



Strategic Plan for the Marketing of Rhode Island Seafood

Rhode Island Seafood Marketing Collaborative

2019 – 2023

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Overview

Rhode Island’s marine fisheries provide jobs, food, and recreation. Thousands of jobs stem from Rhode Island’s commercial fishing, aquaculture, and seafood industries, which provide seafood to consumers; and many additional jobs stem from Rhode Island’s for-hire and recreational fishing industries, which afford consumers the opportunity to harvest their own seafood. Fresh, local seafood has high nutritional benefits, thus contributing to improved public health; it is readily available and sustainable, thus contributing to local food system resilience; and it is delicious, thus enhancing well-being.

Supporting Rhode Island’s seafood industry therefore serves as an integral means for supporting the broad interests of Rhode Island’s marine fishing and aquaculture industry, as well as those of seafood consumers. Promoting the Rhode Island seafood industry supports economic stability, public health, and food resilience. Growing the industry offers promising opportunities to stimulate the economy and bolster the health, welfare and security of Rhode Islanders and other consumers of Rhode Island seafood.

This Strategic Plan for the Marketing of Rhode Island Seafood (hereinafter, Strategic Plan, or Plan) adopts a strategy grounded in achieving long-term stability for the existing Rhode Island seafood industry and fostering opportunities for industry growth. This Strategic Plan embraces all Rhode Island seafood, including exports, while lending particular focus to the profound win-

win opportunities associated with the sale and consumption of Rhode Island seafood in Rhode Island. A central platform of this Strategic Plan is Rhode Island's diverse, and fluctuating, seafood portfolio, which offers an appealing complement to consistent supply chains.

Rhode Island is a small state with a large fishing and seafood industry. Point Judith is the third most valuable commercial fishing port on the East Coast. Newport's Pier 9 supports a stable and productive commercial fleet; Narragansett Bay supports a thriving shellfish industry; and shellfish farms are well-established and expanding in the state's southern coastal ponds and elsewhere in Rhode Island waters.

While certain species such as squid, scallops, and lobsters constitute the highest-value landings in Rhode Island, the long list of additional species landed and grown in the state distinguishes Rhode Island's marine fisheries and enhances their value. Few other states have marine fisheries that are as diversified as Rhode Island. This diversity reflects the availability of a wide mix of species in Rhode Island waters, the waters of southern New England, and neighboring regions – all within range for the Rhode Island fleet. It also reflects the smart business practices of the Rhode Island fishing community, which has built a solid industry based on a blended, mixed-use fishery.

Against this backdrop, the Rhode Island marine fishing and seafood industry is well positioned to not only withstand climate-induced shifts in species availability, and the recent pandemic-induced disruption of traditional supply chains, but to capitalize on them. In many ways, Rhode Island is a bellwether for the future growth of U.S. fisheries, in the face of such challenges.

Like other states, the Rhode Island industry faces the need to adjust to declines in historically important fisheries, such as lobsters and cod, upticks in non-traditional fisheries, such as Jonah crab, and fluctuations in the availability of stocks such as summer flounder, black sea bass, and striped bass. While landings of squid, scup, scallops, and hard clams have been generally stable and provide a reliable source of fresh local seafood year-round, landings of other species tend to fluctuate. The Rhode Island fishing community understands that shifts in species availability and catch caps are the result of a dynamic ecosystem, a changing climate, and a sustainable fishery management system, and thanks to the state's diverse seafood portfolio, the industry is well positioned to accommodate such fluctuations.

However, like many U.S. consumers, Rhode Island seafood consumers are generally unaware of the variability associated with local seafood production, and how and where their seafood is sourced. This largely explains why seafood imports, which tend to rely upon consistent supply chains of specific species from foreign markets, typically eclipse local seafood products in local markets.

Accordingly, a key tenant of this Strategic Plan is to promote increased consumer awareness regarding the nature and availability of Rhode Island's diverse seafood portfolio, leading to increased consumer demand that better aligns with fluctuations in local seafood production. In other words: aligning flexible supply with flexible demand. Increased consumer awareness and

demand give rise to industry stability and growth; and the grounding of such stability and growth in a fluctuating and flexible local seafood system offers huge promise for long-term economic and public health benefits.

