

2003

*This survey provided through a
cooperative initiative between the:*

*Florida Department of
Agriculture and Consumer
Services
and
The United States Department
of Agriculture,
Risk Management Agency*

*Clams Market Research
Focus Group Report*



Kerr & Downs Research

2003

*This survey provided through a
cooperative initiative between the:*

*Florida Department of
Agriculture and Consumer
Services
and
The United States Department
of Agriculture,
Risk Management Agency*

*Clams Market Research
Focus Group Report*



Kerr & Downs Research

Project Directors:

Phillip Downs, Ph.D.
Partner

Vickie Coleman Gallagher, M.A.
Vice President

Kerr & Downs Research
2992 Habersham Drive
Tallahassee, FL 32309
(850) 906-3111 / Fax (850) 906-3112
www.kerr-downs.com

Table of Contents

| | |
|--------------------------------------------|----|
| Introduction | 1 |
| Executive Summary | 3 |
| Consumers..... | 4 |
| Trade | 7 |
| Recommendations | 13 |
| Consumers..... | 14 |
| Trade | 16 |
| Detailed Findings - Consumers | 18 |
| Background & Methodology | 19 |
| Detailed Findings | 20 |
| Detailed Findings - Trade | 39 |
| Background & Methodology | 40 |
| Detailed Findings | 41 |



Introduction

Introduction

The Florida Department of Agriculture and Consumer Services' Bureau of Seafood and Aquaculture Marketing is charged with increasing and maintaining the economic base of Florida's seafood and aquaculture industries. Producers of Florida farm-raised clams are seeking ways to expand their markets.

The purpose of this research was to examine what opportunities exist for market expansion and to explore the best approach for expanding the market for Florida farm-raised clams. This research project focused on two elements of the supply chain for clams: 1) ultimate consumers and 2) organizations in the supply chain, namely wholesalers, brokers, retailers, and foodservice. Specific information needs related to these two research targets were as follows:

Identify and characterize the national wholesale, food service, retail, and consumer buyers of farm-raised clams,

Determine the means and the message content needed to positively influence buyers,

Identify national consumer attitudes and opinions regarding farm-raised clams,

Identify and characterize the socioeconomic status of national consumers that predisposes them to purchase farm-raised clams,

Identify current eating and food preparation habits,

Determine key educational and marketing outlets,

Determine buying habits and key market areas for targeted production including geographic and seasonal demand for product forms, quality, and price,

Identify informational channels, i.e., media, social, etc., that influence purchasing, and

Identify at least five sales messages to positively influence purchase decisions.

This report is divided into sections to present the results of consumer research separate from the results of research conducted with organizations in the supply chain. Focus groups, both live and telephone, were used in each phase of the research.

Qualitative research in this study was exploratory in nature and should not be projected to all consumers, clam buyers, and sellers. Consumers and trade organizations in this study were selected through non-random processes. Nevertheless, insights and recommendations made by these audiences can add tremendous value and directional ideas for marketing Florida farm-raised clams.



Executive Summary

Executive Summary - Consumers

A total of six (6) focus groups were held with consumers in Atlanta, Orlando, and Boston. Key findings were as follows.

Origin of Clams

Many consumers had a vague idea of the origin of clams; most believed clams originated in northern (New England, New York, Chesapeake Bay) waters rather than in southern or Pacific coast waters.

Best Clams

Consumers were more likely to associate the best clams with colder waters. Consumers' association of clams with northern waters translated into them believing that warm water clams were not as high quality.

Experience with Clams

Based on study selection processes, all consumers had eaten clams in the past three months. Boston consumers had eaten clams more frequently than consumers from Atlanta and Orlando.

Consumers were much more likely to eat clams in restaurants rather than at home. This fact was underscored by national trends for consumers to prepare fewer meals at home. Beyond this trend, consumers were not familiar with how to prepare clams, overstated the time required to prepare clams, and did not want to bother with cleaning up after preparing clams.

Boston consumers were more likely to eat clams as the main food (e.g., steamed or on-the-half shell) simply because clams were more available in these forms in Boston. Consumers from all markets enjoyed fried clams; whether the clams were fresh or frozen mattered little in the perceived taste of fried clams. Consumers in all markets enjoyed clams in a number of dishes. Clam chowder and soups were more prevalent in Boston, yet consumers in all markets enjoyed clams in pasta dishes.

Positives and Negatives of Clams

Most consumers enjoyed the taste of clams, yet many consumers indicated that the primary taste emanated from accompaniments such as melted butter, cocktail sauce, and the foods in which clams were prepared. Most consumers were unable to offer adjectives to describe the taste of clams. Those who could suggested "clean," "crisp," and "salty."

Clams were perceived as labor intensive, sandy (gritty), and rubbery if not prepared properly.

Executive Summary - Consumers

Where to Buy Clams

Consumers preferred to buy clams at seafood markets rather than at supermarkets. They did not believe the latter knew how to handle clams (and seafood in general) and that there was a greater chance of getting old clams or previously frozen clams advertised as fresh at supermarkets.

Displaying Clams

Consumers' best ideas for displaying clams at seafood markets or in supermarkets included value-added packaging. For example, consumers recommended plates with Clams Casino, or plates with opened clams and accompanying sauces on the plates. Other consumers were more creative suggesting ocean themes in background displays. Other consumers suggested displaying some clams in a tank of water and having the clams for sale stacked on ice.

In-Store Promotion

All consumers believed it was important to have recipes and tips for preparation near the clams for sale. All consumers also believed that giving samples of clams to consumers in supermarkets and in seafood markets was the best way to increase in-store sales. Having guaranteed and well-publicized "fresh dates" was another suggestion most consumers believed would increase in-store sales of fresh clams.

Frozen Clams

Consumers preferred frozen clams only for fried clam dishes. Many consumers claimed they could not distinguish fresh from frozen clams in fried clam dishes.

Florida Farm-Raised Clams

Very few consumers had heard of farm-raised clams, yet many had heard of farm-raised salmon, catfish or other types of finfish. Reactions to farm-raised clams were more negative than positive especially among Boston consumers. Inferior taste (compared to wild caught) was a key perceived negative to farm-raised clams. Positive reactions to farm-raised clams centered on lack of sand (grit), less salt, and more consistency.

Being from Florida was not a major selling point to consumers in Orlando and Atlanta, and it was a negative selling point to consumers in Boston.

Executive Summary - Consumers

Slogans and Marketing

The best slogans for selling clams were:

- Today's Catch
- ExCLAMation!
- Hidden Treasure
- It's that easy
- Clams are jammin'
- Party Steamers

The best slogans for Florida farm-raised clams were:

- Florida Fun Food
- Florida clams. Fun in the sun
- A taste of sunshine
- Fresh from Florida waters
- Harvested Florida fresh
- Fresh from the Sunshine State

The mass media did not appear to be the best approach for marketing clams. In-store promotion (at restaurants, seafood stores, and supermarkets) was considered a much more effective and cost-efficient approach by consumers.

Major Challenges

The major challenges with increasing sales among consumers were as follows:

- Lack of awareness of clams among consumers. Consumers thought of finfish and oysters much more frequently than clams.
- Perceived preparation difficulty was a key barrier to increased consumption.
- Lack of availability in seafood markets, supermarkets, and restaurants was a major barrier to increased consumption.

Executive Summary - Trade

A total of six (6) focus groups were held with trade organizations as follows: 2 with restaurants, 2 with seafood wholesalers/distributors, and 2 with specialty seafood markets. In addition, two (2) separate telephone one-on-one interviews were conducted with regional *supermarket chains* in order to integrate the valuable insights of this segment of the industry. Key findings were as follows:

Types of Clams Sold

Of the 25 companies that participated in the focus groups, 14 companies sold mostly farm-raised clams, often from Florida with a few buying from Virginia. (Note that this ratio is not a statement of the prevalence across the industry, but simply a perspective as to the ratio among companies interviewed.)

Between the two supermarkets who participated in one-on-one interviews, one sold only wild clams and the other sold a mix of wild and farm-raised. The farm-raised clams were not from Florida, but this retailer was experimenting with and considering Florida farm-raised clams.

The types of clams sold, wild or farm-raised, varied by region of the country.

- Companies in the northeast offered wild clams harvested from local waters, with soft-shell clams popular in Maine and cold-water mahogany hard-shell clams popular in the New England states.
 - Local residents and tourists in the northeast expected indigenous clams to be offered at their restaurants and retail outlets.
 - Among wild clam buyers, there was a perception that Florida farm-raised clams have a shorter shelf life.
- Restaurants and retail establishments located in the southeastern part of the U.S. and distributors located on the Pacific coast were more likely to sell farm-raised clams from Florida.
 - Decisions to use farm-raised clams were based on consistency, availability, and quality.
 - A small number of companies purchased farm-raised clams from Virginia to save on transportation costs or to get a more traditional New England style clam.
- Only one wholesaler out of Illinois sold value-added clam products.
 - Some of the representatives indicated that frozen or prepared products might be the wave of the future because prepared dishes were becoming more popular.

