



BRISTOL BAY

ALASKA'S SOCKEYE SALMON

PILOT PROJECT REPORT

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Prepared for:



BRISTOL BAY
Regional Seafood
Development Association

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Executive Summary

In early 2016, Bristol Bay Regional Seafood Development Association (BBRSDA) executed a pilot marketing project in Boulder, CO. The purpose was to establish a proven model for successfully implementing an effective retail program for refreshed Bristol Bay sockeye salmon. The project also required the design and launch of a new, consumer-facing Bristol Bay brand.

Process and Deliverables:

The new Bristol Bay logo and branding represented a sleek, modern take on seafood: a seven-sided geometric fish shape, with dual campaign themes of wild taste and amazing place. Custom photography, recipes and a redesigned consumer website completed the new look.

For retail engagement, the project team worked with various retailer chains and suppliers to generate interest in participating in the marketing project. This included developing a sell-in presentation, meeting with retailers and distributors in Boulder, and creating marketing materials to be used in the stores such as ice signs, recipe posters, recipe cards, and branded Grundens aprons.

Three retailer chains of diverse size participated in the program.

Bristol Bay's Boulder pilot program was unique: frozen H&G sockeye was thawed and processed into fillets by regional distributors, then shipped to stores, while Bristol Bay sockeye was uniquely brand labeled and marketed at retail. Each of the three retailers elected to use different levels of branding and promotion, which was provided by Bristol Bay.

Bristol Bay also held product training with all stores to educate retailers about the unique qualities of Bristol Bay sockeye salmon. Digital advertising targeted in Boulder, and social media helped build consumer awareness during the test period, along with various local events including a Bristol Bay sockeye salmon chef workshop, public dinner, and restaurant week.

Overall, sales increased during the promotion period between 8 to 14 percent.

Results:

Confidential sales data provided by the participating retailers, along with recurring on-site visits, and exit interviews with key partners, yielded measureable results about the program. Overall, sales increased during the promotion period between 8 to 14 percent. The marketing materials, training, events, and branding were well received.

Although the project attempted to control for product quality by recommending a predetermined set of quality specifications be used by retailers and suppliers, quality proved to be inconsistent. Moving forward, increased attention and adherence to quality standards will be essential to ensure a positive brand experience, and to build brand loyalty over time.

Other conclusions include utilizing product demos and looking at alternative timing of promotions, to create further consumer awareness at retail.



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ALASKA'S SOCKEYE SALMON

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I. Plan

- Project Development
- Proposed Timeline
- Key Players
- Chains Approached

Project Development

In early 2016, Bristol Bay Regional Seafood Development Association (BBRSDA) developed a plan for a regionally-focused marketing project and retained Phil Gibson of Resiliensea. In February 2016, an RFP was issued seeking a marketing agency to help execute the program.

The stated goal of the RFP was to brand re-freshed sockeye salmon from the Bristol Bay region of Alaska so that consumers recognize and seek it out nationwide on a year-round basis. The ultimate purpose of the exercise was to establish best practices and provide retailers with a road-map for successfully implementing an effective program for refreshed Bristol Bay Sockeye.

The level of supply of wild sockeye coming from the Bay combined with the BBRSDA's desire to shift focus to marketing made Bristol Bay sockeye uniquely positioned to move out of the commodity market and break into the premium niche seafood market with the goal of increased domestic retail sales of Bristol Bay sockeye. By adhering to a predetermined set of quality specifications, the Bristol Bay pilot program will lay the foundation for cultivating brand loyalty.

The program was to begin in a test market in Boulder, Colorado, to establish proof-of-concept and then launch in wider distribution once the test had been completed and the program had a measurable record of success.

The program would target grocery retailers in the selected test market and also required participation of the supply chain operators.

The three essential components of the plan:

- Consumer-facing marketing efforts
- Company employee-facing training and support
- Retailer and supply chain-facing participation effort

A marketing agency was solicited to oversee the following components:

- Brand strategy
- Brand development to include messaging and logo
- Web site redesign for www.bristolbaysockeye.org
- Consumer marketing strategies to include all forms of appropriate media
- Social media management
- Employee training and follow-up program
- Supply chain participation
- Measurement and budget.

Proposed Timeline of Key Events- 2016

	April	May	June	July	August	Sept	Oct	Nov	Dec
Social Media									
Strategic Planning									
Branding/Messaging									
Website									
Retail Training Development									
Retail Training Deployment									
Ad Buy Planning									
Ad Buy Execution									
POS Development									
Swag Development									
Measurement									
Reporting Period									

Key Players

- Bristol Bay Regional Seafood Development Association (BBRSDA) fisherman member group with the goal of raising the value of the Bristol Bay sockeye harvest; client for project.
- Resiliensea, seafood retail expert consulting firm, hired to develop and oversee retailer engagement aspects of project.
- Rising Tide Communications, marketing and communications firm specializing in Alaska food and seafood strategic communications, marketing and PR.
- Stellar Group, measurement expert and involved in designing, tracking, evaluating various components of the pilot project.

Chains Approached

Six retail chains were actively recruited to participate in the marketing refreshed fillet project: three large national chains and three regional or local chains of diverse size. Ultimately, all three large chains declined to participate, citing the challenges of implementing a program like this in a handful of stores, when their established supply chains and infrastructure don't allow for custom implementation. One store in particular that declined to participate had an established, highly successful refresh sockeye salmon program, some or most of which was undoubtedly Bristol Bay sockeye, but they preferred to keep their existing program in place, as it utilizes several sockeye varieties. Several of the large chains expressed interest in learning the results of this study as they would consider implementing it at a larger regional level in the future.

2. DO

- Retailer Sell-In Presentation
- Quality Plan
- Campaign Overview: Wild Taste, Amazing Place
- Branding
- Website
- Point of Sale Materials
- Advertising and Social Media
- Retail Training
- Travel to Boulder
- Chefs Collaborative
- Retailer Profiles: A, B, C

Retailer Sell-In Presentation

In order to recruit retail participants, a retail sell-in presentation was developed. Bristol Bay's Boulder pilot program was unique: frozen H&G sockeye was to be thawed and processed into fillets by regional distributors then shipped to stores, while Bristol Bay sockeye was uniquely labeled and marketed at retail. The intent was that the product would be much better handled this way and the quality more consistent, which is important in building consumer trust. The logistical details of the program, the high-end branding and the marketing plan had to be sold to processors, distributors and retailers. In order to convince these stakeholders that Bristol Bay sockeye can be effectively sourced, handled, delivered and promoted, RTC developed a retail sell-in presentation, which Phil Gibson delivered to retail candidates.

Quality Plan

Refreshed refers to fillets that are cut from previously frozen H&G whole salmon. The fish are tempered under controlled conditions to maintain the best quality and reduce moisture loss at a processor or distributor level.

