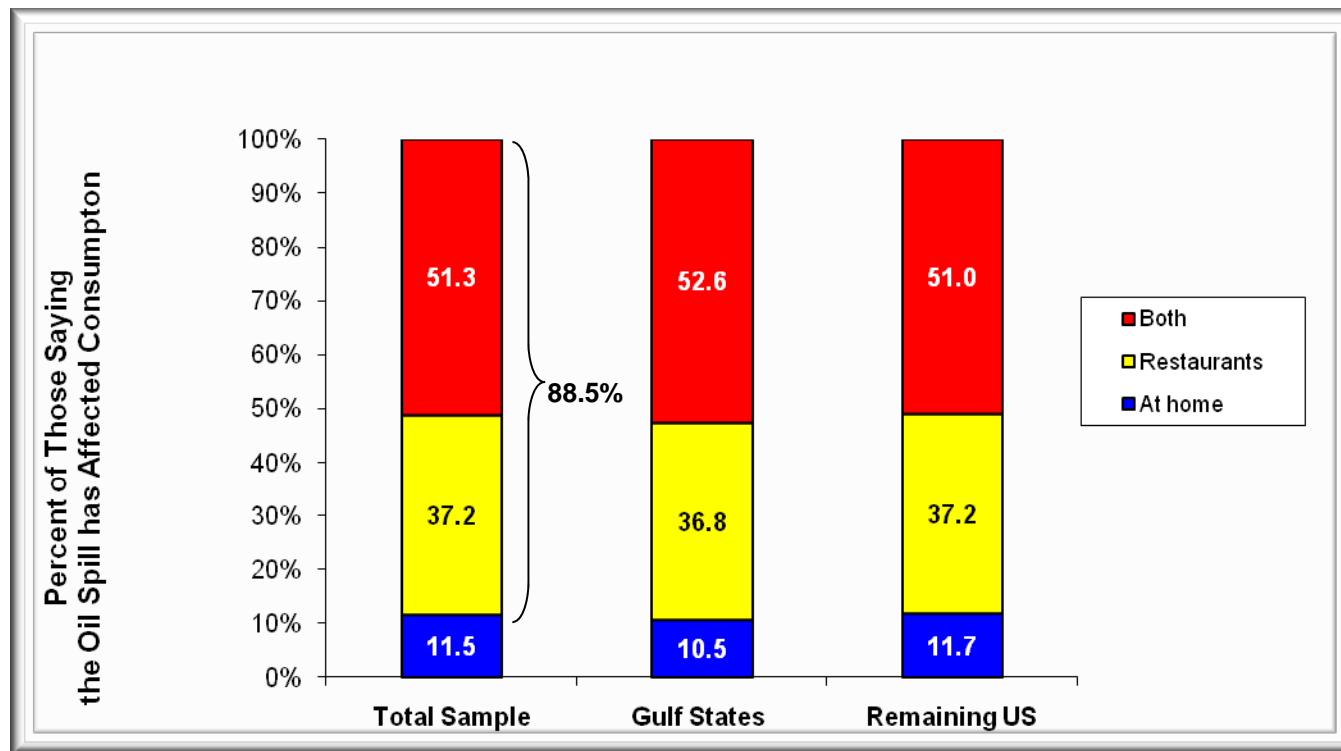
*Note: Sample in gulf states
insufficient to break out from U.S.



Affect on Restaurant vs. At Home Seafood Consumption



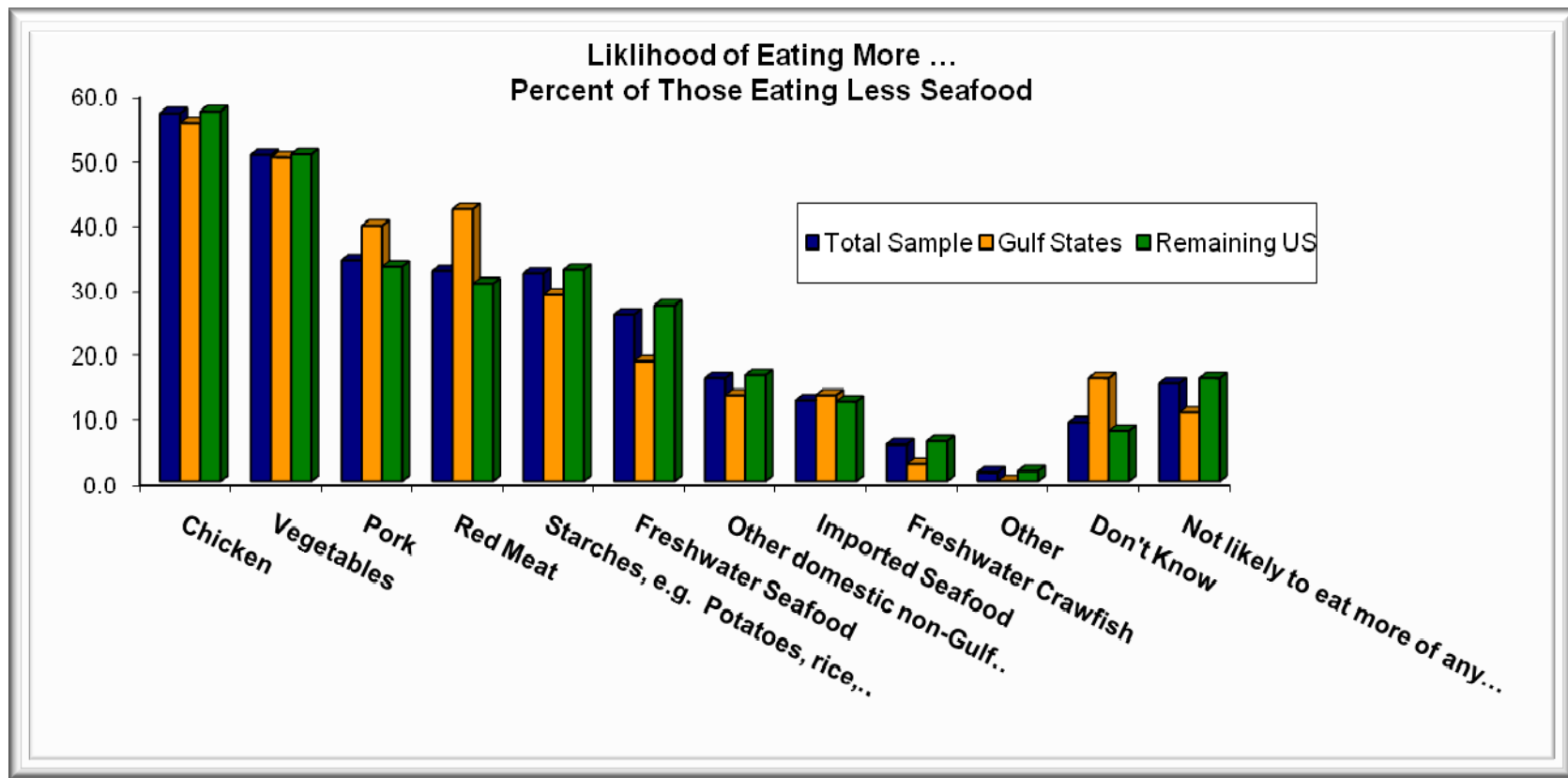
- Although most consumers changing their consumption of seafood indicate they will avoid seafood both at restaurants and at home, food service seems to be more affected.



Substitutions for Seafood



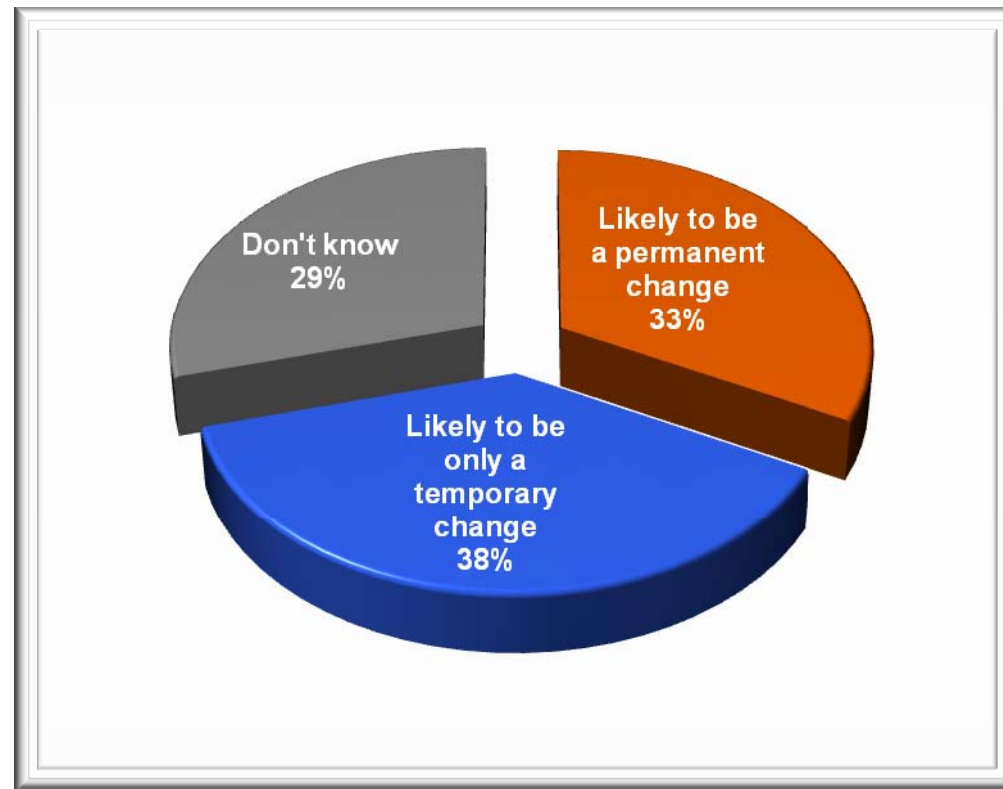
- As a result of the Oil Spill, consumers expect to be eating more chicken and vegetables, but those in gulf states are more likely to eat more pork and red meat.



Expected Duration of Change in Consumption



- About a third of those changing their consumption, expect it to be permanent, but most consumers feel it is only temporary, or aren't sure.





Detailed Findings:

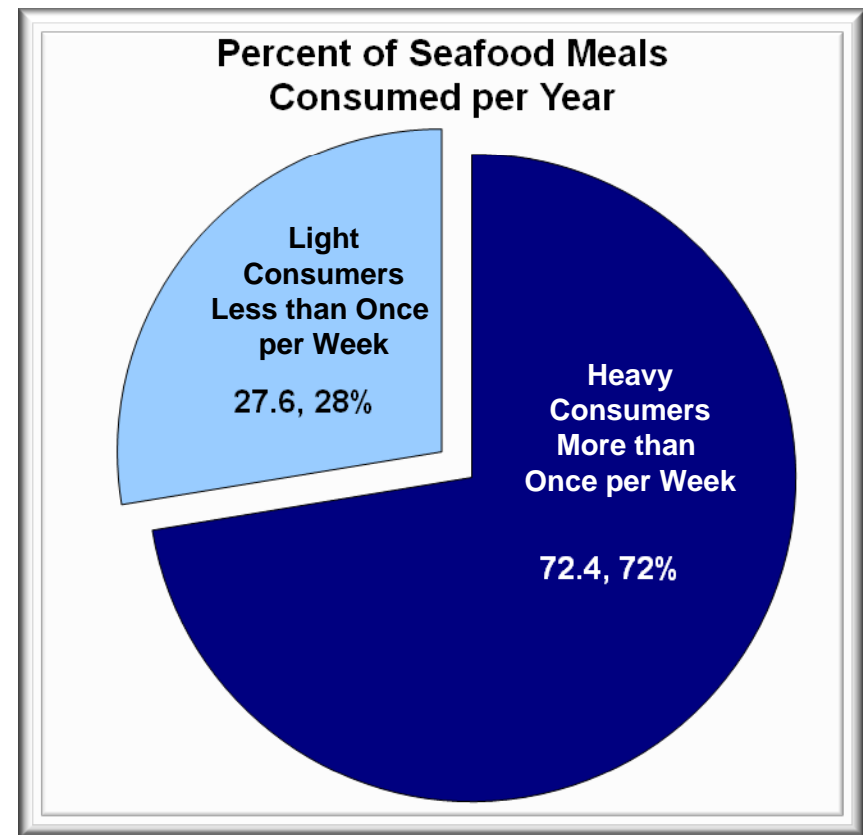
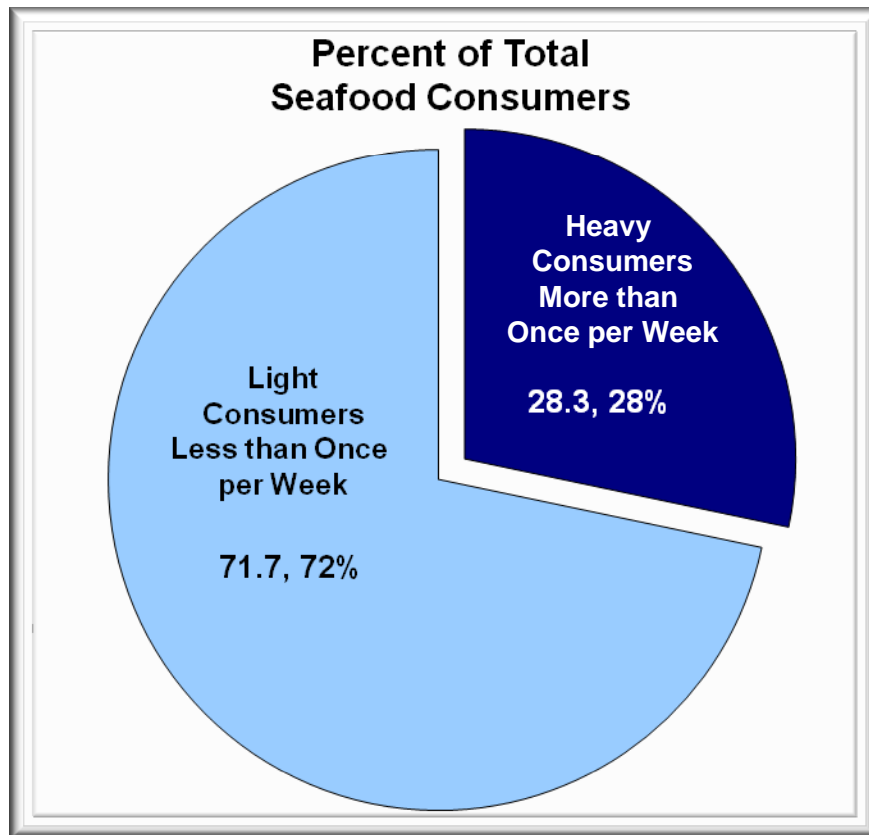
2. Targeting — Heavy versus Light Seafood Consumers