Executive Summary - Trade

Types of Preparation

Seafood wholesalers and fresh seafood retail market representatives cited popular recipes in their market areas, while restaurants outlined some of their own popular preparations.

The types of dishes were quite diverse:

- Raw clams
- Steamed clams
- Clams casino
- Lobster boils
- Baked clams
- Bouillabaisse
- Linguini with white or red clam sauce
- Clams used in chowders (New England and Manhattan)
- Clams with oregano, garlic butter, and breadcrumbs
- Clams Rockefeller
- Poached with ginger wine sauce
- Grilled and oven roasted with garlic and wine sauce

Customer Insights & Target Market

In discussions on the current target market for clams, trade representatives strongly believed sales were concentrated in the northeastern states and along the U.S. coastal areas.

- Customers in coastal parts of the U.S. “grew up on clams”, were in the habit of eating fresh seafood, and were familiar with clams and shellfish.
- Perceptions of the demographics of the “typical customer” varied significantly in age, gender, and socioeconomic status.
- The greatest market potential may be among new entrants such as young urban professionals, younger children beginning to try new foods, and time-crunched couples or families looking for interesting yet simple dishes.
- Another potential market niche for clams is the health-conscious customer who may be attracted to the controlled farming techniques, perceived safety of controlled production, and the consistency of the farm-raised product produced in the United States. A few trade representatives described this market niche as “organic”, which could also incorporate the benefits of buying domestic.

Executive Summary - Trade

Likes & Dislikes

Companies were asked what they liked and disliked about having clams in their product mix, and the importance of clams to their overall business.

- Retailers, supermarkets, wholesalers, and restaurants indicated that consumers expect clams to be in their product mix.

Likes

- Wholesalers in particular explained that clams are a relatively easy part of their business – “clams in / clams out” as they explained.
 - There were components that made wholesalers’ jobs easier. One Wholesaler mentioned a method whereby the producer provides two tracking tags – one for the wholesaler and one for the end user. These tags contained the date and harvest area, making the wholesaler’s record keeping easier.
- Some restaurants enjoyed their ability to deliver an impressive entrée to their customers that was a relatively simple product to prepare.
- Most companies that purchased farm-raised clams liked the consistency and quality of farm-raised clams (compared to the variability of wild clams).

Dislikes

- Overall concerns were as follows:
 - Availability
 - Consistency
 - Size
 - Taste (sweetness and saltiness)
 - Quality (number of broken clams, dead clams, sand, etc.)
 - Price
 - Perceived as expensive compared to the volume of meat derived from a clam
 - Food safety
 - The number of certificates needed to satisfy government’s requirements
 - The tagging system used for tracking sales
 - The impact safety can have on consumer consumption.
 - Shipping issues
 - Compounded for Pacific coast companies due to the distance clams must travel and the lack of control over delays in the airlines.
 - Slow inventory turnover (and the subsequent need for promotions)

Executive Summary - Trade

Overcoming Challenges

Each segment of the industry – wholesalers/distributors, specialty retail markets, supermarkets, and restaurants – had its own unique perspective of how to alleviate the challenges they have with clams and how to increase sales of clams through marketing efforts.

Most recommended an education campaign that would focus on the following:

- Overcoming misconceptions about Florida clams harvested in the summer
- Educating the public about safety issues and regulations
- Educating the public about the ease of preparation
- Generating initial trial

Specific recommendations and methods to accomplish the above are outlined below.

Restaurants

A national campaign would help restaurants, since most restaurants did not currently advertise their specific menu items, including clams. They simply had clams on the regular menu, placed them on their specials board or specials menu flyer, or had the wait staff mention the item at the table.

Some restaurants explained that new menu items became popular by “word of mouth”. Some ideas for the industry to provide in order to boost sales of clams:

- Provide samples to restaurants, so they can give samples to their customers
- Tabletop tents
- Materials to help educate the wait staff, so that the staff can effectively promote the feature item (paired with wine)
- Proactively promote the safety and cleanliness of clams (to combat negative publicity)
 - Restaurants are required to post signs and mention the potential health risks of raw shellfish, yet the industry can help combat the consumers’ negative perceptions through national campaigns.
- Position Florida farm-raised clams as unique, special, and desirable.
 - Some restaurants made analogies to other specialty products (imported from Hawaii and Florida – e.g. alligator), indicating one potential marketing angle for Florida to consider.

Executive Summary - Trade

Specialty Seafood Retail Markets

Many of the companies selling to the public through retail markets were also selling seafood wholesale, and a few were selling prepared foods and operating restaurants. Hence, their perspectives were varied due to their vertical integration.

Retail seafood market representatives suggested that producers of clams provide service and a quality, consistent product. Their own marketing efforts were not specific to clams, and in many instances, they did not advertise. This reality continued to point to the fact that advertising on behalf of the industry may be necessary.

- One-on-one selling at the counter in retail markets was integral to the success of seafood products. Retailers pushed products out the door by verbally recommending the product to consumers at the counter, IF they are making a good margin.
- Prepared or packaged, ready-to-eat items emerged as marketing ideas appealing to retailers.
- Brochures for at the retail counter and an 800 number sponsored by the industry were perceived as beneficial to consumers and time-savers for retailers. Many retailers were not aware that such resources exist.
- Promotional campaigns from other seafood products in the industry, such as lobster and salmon, were recommended as ways to boost clam sales.
 - For example, in Maine, the entire region had a week in August to promote lobsters. The event included lobster recipes, chefs, a panel of judges, and the Governor.

Supermarkets

Turnover was of particular concern to supermarkets that have hundreds of stores. Hence, taste tests and price promotions were mentioned as ways to move product through the system.

- Supermarket representatives voiced many of the same concerns as specialty retail markets. They did not feel obligated to push clams to consumers. It was perceived to be the responsibility of the industry to assist supermarkets in generating consumer enthusiasm, in store excitement, and initial trial.
 - Consumers will not simply try a new product without a free taste.
 - A category manager can provide a product (such as clams) to their individual stores, and the corporate office can give individual stores ideas as to marketing tactics, but ultimately store managers or seafood department managers need assurances that the product will move out the doors. The risk needs to be low and the chance for success high.

Executive Summary - Trade

Wholesalers

These wholesalers did not view themselves as having an ability to push clams to their retail clients. They simply supplied the products that their clients requested. Wholesalers believed that restaurants, chefs, and retail establishments must encourage the public to try clams in order to generate more demand.

- Wholesalers believed that restaurants and individuals need to be encouraged to prepare new dishes. New dishes can be featured through the following:
 - Restaurant trade show taste-tests
 - Magazine articles targeted at chefs
 - Taste-tests for consumers at retail seafood markets and at restaurants
- Wholesalers explained that producers should consider branding Florida farm-raised clams.
 - They pointed to other industries, such as the Alaskan salmon marketing campaigns. Specifically, the Sterling brand of salmon is promoted as an upscale, specialty product that has done such effective marketing that customers “ask for it by name”.
 - Wholesalers suggested that producers find out more about the specifics of this campaign and mirror their efforts.
- The best packing methods (to avoid problems when shipping by air or truck) were to have multiple layers (of Styrofoam and bubble wrap), venting, ice (but no water), and frozen gel packs.

Finally, a few of the wholesalers suggested that new markets need to be penetrated focusing on the Midwest and not just on the coastal markets.



Recommendations

Recommendations

Consumers

1. Marketing efforts directed to consumers should be focused on in-store (retail seafood markets, supermarkets, and restaurants) activities. These efforts should include the following:
 - a. Offer samples of clams for consumers to taste. Samples should include clams as the primary focus such as on-the-half-shell and steamed, and as an ingredient to other foods such as pasta sauces, gumbo, and chowder.
 - b. Enhance displays of clams. Displays should include prepared clam dishes such as Clams Casino and clams on-the-half-shell; mounds of clams stacked on ice; clams in water tanks; clams displayed with other foods such as a simulated clambake dinner; and posters containing pictures of clambakes and clams served with other foods.
 - c. Provide recipes to consumers. Posters should include a website address that consumers can visit to learn about clam recipes and clam preparation. Small pamphlets containing recipes should be distributed to consumers.
 - d. Use value-added packaging by preparing clams for sale, ready to eat. For example, Clams Casino or Clams Rockefeller can be sold with all ingredients in place and consumers only need to put the clams in the oven for ten minutes.
 - e. Distribute table tents to restaurants to be placed on individual tables.
 - f. Focus on the social aspects of eating clams, on summertime, and on special occasions that many consumers associate with eating clams. The social side of eating clams should be broadened to include individual consumption by using a phrase similar to the following: Clams: friends and fun even when you eat them by yourself.

2. Marketing efforts described in the preceding point should be limited to southeastern states and should emphasize Florida clams. The concept of farm-raised clams did not generate a strong enough response from consumers to warrant being the focus of marketing efforts. The goal of marketing efforts should be to increase consumption of clams, hence increasing demand for Florida farm-raised clams in the process. The Florida farm-raised clam industry does not have the marketing dollars required to combat consumer ambivalence to the farm-raised concept and create unique brand demand for Florida farm-raised clams. It will be more efficient to focus marketing dollars on increasing demand for clams, and for the Florida farm-raised clam industry to focus on enhancing demand with wholesalers and distributors.