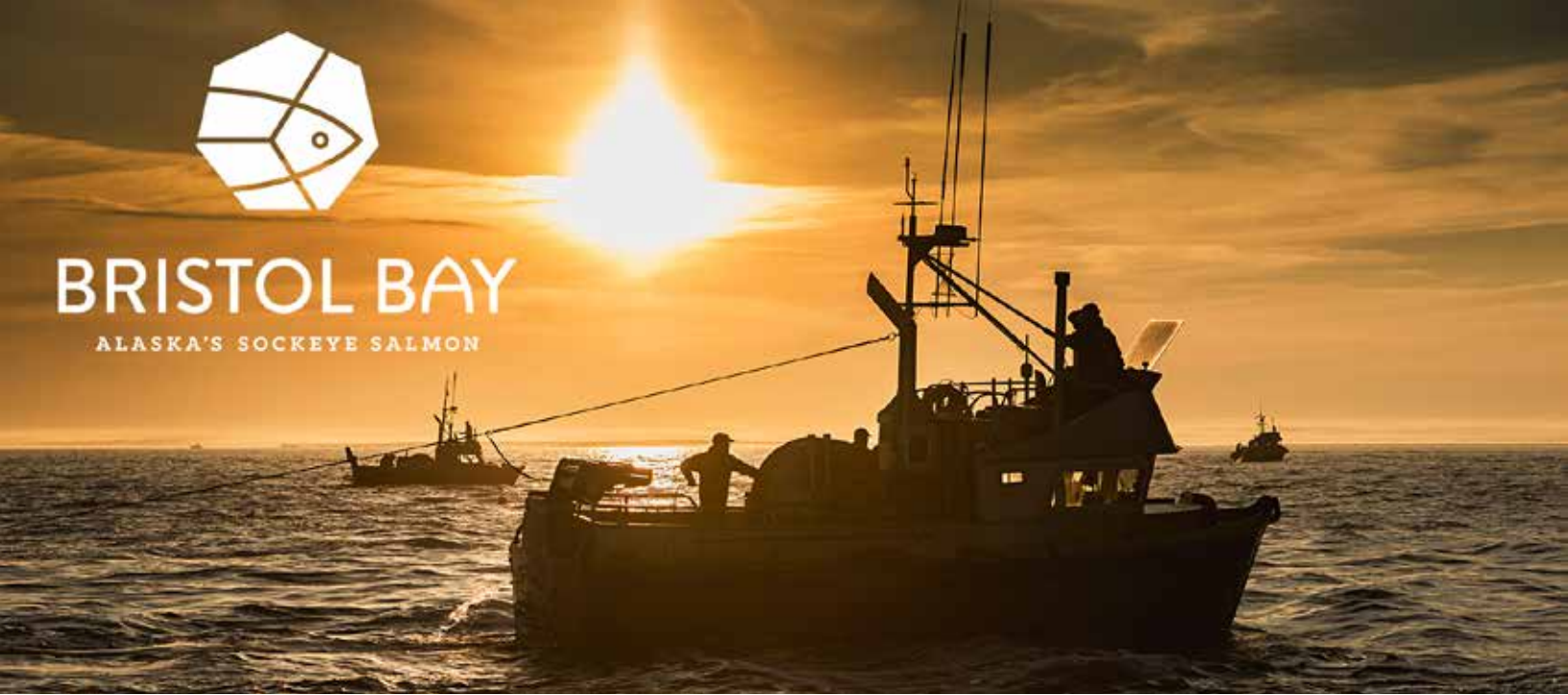
Multiple studies show that a refreshed salmon program using #1 grade fish that have cold chain certification denoting they were maintained at temperatures below 40 degrees until delivery to the processor provides consistent quality, longer shelf life, better appearance, and a more satisfying customer experience than thawing and selling frozen fillets by store personnel.

This program attempted to control for quality by recommending these program specifications and conditions for all product.



BRISTOL BAY

ALASKA'S SOCKEYE SALMON



Campaign Overview: Wild Taste, Amazing Place

Rising Tide Communications built a campaign focused on building the Bristol Bay sockeye brand – a thriving, vital wild food source from the pure waters of Alaska ideally suited for today's consumer who wants a healthy food with an authentic story to support their lifestyle, to feed their families and to fuel their quest for adventure.

The strategy focused on pivoting away from cause-based marketing to positioning the brand as a premium break-out built on the wildness, awe-inspiring harvest volume and pristine habitat of Bristol Bay

Rising Tide wrote a strategic plan to efficiently and effectively inform strategy, tactics, and messaging, as well as final decisions on the marketing mix. Our research indicated that Millennial (or Generation Y) consumers were a prime target for Bristol Bay Sockeye branding. The secondary target identified was Boomers.

Primary Target = Gen Y

Adults born between 1982 and 2004, with an annual household income of \$50,000 or more. Young professionals, either single or with young families, who are also food sophisticates who enjoy cooking, are eco-conscious and prone to considering health implications in their dining decisions. Also called 'Millennials.'

Secondary Target = Boomers

Adults born between 1946 and 1964, with an annual household income of \$100,000 or more. These individuals are food sophisticates who enjoy cooking, are eco-conscious and prone to considering health implications in their dining decisions.

Branding

BRAND IDENTITY

The logo and branding were developed after a period of extensive research and was designed to appeal to our target demographics while also capturing the unique qualities of Bristol Bay sockeye salmon.

Three distinct design profiles were conceptualized: Modern Premium, Hip & Trendy, and High-End. The logo that was ultimately selected reflected all these aspects, with a geometric seven-sided heptagon fish icon. The logo and branding are sleek, fresh, and evoke quality fish in the modern world, with the heptagon shape serving as a subtle reference to water molecules and gill nets.

The logo process was complex, and consensus was a challenge for this client group. Ultimately the branding was very well received by various stakeholder groups.

Monoline

Solid

Stacked



BRISTOL BAY

BRISTOL BAY

ALASKA'S SOCKEYE SALMON

ALASKA'S SOCKEYE SALMON

Horizontal



BRISTOL BAY

BRISTOL BAY

ALASKA'S SOCKEYE SALMON

ALASKA'S SOCKEYE SALMON

Stacked



BRISTOL BAY

BRISTOL BAY

ALASKA'S SOCKEYE SALMON

ALASKA'S SOCKEYE SALMON

Horizontal



BRISTOL BAY

BRISTOL BAY

ALASKA'S SOCKEYE SALMON

ALASKA'S SOCKEYE SALMON

BRAND MESSAGING

In addition to the brand mark, it was also decided to call the brand 'Bristol Bay Sockeye Salmon' with the tagline 'Alaska's sockeye salmon' to both differentiate Bristol Bay by species as well as region, and to further leverage the existing efforts by the Alaska Seafood Marketing Institute to brand all seafood from Alaska as wild, natural and sustainable. This geographic identity also served to help consumers understand where their seafood came from.

Further campaign messaging focused on the twin themes of taste and place; an inseparable combination of attributes that spoke to not only BBSS's single largest unique traits but also consumer's desire to eat good food from a source they trust.

BRAND ASSETS: RECIPES + PHOTOGRAPHY

Custom photography that portrayed both taste and place were an essential investment that supported all elements of the campaign including website redesign, point of sale materials, chef events, social media, digital advertising, and later, new trade booth design.

For the place theme, RTC utilized the existing relationship with photographer and Bristol Bay fisherman Chris Miller to commission six photos for the exclusive use in the campaign. These were more 'commercial' in composition than the typical editorial style of his social media photo feed that he provides throughout the season, but were an essential tool for translating, visually, the awe-inspiring place of Bristol Bay and its people, for our target.

For the theme of taste, RTC hired a professional recipe developer to create four custom on-trend recipes that would appeal to our target demographic, and conducted a photo shoot in Anchorage to portray the high-end look and feel of the brand. Resulting recipes included Hot Honey Broiled Sockeye Salmon, Sockeye Salmon Quinoa Taco Bowls, Sockeye Salmon Citrus Veggie Skewers with Herbed Yogurt Dipping Sauce, and Sockeye Salmon Poke Bowls.