Seafood Consumption



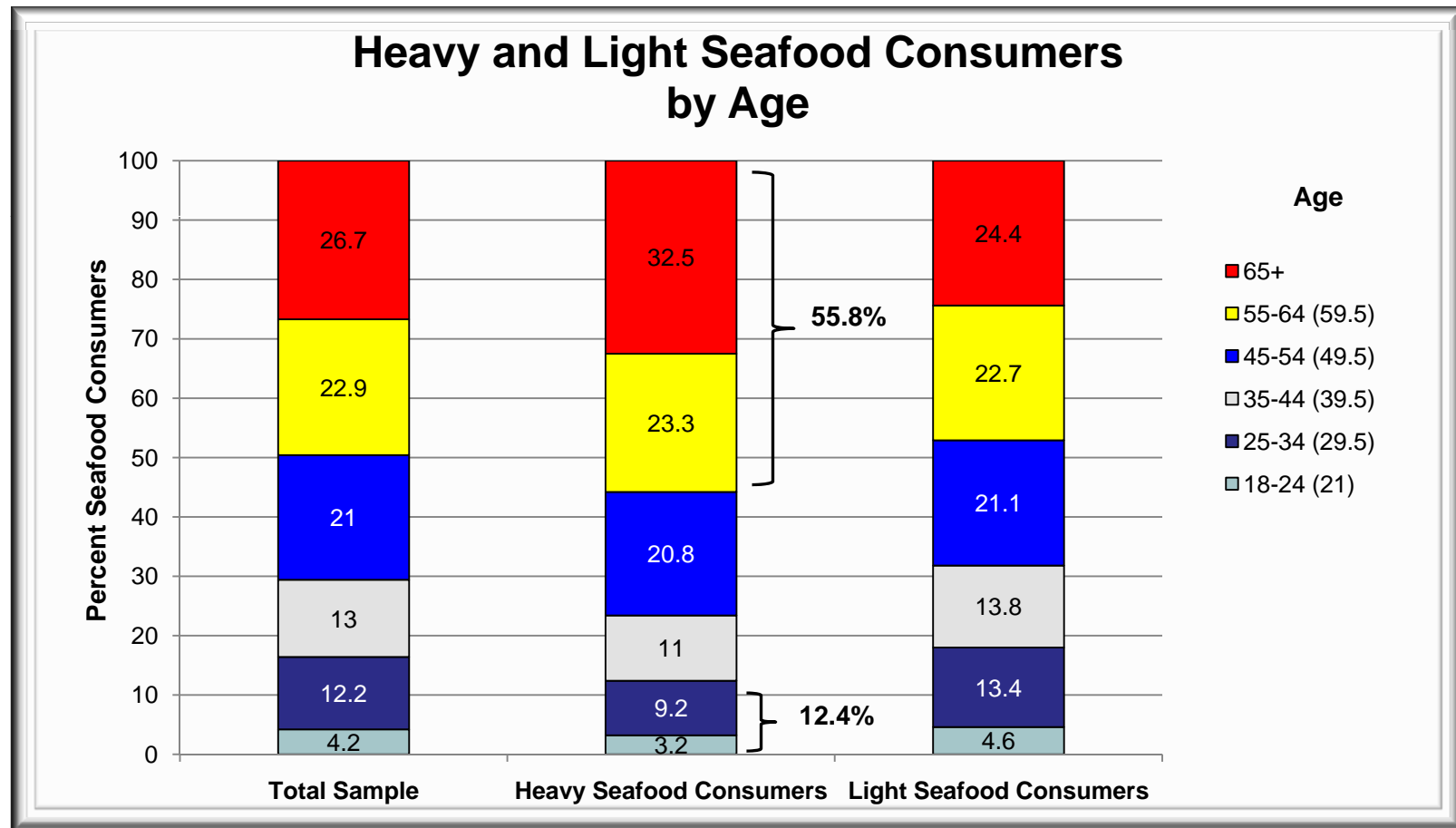
- Like most foods, seafood consumption is concentrated – about a quarter of consumers account for about three quarters of the seafood consumed per year.



Seafood Consumption by Age



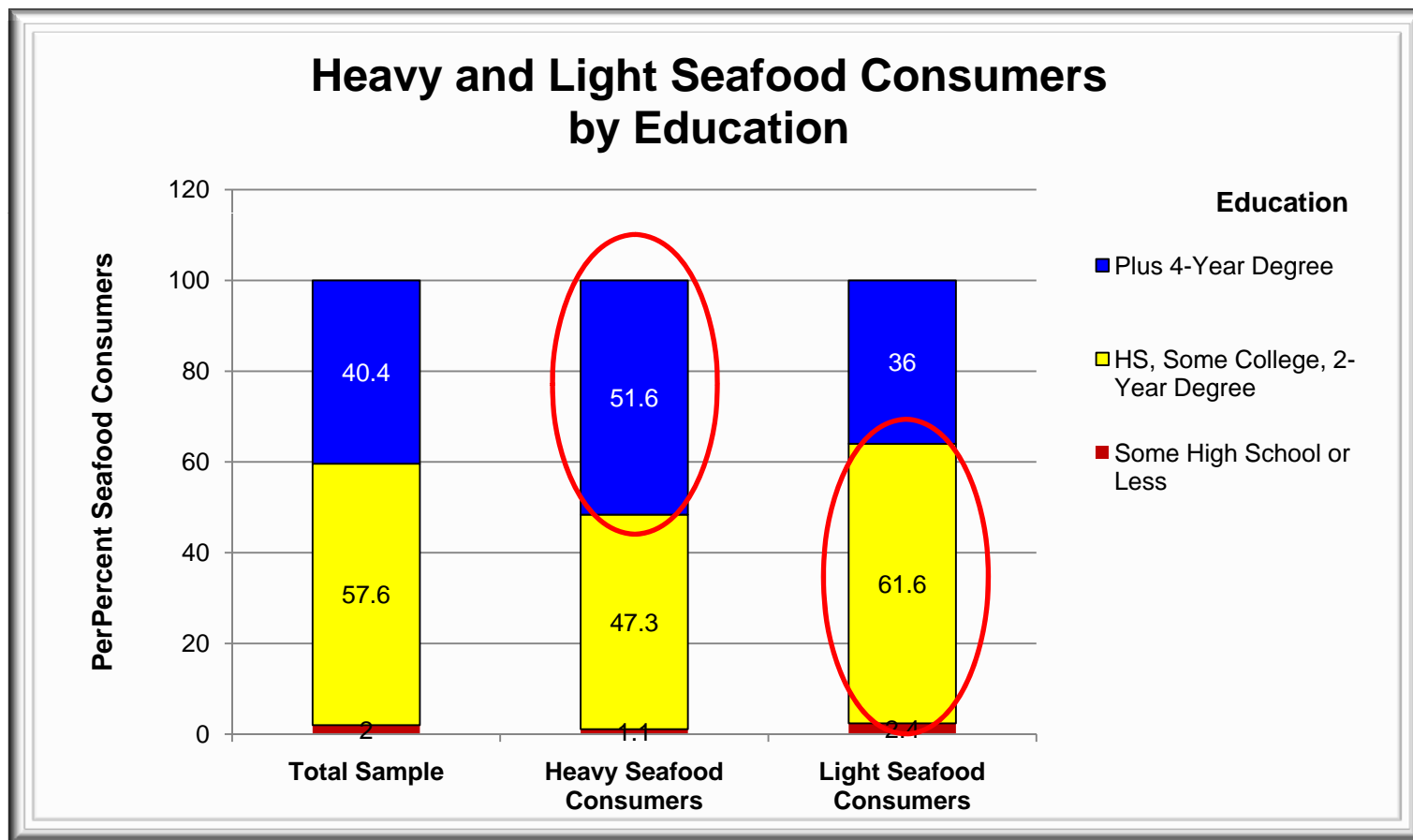
- People over 55 years of age are more frequent consumers of seafood. Younger consumers eat seafood less frequently.



Seafood Consumption by Education



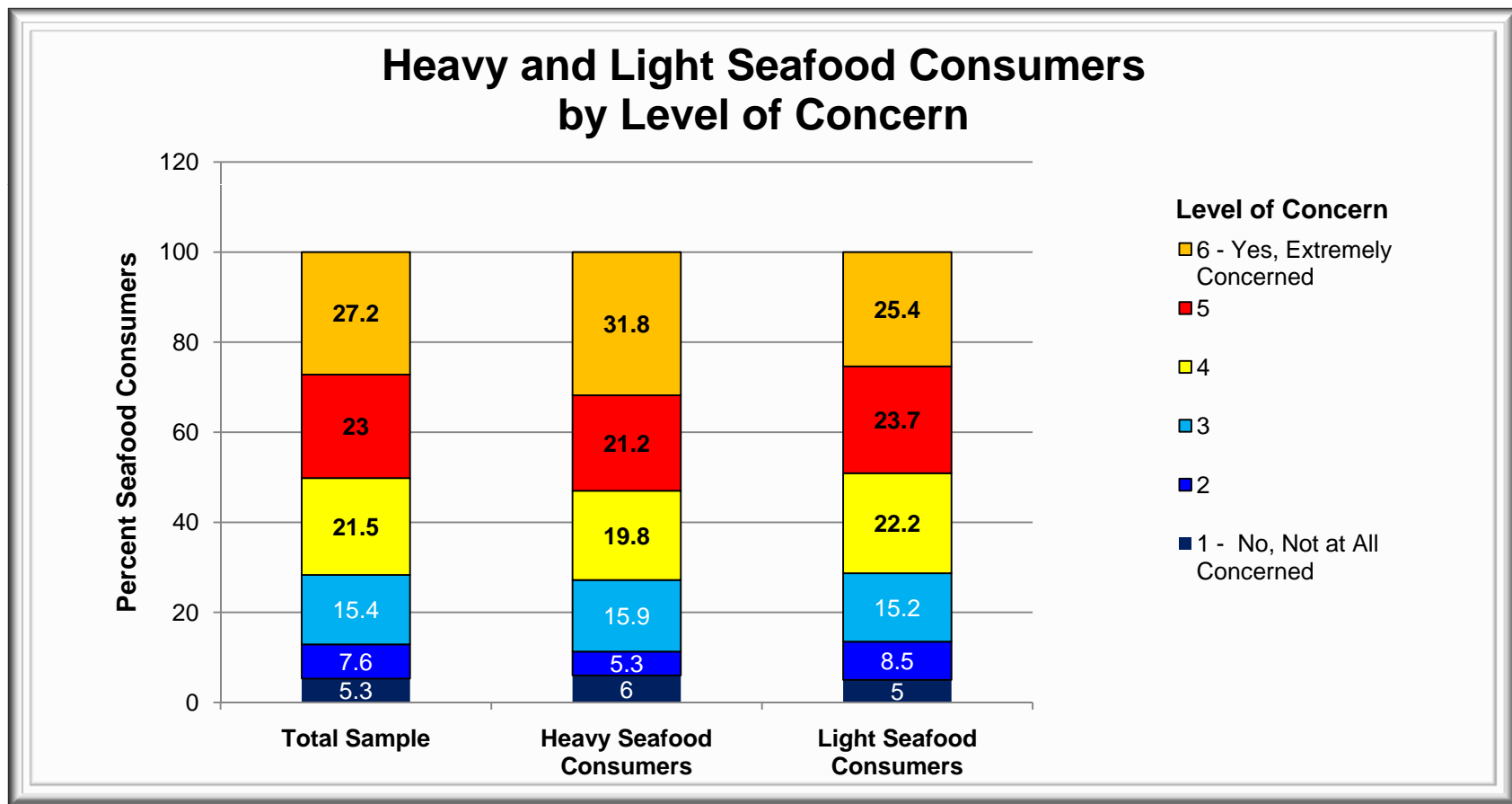
- Higher educated people eat more seafood. Less educated consumers eat seafood less frequently.