Recommendations

Consumers (Continued)

The geographic focus of marketing efforts should be southeastern states because of distribution costs and the ability to ship fresh product to nearby states. The geographic focus should also be on nearby states because the Florida brand does not translate for clams in the northeast.

3. Develop a website for Florida farm-raised clams. Publicize this website in all other marketing materials referenced in this report (e.g., brochures, table tents, posters, etc.). The website should focus on recipes, preparation of clams, and the health benefits of eating clams.
4. **IF** the Florida farm-raised clam industry has money for a limited advertising campaign, the focus should be on outdoor advertising on boards near supermarkets, on boards near seafood markets, and on 5 to 10 second radio spots. The positioning theme for these advertisements should be that fun, social, and special occasions include clams. Healthy aspects of clams (low sodium, cholesterol, calories) can be a secondary theme.
5. The best slogans for promoting clams were:

ExCLAMation!
Clams are jammin'
Party Steamers

While emphasizing the Florida brand is not strongly encouraged, the following slogans received the most support:

Florida Fun Food
Florida clams. Fun in the sun

Of course, Florida can be added to any slogan, for example:

Florida ExCLAMation!
Florida Clams are jammin'
Florida Party Steamers

Recommendations

Trade - Restaurants

1. Target high volume seafood restaurants and chain restaurants for distributing free samples of clam dishes to consumers before they order their food. Samples can include steamed clams as well as pre-prepared dishes such as Clams Casino and Clams Rockefeller that restaurants can simply heat and serve.
2. Prepare brief educational brochures for wait staff in restaurants to familiarize them with Florida farm-raised clams, the healthy benefits of clams, and the different ways to serve clams.
3. Distribute table tents (referenced in the “Consumer” section of the Recommendations) to high volume seafood restaurants and chain restaurants.

Trade – Seafood Markets & Supermarkets

1. The Florida farm-raised clam industry should educate seafood retail markets and supermarkets on how to sell and package value-added clams. In addition, test the shelf life and preparation for various pre-prepared dishes that could be sold at retail including Clams Casino and Clams Rockefeller.
2. Provide brochures for high volume seafood markets and chain supermarkets to distribute to consumers. Design the brochures to focus on the fun/social nature of eating clams, show recipes for clams, and educate consumers on the healthy aspects of eating clams. In order to share brochures with retailers, develop the following:
 - a. A registry or list (based on lists obtained from the distributors and wholesalers)
 - b. A list based on the government’s registration process
 - c. A website (or a clearinghouse for information) where trade organizations can obtain brochures and other marketing materials
 - d. 800 numbers for trade organizations to call and replenish their brochures
 - e. Partnerships with distributors that can then pass out brochures to the retailers
3. Create a Florida Clam Week and celebrate it in Florida. This campaign should include seafood restaurants, seafood markets, supermarkets, and consumer promotional activities.

Recommendations

Trade – Wholesalers & Distributors

1. The best marketing strategy that the Florida farm-raised clam industry can formulate for wholesalers and distributors is to provide a consistently high quality product with constant availability at a competitive price. Clams, whether they are from Florida or elsewhere, or whether they are wild caught or farm-raised, must compete with other, more popular shellfish and finfish to be part of wholesalers' and distributors' product lines. Presently, consumer demand for clams (fresh or frozen, farm-raised or wild caught) is not sufficient for wholesalers and distributors to experience any market demand pressure from consumers to carry clams. Hence, clams must provide a good margin and be available in sufficient quantities and quality so wholesalers and distributors begin to rely on clams for a significant percentage of their revenue and profit.
2. The Florida farm-raised clam industry should also show wholesalers and distributors that they will support clams by exhibiting at trade shows and promoting Florida farm-raised clams at industry events at which wholesalers and distributors appear. The industry should also pay travel and registration fees for high volume wholesalers and distributors to attend industry events at which Florida farm-raised clams are marketed.

Target Audience

1. Assist trade organizations in identifying and understanding the consumer. Focus on the following target audiences when designing the above promotional materials:
 - a. New entrants into the market, or, current low volume clam eaters. (Those consumers who currently purchase New England style clams will be more difficult to convert.)
 - b. Young urban professionals, younger children beginning to try new foods, time-crunched couples or families looking for interesting yet simple dishes, and health-conscious individuals.



Detailed Findings - Consumers

Background & Methodology - Consumers

A total of six (6) focus groups were held with consumers in Atlanta, Orlando, and Boston to explore the following:

- Awareness of the origin of clams
- Perceptions regarding where the best clams come from
- Eating frequency and preferences
- Favorite clam dishes
- Eating clams at home vs. a restaurant
- Positives and negatives associated with fresh clams
- Prefer to buy fresh clams at supermarket vs. seafood market
- How to display clams at a supermarket/seafood market
- Value-added packaging
- Reactions to frozen clams
- Awareness of Florida farm-raised clams
- Reactions to the concept of Florida farm-raised clams
- Marketing slogans and tactics for marketing clams
- Slogans and tactics for marketing Florida Farm-raised clams

All consumers in the study had eaten fresh clams within the past three months. Consumers were given an honorarium of \$75 for their participation in the study.

Detailed Findings - Consumers

Origin of Clams

When asked from where the clams they ate came from, the first location mentioned most often was somewhere in the northern United States. New England, Long Island, and the Chesapeake Bay, in that order, were mentioned more often than other locations. Orlando participants were more diverse in their responses with more of them naming Florida and the Pacific coast in addition to New England, Long Island, and Chesapeake Bay. Many participants merely referred to “northern” waters, while others had little knowledge about the origin of clams and obviously had not thought about this issue prior to the focus group. As evidence of this lack of knowledge, and lack of concern about the origin of clams, many participants merely replied “the ocean” when asked where the clams came from that they ate.

Southern waters were definitely mentioned less frequently than northern waters even though two of the three groups were held in the south. Florida and the Gulf of Mexico were mentioned more often than other places in the south. Participants volunteered the Pacific coast less frequently than Florida or the Gulf of Mexico as the origin of clams. Once various locations were mentioned, many if not most of the participants nodded in agreement as if saying it made sense that clams could come from Florida, or the Gulf of Mexico or the Pacific coast.

A few of the 55 participants mentioned farm-raised clams at this early point in the focus group in response to the question “Where do the clams you eat come from?” There was some recognition that farm-raised clams existed, but most participants were more familiar with farm-raised salmon or catfish. One participant remarked, “It makes sense that there are farm-raised clams. There are farm-raised catfish and farm-raised salmon. There must be farm-raised clams.” But it was clear from the verbal and non-verbal communication within the focus groups that most participants had no prior knowledge of farm-raised clams. This concept was not one that had ever entered their consciousness.

There was general consensus that the best clams came from northern, or colder, waters.

North because you get them with a belly. They're not just clam strips like you get in Florida.

I assumed they were better from cold-water areas.

Cold water probably makes them bigger and the Florida clams are much smaller than up north.

Different taste because of the cold water here (Boston).

Detailed Findings - Consumers

You assume New England clams are better because that's the name (New England Clam Chowder) that's attached to them. They have to have some kind of reputation.

The difference between Florida and New England (clams) is the difference in environments. Hot vs. cold weather. Difference in their tastes because it has different elements that it's feeding off of.

While no logical explanation was offered by participants, it was just assumed by most that better clams were raised in northern waters. Some participants cited the difference between Maine lobsters and lobsters caught in southern (Florida and the Caribbean for the most part) waters. The point was made that not only were northern and southern water lobsters different, northern lobsters were better. Salmon was also thought of as a cold-water entity. Hence, northern clams were considered better because of their geographic association with northern lobsters and salmon and because more people associated clams with New England, Maine, Long Island, and to a lesser extent, Chesapeake Bay. A Boston participant emphasized this point, "You hear New England clams all the time. I've never heard 'Florida' and 'clams' in the same sentence." Boston participants were less likely than Orlando and Atlanta participants to recognize that clams were in southern and Pacific coast waters. In response to the question of whether clams were in Pacific coast waters, one Bostonian stated, "I don't recall seeing them on the menus out there." Another added, "I honestly thought that they came from New England." However, a few Boston participants were more accepting of clams from locations outside of New England and the northern Atlantic coast as evidenced by the following quotes:

I would assume you could buy clams anywhere in the world.

Why wouldn't they (Florida) have clams? They have oysters.

Florida waters. It makes sense that they are there.

Yet even the preceding quotes make it clear that Boston residents do not normally think of clams as being from Florida or the Pacific coast.

Eating Frequency and Preferences

Participants were asked to estimate how many times they had eaten clams, either by themselves (e.g., steamed, on-the-half-shell, fried) or as ingredients in other foods (e.g., clam chowder, pasta with clam sauce, etc.) within the past three months and within the past year. Boston participants reported eating clams no more frequently than participants from Atlanta or Orlando. It should be noted that one of the eligibility requirements of the focus groups was to have eaten clams within

Detailed Findings - Consumers

the past month, so differences in clam consumption across the three cities are not representative of the general populations in the three cities.