Further campaign messaging focused on the twin themes of taste and place; an inseparable combination of attributes that spoke to not only BBSS's single largest unique traits but also consumers' desire to eat good food from a source they trust.

Website

RTC rebuilt www.bristolbaysockeye.org to match the premium look and feel of the new brand. In keeping with the brand theme of high quality, modern looking and highlighting the twin messages of taste and place, the new site featured high-end photography, a streamlined layout and improved user experience. The Bristol Bay Instagram feed featured prominently on the new home page to again capture the imagination of the target audience who loves to share their food adventures in the digital space. The website and new branding launched in early September to positive reviews from industry and the fleet:

This website works well for a handful of reasons. As I mentioned, the photos are on point. Being exposed to so many images every day online, in print and on TV, you've got to be bold to stand out.

— “Selling Sockeye To Millennials,” National Fisherman online, 8/31/16

Picture a sockeye salmon, and you'll probably think of the classic silver fish, or maybe a red spawner. A project launched by the Bristol Bay Regional Seafood Development Association this month is also hoping to connect the region's fish to a modern-looking logo, and the feeling of a wild place.

— “BBRSDA Launches Sockeye Brand in Boulder,” Bristol Bay Times, 9/9/16

Point Of Sale Materials

Unique point of sale materials were developed, utilizing custom Bristol Bay assets of logo, photography, and recipes, to create recipe posters, recipe cards, ice signs, stickers, fish wrapping paper, tote bags, aprons, and mugs.



One retail partner requested some POS (ice signs and wrapping paper) to be co-branded with their logo. In this case, the project provided the Bristol Bay logo resources to the retailer marketing team, and then produced once a final product was designed.

Advertising and Social Media

A digital ad buy was placed, geo targeted to the Boulder region. This portion of the campaign was a good place to test for message resonance and performance among our target demographics. Four suites of digital ads were developed based on the two themes of Wild Taste and Amazing Place, and delivered to consumers who fit each of our target demographics, for a total of four themes: Wild Taste/Boomer; Wild Taste/Millennial; Amazing Place/Boomer; and Amazing Place/Millennial. Ads ran September 15th – November 15th. These ads were designed to lead consumers to a Boulder-specific landing page on the Bristol Bay website that listed which retailers carried the product.



Ads were also run on social media, emphasizing the twin themes and separate demographics. These ads were evaluated by a metric called "recall lift." Recall lift is a way to measure how likely someone who saw the ad would be likely to remember seeing it.



Retail Training

The retail training program was a key campaign element, as sales counter staff are viewed as the most trusted and knowledgeable source of seafood information, and are in the unique position to inform purchase decisions for every fresh case sale transaction. Unfortunately, this group tends to suffer high turnover and lack of product training; our goal was to change these front lines into endeared brand advocates with properly designed training tools. These consisted of a presentation, POS introduction, a leave-behind laminated training poster calling out the key points of the brand that are also printed on the back of the ice signs.

In-person training sessions were conducted by the marketing team on two separate visits to Boulder.

Although initially planning a distance delivery training via a digital portal, condensed timelines and scope of work suggested the better tactic was to keep it simple. Thus, the training was delivered in a way that allowed for immediate feedback from our partners: in-person with a post-training survey to gauge effectiveness.

Travel to Boulder

Throughout the pilot project, several visits were made to the test market for planning, retailer recruitment and training, store visits, and events.

SPRING - RETAILER MEETINGS

Resiliensea travelled to Boulder to meet with retailers and recruit them to participate in the program.

JUNE - RECRUITMENT, MARKETING MATERIALS PLANNING

Rising Tide Communications and BBRSDA visited the test market in late June, meeting with participating chains to determine the POS, and meeting with additional chains to recruit additional participation in the pilot program.

AUGUST - RETAIL TRAINING, PRE-LAUNCH

Rising Tide Communications and Resiliensea travelled to Boulder, CO to conduct retail training and pre-launch the refresh program Sunday, August 21st - Tuesday, August 23rd. During this visit, training was conducted at two of the three Retailer B locations, and both Retailer A locations.

The team visited the cooking school, The Food Lab, to preview the space for the Chefs Collaborative Sockeye Salmon workshop in September. They also met with Seafood Distributor 1 to prepare for the refresh program.

SEPTEMBER - FINAL RETAIL TRAINING, CHEF WORKSHOP

Rising Tide Communications travelled to Boulder, CO to conduct retail training, store visits, and the Chef's Collaborative workshop Friday, September 16th - Tuesday, September 20th.

OCTOBER - COMPREHENSIVE STORE VISITS, PUBLIC DINNER/RESTAURANT WEEK KICKOFF

RTC travelled with BBRSDA board president to visit all participating stores and attend Chef's Collaborative public dinner event.

Taste the Wild

SEPTEMBER 19, 2016

BRISTOL BAY SOCKEYE SALMON WORKSHOP



Chefs Collaborative

As part of an existing relationship with Chefs Collaborative, they were contracted to produce a workshop, public dinner and restaurant week in support of the pilot project. The marketing team worked together with Chefs Collaborative to create the plan, direct messaging, provide branded campaign assets, and create and execute the following three events:

TASTE THE WILD: BRISTOL BAY SOCKEYE SALMON WORKSHOP

The event began with the RTC team providing background information about Bristol Bay's history, sustainability, the sockeye season, and quality standards. Information on where to purchase the salmon was also given. Attendees engaged in Q&A with our team. Next, we moved into cooking demonstrations given by three different local chefs (Kyle Mendenhall, Kelly Whitaker, Josh Pollack) where attendees could engage with the chefs in Q&A about sockeye salmon preparations. A Bristol Bay fisherman, Matt Aboussie, also spoke about his experience as a fisherman, quality standards, and what the fishery and the product means to him personally.

All who attended the event received a branded mug, along with information about the upcoming Sockeye Restaurant Week and where they can purchase Bristol Bay sockeye salmon.

TASTE THE WILD: BRISTOL BAY SOCKEYE SALMON PUBLIC DINNER

Local chefs Kelly Whitaker, Kyle Mendenhall, and Joshua Pollack participated in the dinner, and it was held at Chef Kelly Whitaker's Basta on Monday, October 24th. The event was advertised via social media, and Chefs Collaborative outreach.

The event was also cross promoted with the fourth annual Flatirons Food Film Festival, which was taking place in Boulder the week prior and provided some strategic cross promotion opportunities. It was decided to screen select shorts from "In The Same Boat" at the Festival, and also at the dinner.

TASTE THE WILD: BRISTOL BAY SOCKEYE SALMON RESTAURANT WEEK

The Taste the Wild Restaurant Week took place from October 24-30th, 2016 with 16 participating restaurants. The participants included tastemakers in the Boulder market, such as The Kitchen and Black Cat Bistro, as well as businesses that operate at a large scale, such as Colorado University Boulder. The marketing team provided talking points and sourcing resources to chefs who were new to the product and the brand.

Retailer Profiles: A, B, C

The project secured participation from three retailers: Retailer A, Retailer B, and Retailer C. Several additional chains were approached, but declined to participate, citing centralized supply chain issues, lack of access to senior level managers, and existence of established refresh programs.

RETAILER A

Retailer A was one of the first stores to sign on to the project. They are a higher-end chain catering to the natural, organic, healthful and gourmet client base. They have a large prepared foods section, and a small seafood counter.