Concern Over Seafood Safety by Heavy and Light Seafood Consumers



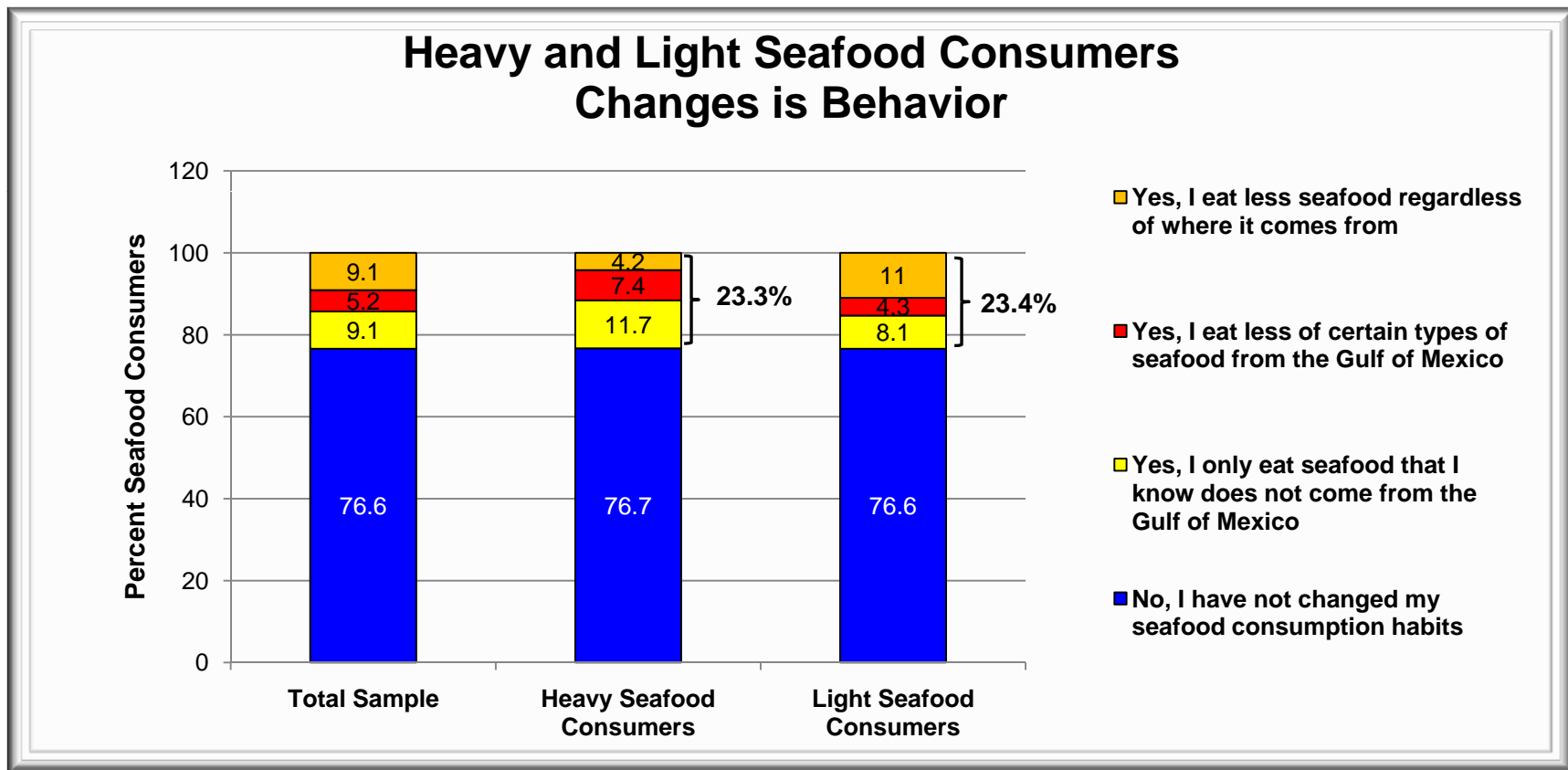
- Both heavy and light seafood consumers are equally concerned.



Heavy and Light Seafood Consumption



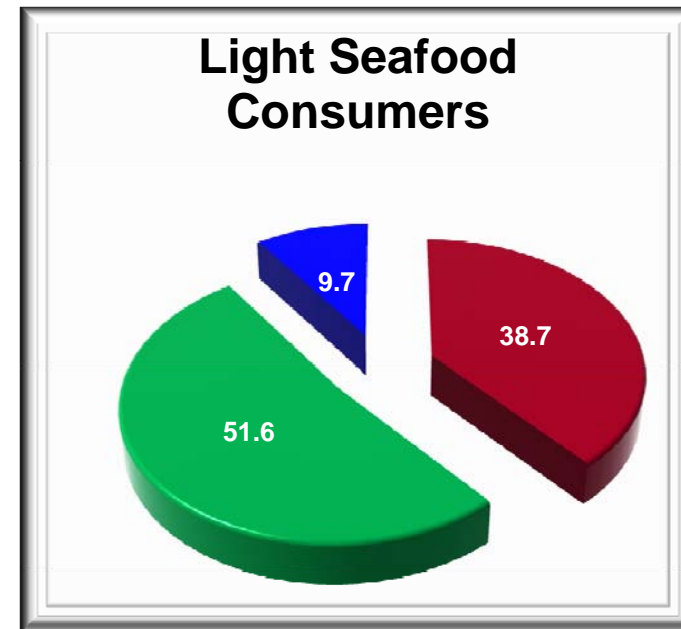
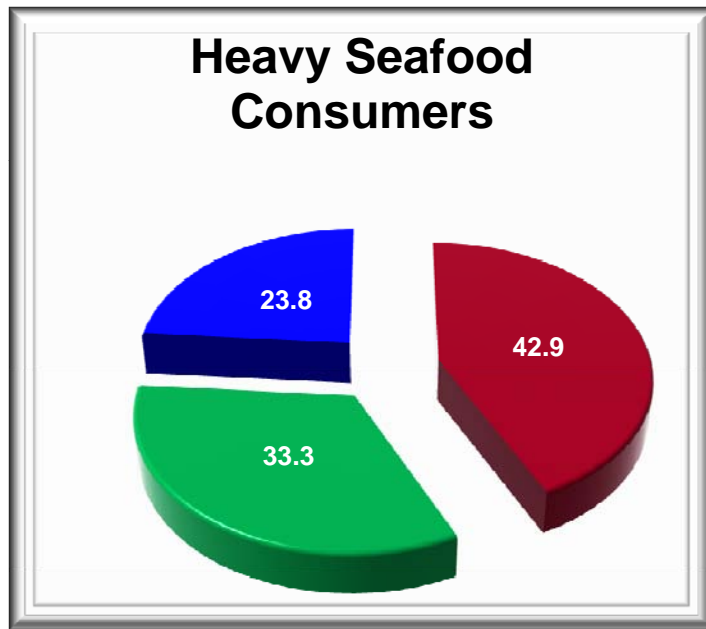
- Both heavy and light seafood consumers are avoiding seafood.



What types of seafood are being avoided?



- Of the heavy users avoiding seafood, about 4 in 10 say they avoid both fish & shellfish. But more than 5 in 10 of the light users are avoiding mostly shellfish.

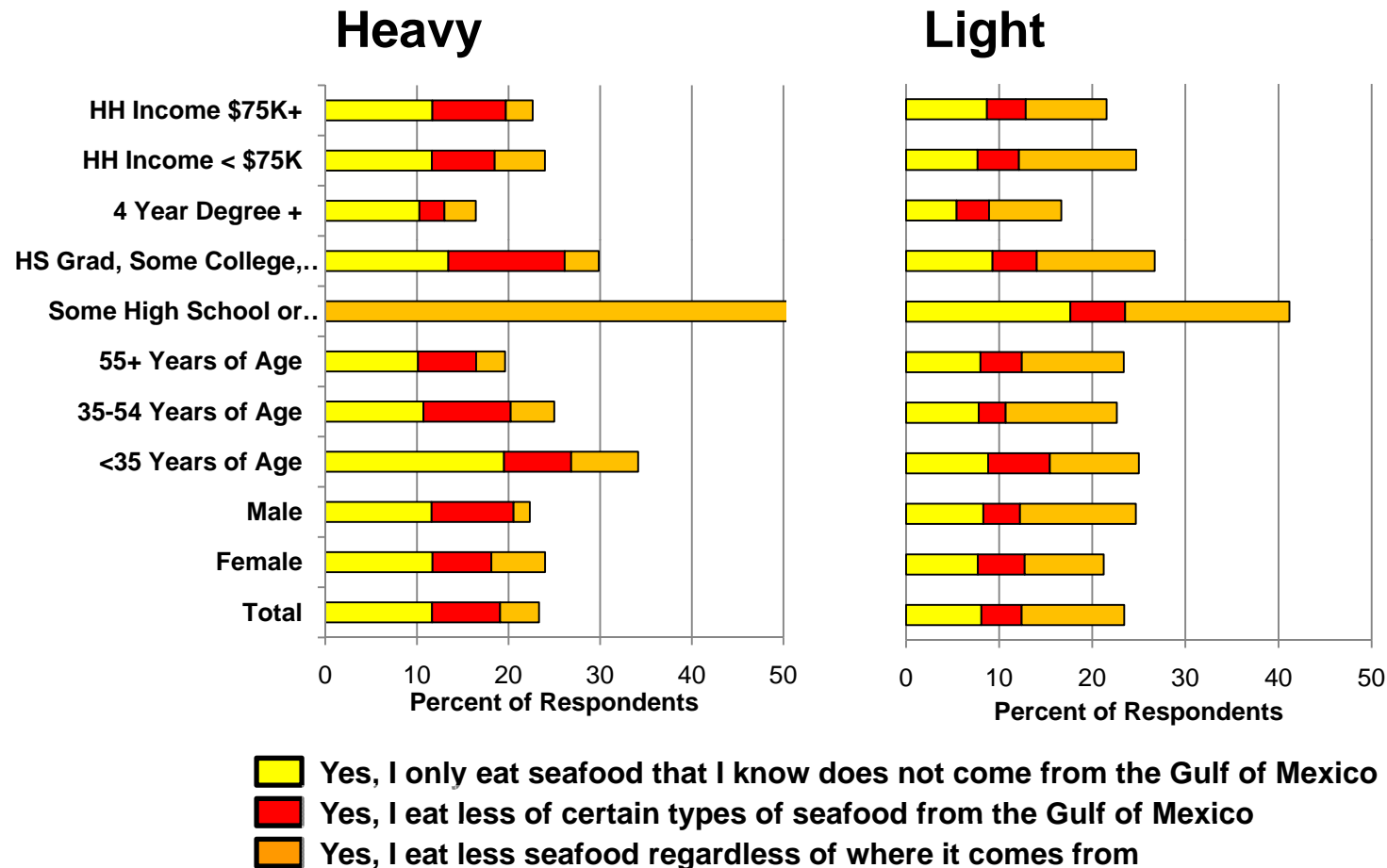


- Fish (examples include Red Snapper, Grouper, etc.)
- Shellfish (examples include Oysters, Shrimp, etc.)
- Equally likely to avoid fish and shellfish