The average number of times participants had eaten clams alone (steamed, on-the-half-shell, etc.) or as ingredients in other foods in the past three months and in the past year are summarized below.

***Number of Times Consumers Had
Eaten Clams Alone (steamed, on-the-half-shell, etc.)
Past 3 Months***

| | | <i>Boston</i> | <i>Atlanta</i> | <i>Orlando</i> |
|----------------|---------|---------------|----------------|----------------|
| Average | Group 1 | 3.4* | 1.8 | 1.4 |
| | Group 2 | 3.0 | 0.9 | 3.4 |
| Range | Group 1 | 0-9* | 0-3 | 0-4 |
| | Group 2 | 2-5 | 0-3 | 0-12 |

*For example, consumers in Group 1 in Boston had eaten clams as the primary food (steamed, on-the-half-shell, etc.) an average of 3.4 times in the past three months. The number of times that consumers in Group 1 in Boston had eaten clams as the primary food in the past three months ranged from 0 to 9.

***Number of Times Consumers Had
Eaten Clams As Ingredients in Other Foods
Past 3 Months***

| | | <i>Boston</i> | <i>Atlanta</i> | <i>Orlando</i> |
|----------------|---------|---------------|----------------|----------------|
| Average | Group 1 | 6.2* | 3.9 | 3.2 |
| | Group 2 | 2.1 | 4.9 | 5.1 |
| Range | Group 1 | 0-25* | 2-10 | 1-7 |
| | Group 2 | 0-6 | 1-10 | 1-15 |

*For example, consumers in Group 1 in Boston had eaten clams as ingredients to other foods (e.g., clams in red sauce for pasta) an average of 6.2 times in the past three months. The number of times that consumers in Group 1 in Boston had eaten clams as ingredients to other foods in the past three months ranged from 0 to 25.

Detailed Findings - Consumers

*Number of Times Consumers Had
Eaten Clams Alone (steamed, on-the-half-shell, etc.)
Past Year*

| | | <i>Boston</i> | <i>Atlanta</i> | <i>Orlando</i> |
|----------------|---------|---------------|----------------|----------------|
| Average | Group 1 | 12.6* | 5.9 | 9.0 |
| | Group 2 | 8.9 | 1.8 | 15.0 |
| Range | Group 1 | 2-48* | 2-10 | 2-12 |
| | Group 2 | 4-12 | 0-6 | 0-50 |

*For example, consumers in Group 1 in Boston had eaten clams as the primary food (steamed, on-the-half-shell, etc.) an average of 12.6 times in the past year. The number of times that consumers in Group 1 in Boston had eaten clams as the primary food in the past year ranged from 2 to 48.

*Number of Times Consumers Had
Eaten Clams As Ingredients in Other Foods
Past Year*

| | | <i>Boston</i> | <i>Atlanta</i> | <i>Orlando</i> |
|----------------|---------|---------------|----------------|----------------|
| Average | Group 1 | 26.7* | 22.8 | 13.4 |
| | Group 2 | 5.9 | 20.7 | 19.0 |
| Range | Group 1 | 0-100* | 10-40 | 4-30 |
| | Group 2 | 2-15 | 6-40 | 7-65 |

*For example, consumers in Group 1 in Boston had eaten clams as ingredients to other foods (e.g., clams in red sauce for pasta) an average of 26.7 times in the past year. The number of times that consumers in Group 1 in Boston had eaten clams as ingredients to other foods in the past year ranged from 0 to 100.

Detailed Findings - Consumers

While there were some exceptions, most participants reported eating clams more frequently as an ingredient to other foods rather than alone. The amount of food, or lack thereof, was one reason, while cost, taste, texture, lack of preparation knowledge, and availability were other reasons why participants ate clams more frequently as ingredients to other foods.

(It is) more of a meal to have it combined into clam chowder, different types of chowder or seafood pastas.

Clams are chewy and if I'm going to chew on it, you got to get some other flavors in there.

Clams are a flavor issue for me – alone, gross.

Most of the restaurants don't offer them on the half shell.

At restaurants, nine times out of ten they come fried or mixed with other things.

I think of oysters on the half shell, not clams.

Clams cost more.

I don't know how to steam clams.

Sometimes I wonder how fresh they are.

Because they are not available in every place (by themselves) where they are available in soups and things.

Don't like the hassle of dealing with the shell and steaming them.

Don't like to cook them at home.

Detailed Findings - Consumers

You don't really see clams by themselves in restaurants.

They are never on sale – too expensive.

More expensive than a steak dinner.

Price issue – money value. Not getting much meat for what you are paying.

Regarding preparation, participants were more likely to steam shrimp or lobster, but shied away from steaming clams (except in Boston). Shrimp were considered to be much easier to prepare and to eat than clams.

There was a cultural issue in play as many participants in the south considered oysters a “southern thing” and clams a “northern thing.”

Oysters are more popular here (in the south). I have always associated clams with the north.

It's a location thing. Oysters are a southern thing.

They have clam bars up north. We have oyster bars in the south.

It's about where you're from and what you've been exposed to. We didn't grow up with clams like they do up north.

Many focus group participants had some first-hand experience growing up with shrimp or lobster; few had first-hand experience in their homes with clams. Most participants' parents did not eat clams at home unlike an occasional lobster (on very special occasions) or shrimp.

Regarding expense, some focus groups were asked to estimate the cost of a dinner that focused only on clams. Costs in restaurants averaged between \$20 and \$25, while costs for home-prepared clam meals averaged between \$10 and \$15. These prices were at the high end of the spectrum for all focus group participants.

Favorite Clam Dishes

When participants were asked to name dishes in which they enjoyed clams, most mentioned soup and chowder, pasta sauces (red and white), fried, dips, gumbo (in the south), and salads. Yet few participants cooked these dishes at home.

Detailed Findings - Consumers

Home or Restaurant

By a landslide, participants were more likely to eat clams, both alone and as ingredients to other foods, at restaurants more so than at home. Lack of knowledge about preparation, mess and fuss of preparation, and lack of cooking period were key reasons why many participants did not eat clams at home.

I don't really know how to prepare them. It's not easy.

It's the ease of going into a restaurant and having clams casino. I see preparing them at home as more of a hassle.

Not everyone in my home likes them.

I don't like to cook (anything) at home.

Don't cook at home.

It's a lot to clean up.

Eat more at restaurants because of the effort you have to put into it.

Eat less at home because of the smell of the clams.

I don't like the fishy smell, so I won't cook seafood at home.

It's a riskier food to do at home.

When I want clams, I go to a restaurant that specifically serves that. I don't ever cook them at home and I guess it's because I'm making sure they're fresh and available to me. By knowing that they're fresh, I put the restaurant responsible for making sure they are fresh.

Several participants agreed that knowing more recipes and more education about preparation would increase home consumption of clams.

A lot of people don't know clam recipes like they do for chicken.

Teach people how to cook them right. If you don't cook them right, they are like shoe leather.

Detailed Findings - Consumers

Many participants considered clams an “event” food or “social” food. Clams were associated with having many people together, either at home, or more frequently, at a restaurant.

Clams are an event type thing rather than a staple.

Clams are an event type thing because of the amount of preparation or the perception of the amount of preparation.

(We have clams) for social events only.

Finger food. They are fun to eat.

Fresh clams are a get-together food.

Never do it (eat clams) by yourself.

Clams were associated more with summer and with special holidays or occasions.

When you think of clams in New England, you think of August.

Fourth of July.

Clam bakes and any holiday.

Barbeques (even though most participants had not grilled clams on a barbeque grill).

Clams are associated a little more with summer.

Spring and summer seasons.

Half shell, fresh steamed in the summer time.

Associate summer with seafood.

Detailed Findings - Consumers

Positives and Negatives

Taste was the number one attribute that participants mentioned when asked to indicate what they liked best about fresh clams. Yet, participants were hard-pressed to describe the taste. Chewy was the most frequently mentioned adjective used to describe the taste of fresh clams, although a few participants used adjectives such as crisp, clean, and salty. “Fun” was another adjective often used to describe eating fresh clams. Fun was associated with eating clams with other people and with the amount of time required to eat fresh clams. Some of the comments about what they liked best about clams are shown below:

Taste, chewy, sweet, fishy.

Taste. It takes a long time to eat them.

Taste. Healthy. You don't need utensils.

Social.

Light but filling. Substance but not a whole lot.

Some people thought of clams as healthy, but others remarked that they did not consider them healthy because they dunked them in butter or sauce.

Dislikes of clams focused on difficulty of preparation, chewy (which was positive and negative), bland taste, and gritty or sandy. There was some concern about health risks as well.

Labor intensive.

Sandy and gritty on the half shell.

Hassle of dealing with the shell and steaming the clams.

Risk of getting sick.

If they are not cooked properly, they are like rubber.

If they are gritty, I can't do them.

Texture makes a difference (in whether or not clams are a positive or negative). Fresh clams have a good texture. Non-fresh (clams) would be more rubbery and more chewy.