Retailer A opted for every piece of POS offered: recipe cards, recipe posters, ice signs, bib aprons, digital images in the stores, and branded social media posts.

All stores received a training presentation, training booklet, and training poster. Compared to Retailer B, there were noticeably fewer staff participating in the trainings, and there was no upper-level management present.

Demos were discussed with retailer A but never executed for a variety of reasons, including difficulty in scheduling fisherman to travel to Boulder during a compressed campaign time. Although not stressed at the time, Retailer A indicated the significance of demos during exit interviews (below).

Retailer A had the highest level of initial engagement in the program, but did not follow through with the agreed-upon release of sales data at the close of the project.

RETAILER B

Retailer B is a specialty grocery store chain focused on natural, organic and locally-grown products.

Retailer B was an early recruit to the program. Retailer B's seafood category manager is based in Boulder and was consistently engaged in the planning process, as well as that chain's marketing team.

Retailer B elected to co-brand some POS items: the ice sign and the wrapping paper were designed to feature both the Bristol Bay brand and Retailer B's brand. Retailer B keeps a consistent visual effect throughout their stores and it was important to them to retain that even when showcasing Bristol Bay's brand.

Retailer B was provided with images for digital and print ads as well as social media. Retailer B featured the Bristol Bay Sockeye product in some ads, but did not utilize our photo assets.

Two stores received training presentations, training deck, recipe cards and training posters. Store managers and employees alike attended trainings at those stores. One store failed to make staff available for two separate scheduled trainings.

Demos were also discussed with Retailer B but were not executed due to time and budgetary constraints.

RETAILER C

Retailer C is a health food supermarket.

Retailer C joined the program relatively late; Rising Tide Communications had first contact with Retailer C's seafood category manager in late July. Retailer C's local area stores had no dedicated seafood area managers, but there was a training manager who helped set up training.

Retailer C wanted only training and recipe cards. It became clear later that the stores needed to mark the product more clearly, so ice signs were shipped. Retailer C was provided with images for digital and print ads as well as social media.

All four stores received training presentations, training booklet, recipe cards and training posters. Only store managers were made available for training, not counter staff. Many counter staff serve both meat and seafood. The store department managers that came to the training were engaged and receptive. They appeared to be willing to participate.



3. CHECK

- Sales Data
- Retail Training Surveys
- Mystery Shopper Surveys
- Exit Interviews
- Advertising Outcomes
- Consumer Surveys (Mug)
- Chef's Collaborative Events

Sales Data

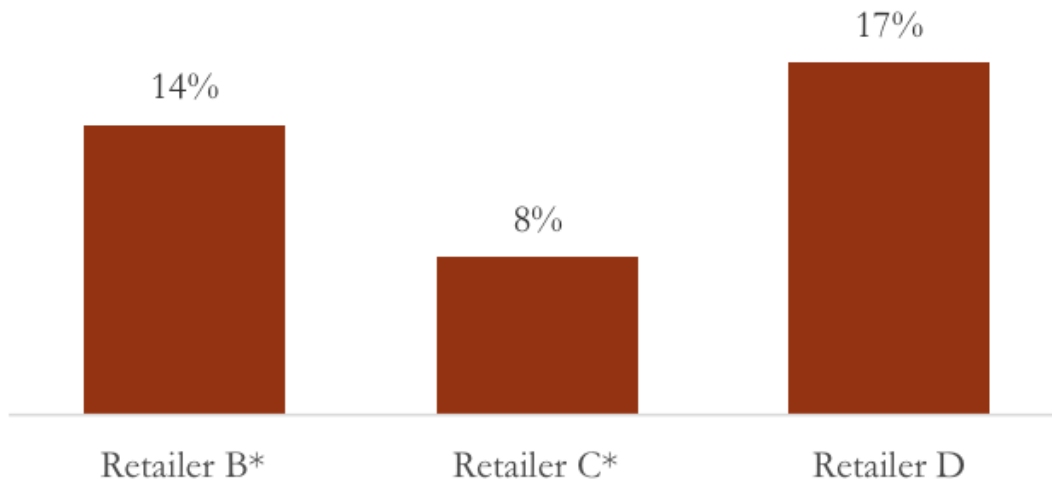
At the onset of the project, sales data was requested to be provided to the project voluntarily by participating retailers, with augmenting data provided by the Nielsen Perishables Group. Retailer A did not provide any sales data to the project team. Retailer B provided data for October and November 2016, as well as prior year sales for comparison. Retailer C provided data for September and October 2016 as well as prior year's sales during the same time period for comparison. Nielsen Perishables Group data was used to provide information for Total Market and Retailers D & E, who did not participate in the program, for comparison.

One of the primary goals of the pilot project was to see if the multi-pronged efforts to build brand awareness among consumers, combined with digital advertising and social media would increase sockeye sales.

Nielsen Perishables Group data was purchased to measure sales in the specific stores that were anticipated to participate. However, none of the participating stores report to Nielsen. The Nielsen data was instead used as a comparison, focusing on two non-participating store chains known as Retailer D and Retailer E.

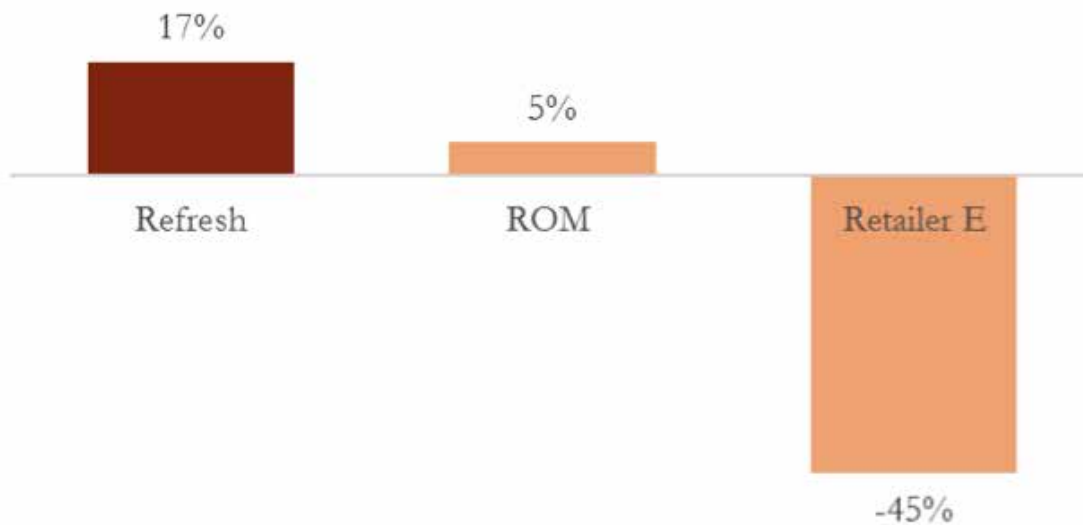
Retailers A, B and C participated in the Boulder Market Pilot Project. Retailer D has a separate refresh program now in its second year. While new to the refresh program, Retailer B and Retailer C both did see noticeable increases in sales of sockeye salmon during the test period. This increase is over sales during the same period in 2015. While we have no sales data from Retailer A we assume that their sales likely followed a similar trajectory. These increases were also greater than those seen in the rest of the market.

Sockeye sales rose at all retailers with an active refresh during the pilot period.



Retailer E had a significant decline in their sockeye sales during the test period. They were separated out from the rest of the market, along with retailers with active refresh programs in the graph below. It is clear that the retailers engaged in an active refresh program had the highest sales of sockeye during the promotional period, although the rest of the market also saw a modest increase.