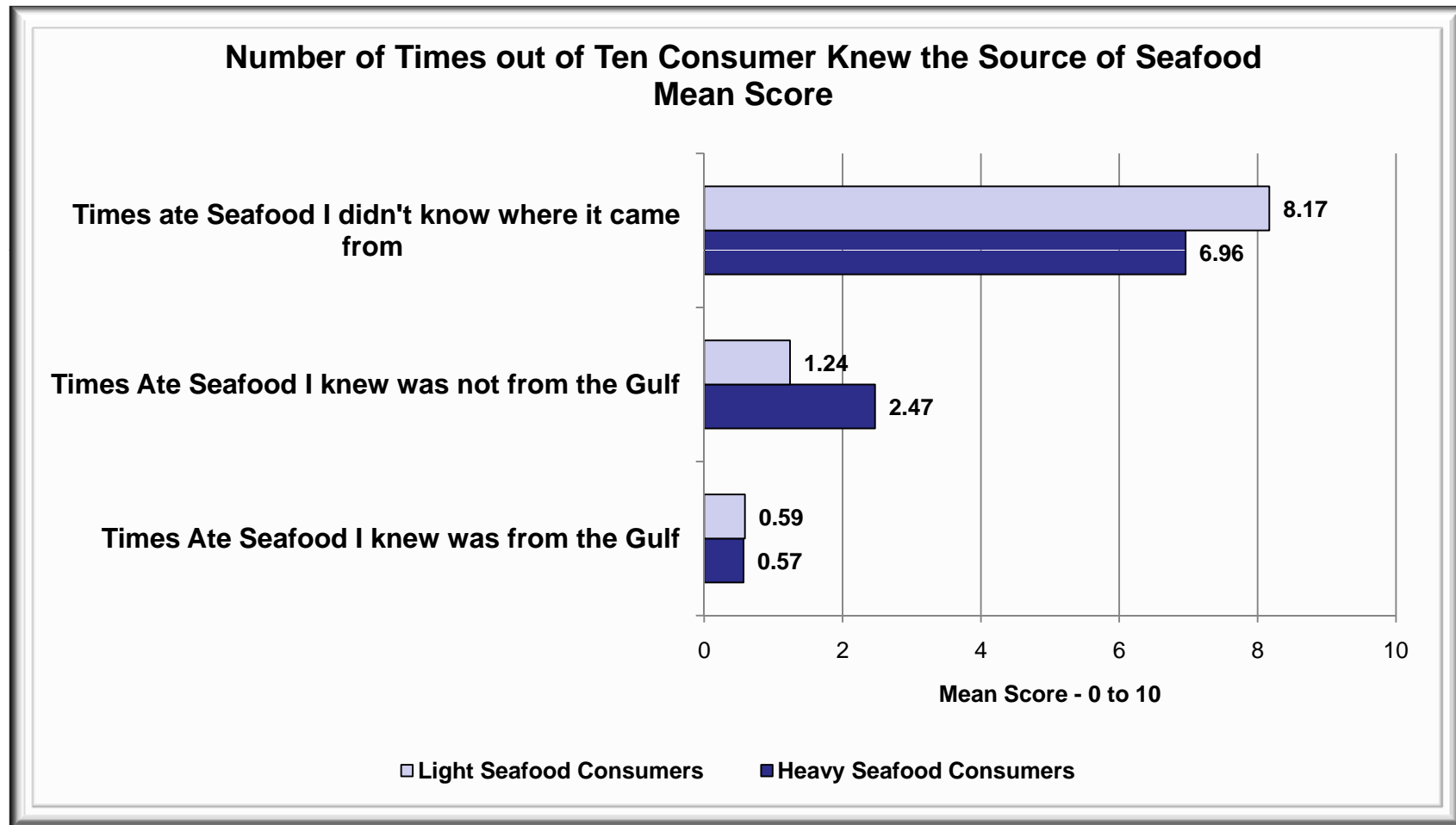


Who's Avoiding Seafood – heavy versus light

- Heavy users are more likely to avoid Gulf Seafood.
- Light users are more likely to avoid All Seafood



Most of the time consumers don't know where their seafood is caught





Detailed Findings:

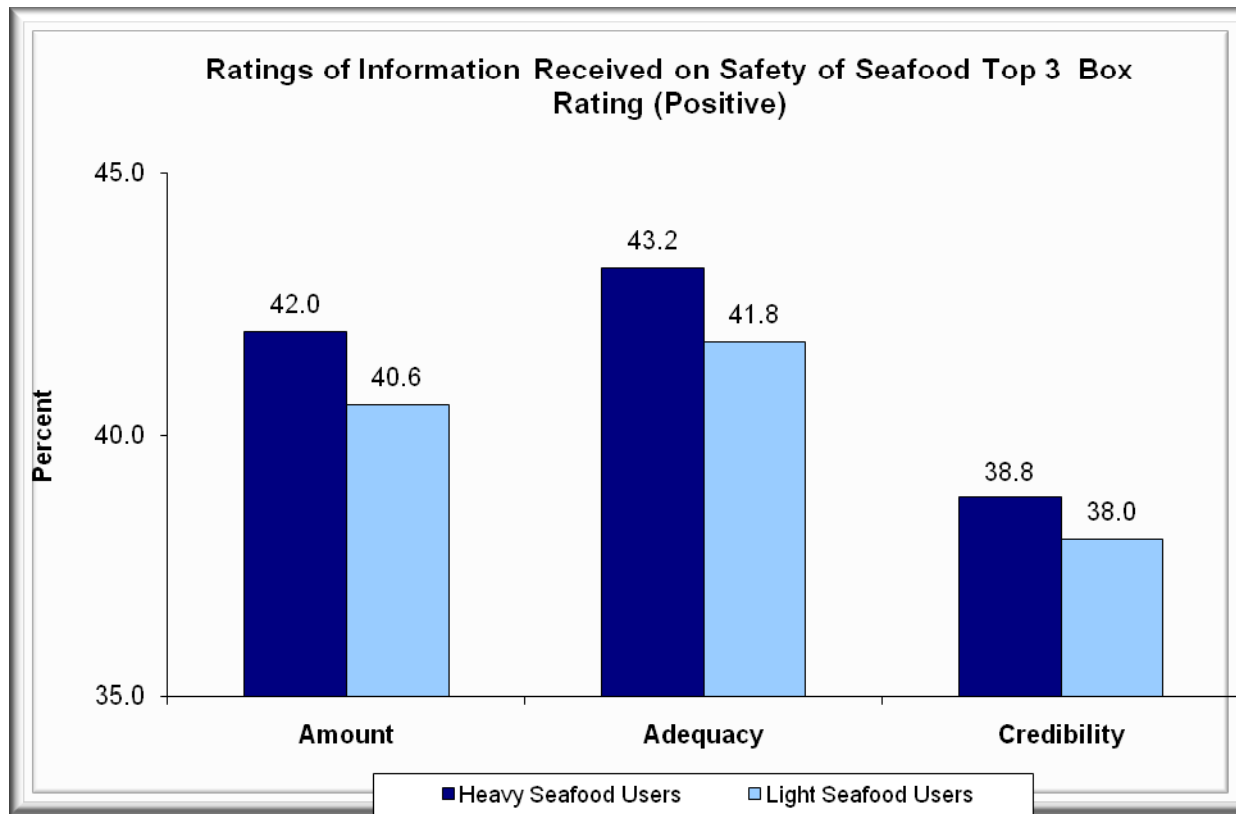
3. Messaging



Ratings of Information Received



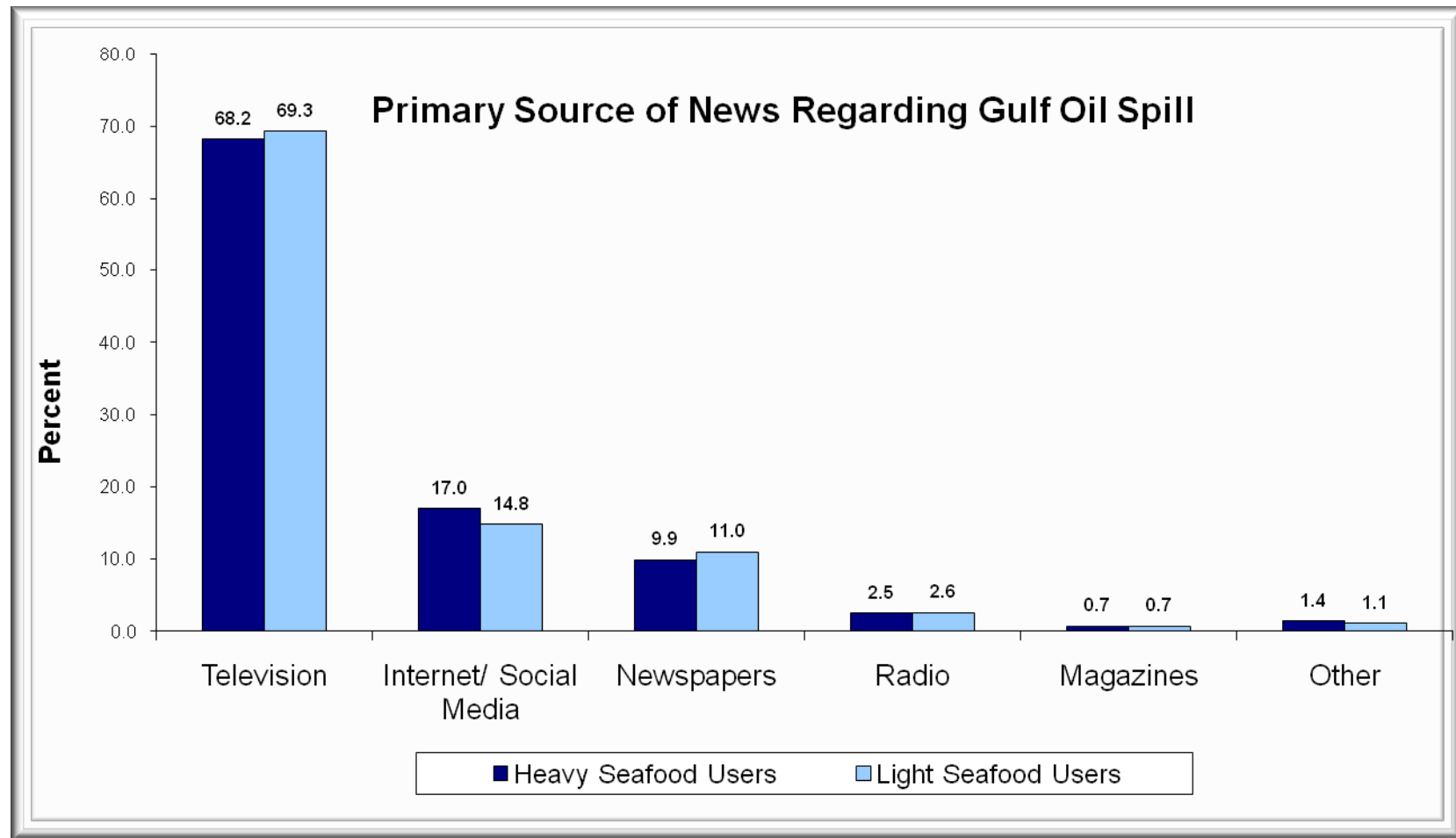
- Less than half of seafood consumers gave positive ratings of the amount, adequacy and credibility of the information. Credibility has the lowest ratings.
- Heavy Seafood consumers provide slightly higher ratings on all three measures – which likely reflects a higher interest level.



Primary Source of News on Oil Spill



- The majority of seafood eaters by far get their news on the Gulf Oil Spill from television – whether they are heavy or light users.