Detailed Findings - Consumers

Buying Fresh Clams

Most participants preferred to buy fresh clams at a seafood market rather than at a supermarket.

At a seafood market, you know they are fresh.

Fresh clams at a supermarket counter are many things, especially frozen.

Do supermarkets sell fresh clams?

They (supermarkets) don't keep them cold enough.

This last point resonated with several participants who could not recall seeing fresh clams at their supermarkets. Even after going through an exercise that focused on forming a mental image of their supermarket's seafood counter, many participants could not visualize clams in the display case.

I have never seen them at the grocery store.

Not all participants thought that seafood markets were the best place to buy fresh clams.

Wherever is convenient.

As long as I feel that it (clam) is fresh. Fresh is a big thing.

There are not a whole lot of seafood markets around here (Orlando).

Displaying Fresh Clams

There was no consensus regarding the best way to display fresh clams at a seafood counter whether it was in a seafood market or in a supermarket. Ideas that received comparatively more support included the following:

- A mound of fresh clams in the shell lying on crushed ice
- A tank of water with clams in it
- Plates with clams opened, either with or without sauces or condiments such as clam casino
- Packed in mesh bags and placed on crushed ice
- Recipes

Detailed Findings - Consumers

The following are selected verbatim comments that support the preceding themes.

I've found them enticing in the mesh bags (although there was no consensus regarding the appropriate color for the mesh bag).

Clams in the shell on ice not shucked and unopened.

Have the shellfish in the front instead of always in the back of the display.

(Design) a clambake thing. Spread them out with some seaweed and some corn.

If it's in a tank of water, that's going to make me think it's fresh as opposed to putting it in a display or on ice.

Ocean scene – a whole production.

Recipes or a variety of ways to make clams.

Some clams on ice spread out. Maybe some mesh bags with lemons.

I'd rather see pictures of different ways to prepare and serve fresh clams.

Maybe a couple of dishes already prepared.

Buckets of clams. Red bag of clams, yellow bag of clams, each with a different recipe on how to cook them.

Put a few in a tank like lobsters and then keep the rest in the back.

A poster with instructions on how to cook them.

Little cards with recipes.

If there was something that told how fresh they were. I just don't trust them at a supermarket.

Detailed Findings - Consumers

Giving out samples of fresh clams at the supermarket or seafood market received support from nearly all focus group participants as a method for increasing fresh clams sales. Participants enthusiastically supported this technique for selling fresh clams as the verbatim comments below attest.

Give out samples of clams casino.

Free samples people could taste and then they could buy fresh clams with a coupon.

Samples with someone charismatic talking about them.

Put a stack on ice and then have a few opened and give them to customers to taste.

Have someone saying "Here's a sample, taste it."

Freshness was a key issue in encouraging people to buy fresh clams. An adaptation of Budweiser's Born On Date appealed to most participants. There was considerable variation in how many days fresh clams would be good to eat if stored properly. Responses ranged from one or two days up to two weeks. Yet most participants planned to eat fresh clams (as well as all fresh seafood) they bought within one or two days.

If I bought clams, they would be eaten that night or the next day.

I never buy fish for Friday when the day is Wednesday. I eat fish the same day I buy it.

So supermarkets and seafood markets should inform customers of when the clams were caught and indicate the last date at which they can be eaten.

Have a guaranteed fresh date.

(Out-of-date) shellfish are very dangerous.

Promote the date it was caught.

Detailed Findings - Consumers

Value-added Packaging

Most participants' ideas about value-added packaging centered on steaming clams at the supermarket or seafood market, or on having plates of clams casino, clams Rockefeller, etc. There was support for selling fresh clams with packets of sauce (casino, Rockefeller, etc.) that customers could pour on top of the clams and place them in the oven or on the grill. There was not much support for packaging shucked, fresh clams au jus in clear containers in the same manner fresh oysters are sold.

Clams Casino fresh prepared at the seafood counter. I would definitely try it (most participants agreed).

If I saw a dish (of clams) already prepared, that would be great.

Have a pre-made clam salad.

Have it steamed for you at the supermarket so you can just take it home and eat it.

You show people what they're like (Clams Casino and Clams Rockefeller) and they're going to say "Oooh!"

I saw something like that (Clams Casino at the supermarket) and it was great. I would definitely try it.

Frozen Clams

Most customers who bought frozen clams bought fried clams. Given that they were breaded and dipped in sauce, the bland taste that most consumers associated with frozen clams was not an issue. The taste came from the breading and the sauces, while the clams provided the texture. Some participants bought frozen clams for pasta sauces as well.

Frozen clams are a lot more tough.

Detailed Findings - Consumers

Farm-Raised Clams

As mentioned near the beginning of this report, many of the focus group participants thought the concept of farm-raised clams made sense because they had heard of farm-raised catfish or salmon, yet only a few participants had actually heard of farm-raised clams. Reactions were varied with negative reactions slightly outnumbering positive ones in Boston, while positive comments were more numerous in Atlanta and Orlando.

Negative Comments

If it's farm-raised, it doesn't taste as good.

I would assume that it (wild caught from the ocean) would taste better.

The perception that if you caught them out of the ocean is that they would taste better.

Too chewy or rubbery.

Taste, texture, size.

Not direct from the ocean.

Unnatural. Processed.

Artificial.

Disease possibilities.

Pollution.

Positive Comments

It's probably better if it's farm-raised.

You are not damaging the environment.

Not as sandy.

Cheaper.

Not depleting the natural environment.

Detailed Findings - Consumers

More consistent.

More available. Lower prices because of guaranteed supply.

Don't worry about contaminants.

Less salty.

Get them faster, fresher, and easier perhaps.

I like farm-raised.

Less pollution in a controlled environment.

Despite the fact that positive comments about farm-raised clams outnumbered negatives ones in Orlando and Atlanta, it should be noted that no one in any group made a direct comment that farm-raised clams would taste better than wild caught clams. Positives focused on uniformity, availability, price, and fewer contaminants (less health risk). Some participants did remark that farm-raised clams would be less gritty or sandy, so taste did enter into the discussion.

Slogans for Clams

Focus group participants were asked to write down slogans that would encourage other people to buy and eat clams. As expected, responses varied with some being quite sophisticated and others simply mundane. Slogans that seemed to have some promise are listed below.

Today's catch.

ExCLAMation!

Had a clambake lately?

Quick, convenient clams.

As fresh as the ocean breeze.

Hidden treasure.

Fresh, fast, and good.

Heart-healthy and delicious.

Detailed Findings - Consumers

Fresh for your health.

Party Steamers.

Clam it up.

It's that easy.

Clams are jammin'.

Cram your plate with clams.

Have a belly full of bellies.

Florida Farm-Raised Clams

The best slogans that focus group participants generated for Florida, Farm-raised clams are shown below.

Harvested Florida fresh.

Florida's best.

Florida Fun Food.

Tasty safe.

Fresh from our farm to your home.

Fresh from the Sunshine State.

Fresh from people who know seafood.

A taste of summer year-round.

Fresh from Florida waters.

A sunshine food.

A taste of sunshine.

Detailed Findings - Consumers

Beat the summer heat. Florida clams are cool to eat.

Florida clams. Fun in the sun.

Enjoy the freshness of Florida.

Slogans for Clams – Finalists

While selecting slogans or positioning themes is an inexact science, the following slogans for clam consumption were considered best based on focus group reactions and based on the marketing experience of the researchers.

Today's catch.
ExCLAMation!
Hidden treasure.
It's that easy.
Clams are jammin'.
Party Steamers.

“Today's catch” focuses on the freshness of clams and places them in the fish category rather than in the shellfish category. Shellfish are considered more problematic to prepare at home, less available and more expensive than fish, in general. This slogan places clams more in the fish category and along with the use of an expiration date, could focus on the freshness of clams.

“ExCLAMation” is an exciting slogan. Focusing on the product name within a longer word is a tried and true marketing tactic. Another positive for this slogan is its shortness and simplicity.

“Hidden treasure” conjures up the special nature of clams and the social/special occasion that most people associate with eating clams. It does not, however, mention the product.

“It's that easy” preceded by the word clams is a strong candidate because it focuses on one of the key inhibitors to home consumption. Of course this slogan would need to be paired with recipes and instructions on how to prepare clams.

“Clams are jammin'” (or Clams be jamming) should pay well with Baby Boomers and Generation X consumers. It is a reggae phrase that has positive and party connotations that fit consumers' perceptions of clams.

“Party Steamers” is a strong slogan because it focuses on the fun/social aspect that consumers associate with clams and it brings a surrogate name for clams into the phrase.

Detailed Findings - Consumers

Slogans for Florida Farm-Raised Clams – Finalists

Based on this study, it is debatable whether there should be any focus on Florida or farm-raised. The health benefit that some associated with farm-raised was countered in most peoples' minds by sauces and butter with which they smother clams. Availability and price were two other benefits, yet these benefits become entirely obvious based on distribution and pricing tactics rather than on promotional tactics. Taste was not a strong positive benefit of farm-raised clams (or other farm-raised seafood) in the minds of focus group participants. Hence, it is debatable whether farm-raised should be mentioned in marketing to ultimate consumers.