Sockeye sales rose more for the refresh program stores, than the rest of the market during the pilot period.



Retail Training Surveys

A short evaluation form was developed to gather feedback on the training from participants. Feedback was collected from each participant using a paper feedback form immediately following the trainings. Trainings were held in August and September 2016.

Staff members were trained at 8 of the 9 retail locations. At one retailer sales associates as well as managers were trained, in the others just trainers or store managers/trainers were trained with the intention that they would disseminate information to front-line staff.

The feedback on the trainings was universally positive and the trainings achieved their ultimate goal of making staff enthusiastic about selling Bristol Bay to their customers.

The staff who received the training thought that all of the training topics covered were useful. The two most highly rated topics were the history of the Bristol bay fishery and organization and the high quality handling and freezing of the Bristol Bay salmon. This was confirmed in the individual comments, when individuals specifically listed the following elements of the training as the most useful to them:

- Region & its fishing history (7)
- Refreshing fillets (4)
- Harvesting method (3)
- Different types of salmon (2)

During the exit interviews, store managers also confirmed that they thought the training had been a good use of their staff's time. One manager reported, "We had good feedback on the training from our training managers."

This translated into real recommendations during consumer interactions. Overall, when in stock, Bristol Bay salmon was recommended by a sales associate in 73% of all mystery shops. The key themes were used 35% of the time by sales associates to describe the Bristol Bay salmon.

The only part of the training that any staff commented on as the least useful or informative was the sales techniques (2) and display information (1). While only mentioned by one person, it is interesting because during the mystery shops, the recommended method for displaying fish was not observed in 89% of shops. Typically, the sockeye salmon was displayed with skin touching flesh. This may be an area where it is difficult for Bristol Bay to influence retailers behavior even though 94% of staff did rate the tips and tricks for attractive displays as useful or very useful. Sales techniques were the lowest rated.



Mystery Shopper Surveys

Mystery shoppers were used as the main mechanism to collect information about the in-store placement and usage of promotional activities and the in store experience for consumers. A 25 point questionnaire was developed for use by mystery shoppers, and mystery shoppers were asked to take photos of the fish they purchased, as well as placement of promotional items in the store environment. Second-to-None, a customer experience research firm based in Ann Arbor, Michigan consulted in the development of the questionnaire, recruited the mystery shoppers and provided the results of the mystery shops to the Bristol Bay project team.

Retailers A, B and C each received 8 secret shops during the project period. All shops were conducted between September 28th, 2016 and November 16th, 2016. The retailers were not made aware of the shops in advance.

RETAILER A

For this store, no sales data was provided by the participating retailer, so the impact on their overall sockeye sales is unknown. However, during the exit interview anecdotal evidence of positive increases in sales seen was noted.

Of all participating retailers, Retailer A had the product in stock most often when mystery shoppers visited. It was in stock 94% of the time.

Two staff from each of the two locations were trained by the BB team.

When the Bristol Bay sockeye salmon was in stock:

- 67% of the shoppers had it recommended to them.
- 50% of the shoppers reported that the sales associates used one or more of the key themes to describe the Bristol Bay sockeye salmon. These included:
 - Pure wild Alaska flavor
 - Hand harvested by fishermen
 - Sustainable superfood

The mystery shoppers described positive experiences in the stores, and a couple expressed appreciation of the displays:

- *“I liked the poster display and the fact that the TVs had slides of different products featuring Bristol Bay. Additionally, another customer came up while I was deliberating, and she bought a pound of the Bristol Bay right away. She said she preferred it to the farmed.”*
- *“My impression of the Bristol Bay brand based on the product display was very positive. I could see the quality of the brand just by the advertising.”*

- *"I asked Christian for a recommendation on salmon, and he immediately recommended the Bristol Bay Sockeye Salmon. I asked what the difference was between the Bristol Bay and the farmed, and he talked about the flavor of the farmed fish being much more mild. He did a good job using words like "wild caught" and "sustainable", which encouraged me to choose the Bristol Bay Sockeye Salmon."*

When fish was in stock, it was of a good quality. The fish was reported to be fresh and free of offensive odors in 93% of Retailer A shops. However, cracks or other defects were observed more often in Retailer A, with 65% of shoppers reporting them.

RETAILER B

For Retailer B, only September/October sales data was available. Retailer B had three stores participating in the program, including one store that was opened at the start of the promotion period, so there was no prior year comparison data. The salmon was in stock during 75% of the shops.

Sockeye sales increased 14% during September and October over 2015 sales during the same time period. Retailer B's larger bump in sales may be partially due to the additional location serving the Boulder market.

At two Retailer B stores seafood department staff in each store received training. Staff at a third store did not receive training due to circumstances beyond the control of the Bristol Bay marketing team. At that location, shoppers reported that staff recommended the Bristol Bay salmon less often (50% of shops) than at other Retailer B's locations when Bristol Bay sockeye was in stock (86%).

Overall, when the Bristol Bay sockeye salmon was in stock:

- 75% of the shoppers had it recommended to them.
- 25% of the shoppers reported that the sales associates used one or more of the key themes to describe the Bristol Bay sockeye salmon. These included:
 - Pure wild Alaska flavor
 - Hand harvested by fishermen

Promotional items were also less visible in Retailer B stores than in others. Only ice picks were observed in all stores, and posters and recipe cards were in one location. At the location with recipe cards and posters, staff recommended purchase 100% of the time, and used key phrases 57% of the time. It is possible that visible reminders of the brand contributed to their enthusiasm for the Bristol Bay sockeye salmon, and their use of key phrases.

Shoppers described many positive interactions with sales associates:

- *“The Seafood department was clean and appealing. An associate was behind the counter when I arrived. He asked if I knew what I would like. I told him I didn’t know what salmon to pick, and he recommended the Bristol Bay Sockeye Salmon. He said it had a far better flavor, was from Alaska and was hand caught. I asked him for about a pound, and he selected a fillet. He chatted with me, wrapped the fillet up and thanked me.”*
- *“From the start, it was obvious that the associate saw the Bristol Bay brand as the most obvious choice in salmon. The little he told me and the signage on the Seafood counter convinced me it was the best choice at the store as well. While he did not mention any of the key phrases, he mentioned what I found to be most important; the freshness and the source of the fish. The product itself was impressive, and I would likely purchase it again.”*
- *“The associate was quick to offer assistance. I told him I was looking for salmon. He said he had a farm raised salmon and a Bristol Bay Sockeye Salmon that was wild from Alaska. I asked him if it was good, and he said it was really good. He said that Bristol Bay had come in and that they had had a tasting with local chefs from Jax and two other restaurants where they serve Bristol Bay exclusively. He asked if I would like some and said again it was very good. The associate asked which piece I liked. He weighed it, wrapped it neatly, and offered me some recipe cards to take. He pointed out the recipe he liked the most.”*
- *“The associate was clearly in favor of purchasing the Bristol Bay fillets. He didn’t recommend any other type. He explained that the Bristol Bay was the most popular, noted that it was on sale, and told me that it came from Alaska where it was caught in the wild... The associate was friendly, and he was efficient in wrapping up my purchase and inviting me to enjoy the salmon.”*

When fish was in stock, it was generally of a good quality. The fish was reported to be fresh and free of offensive odors in 85% of Retailer B shops, although some cracks or other defects were observed 45% of the time.