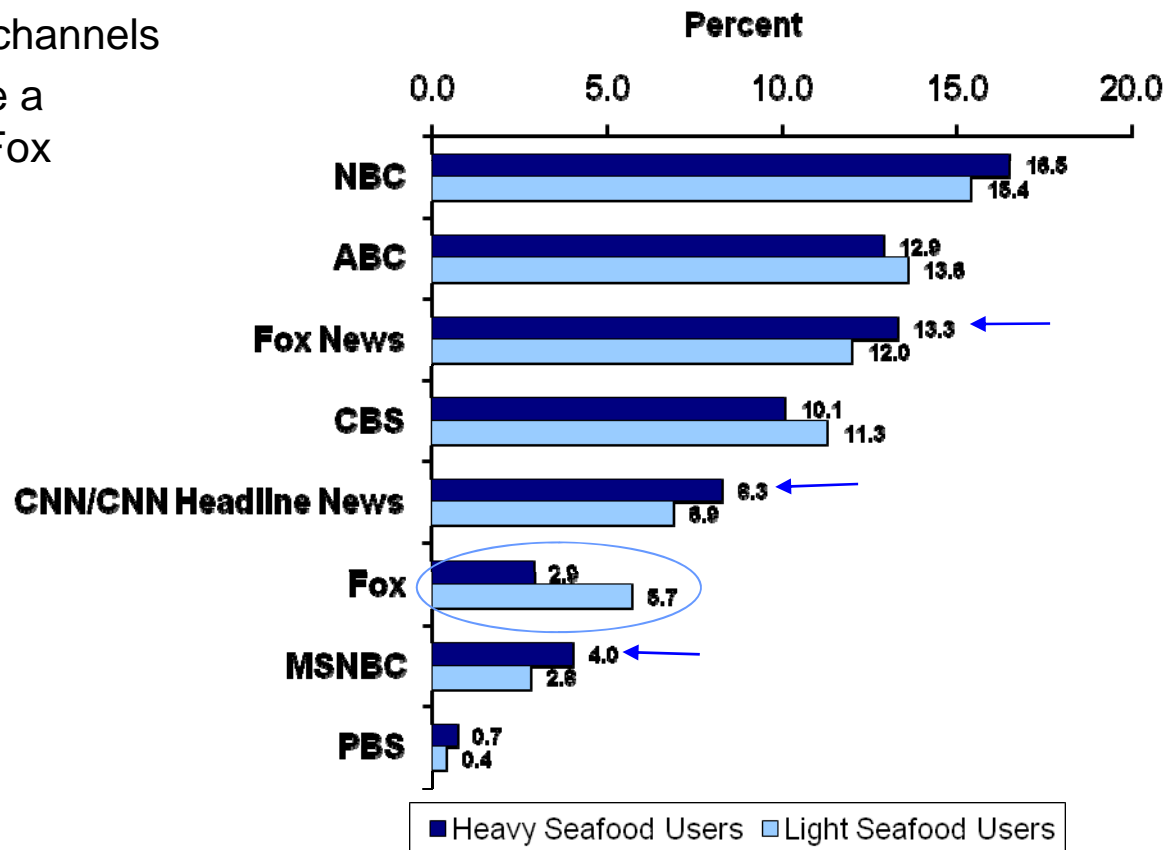


Media Sources Used Most Often



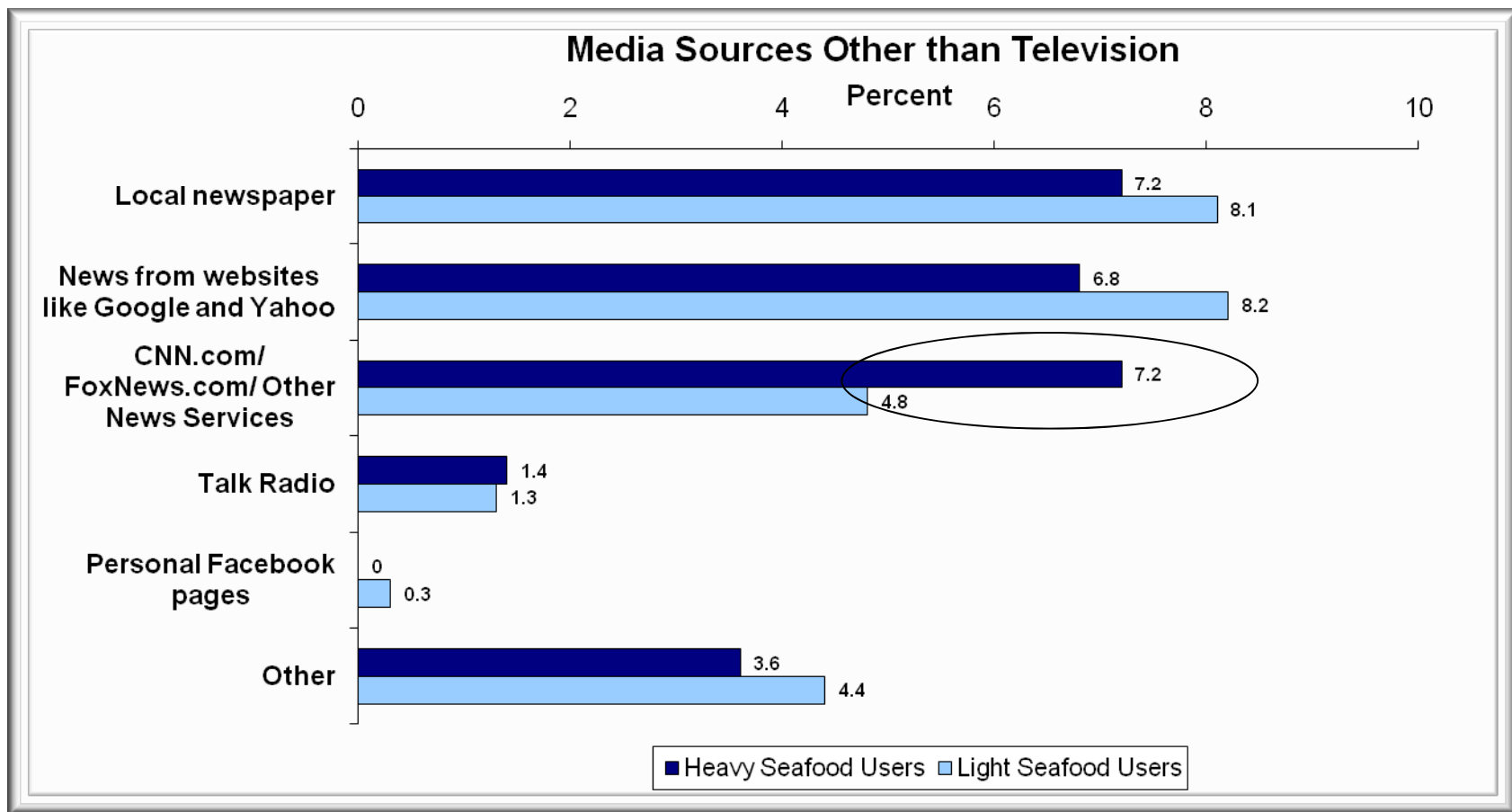
- The television news they are getting tends to be divided across major networks, but some differences between heavy and light users can be noted.
- Heavy users have a tendency to use the cable news channels
- Light users have a higher skew to Fox network news.

Television Network Used Most Often



Media Sources Used Most Often

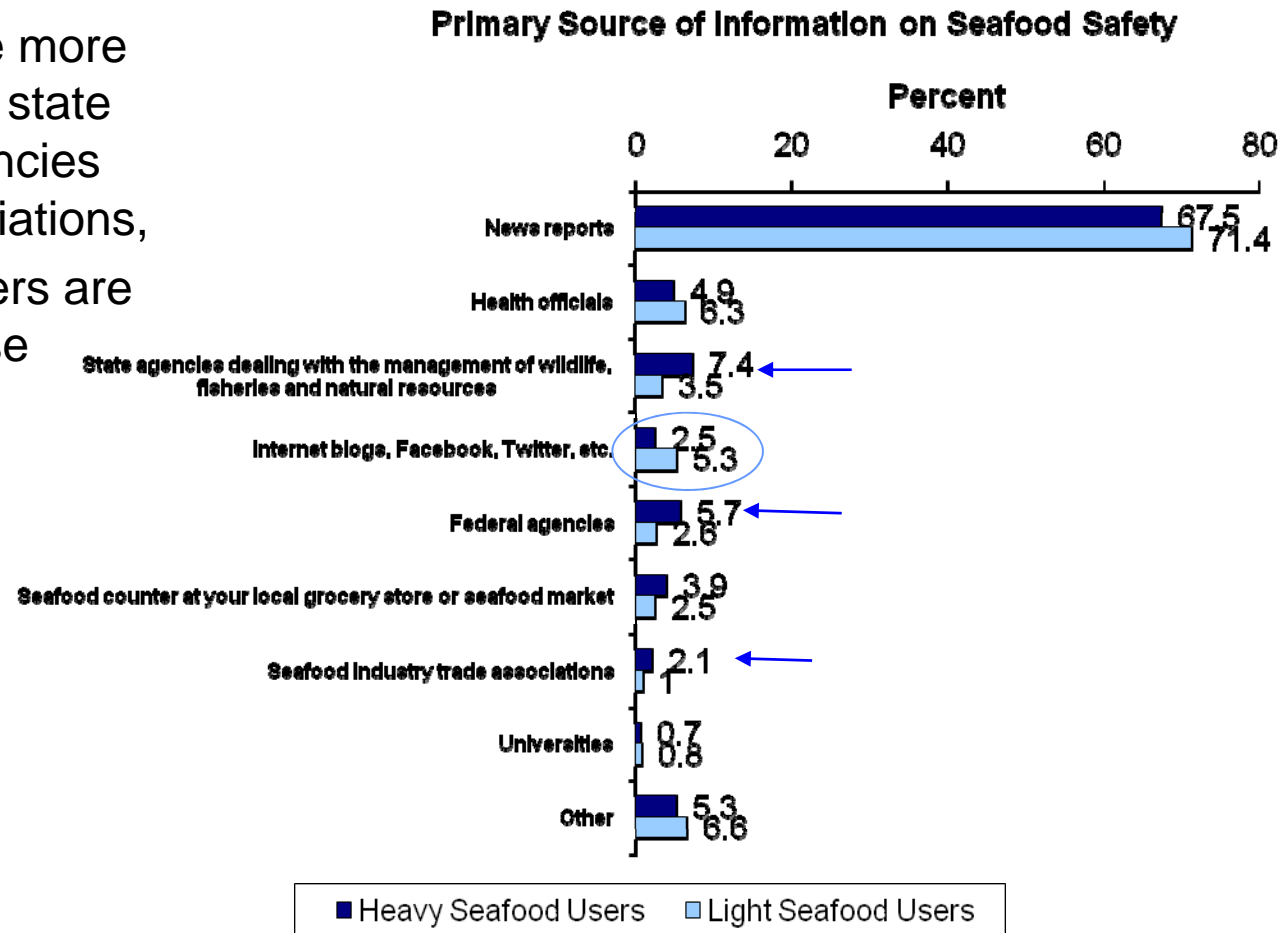
- Relatively few seafood eaters use other types of media, however heavier users have a higher tendency to also use news .coms



Primary Source of Information on Seafood Safety



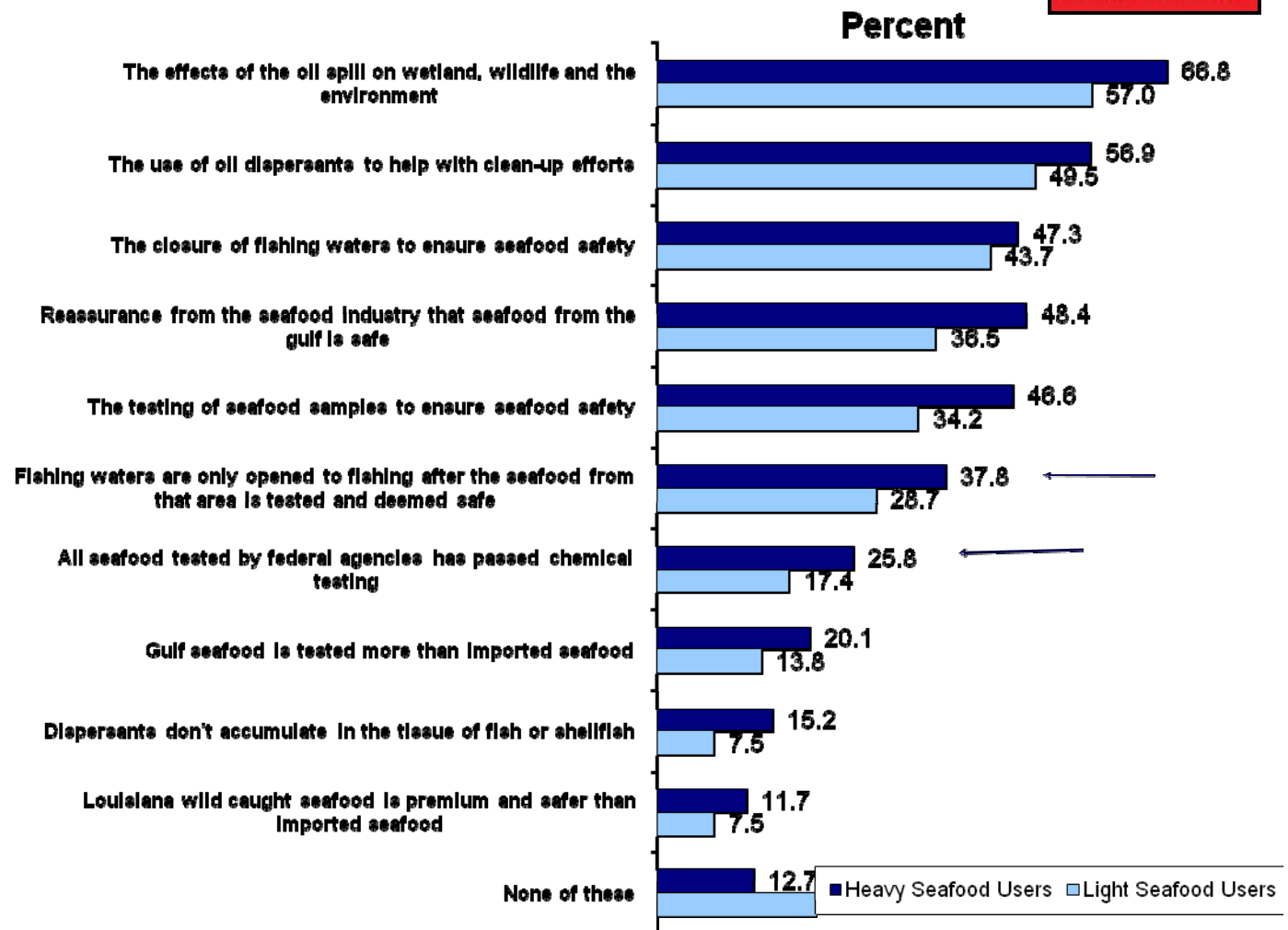
- Specifically with regard to seafood safety, news reports tend to be the dominant source of information.
- Heavy users are more likely to listen to state and federal agencies and trade associations,
- While lighter users are more likely to use social media.