Association with Florida has potential with consumers in the south, but not in the northeast where consumers believe that nothing can beat their local seafood products for taste, size, and freshness. Despite the preceding comments, if the decision is to focus on farm-raised clams, the following slogans were the best.

Florida Fun Food.
Florida clams. Fun in the sun.
A taste of sunshine.
Fresh from Florida waters.
Harvested Florida fresh.
Fresh from the Sunshine State.

“Florida Fun Food” is a good slogan because its alliteration and reference to Florida fun.

“Florida clams. Fun in the sun” is a strong slogan because it mentions the product (without mentioning farm-raised) and it utilizes a common phrase (Fun in the sun) used by millions in many different contexts. This phrase conjures up Florida vacations, youth, good times, etc.

“A taste of sunshine” is a good slogan because most consumers think of Florida as the Sunshine State. Fresh citrus, Disney World, and other attractions, cruises, beaches, good weather, etc., are positive associations with the Sunshine State.

“Fresh from Florida waters” is a positive slogan for Floridians, but probably does not have impact outside of the state.

“Harvested Florida fresh” has the same concerns as the previous slogan.

“Fresh from the Sunshine State” is a positive slogan because of reasons cited previously.

Detailed Findings - Consumers

None of the “Florida, farm-raised” slogans are as strong as the slogans for clams, in general. Of course it is possible to combine elements of the “clam consumption” slogans with elements of the “Florida, farm-raised” slogans. The following are examples:

ExCLAMation. From the Sunshine State.
Florida clams. It’s that easy.
Florida Party Steamers.
Florida clams are jammin’.

Media

Based on consumers’ reactions to clams, use of mass media does not seem to be the best strategy. Inserts with Thursdays’ supermarket advertisements would be the only exception. The focus should be on in-store advertisements and in-store samples of the product. Promotional money would be more wisely spent in this manner.



Detailed Findings - Trade

Background & Methodology - Trade

Kerr & Downs Research explored opinions of trade organizations (wholesalers, retailers, and restaurants). Key areas of inquiry were as follows:

- Types of clams sold (wild, farm-raised, fresh, frozen)
- Places where clams are harvested/preferences for types of clams
- Types of preparation, customer preferences, and customer demographics
- Importance of clams to overall company/fit within product mix
- Challenges or concerns/transportation methods
- Recommendations for alleviating concerns
- Advertising, marketing, and promotions

In order to gather feedback from a variety of companies throughout the supply chain, a representative from Kerr & Downs Research contacted companies and scheduled individuals to participate in one of six telephone focus groups as follows:

| Group | Tues 7/22 | Wed 7/23 |
|------------------------------------|--------------------------------------------------------------|-------------------------------------------------------------------|
| Restaurants | 10:00 AM Eastern Standard Time <i>(4 participants)</i> | 10:00 AM Eastern Standard Time <i>(4 participants)</i> |
| Seafood wholesalers / distributors | 1:00 PM Eastern Standard Time <i>(5 participants)</i> | 10:00 AM Pacific Time (1:00 PM EST) <i>(4 participants)</i> |
| Specialty seafood retail markets | 3:00 PM Eastern Standard Time <i>(3 participants)</i> | 3:00 PM Eastern Standard Time <i>(5 participants)</i> |

Twenty-five (25) persons participated in these one-hour focus groups.

Two (2) separate telephone one-on-one interviews were conducted with regional *supermarket chains* in order to integrate the valuable insights of this segment of the industry.

Companies that participated in this research were provided \$75 for their time, payable to the interviewee, or to a charity of their choice.

Detailed Findings - Trade

Types of Clams Sold

Wholesalers, Seafood Retail Markets & Restaurants

The types of clams sold, farm-raised or wild, varied by region of the country.

Companies in the northeast tended to offer wild clams harvested from local waters, with soft-shell clams popular in Maine and cold-water mahogany hard-shell clams popular in the New England states. They explained that local residents and tourists were accustomed to these indigenous clams, and expected their restaurants and retail outlets to have the native varieties.

Customers often asked for clams by name and wanted to hear that the clams were from local waters. Furthermore, companies in the northeast assumed the price would be too high to transport clams from Florida. Subsequently the product would not be as fresh. Other concerns were that Florida clams had shorter shelf life because they were harvested in warm waters.

(Wholesaler, RI) I haven't got around to (trying Florida farm-raised clams). My general feeling is that we are 'northern species people' and we have the impression that southern clams have too much water and they don't hold up well.

(Wholesaler, OR) I have not tried a Florida clam due to availability. We are more of a buy station. Selling a Florida clam in a steamer plate or pasta dish would be pretty much impossible to sell here. Most people like Moe's clam chowder. And most clams come from off the East coast.

(Retail Market, ME) There is no airfreight and we are pretty rural here, so we buy direct from the harvesters and save some money. It seems to work well.

(Retail Market, ME) A farm-raised product would have trouble competing against the natives. In this area, soft-shell clam is the number one item people are exposed to. With hard-shells, even though they are harvested here, the consumption is considerably less (like 2%)... No one asks for them. They would be sitting along side blue muscles and soft-shell clams that are indigenous. It is hard to offer something that is not native, especially since people come here asking for the native products.

(Restaurant, RI) We buy 100% from local waters - littlenecks, cherrystones and steamers from Maine. We buy hard-shells straight from a digger wholesale, the same day they are dug up. Our steamers are out of Boston. They deliver three times a week and we use about four bushels a week of the steamers from the Cape or Long Island.

Detailed Findings - Trade

(Retail Market, MA) Here in Massachusetts, it is steamer country and soft-shell clam country. We just don't sell many hard-shell clams. People use some hard-shell clams on the half shell or maybe for a bouillabaisse, with scallops and lobster, but they would only put one, two or three littlenecks in the dish... No, I have never tasted Florida farm-raised clams.

(Restaurant, New England) We are cranky Yankees. People are used to what they are used to around here. We have a bountiful harvest from the sea.

However, there was some debate about whether or not a customer would actually know the difference in a taste test, particularly since many of the company representatives had not tasted Florida farm-raised clams.

(Restaurant, CT) People are used to the fresh strips and bellies. That is what they expect since it is here all the time. I have never asked about farm-raised. I believe customers would (know the difference).

(Restaurant, CT) The difference comes down to price. The difference in flavor and texture, I doubt anyone can tell. I watch my bottom line. It is that extra \$.10 a clam, and when we sell \$100,000 worth of clams a year it adds up fast.

(Restaurant, NH) I agree. The flavor and texture is probably the same.

Restaurants and retail establishments located in the south and southeast, as well as distributors located in the western part of the U.S., were more likely to sell farm-raised clams from Florida. Specifically, out of the 25 companies that participated in the focus groups, 14 companies sold mostly farm-raised clams. (Note that this ratio is not a statement of the prevalence across the industry, but simply a perspective as to the ratio among companies interviewed.)

Decisions to carry farm-raised clams were based on consistency, availability, and quality, as outlined in the following comments:

(Wholesaler, AL) For me it was an industrial decision (to buy from Cedar Key). There is a lack of steady production of wild (unless you get it north of VA and MD). But by time we get it down here, it is not fresh enough and it does not have a long enough shelf life. We would encounter distribution problems. The airplanes leave it on the tarmac too long.

Detailed Findings - Trade

(Restaurant / Resort, FL) The only ones we buy are littlenecks and muddlenecks, also called cherrystones, from Melbourne, Florida. Our muddlenecks are sold on the raw bar. We don't use steamers. They are too hard to get down here... Down here, this is what they have to offer so I buy it. The Florida clams are sweet and less salty (compared to New England). If clams are on a menu, customers buy them for a kick. It is not a big clam state. However, oysters sell like hot cakes. Shrimp is huge. People want Gulf seafood. People vacation here from all over the world and they are looking for grouper, shrimp, and other local stuff... I never have a problem with supply, but we do not have the volume that you other guys do.

(Wholesaler, VA) We know where the clams are (located in the farm) and roughly how many will be there... Wild is not our niche. There is a lot of variability in wild. We don't have the time for that. Wild is a whole other business.

(Wholesaler, FL) All the wild clams died in Florida. There are very little. We resorted to farm-raised.

The majority of companies were purchasing fresh farm-raised clams from Florida, but a small number purchased farm-raised clams from Virginia to save on transportation costs or to get a more traditional New England style clam. Their comments were as follows:

(Retail Market, VA) Transportation and to maintain the best quality we try to buy as close to the local source as we can (from VA). I get a beautiful product for the quality and consistency.

(Retail Market, IL) Littlenecks, about 70% of them are farm-raised, primarily from VA and some we get from Florida from time to time. I don't know how often, but the shelf life (of Florida farm-raised clams) is a problem.

Among companies that bought wild clams, there was a perception that Florida farm-raised clams had a shorter shelf life. However, a number of loyal Florida farm-raised clam buyers / sellers came to the defense of Florida clams, stating that they do indeed have a reasonable shelf life, if handled properly.