RETAILER C

While Retailer C had more stores participating in the program, their stores kept the salmon in stock less often than other stores. It was found in the stores just 53% of the time when mystery shoppers were sent in. They also started the program later than other stores. During exit interviews, store staff further revealed that they had de-emphasized the product at times and advertised other salmon products in their store flyers, which accounted for the lack of product in stock at the time.

Despite these challenges, they still saw an 8% rise in sockeye salmon sales during the pilot project, over prior year sales during the same period.

The training clearly made a difference. At this retailer, only the department managers received training, but the training managers gave positive feedback on the training, and in the mystery shops it was clear that components of it had been communicated to seafood department staff.

When the Bristol Bay sockeye salmon was in stock:

- 76% of the shoppers had it recommended to them.
- 35% of the shoppers reported that the sales associates used one or more of the key themes to describe the Bristol Bay sockeye salmon. These included:
 - Pure wild Alaska flavor
 - Hand harvested by fishermen
 - Sustainable superfood
 - World's largest salmon run

The mystery shoppers described positive interactions with sales associates, who spoke convincingly about Bristol Bay sockeye salmon.

- *"I enjoyed being educated on salmon. I appreciated the honesty of the associate to tell me what he did about the farm raised salmon. He said farm raised was cheaper because they hold them in tanks versus fisherman going out to catch the wild caught. The wild caught had a robust taste and was overall a better, more natural product. I was told that the store had someone from Alaska come and talk to the Seafood department about wild caught salmon. The associate said the salmon was caught and flash frozen to seal the freshness."*

- *“I asked which had the best flavor, and the Associate suggested the Bristol Bay salmon. He explained that it was not salmon season right now, so all of the salmon was frozen. He talked about the difference between the farmed and the fresh fish. Aaron talked to another customer and me about the sustainability of the Bristol Bay Sockeye Salmon.”*
- *“The associate who assisted me directly highly recommended the Bristol Bay Sockeye Salmon. The other associate agreed with him but also told me that farm raised salmon was a good choice for the environment since our oceans were overfished. The first associate chimed in to agree but pointed out Bristol Bay limited the amount of fishing so there wasn’t an issue with the wild caught salmon. I was given a lot of good information between the wild caught and farm raised salmon. I was told that the wild caught had a nice dark color because of what they ate.”*
- *“The assistant was knowledgeable about the salmon, and he was enthusiastic about the Bristol Bay Sockeye Salmon. He said the salmon was as fresh as it could get and told me how it was flash frozen. The associate pointed out the color differences in the salmon and the fat lines in the Atlantic salmon. He said the Bristol Bay Sockeye Salmon was really easy to make and that there were so many recipes I could do, including tacos. He said I would notice there is no strong fish smell to the Bristol Bay salmon. He said it was really good.”*
- *“The seafood associate recommended the Bristol Bay sockeye salmon right away because it had better flavor even though it was not salmon season and it had been frozen. He said the farm raised fish would give me more meat per \$1 but that it wouldn’t taste as good as the wild caught salmon.”*

When fish was in stock, it was usually of a good quality. The fish was reported to be fresh and free of offensive odors in 88% of Retailer C’s shops, although some cracks or other defects were observed 47% of the time.

Exit Interviews

Exit interviews were conducted with sales/department managers who served as primary points of contact during the project. Retailer A, Retailer B and Retailer C each participated in exit interviews. Seafood Distributor A also participated in an exit interview. The interviews were conducted telephonically and followed a twelve-item questionnaire developed by the project team. Exit interviews were conducted on December 21st, 2016 and January 4th, 2017.

- 2 of 3 retailers have done similar promotion projects. Distributor A also has worked with a number of brands, mostly farmed fish. They bring in and launch new brands on a regular basis.
- 2 of 3 retailers were looking for a sales impact, one had no specific goals other than seeing where they fit in with the rest of the market sector. One specifically was hoping to lift all seafood through this promotion and the other wanted to generate customer interactions in the store.

Interviewees highly rated:

- Materials provided were really well done, professionally produced
- Having a new product to create buzz around a store's opening
- The partnership with Chef's Collaborative
- In store print ads/flyers also generated buzz
- Retail training was good

2 of 3 reported issues with the quality of the fish. The retailer that did not get from Seafood Distributor A was happy with quality. One retailer reported sending back some fish. Distributor A also noted that quality was inconsistent and sometimes poor.

Specific issues included:

- Size - small fillets, too large of packages
- Appearance - cracks/split
- Looked aged/old
- Poor handling

Suggestions for the future included included:

- Launch a different time of year (2 of 3)
- Do in store demos, create consumer interactions to drive sales/awareness
- Having the fisherman in store, talking to customers/employees
- Feature in other parts of the country, where the demographics are different

Advertising Outcomes

Digital display advertising (embedded ads on supported desktop websites, mobile websites, and smartphone apps) is the most sophisticated and cost-effective form of digital advertising. Using a combination of location, proximity to participating stores, geo-targeting, internet browser history, purchasing behavior, economic status, loyalty-card purchases, age, gender, interests, and other traits, we were able to specifically target our most valuable audiences and most likely consumers of Bristol Bay sockeye.

In the period between September 15th and November 15th, we delivered 1,892,753 impressions to our targeted audiences in Boulder, Longmont, Louisville, and Lafayette.

It is well understood that consumer branding is more effective when messages are repeated.

It is well understood that consumer branding is more effective when messages are repeated. We successfully generated multiple impressions (between 4-6) per person within our identified targets.

We also advertised on Facebook and Instagram. Advertising to audiences on Facebook and Instagram extends well beyond page likes. We targeted our ads to zip codes in the Boulder and greater Boulder areas. Within that audience, we targeted specific characteristics of lifestyle, related interests, and purchasing and internet behavior.

Between September 15th and November 15th, we generated 369,940 impressions on social media. Our ads were delivered to individuals approximately 3.5x each, resulting in 110,040 unique user views.

We also utilized Google Ad Words to aid our consumer's recall of ads. This is one of our more specific strategies, in that the audience is relatively small. These are designed to capture people in the Boulder and greater Boulder area who are searching on google for a list of keywords, including "Bristol Bay" "salmon" "sockeye salmon" "salmon recipes" "seafood" etc. This is also set up to capture the audiences who have been to our website previously and is a measure to re-target them. When a user searches for one of these terms on Google, our ad appears at the top of the search results. Since launching our ads on September 23rd, we have received 45,045 impressions. Depending on the popularity of those searches on any given day, we receive between 200 to 2,000 impressions a day.

OUR OCEAN, YOUR TABLE.