Messages Seen/Heard about Oil Spill



- Predominant messages seem to be negative in tone
 - Environmental impact
 - Use of dispersants
 - Closure of waters
- Heavy seafood users appear to be more “tuned-in” with respect to positive oil spill messaging – particularly with respect to:
 - Reassurance from the industry.
 - Testing for safety.



Messages Reassuring Heavy Users



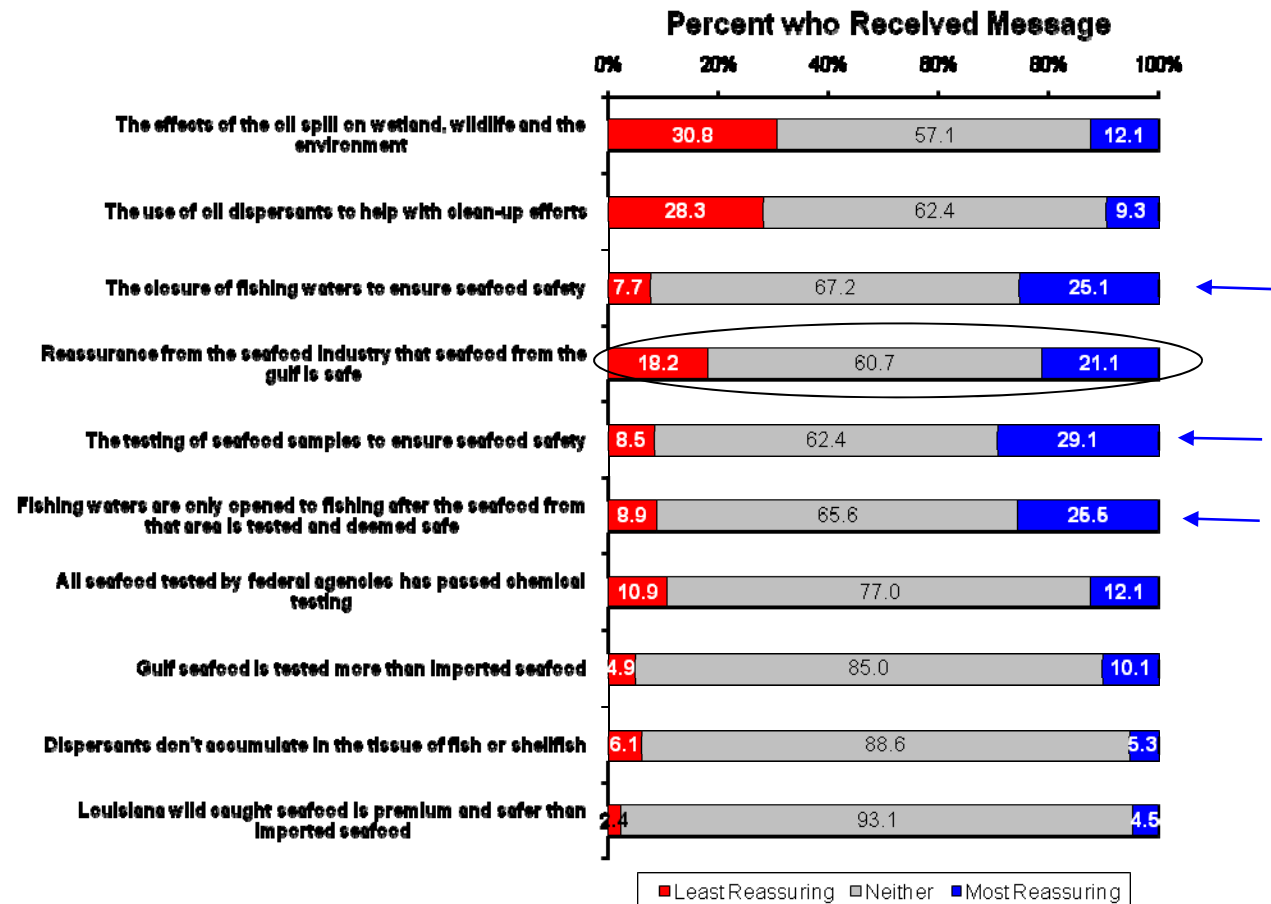
- Among Heavy Seafood Users the most reassuring messages have been with respect to;

- The testing of seafood
- The closure and opening of fishing waters to insure safety

– These should be emphasized more.

- However reassurance from the seafood industry seems to be meeting with some skepticism

Message Reassurance - Heavy Seafood Users

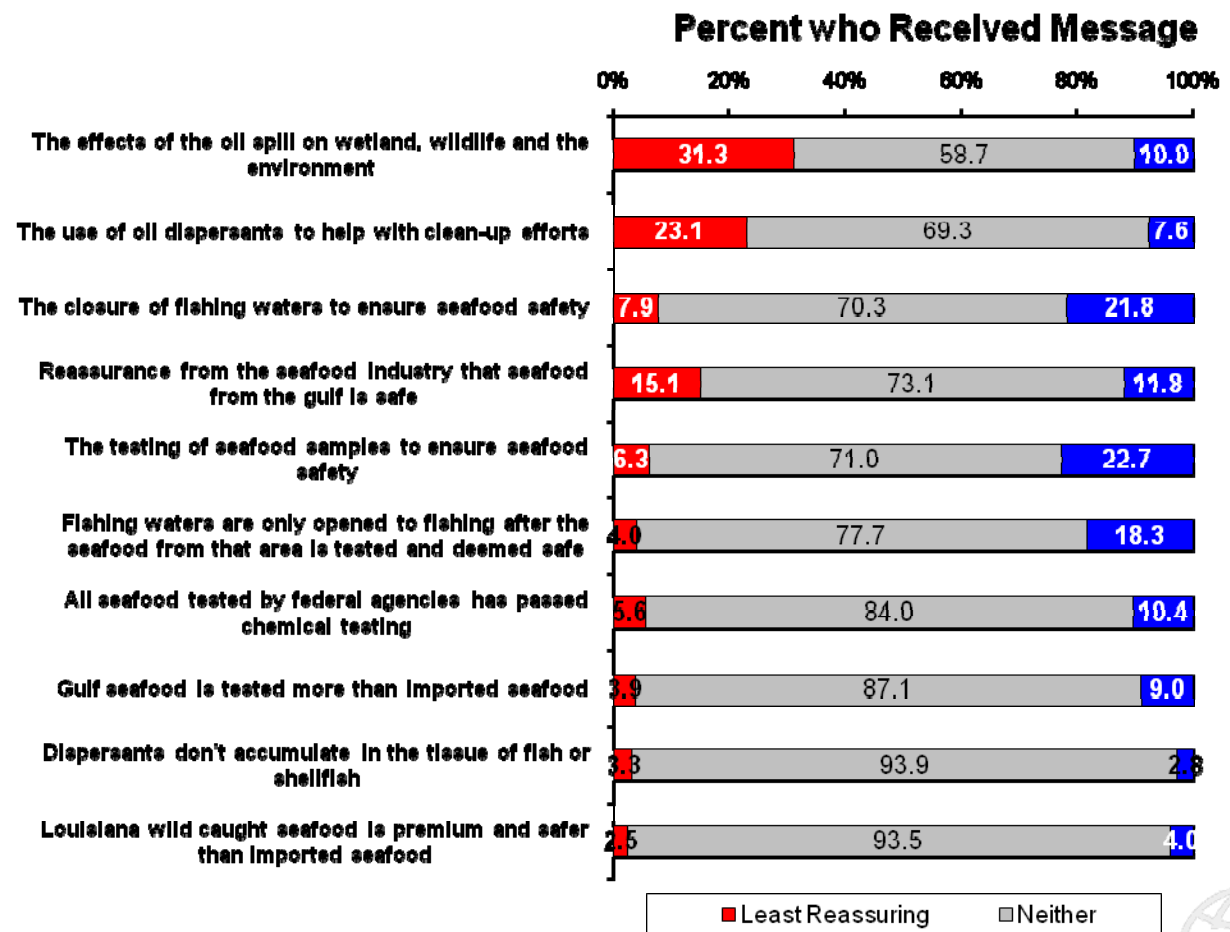


Messages Reassuring Light Users



- The same messages are also reassuring among lighter users, but to a lesser extent.
- And lighter users find more skepticism in industry messaging than reassurance.

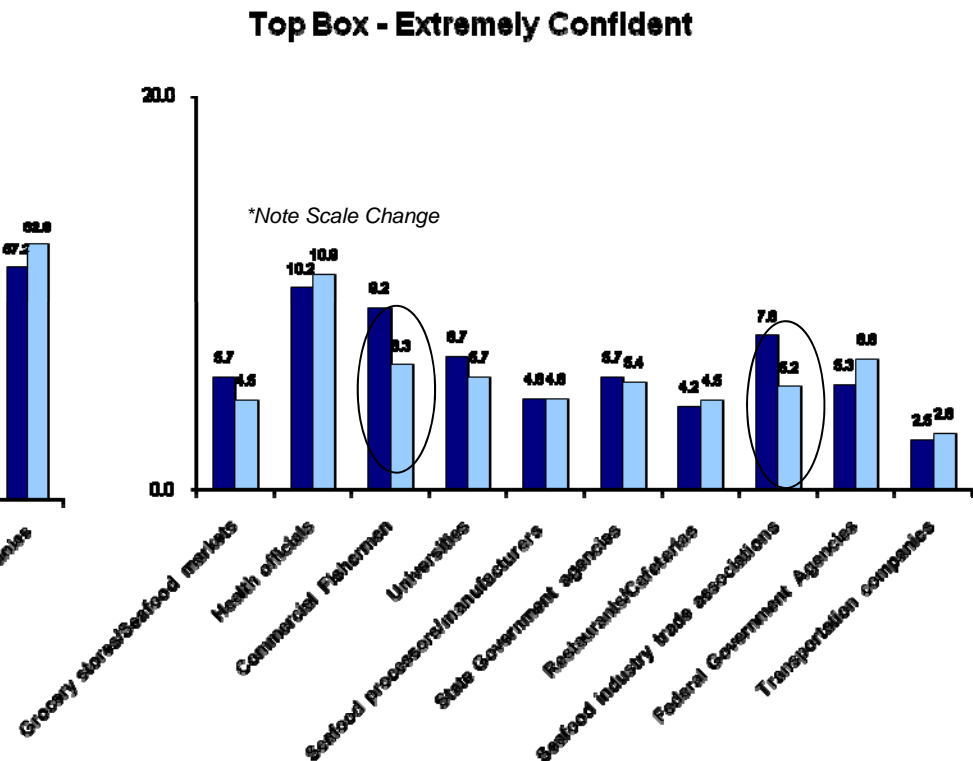
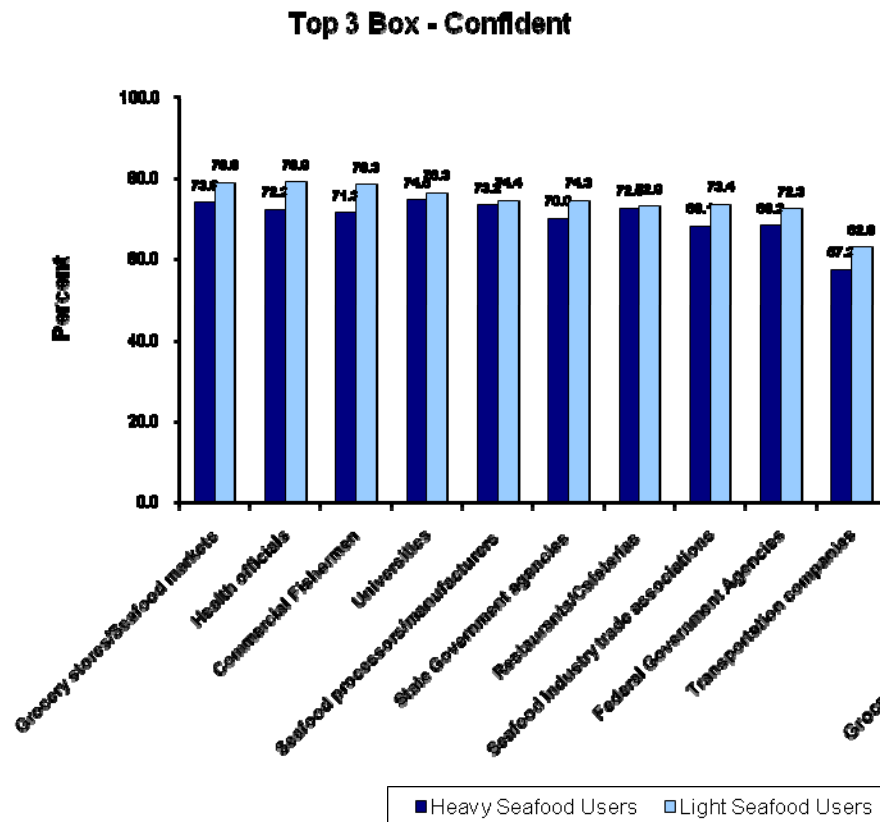
Message Reassurance - Light Seafood Users