Frozen and canned products were rare among this group of seafood trade organizations. However, some comments about frozen clams, e.g., consistency, shelf life, and safety of frozen clams were as follows:

Detailed Findings - Trade

(Wholesaler, FL) There are also a lot of requirements for micro-testing on products, and frozen products hold up a lot better. They have lower bacteria counts when they are tested. It is like oysters (that went through this 10 years ago), where everyone wanted to switch to a pasteurized or frozen product. Clams are going that way too.

(Wholesaler, RI) I agree that frozen is the wave of the future. If you want volume, servicing large companies, you need frozen.

(Wholesaler, IL) I sell a fair amount of IQF clam meat, block frozen clams, and clam juice, but still in small quantities (from domestic producers). I have looked at imports but haven't gotten into that yet.

(Wholesaler, CA) That is the \$64,000 question – 'How do we grow the Florida farm-raised clam business?' We have saturated the wholesale trade on live clam products. Now is it going frozen? That is the question. What is the acceptability of frozen and in what form? No one has really gotten into a shucked clam yet, but there was a little of that going on with dredged clams out of Port St. Joe a few years ago, but that has fell by the wayside.

(Restaurant, CT) I have a supplier that just started doing a fresh-shucked frozen clam on the half shell. I let it sit in the fridge overnight to thaw, tried it, and the flavor wasn't quite as good as fresh.

(Restaurant, CT) I did get some frozen. I don't care for them. Someone gave them to me. They are garbage. No taste. They are easy to use, but if I put steamers on the menu for \$9 or \$10 and were to give them one bag of these... they are very small and bland with no ocean flavor. They are frozen from China.

Supermarkets

A smaller supermarket chain from the northeast (with over 100 stores) was primarily selling fresh wild clams (95% of his clams) and a small amount of value-added clam products (5% of his clams). This included frozen Clams Casino and frozen stuffed clams. This supermarket representative explained that his company tried farm-raised clams a few years ago, but the price was not competitive and they discontinued the product offering. He realized that farm-raised clams were higher quality and more consistent, but he had not been approached recently to re-consider the product offering.

A larger southeastern supermarket chain (with over 1000 stores) sold only fresh clams, including a mix of wild and farm-raised. (The exact ratio of wild versus farm-raised was unknown). This chain did not sell value-added products.

Detailed Findings - Trade

Types of Preparation

Wholesalers and fresh seafood retail market representatives cited popular recipes in their market areas, while restaurants outlined some of their own popular preparations. The types of dishes were quite diverse, ranging from raw or steamed clams to Clams Casino, linguini with white or red clam sauce, clams used in chowders or bouillabaisse, or simply baked clams:

(Retail Market, ME) Shellfish are eaten on the half shell and soft-shells are almost exclusively steamed, unless they are made into chowder. Maybe farm-raised clams could make an inroad with the creation of new dishes, but not existing dishes.

(Retail Market, FL) We sell 90% of our clams just as they are to the customer and 10% are already steamed (by us).

(Retail Market, IL) Most of our clams are sold raw. We do have recipes available for people and a lot of the dishes are combined with lobster boils. Over the holidays, we do in house cooking and prepping for our clams casino. We use a lot of topneck clams, cook them, and prep them for the holidays. Clams casino is bacon and stuff like that, like a chowder. We grind the clams up with bacon and onions and stuff.

(Retail Market, MA) To me, clams casino is a topneck clam opened up as if you were to eat it raw with bacon, breadcrumbs, and onion on top. The clam is either chopped or whole.

(Retail Market, eastern U.S.) We have clams casino and oysters Rockefeller. Maybe a clams Rockefeller would work, with spinach, onion, cheese, and Pernot liqueur.

(Wholesaler, IL) I don't cook. There must be more to clams than baking or putting them on top of pasta.

(Restaurant, NH) Our mahoganies are prepared oregano style with garlic butter and breadcrumbs, or in red and white clam sauce with linguini.

(Restaurant, CT) We just steam them.

(Restaurant, CT) We make clams casino - serve them raw with breadcrumbs or baked, or poached with sausage and onions. We also have a classic red and white clam sauce, or poached with ginger wine sauce.

Detailed Findings - Trade

(Restaurant, ME) All we do is steam them in a clambake where all the seafood is in a container at the same time with potatoes, onions, corn on the cob, lobster, muscles, and clams. Then the clams are served in a container with butter.

(Restaurant, MD) Our main seller is clams casino. It is topped with a mixture of bacon, celery, onions, and herbs and baked to a golden brown. We also do steamed clams, shucked on the raw bar. Sometimes they are on a special sheet such as linguini marinara.

(Restaurant, FL) Clams casino, linguini and clams, clams at the raw bar, we have three or four types of chowder. We're doing steamed clams with the middleneck clams but it is not high on the list. One of our restaurants has a lunch and dinner buffet and the chowder sells well, but otherwise clams are towards the bottom, and maybe are part of a banquet at times.

(Restaurant, RI) We sell them at the raw bar, shuck the littlenecks and cherrystones and as an appetizer grilled with oven roasted garlic and wine sauce. We have three pasta dishes (seafood pasta, white clam sauce or red clam sauce) and Manhattan and white clam chowders. Among our appetizers, it is number three in popularity. Shrimp cocktail is number one.

(Wholesaler, eastern U.S.) Shore types of restaurants sell the half shell, and that is why they want the fresh live products. But if you throw crackers on top of a clam, customers won't care. Given the pallets of Americans, they don't know the difference.

(Wholesaler, FL) Italian markets are booming. Restaurants use five to six bags at a time. They place them in the shells on the pasta. We do a very big export business to the Caribbean and I believe they are going to Italian restaurants.

Wholesalers and distributors were selling primarily fresh clams, and only beginning to explore some frozen products. Only one wholesaler out of Illinois sold value-added products, and one supermarket sold Clams Casino and stuffed clams (as previously mentioned).

As one retailer explained, frozen or prepared products may be the wave of the future. Because many families did not have the time to prepare home-cooked meals, prepared dishes were becoming more popular.

(Retail Market) The major problem is that most people are so busy making a living that they have no time to go home and prepare meals. Clams oregano or casino is nice to just go home and stick in the oven. We are thinking of offering that, but just to come in and

Detailed Findings - Trade

buy a dozen clams and opening them up and eating them, there is a limited population that would do that. It is time consuming if both people are working and they have to pick up the kids from the babysitter.

Another retailer explained that his retail sales had been down in the past few years, and he was not certain whether this reflected a poor Florida economy or the competitive market around his retail outlet in Florida. He explained that a nearby seafood store that had just opened was booming. The new competitor offered wine, cheese, and prepared foods – “one stop shopping” ideal for the busy working family.

Customer Insights & Target Market

Companies discussed both the current target audience for clams as well as the most appropriate audience going forward. The current customer was consistently perceived to be concentrated in the northeastern states and in areas along the U.S. coasts. As outlined below, these customers are in the habit of eating fresh seafood.

(Wholesaler, AL) The thing we find is that within 100 miles of the coast they eat clams but when you get into the central part of the U.S., like Oklahoma and Tennessee, there are very few distributors that use clams.

(Restaurant, northeastern U.S.) Different people order different things. Generally, most people up here (in the northeast) eat clams. Some eat strips and not bellies. Some bellies and not strips.

(Restaurant, northeastern U.S.). We are used to eating them. We grew up on them. Grandma had them 30 years ago. We had fritters at the beach. Target them and get them when they are two years old. We tell our customers, 'Don't give them a hot dog, give them popcorn shrimp and clam strips.' When they are young and they grow up with a diversified mind, feed them seafood and by 10 years old they won't say 'ewe'.

(Restaurant, ME) I used to farm aquaculture oysters. I could only sell shellfish to an area where the clientele were familiar. I couldn't sell other oysters in Maine (since they were not native), but in DC and NY where the clientele has traveled, they would even eat a European oyster.

However, in every other regard, perceptions of the consumer demographics of the “typical customer” ranged significantly.

Detailed Findings - Trade

(Retail Market, MA) For the soft-shell clams, it is all ages and all walks of life. However, on the hard-shell clams it is 45 and under. The 30-45 year old yuppie making the extra money who wants to put on some fancy meal. Sometimes you have guys come in for a party and they go to the races and open a bunch up together.

(Retail Market, FL) It was only women before, but now both men and women come in. Women were the primary shoppers. We are in a tourist area. The winter tourist is over 70 years old and in the summer, the tourists are never over 50. We have a lot of husbands and wives come together.

(Retail Market, IL) I think it is ages 45 and up buying any shellfish. Or you can pick out the younger couple who has traveled a lot and they will eat clams and oysters or whatever. There is definitely a hole out there of the 35 and under that is really lacking. They have gotten out of the habit of eating clams.

(Retail Market, FL) Everything from raw bars to sports bars, casual, and high end.

(Restaurant, northeastern U.S.) You cannot accurately target the audience. I have kids that come in who are four years old that eat strips or bellies. Seriously. My son at 10 is eating sushi with me now.