In 2020, the Rhode Island commercial fishing and seafood industries were severely impacted by the COVID-19 crisis. One immediate effect was the sudden breakdown in traditional seafood supply chains and markets. That breakdown exposed vulnerabilities and insecurities associated with local seafood production grown dependent on complex out-of-state seafood purchasing and distribution systems, as well as local consumer access to seafood, grown dependent on those same systems. When those systems collapsed, as they did at the outset of the crisis, local harvesters and wholesalers lost their ability to sell, and local consumers lost their ability to purchase – even though local product remained readily available.

The COVID-19 crisis thus called attention to the importance of establishing shorter, local, more sustainable seafood supply chains and markets to buffer the impacts associated with reliance on traditional systems, while garnering the full benefits associated with local seafood. Those principles, already embodied in this Strategic Plan, emerged as being core drivers to help the industry recover and rebuild.

In response to the crisis, and in keeping with the priorities set forth in this Plan, the Rhode Island Department of Environmental Management, in coordination with the Rhode Island Department of Health, enacted a new Direct Sale Dealer License, enabling commercial harvesters to sell certain species directly to consumers and retailers. DEM, the Commercial Fisheries Center of Rhode Island, the Rhode Island Food Policy Council, Eating With the Ecosystem, and other partners also launched several other initiatives, all aimed at helping the Rhode Island seafood industry to regain its footing and adjust to new challenges and realities, and seize upon new opportunities -- all relating to key strategies set forth in this Plan.

The upshot is that this Plan, emanating from and reflecting the broad interests of the Rhode Island commercial fishing and seafood industry, has already proved to be a springboard for action in support of those interests. Its ongoing refinement and implementation offer promising opportunities for further industry growth.

Vectors

The vectors of Rhode Island seafood addressed by this Plan are threefold:

- ❖ Rhode Island seafood sold in Rhode Island to Rhode Island seafood consumers
 - By Rhode Island retail establishments
 - Via Rhode Island dealers/wholesalers and commercial harvesters
 - By Rhode Island commercial harvesters
 - Via direct sales
- ❖ Rhode Island seafood exported and sold outside of Rhode Island to seafood consumers

- By Rhode Island dealers/wholesalers
- ❖ Rhode Island seafood harvested directly (recreationally) by seafood consumers
 - From Rhode Island-based for-hire vessels
 - From Rhode Island shores or Rhode Island-based private vessels

Plan Development and Consistency

This Strategic Plan was developed and adopted in 2019, and updated in 2020, by the Rhode Island Seafood Marketing Collaborative, established pursuant to Chapter 20-38 of the Rhode Island General Laws. The Collaborative involves all key sectors of the Rhode Island commercial fishing, aquaculture and seafood industries, along with leaders from state government and academia; key partners include several non-governmental organizations and the Rhode Island Food Policy Council. The Plan stems from the insights and experience gained, and groundwork laid, by the Collaborative over the past several years, via close coordination with partners and stakeholders.

This Strategic Plan complements and builds upon the Rhode Island Food Strategy, *Relish Rhody*, adopted by Governor Raimondo in 2017. That statewide food plan is organized around three core themes – Health & Access; Economic Development; and Environment & Resiliency -- and five integrated focus areas, which include (1) preserving and growing agriculture and fisheries industries and in Rhode Island, and (2) sustaining and creating markets for Rhode Island food and beverage products. Marine fisheries, aquaculture, and seafood serve as core elements of the statewide food plan. Buoyed by largely consistent goals and objectives, the development and implementation of this Plan will continue to be closely coordinated with the statewide food plan, in a mutually reinforcing way. While Rhode Island seafood has certain attributes that render it unique from other types of fresh local food, it also has a lot in common and stands to benefit from a synergistic approach to marketing and promotion.

This Strategic Plan also aims to advance the seafood marketing tactics set forth by the *Rhode Island Commercial Fisheries Blueprint for Resilience*, adopted in 2018 via the grassroots Resilient Fisheries RI Project.