FIND IT IN
BOULDER

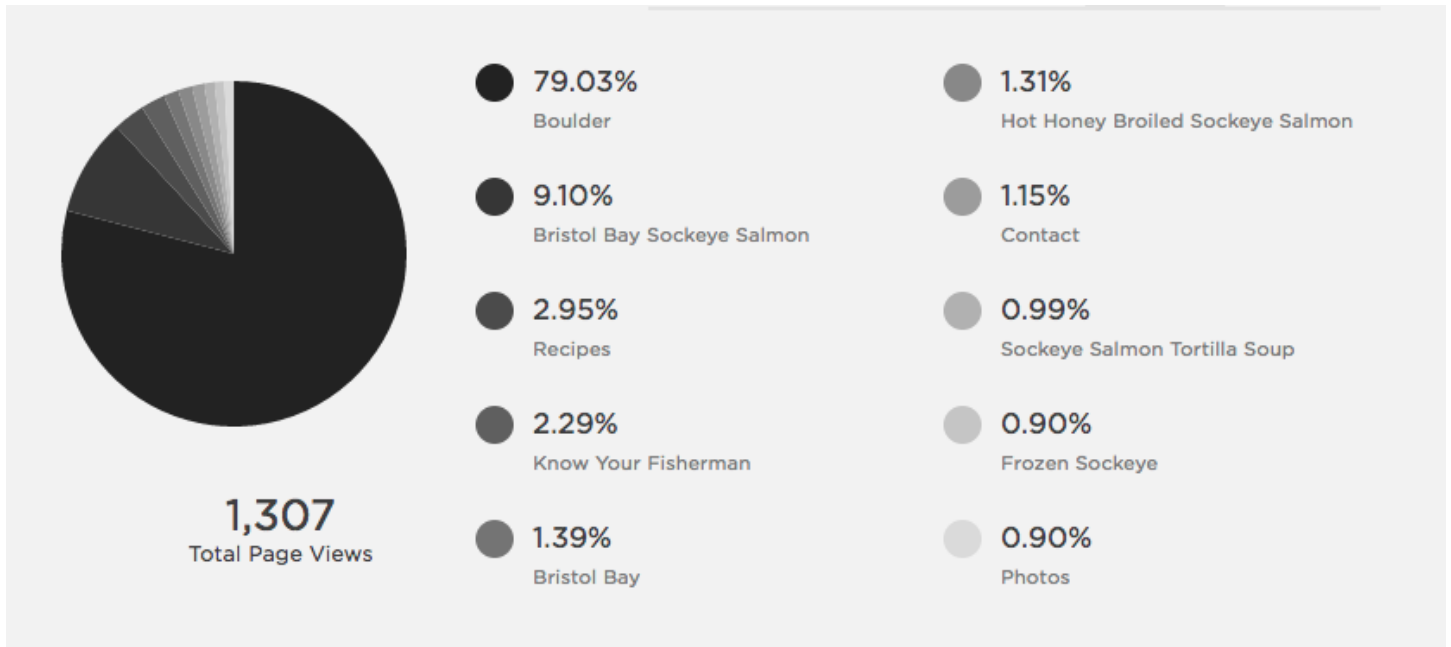


BRISTOL BAY
SOCKEYE SALMON

One of the metrics for success in digital advertising is the conversion rate, or rate of people who click through on your ads. Since making the page live and kicking off the strategic marketing campaign on September 23rd, the Bristol Bay website saw an immediate spike in traffic, and we have enjoyed a steady and consistent level since.

Between September 23rd and November 15th, we received 8,844 unique visitors to the website. On average, this is about 233 visitors per day.

This is a snapshot of our average week with traffic to the website.



Predictably, we are seeing 80% of our total traffic visit the Boulder page, as this is where all of our local digital and social advertising lands.

From there, the other 20% of our traffic is clicking through from the Boulder page to visiting the homepage and other various subpages.

Overall, our page view trends are a promising sign and a reflection of how engaging the content is on the website. Visitors who are landing on the homepage are clicking through to other parts of the website to engage with content.

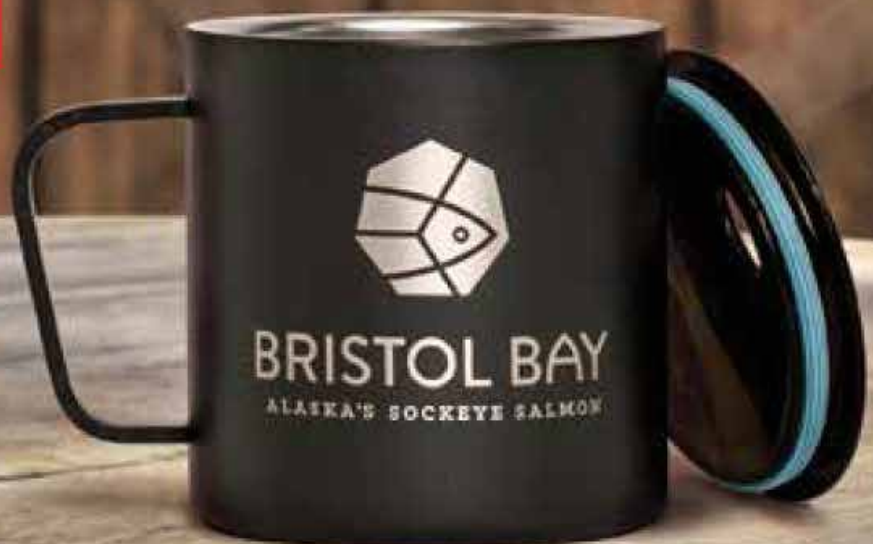
A bounce rate is the percentage of single interaction visits to a website. This is generally the most common interaction on websites and bounce rate is on average with other websites. Because we are running such a robust marketing campaign directed to a single page on the website, on the surface this appears to have increased the bounce rate.

Consumer Surveys (Mug)

We attempted to gather data on consumer brand impressions via a survey distributed at retail, with a high-quality Bristol Bay mug as incentive. Only Retailer A opted to distribute the survey. Unfortunately, the link to the survey was shared repeatedly on websites dedicated to surveys and sweepstakes. We tried to block these efforts by de-listing the survey website and making responses available only to Boulder-area residents, but it was a repeated problem. Thus, the data collected is invalid and will not be included in this report. However, anecdotally, the first phase of data gave us these interesting insights:

- Most consumers are reporting that they were unfamiliar with the brand prior to their first purchase, but they are highly satisfied from their first interaction with it
- Seafood counter staff and in store promotional items such as recipe cards and posters were equally important to consumers in introducing consumers to the brand (48% each).
- 100% of consumers rated the salmon as good or excellent after eating it and 100% said they were somewhat or very likely to purchase Bristol Bay sockeye again.
- The primary driver of consumer's choice was the salmon's appearance. Sustainability, price, and sales associates were close seconds.
- Consumer comments are all positive:
 - *"I liked that the poster had real people on it. I feel like I am supporting people and not a giant company"*
 - *"So incredibly delicious! I've already told many friends and family members about it."*
 - *"Pretty darn good. Taste reflects the price well"*

**AMAZING PLACE.
FREE MUG.**



Chefs Collaborative Events

The three events produced by Chefs Collaborative were a useful tie-in to the food influencer community to introduce them to the Bristol Bay Sockeye Salmon brand.

TASTE THE WILD: BRISTOL BAY SOCKEYE SALMON WORKSHOP

The involvement of three influential Boulder area chefs spurred attendance and ensured a full workshop: 46 RSVPs and 38 chefs and food professionals participated day-of (not including CC, Rising Tide staff). Further, culinary leadership from CU Boulder participated and immediately brought what was learned to the staff, resolving to put Bristol Bay sockeye salmon on the campus menu and to then participate in the restaurant week.

TASTE THE WILD: BRISTOL BAY SOCKEYE SALMON DINNER

The dinner was a sold-out success, with more than 35 guests. The dinner featured three sockeye salmon courses – appetizers, and two entrees – that showcased both the sockeye as well as the chefs’ craft and technique.