Confidence in Ability to Protect Seafood Safety



- Confidence levels in all parties involved in protecting the safety of seafood are similar across all consumers - but heavy users tend to be slightly less confident across the board than light users.
- But some heavy users find higher confidence in commercial fishermen, and trade associations – perhaps these be leveraged more effectively?



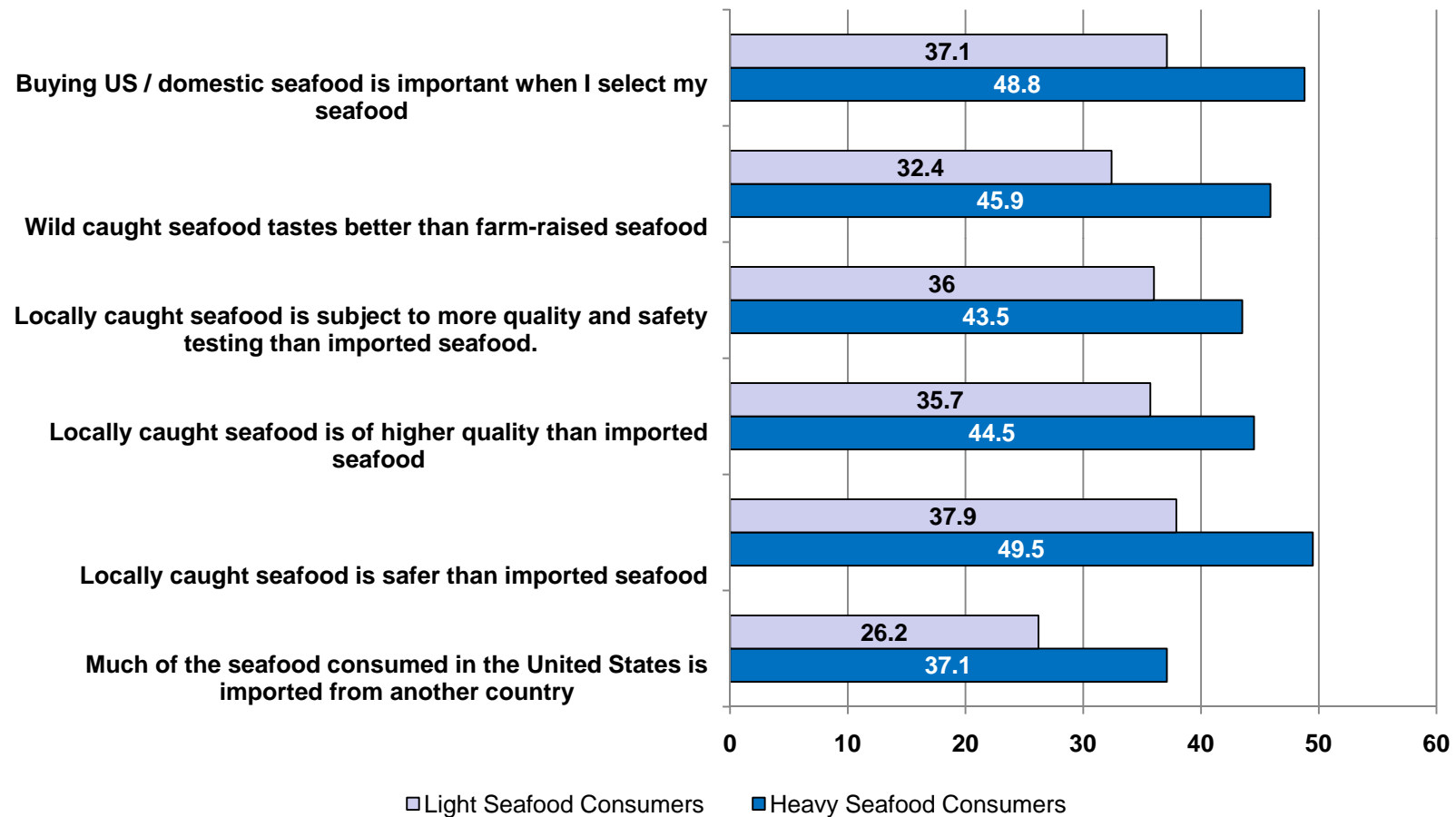
Next Steps



- LSPMB Plans for advertising and promotion – strategy and timing?
- Tweaking the Survey – Additional Messaging?
- Timing of the Second Wave – Target Date
- Segmentation Study – Strategic Marketing – Who to target? What to say?



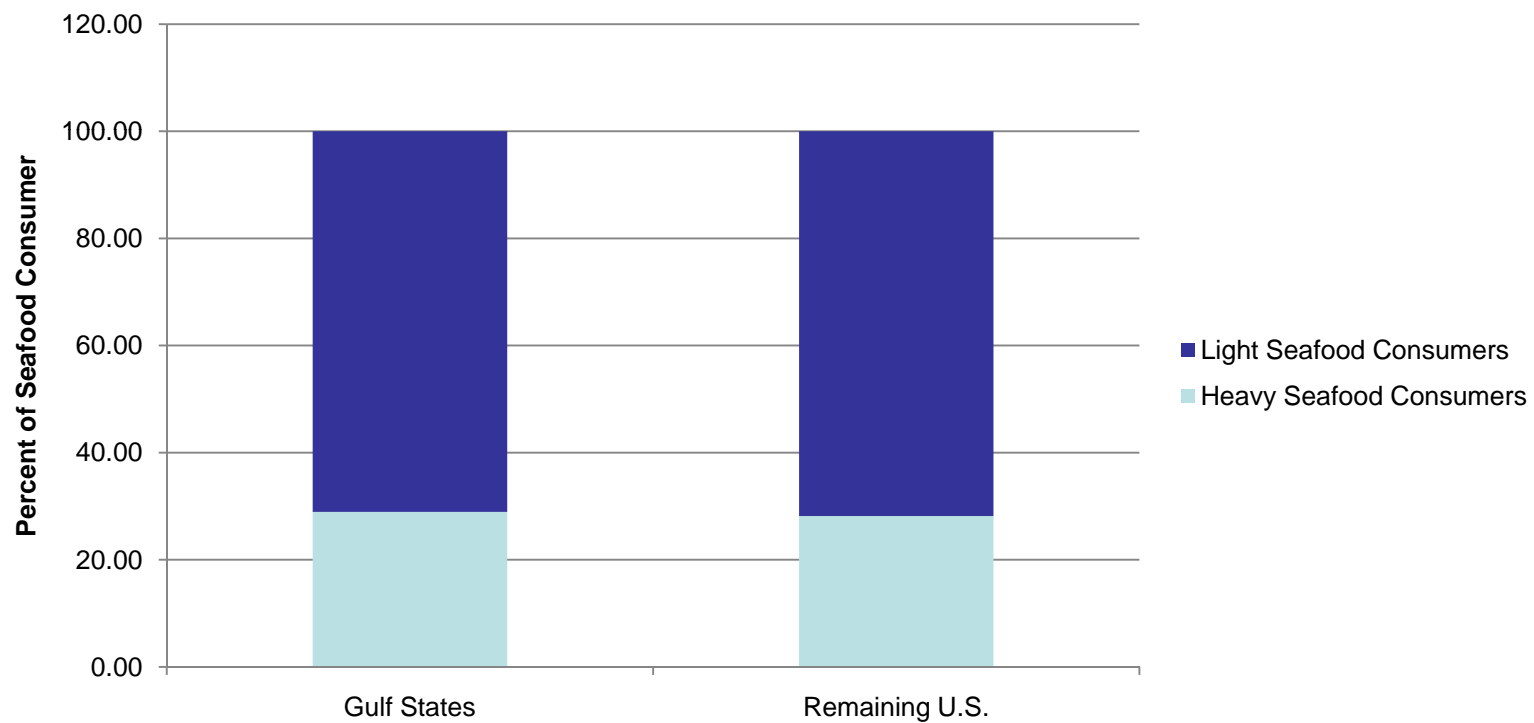
Agreement with Statements: Top Two Boxes



Heavy Seafood Consumers – 28% in both Gulf States and Remaining U.S.

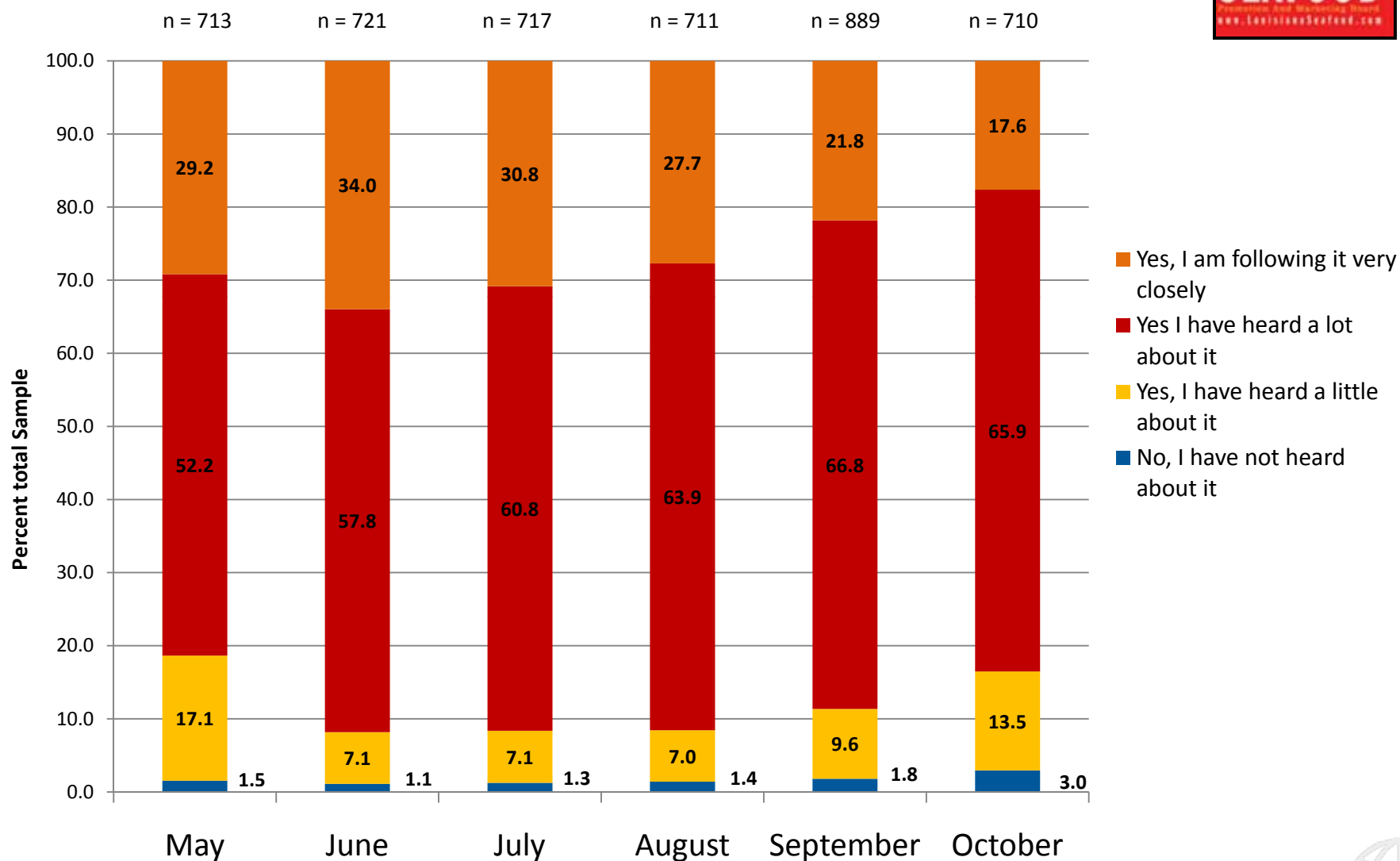


Percentage of Respondents:
Heavy/Light by Gulf Remaining U.S.