Broadly, this Strategic Plan builds on the myriad of ongoing efforts in Rhode Island to sustainably manage Rhode Island’s marine fisheries, support Rhode Island’s fishing and seafood industries, and protect and promote public health.

Plan Implementation and Support

The Rhode Island Seafood Marketing Collaborative will implement this Plan by developing targeted work plans that reflect top strategic priorities identified herein, and operationalizing those work plans through partnerships, in accordance with available resources. While this Plan offers enormous promise for economic growth and improved public health, its implementation and impact depend on sufficient funding. To date, the Collaborative and the Rhode Island

Department of Environmental Management have relied upon a modest annual appropriation of \$20K from the Local Agriculture and Seafood Act Grants Program to promote Rhode Island seafood. The results have been impressive, though limited in scope and impact due to the thinness of funding. Achieving the goals, objectives, and strategies set forth in this Plan will require additional financial resources above and beyond those that have been provided to date. Thus, a top priority of this Plan is to assess the funding requirements needed to support the key objectives of this Plan, and to pursue funding opportunities to meet those needs.

Summary

This Strategic Plan is both comprehensive and focused. In the broadest sense, this Plan addresses the sustainability, accessibility, value, quality, diversity, quantity, and affordability of Rhode Island seafood. In a more targeted sense, it offers a roadmap for steering forward a range of interrelated initiatives focused primarily on: (1) educating Rhode Island seafood consumers regarding the nature and availability of Rhode Island's diverse array of seafood products landed at Rhode Island ports and grown in Rhode Island waters; (2) partnering with seafood harvesters, dealers and retailers throughout the state to provide increased access to Rhode Island seafood products; and (3) providing a platform for existing and new businesses to seize upon the opportunities afforded by increased consumer awareness and demand for Rhode Island seafood products.

The expected outcomes of this Plan are: (1) an increase in value for Rhode Island seafood products, based on an increased willingness-to-pay or substitute; (2) a shift in market preference for Rhode Island seafood products over imported seafood products; and (3) a more sustainable and healthy Rhode Island seafood system that is aligned with the state's and region's sustainability and economic development goals.

The implementation of this Plan will require ongoing collaboration with the many partners and stakeholder groups who participate in and contribute to Rhode Island's seafood sector. The foundation for this collaboration is already in place and will continue to be cultivated and supported. The implementation of this Plan will also require sufficient financial resources.

Plan Framework

The framework of this Strategic Plan includes the following six components: Mission; Overarching Goals; Key Objectives; General Strategies, Specific Initiatives; and Metrics.

Mission:

- Promote and support Rhode Island seafood and the Rhode Island seafood industry.

Overarching Goals:

- Economic stability and growth

- ❖ Sustain and grow Rhode Island’s seafood-based economy.
 - ❖ Spur the U.S. seafood-based economy via Rhode Island’s contributions thereto.
- Public health and food security
 - ❖ Sustain and improve public health and welfare, in Rhode Island and throughout the U.S., via increased consumption of healthful Rhode Island seafood.

Key Objectives:

- Optimize opportunities to sustainably grow, harvest and land in Rhode Island a diverse range of marine fishery resources.*
- Enhance awareness of and demand for Rhode Island seafood.
- Support opportunities for existing and new Rhode Island businesses to sell Rhode Island seafood.
- Enhance opportunities for consumers to harvest their own Rhode Island seafood.

General Strategies:

- Support sustainable, ecosystem-based fisheries management programs for marine fishery resources in Rhode Island and southern New England; equitable and reasonable access to those resources by the Rhode Island fishing community; and a robust and diversified Rhode Island fishing industry.*
- Support the growth of in-state marketing opportunities by increasing consumer awareness of and access to Rhode Island seafood, giving rise to increased consumer demand and increased willingness to pay or substitute, with associated public health benefits.
 - ❖ Tailor consumer awareness (education) initiatives to align with the availability and diversity of fresh Rhode Island seafood products.
 - ❖ Focus consumer awareness initiatives on identifiable/traceable Rhode Island seafood products -- to boost consumer confidence regarding the nature and source of their seafood, and to enable consumers to make choices that reflect their interests in supporting Rhode Island fishermen and farmers, and in eating well.
 - ❖ Focus consumer awareness initiatives on Rhode Island seafood products that are recommended as healthy choices.