The evening featured various short films from “In The Same Boat”, a video funded by the BBRSDA, and photography from Bristol Bay, and conversation with Mike Friccero, BBRSDA Board President. Many commented that there was great audience engagement with Mr. Friccero and that having a fisherman present for questions and answers was a great learning opportunity for the audience. Chef Kyle Mendenhall provided powerful testimonials, and his previous trip to Bristol Bay helped him tell engaging stories for guests.

TASTE THE WILD: RESTAURANT WEEK

Ultimately, 16 area chefs participated in the Restaurant Week: River and Wood, CU Boulder, Colterra Food and Wine, Salt, Wild Standard, Jax Fish House, The Kitchen, Arcana, Rosenberg’s Bagels, Beast + Bottle, Blackbelly, Fresh Thymes Eatery, Mercantile, Black Cat Bistro, Bramble & Hare, and Basta. Promotional efforts by Chefs Collaborative resulted in 13 unique pieces of earned media, driven largely by the collaboration with the Flatirons Food Film Festival.

Chefs Collaborative placed social media ads, targeted to individuals in Boulder, to help promote the Sockeye Restaurant Week and Dinner at Basta, resulting in nearly 35,000 impressions and 350 click throughs to the Chefs Collaborative event website. Chefs Collaborative tweets promoting the dinner resulted in almost 10,000 impressions and over 50 unique engagements.

IV. Act

- Key Takeaways
- Recommendations
- Critical Decisions

Key Takeaways



1. **Sales increased** during the promotional period by 8% for Retailer B and 14% for Retailer C. Retailer A did not submit sales data at the close of the project, but results were likely consistent. This is a notable increase for a short timeline project.



2. **Promotional materials provided by Rising Tide Communications were well received** by both consumers and retailers. They were described as high quality, attractive and professional looking. Individual retailers used and appreciated different materials based on the look and feel of their own stores, so having a variety to them was important.



3. **The retail training developed by the Bristol Bay team was effective.** One retailer reported that their training staff gave positive feedback, as did 100% of those who attended the training in person. Additionally, even at stores where seafood department staff did not attend the training in person, mystery shoppers reported that they were speaking knowledgeably and enthusiastically about Bristol Bay. This indicates that the information in the training did get passed along to frontline staff. This is important because developing a training program that doesn't need in person delivery was a stated goal of the project.



4. **Two of the key themes resonated more strongly with sales associates** when talking with consumers. While the exact themes were only used in 35% of all shops, “pure, wild Alaska flavor” and “hand harvested by fisherman” were used far more often than “sustainable superfood” and “world’s largest salmon run” during customer interactions. This is in line with the training feedback, where staff noted that the information about the region, as well as the handling was the most interesting information.



5. The **biggest challenges** to getting seafood department staff to recommend Bristol Bay was a clear personal preference for Atlantic/Farm-raised salmon. When Bristol Bay was not the recommendation, Atlantic was almost always what they did recommend. Apathy of sales personnel was also a barrier to consumer engagement but typically resulted in no additional information offered to consumers or recommendations being made.



6. All retailers suggested after the project closed that the **timing was not ideal**. Some of the participating retailers were still trying to promote other fresh salmon species at the same time as the test period, while one retailer said they would have preferred to begin earlier as the months surveyed were typically slow. There also was a loss of retailer focus as the holiday period began. A suggestion that implementing early in the calendar year to help capture the desire of consumers to eat healthier meals and to coincide with Lent would be an effective marketing initiative to plan for in 2018. This test period had defined parameters to coincide with other marketing efforts (advertising and events) and to ensure the test would conclude with allowing enough time for analysis and reporting ahead of the next harvest cycle.



7. The **small test market limited involvement** to smaller chains. Larger chains were intrigued by the project but unable to adjust their supply chain infrastructure to accommodate the limited size of the project. We anticipate greater interest from larger chains when discussing implementation in a wider range of markets.



8. **Product quality issues** were described by both secret shoppers and in exit interviews with store managers. Several factors impacted quality:

- Although the program was designed to have sockeye thawed and filleted locally, the distributor elected to instead thaw and fillet the fish in Seattle, and then shipped the fillets in large boxes, causing damage to the fish. This was in contrast to what the expectation was at the beginning of the pilot program and that resulted in greater losses for Distributor 1. Recommend further research as to why this decision was made, and how to mitigate this in discussions with distributors moving forward.
- While we can't ascertain that the recommended quality specifications were followed by the distributor, the variable quality indicates that it may not have been.
- Quality measures are inconsistent among processors, and the product coming from the processor may have been variable while still meeting the specs.



9. **Demos drive sales**. Retailer A indicated that their stores typically see a 300% lift in product sales when demoed in the store, and that demos are most successful when they are done frequently. Retailer B also mentioned that having a Bristol Bay fisherman and BBRSDA Board President there in person to share his passion and expertise made an impact, and is something that can be focused on in the future, especially for a store launch. In this project, demos were discussed but ultimately determined to not be an effective use of funds. A cost-effective demo program could be a highlight of future projects.



10. The **campaign twin messages “Wild Taste” and “Amazing Place”** were examined during analysis of our digital and social media advertising. Boomers responded significantly more to the Place digital advertising than Taste digital advertising. On average, Millennials responded similarly to Place and Taste digital advertising. On social media advertising, Millennials engaged marginally more with Place content over Taste. It is interesting to note that Place ad content on Instagram averaged 5:1 times more engagement than Facebook, whereas Taste ad content on Instagram averaged about 2:1. On social media advertising, Boomers responded significantly more to Place messaging than Taste messaging.

Recommendations

1. Follow up with the managers at Retailer A & Retailer C to learn more about how store managers/training personnel delivered the Bristol Bay training to frontline staff. Their feedback will be helpful in providing guidance to new retail partners about how to use training materials with their staff, when in person trainings from Bristol Bay team members are not possible.
2. Enter into memorandums of agreement (MOA's) with retailers that clearly outline the roles and responsibilities of retailers/Bristol Bay during the joint promotion period. This will ensure absolute clarity about the expectations and support that each party is going to provide. Conditions of program participation could include:
 - Not carrying other sockeye or wild salmon products in the fresh case.
 - Not advertising/promoting others salmon products.
 - Keeping the Bristol Bay sockeye salmon stocked for sale during the promotional period.
 - Adherence to quality specifications for Bristol Bay sockeye salmon provided by BBRSDA.
 - Providing useful sales data in a timely fashion.
 - Engaging in training with staff ahead of promotion periods.
 - Timing of demos, delivery of promotional materials.
3. Involve supply chain in early discussion. Get them on board to follow specs outlined for the program. An important take-away for the marketing team from the test program is to ensure that processors, distributors, and retailers are all in agreement about the specifications that are required to produce a high-quality product. A key component of the Bristol Bay brand and the refresh fillets program is the ability to ensure superior quality. This must be solved or it will create lasting damage to the brand's identity with retail partners and consumers.

4. Continue to emphasize and work towards improved quality among stakeholder groups (fleet, processors, distribution network, retail partners) to support the brand image.
5. Consider using targeted use of in store demonstrations to increase brand awareness/familiarity of both consumers and sales associates.
 - Retailers speak highly of demos as a way to engage consumers with brand.
 - Associates who had a positive experience with the brand tended to share that knowledge/experience with consumers.
6. Explore how different timing throughout the year might present new opportunities for the brand. Distinct aspects of the brand identity may resonate stronger at different times of year and fit well with retailers pre-existing promotional strategies.

Critical Decisions

1. Product form: Is the branding going to be reserved for only refreshed fillets?
2. Quality: How strict will quality specification enforcement be, if at all?