Awareness of Gulf Oil Spill (CFST Survey)

Question: Have you heard about the recent oil spill in the Gulf of Mexico?

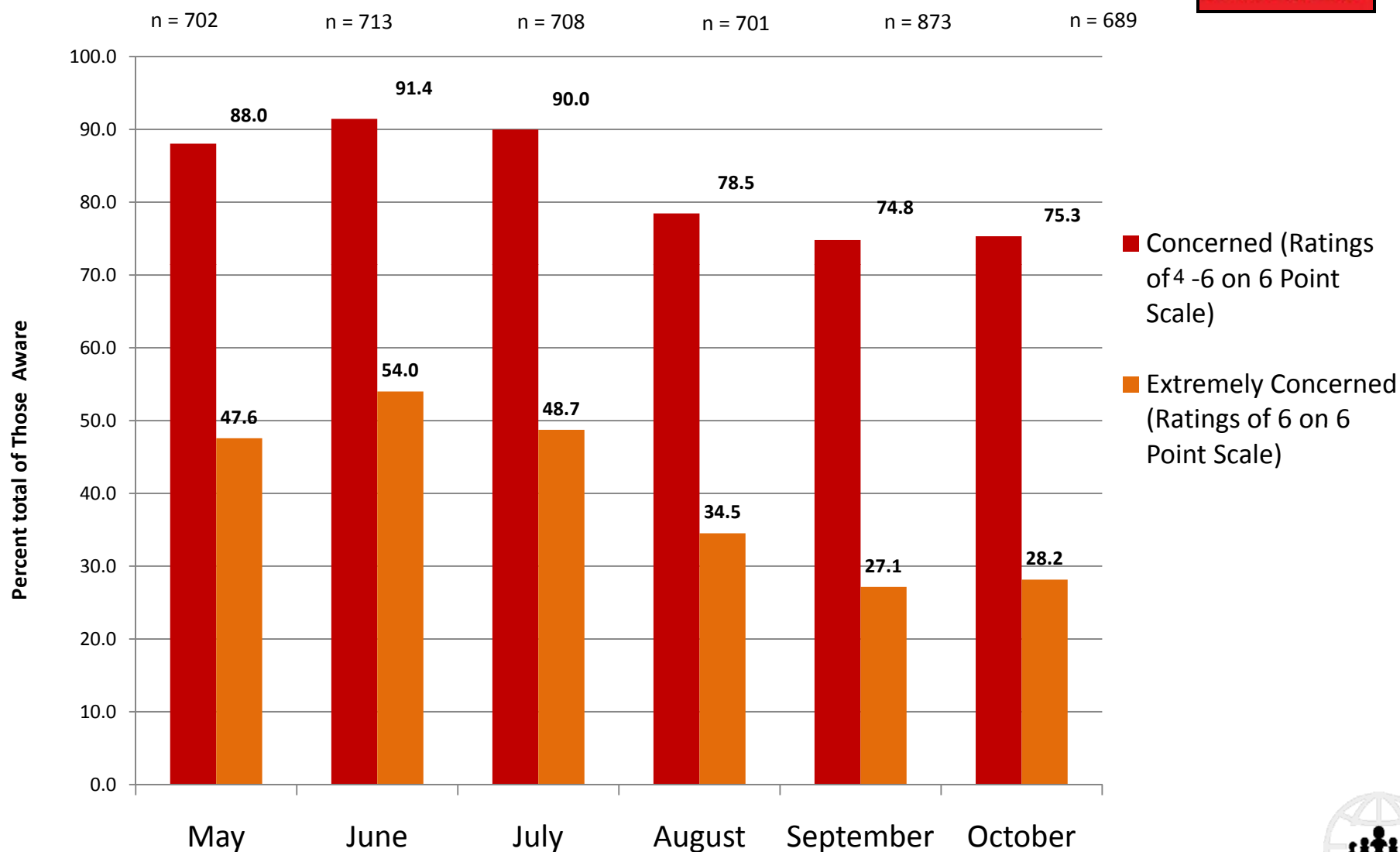


Source : Harrison, Degeneffe & Kinsey, CFST Study 2010



Concern Over Risk Gulf Oil Spill Poses to Safety of Seafood From the Gulf (CFST Survey)

Question: How concerned are you about the risk this oil spill poses to the safety of seafood from the Gulf of Mexico?

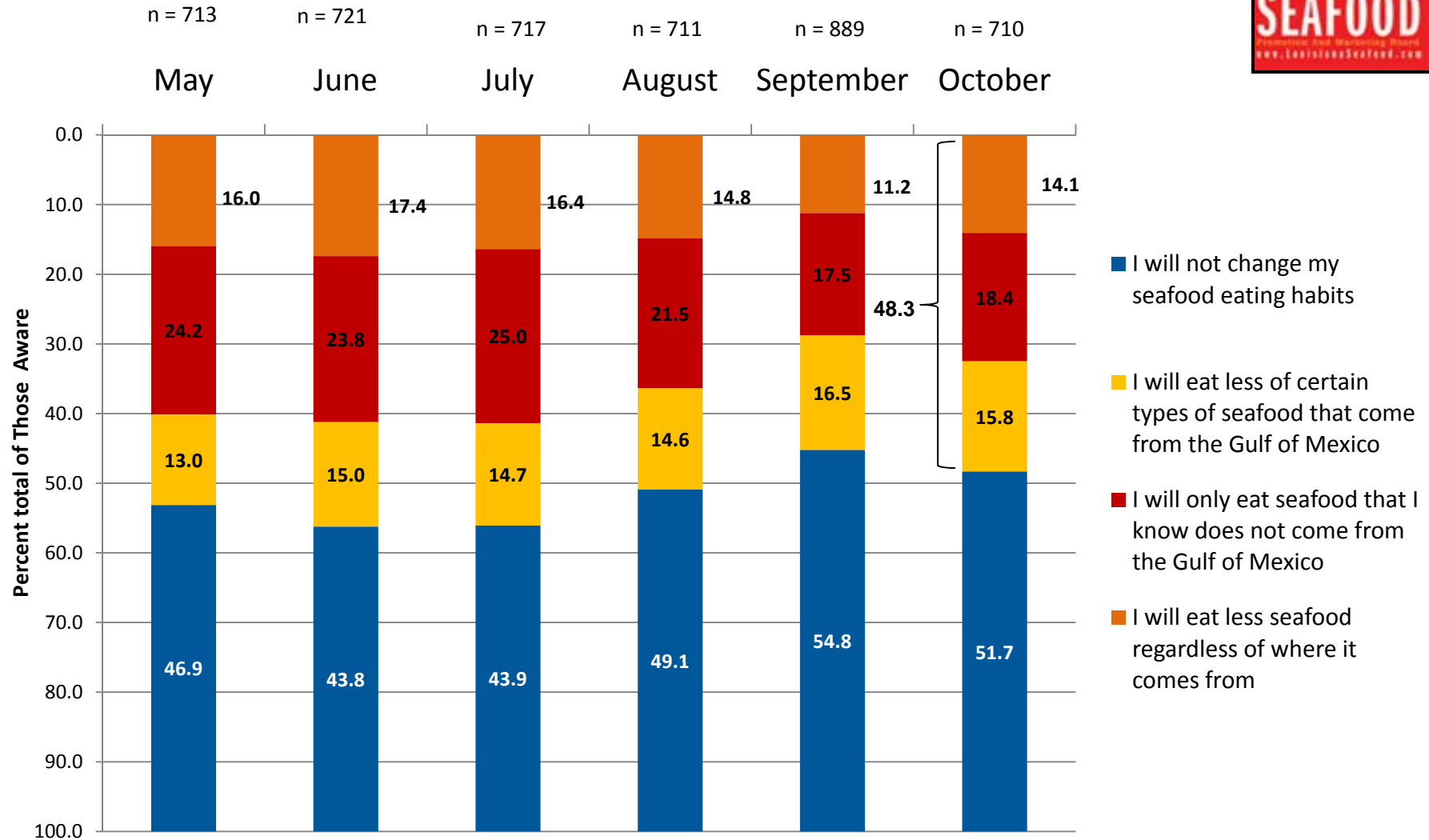


Source : Harrison, Degeneffe & Kinsey, CFST Study 2010



Impact of Gulf Oil Spill on Seafood Consumption (CFST Survey)

Question: How will this oil spill affect your consumption of seafood?



Source : Harrison, Degeneffe & Kinsey, CFST Study 2010



Research Questions ...



- *What are the long term effects on consumer confidence in the safety of Gulf Coast seafood?*
- *Has confidence recovered since the well has been capped?*
- *Is remaining concern attributed more to uncertainty about unaccounted for oil, or the large and widespread use of chemical dispersants?*
- *Which marketing/promotional strategies are most effective in restoring consumer confidence in the safety of its seafood?*
- *Are there differences across consumer segments (i.e., heavy seafood consumers versus light seafood consumer) regarding the level of concern and the impact on consumption behavior?*
- *Have seafood consumers substituted other seafood products (e.g. fresh water products such as crawfish and catfish, or imported farm raised shrimp) for Gulf coast shrimp, oysters, crab or finfish? Is this substitution temporary or permanent?*



Management Summary

Demographic Differences



- **Demographically, those tending to avoid seafood are socio-economically downscale**
 - **lower income and education**
 - **younger**
 - **suggesting that those changing their consumption may lack perspective.**





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SEAFOOD**
Promotion and Marketing Board
www.LouisianaSeafood.com

**Thanks!
&**



Questions

Dr. R. Wes Harrison – Louisiana State University

Dennis Degeneffe – Principal Consultant

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Consumer Centric Solutions LLC



Louisiana Seafood Promotion and Marketing Board Budget Plan

Last updated:

3/2/2011

BP Oil Spill Rebranding / Market and Perception Recovery Fund \$15 Million

	Year 1	Year 2	Year 3	Total
Marketing Firm				
Market Research				
Consumer, Industry (harvestors, docks, processors), Foodservice, Retail, Market segmentation studies, Product tracking study, etc				
Market Research Total				
Communications				
Press, Media, video, photo, events, Newsroom; Newsletters (CyberFish), Social Media				
Communications Total				
Seafood Technical				
Exporting guidelines and resource site, photography, videography, online quality training, quality surveys, characteristics / buyers guide, photography, foodservice guide to LA seafood, retail handling, Premium quality / handling specs, safety, labeling / regulatory, ecological issues / sustainability communications, nutrition testing				
Technical Total				
Consumer Domestic				
Recipes, chefs, health and nutrition, traveling sample kitchen, wild benefits, educational pieces (also see Food Network proposed buy under LSPMB budget)				
Consumer Domestic Total				
Retail Domestic				
Branding, merchandising, education pieces, POP displays, best practices, supplier directory, education / training - (e.g. seafood counter web training), tradeshow				
Retail Domestic Total				
Food Service Domestic				
Restaurant purveyors, recipe inspiration, training, promotions, best practices, supplier directory, menu development, table toppers, logo inclusion, tradeshow				
Food Service Domestic Total				
Broadline Domestic				
Sysco, US Foodservice, etc. communications, promotions				
Broadline Domestic Total				
International				
Japan, China and Germany, France, Belgium, Italy, Greece, Spain, Portugal, UK, Ireland, Sweden, Netherlands, Denmark, Finland (51% EU / 33% Asia), promotions, exporter resources, supplier directory				
International Total				
Sustainability / Traceability / Quality Certif				
Certified Wild Louisiana Seafood Quality micro campaigns to communicate initiatives by LDWF, traceability and sustainability certifications				
Sustainability / Traceability Total				
Other				
Other				
Other Total				
Marketing Firm Total				\$15,000,000.00