* While these elements are central to the overall success of this Strategic Plan, and are thus included herein as reference, their implementation generally falls outside the purview of the Collaborative.

- ❖ Expand access by institutions (e.g., schools, hospitals) and low/moderate-income consumers to high-quality, healthy, low/moderate-cost Rhode Island seafood products, in the form of economically viable, healthy substitutes for other foods.
- Support Rhode Island seafood dealers/wholesalers who export Rhode Island seafood products to meet out-of-state demand, in accordance with their business interests.

Specific Initiatives:

- Refine the Rhode Island Seafood Logo to improve its use for the reliable identification (“branding”) of Rhode Island seafood products in the marketplace. Focus adjustments to the logo on better alignment of retailer and consumer interests in identifying and accessing Rhode Island seafood products, better representation of Rhode Island seafood product attributes, and coordination of the logo design with an integrated suite of Rhode Island food brands/marks. Refine logo compliance guidelines based on use of SAFIS dealer reporting records to verify source and species.
- Administer a comprehensive, integrated communications/marketing campaign that includes a robust *SeafoodRI* website and use of all forms of media outreach – social, earned, and paid; digital, electronic and print – to promote Rhode Island seafood, with a primary focus on “brand” awareness, appeal, and availability.
- Support further development and promote wide use of the Fish Line phone app as a tool for connecting RI seafood consumers with RI sellers of seafood, and vice versa.
- Promote retail establishments that feature Rhode Island seafood products. Provide point-of-sale promotional support to these retail establishments via distribution of information and promotional materials pertaining to Rhode Island seafood – e.g., tent cards and placemats for tables at restaurants, ice picks for display cases at retail markets, etc. Provide other marketing/communications support, as needed, to these retail establishments to enhance consumer awareness.
- Identify supply-chain barriers inhibiting the growth in the number of retail establishments that feature Rhode Island seafood products and develop solutions to those barriers that encourage sourcing/selling Rhode Island seafood products.
- Provide consumers with point-of-sale information about Rhode Island seafood products – e.g., how to choose; how to handle and store; how to cook; nutritional information; how/why buying Rhode Island seafood helps to support the Rhode Island fishing community and is consistent with sustainable fisheries management; and how/why

buying Rhode Island seafood connects with enhanced food quality, food safety, and food system resilience.

- Provide consumers and retailers with online access to aggregated weekly Rhode Island commercial landings data, by species, drawn from the SAFIS dealer reporting program administered by the Rhode Island Department of Environmental Management's Division of Marine Fisheries – while being mindful of the need to protect confidential information.
- Promote and participate in Rhode Island seafood festivals and related events.
- Conduct special programs that feature select sectors of the Rhode Island seafood industry – e.g., Quahog Week.
- Provide technical, financial, and regulatory assistance to businesses, existing and new, seeking to capitalize on opportunities associated with Rhode Island seafood – e.g., LASA Grant Program, Fish Forward Program, inter-agency coordination, centralized/regional distribution hubs, etc.
- Refine and support clear pathways for Rhode Island commercial harvesters to provide Rhode Island seafood to Rhode Island seafood consumers; in so doing, enhance access to Rhode Island seafood by Rhode Island seafood consumers.
 - ❖ Optimize direct-sales opportunities by commercial harvesters, while being mindful of the importance of maintaining full accountability for landings, upholding appropriate food-safety standards, and considering impacts to established, licensed wholesalers. Such opportunities include:
 - Dockside (off-the-boat) sales of certain finfish and live lobsters, crabs, and whelks, to consumers and retailers, via the Direct Sale Dealer License
 - The transportation and sale of live lobsters, crabs, and whelks, to consumers and retailers, via the Direct Sale Dealer License.
 - Sales to consumers at farmer's markets via a Peddler's License.
 - ❖ Support business models that meet the mutual needs and interests of those who harvest Rhode Island seafood, and those who process, market and sell Rhode Island seafood to Rhode Island seafood consumers.
 - ❖ Provide guidance and assistance to commercial harvesters seeking to become licensed wholesalers and achieve full vertical integration with regard to all components of the seafood supply chain (i.e., harvest, process, transport and sale).

- ❖ Explore the potential for aggregators – existing and new – to better marshal the distribution of Rhode Island seafood via local cooperatives, community-supported fisheries programs, etc. The cooperative model, where resources are pooled in order to secure a facility and meet wholesale licensing requirements, holds particular promise for harvesters and local communities whose needs and interests are not being met by status quo business models.
- Support initiatives that connect local institutional buyers (e.g., schools, hospitals, universities) to Rhode Island seafood products by increasing awareness, availability, and price-competitiveness in existing supply chains.
- Support new approaches for marketing underutilized species.
- Enhance opportunities for consumers to harvest their own Rhode Island seafood, coupled with the enjoyment of the outdoor recreational experience, by:
 - ❖ Promoting recreational harvest opportunities in Rhode Island and providing the recreational fishing community with promotional information to enhance fisher-as-consumer appreciation of Rhode Island seafood – e.g., what’s available, what’s good eating; how to harvest; how to safely handle and store; how to cook; nutritional information, etc.
 - ❖ Promoting Rhode Island’s for-hire industry and local catch attractiveness; providing promotional information for for-hire customers on what’s good eating; how to safely handle and store; how to cook; nutritional information, etc.; and developing and implementing a pilot Hook-It-And-Cook-It Program, while being mindful of the importance of upholding appropriate food-safety standards.
- Assess funding requirements needed to support priority elements of this Plan, and pursue funding opportunities aimed at achieving stable, long-term programmatic support.
 - ❖ Seek initial funding support to seed and advance initial program implementation.
 - ❖ Identify and apply for dedicated public and private sector funding, aligned with key objectives of this Plan, to enable long-term programmatic support.
- Consider a legislative proposal to update the enabling statute governing the Rhode Island Seafood Collaborative, particularly with regard to expanding membership to

include representatives from key non-governmental organizations dedicated to advancing the mission of the Collaborative.

- Develop and implement protocols for measuring the success of this Strategic Plan, drawing chiefly upon the metrics set forth herein.
- Develop a research agenda aimed at informing the advancement of the goals, objectives and strategies of this Plan, and lend support to research proposals that are consistent with that agenda.

Metrics:

- General:
 - Jobs and income associated with Rhode Island’s commercial fishing and seafood industry.
 - Sales, value of sales, and consumption of Rhode Island seafood products – in Rhode Island, and outside the state.
- Targeted:
 - The direct impact of this Plan’s education/awareness/branding program in Rhode Island will be measured at the 3- and 5-year marks through follow-up consumer awareness surveys that can be compared with the results from the University of Rhode Island’s (baseline) 2018 seafood consumer survey.
 - The impacts of efforts to increase opportunities for new and existing businesses to sell Rhode Island seafood will be measured on an ongoing basis by the total number of retail establishments featuring Rhode Island seafood products annually; the total number of establishments utilizing the Rhode Island Seafood Logo and related promotional materials annually; the total number of establishments participating in seafood promotional events, such as Quahog Week, annually; and the total number of institutional buyers who are participating in “buying Rhode Island” seafood efforts annually.
 - The economic impact of local marketing and promotion will be assessed by comparing sales of Rhode Island seafood, and the value of those sales, before and after marketing and promotional activities are undertaken. Given the breadth of the Rhode Island seafood supply chain, and the primary focus of marketing and promotional activities on in-state sales, assessing impacts will need to be done via targeted analyses of specific species and changes in sales and value associated with those species.
 - The impact of local marketing and promotion on local food security will be assessed by comparing consumption of Rhode Island seafood by Rhode Island

seafood consumers before and after marketing and promotional activities are undertaken.