(Restaurant, RI) I've tried mahogany clams (but not from Florida). I could see us (trying other varieties). We have eight different oysters (on our bar) and it would work at a raw bar. People like to try something new, especially in a touristy metropolitan area.

(Wholesaler, CA) Who doesn't like clams? Really. It is more of a question as to ask who doesn't eat clams.

(Retail Market, IL) The big thing we have to realize is that a lot of the shellfish people are gradually dying. The marketing has to be targeted at younger people. We need to recruit younger people for shellfish. You and I grew up on shellfish.

In summary, those who were least likely to try Florida farm-raised clams were already eating New England style clams. The greatest market potential may be among new entrants such as young urban professionals, younger children beginning to try new foods, and time-crunched couples or families looking for interesting yet simple dishes.

Another potential niche is the health-conscious customer who may be attracted to the controlled farming techniques, perceived safety of a controlled product, and the consistency of the farm-raised product produced in the United States. A few trade organizations described this niche as “organic”, which could also incorporate the benefits of buying domestic.

Detailed Findings - Trade

Likes & Dislikes

In order to gain some perspective, companies were asked not only what they liked and disliked about the business of clams, but also how important it was to their overall business. That is, if it were to go away, would they care? The general consensus was that enhanced sales for any product would be positive.

(Wholesaler, CA) I'm looking to grow on any product I have. Not just on clams. We would be interested in growing any product and any help (from producers or the government) would be good.

(Wholesaler, CA) It doesn't matter if it is clams or something else. We want to sell more of everything.

(Wholesaler, OR) Anything to help improve sales, you bet.

(Retail Market, eastern U.S.) I'd love to see more. It is easy to deal with, there is no labor, and you get good money for clams.

(Supermarket, southeastern U.S.) We are interested in increasing our sales, period. If that means imported shrimp from China, and if that will help me meet the requirements the company has laid down for me, then wonderful. And if that's clams from Florida, then wonderful.

Nevertheless, likes and dislikes were voiced, as outlined below.

Likes

Retailers, wholesalers, and restaurants indicated that consumers expected clams to be a part of their product mix. As the following northeastern supermarket explained:

(Supermarket, northeastern U.S.) People are looking for items and it is our job to take care of our customers and get them what they need.

Wholesalers in particular explained that it was a relatively easy business – “clams in / clams out”. There were, of course, components that made their jobs easier, such as tagging, as discussed below:

Detailed Findings - Trade

(Wholesaler, FL) The one nice thing is that we don't have to process it. The tag situation is another story. We just take the bag out of the box and take it to our customer. The challenge is that there will never be a ton of volume in clams. We sell only a few at a time. It is just part of the line, but it has been a fairly high margin (with not much labor).

(Wholesaler, IL) I agree. And tagging isn't too bad if you can get double tagging from your producer. All shellfish have to maintain records such as where they are from and where they go. The tags have the harvest areas and date on every bag. So when we translate it to the computer, if you have double tags, you can rip one off and have one for the customer and one for yourself. It is easier.

(Wholesale, eastern U.S.) As long as you don't have to break them down (it is an easy industry). Some people want only 15 clams not 12, or 25 clams instead of 50 or whatever size. I have to count them out and make special tags. It is a lot more record keeping and then they want every one of the clams to be closed.

(Retail, FL) It is just something you need on the menu to keep customers happy. If you don't have them, they buy from someone else.

(Retail Market, VA) When you think of seafood, clams are at the top of the list in desirability, but affordability is another issue. Salmon and finfish are more affordable. If you calculated the cost for clam meat per pound, the edible portion, the cost would be astronomical. I'd be shocked if it wasn't. It is very desirable and an important part of the equation (of our business).

(Retail Market, ME) We would lose business if we didn't carry clams.

(Retail Market, FL) I'm in Florida and the northerners come down and if we don't have it on the menu, it ruins their day. I have to have them flown in every other day from my guy up north. They ask, 'Do you have steamers or fried clams today?' If I say, 'no', but I have Florida clams, they say 'No. I'm from Maine (or Boston) and I need my Ipswich or my bellies fried.'

(Wholesaler, FL) One of the issues is that nobody wants to receive open clams. But you could justify that if you cook it off right away they are OK. We need to educate consumers that they are OK. Otherwise, clams are an easy product to sell. It is just bag in bag out.

Detailed Findings - Trade

Some restaurants seemed to have an even stronger affinity for this segment of their product mix, particularly when they had a consistent, quality supply of clams without fluctuations. Some restaurants enjoyed their ability to deliver an impressive entrée to their customers that was relatively easy to prepare:

(Restaurant, northeastern U.S.) It is easy. It looks good on a plate and you can blow people away when you put a half pound of strips on their plate. It covers the plate good.

(Restaurant, eastern U.S.) Clams add well to the bottom line since they are a fairly good price. You get a good return.

(Restaurant, eastern U.S.) They are easy to hold and they cook quickly.

(Restaurant, eastern U.S.) They store easy and you don't have to mess with them. With fish you need to ice it down, cut it, and make sure it is not in water.

Dislikes

In the context of issues that should be alleviated, the following issues emerged:

- Consistency
 - Size
 - Taste (sweetness and saltiness)
 - Quality (number of broken clams, dead clams, sand, etc.)
- Price
 - Perceived as expensive compared to the volume of meat derived from a clam
- Food safety
 - The number of certificates needed to satisfy government's requirements
 - The tagging system used for tracking sales
 - The impact safety can have on consumer consumption.
- Shipping issues
 - Compounded for Pacific coast companies due to the distance clams must travel, and the lack of control over delays in the airlines.
- Turnover

For example, a large catering company and clambake theme restaurant in Maine started as a small company (buying clams from multiple vendors) and grew to utilizing one vendor and paying a higher price (in order to achieve **consistency** and improve **quality**). As he explained:

Detailed Findings - Trade

(Restaurant, ME) We couldn't continue with the variables of buying from multiple flats and different vendors. We had to pay more to have a consistent and no-silt product. The clams follow the chowder (which is the first course) and it would ruin the rest of the experience (if they had sand in their clams). I pay more for high-end products. It is important to have high quality.

Another large wholesaler in California explained his concerns with **availability and price** considerations, having switched from wild to farm-raised clams for a significant amount of his seafood operation:

(Wholesaler, CA) The problem with Manilas was that we used to sell 8-10,000 pounds a week. We started switching away from Manilas because the price kept rising and the quality of the Manilas in the summer was horrendous. It wasn't how much you would lose but how much would be alive. Then the Florida clam started coming, the Cedar Key area opened up, and we had a more reliable source year round. Then the New Zealand clam operation opened up and their big advantage was price. They came in with a real cheap cockle and forced others to go in their direction (on price) because they were selling for \$.60 a pound cheaper than Manilas.

A few restaurants explained their slightly less enthusiastic perspective with regard to clams, focusing on **consistency, safety, price**, and the overall number of variables that affect their use of clams:

(Restaurant, northeastern U.S.) Clams have the most variables compared to other things we deal with. The quality and price fluctuations are dramatic. It can rain for three to four days and the beds will be closed because of bacteria flowing off the watershed. Blueberry season impacts clams (although that is somewhat mythical). Sometimes I have to go through my rolodex, which is thick, and a truck can go far all night to get them here, but it sucks. I don't know what I will get (as far as quality) if I have to get them from someone else.

(Restaurant, ME) We commit to a price for the year and our season is from April to November. By May, we are committed to a price. If the market is driven up by bacteria or red tide, we are in trouble.

(Restaurant, MD) I won't say I don't like it. I agree that there are so many variables. It is not my number one seller but it is a favorite.

Detailed Findings - Trade

Sand was a recurring theme mentioned as very important to customers. Companies handled the issue of sand in a few different ways, ranging in the degree of effort to remove sand. Some offered a bowl of warm water for customers to rinse their clams before eating, some placed their live clams in water with cornmeal (before preparing the clams), and others used sophisticated processing called depuration, as described below:

(Restaurant, ME) Our clams come from Maine and are trucked to the depuration process. Then they are re-packaged. They are wild clams that are held for 48 hours in circulating water with an ultra violet light to kill bacteria and rid them of the sand. It is done by the purveyor off site.

(Retail Market, FL) The biggest dislike among customers is that it is gritty, usually in the summer. Farm-raised clams are far superior because they have less grit. I think they take them out in 200 count bags and leave them in water before they harvest them. That will generally purge the sand. We have very little sand problems. If they would offer us wild clams at half the price, we would never go back to them. Not only that, they are very consistent. They are sized properly with no big and little ones (mixed together). They are whole not broken. There are no rocks in the bag like wild clams. It is a consistent product at a reasonable price and I pass that on to the customer.

(Retail Market, ME) The farmer can mitigate the grit by purging them after they pull the clams out of the water with cornmeal. They take 10 bushels, put it in a tank, and purge it overnight. They will get a quarter inch of sand out from that. Customers love that there is no sand. If we could get the marine resource people to allow the harvesters to purge them, the sand would be spit out and we would have a significantly superior product.

(Retail Market, FL) I have no issue with farm-raised clams. Everyone loves them. I have the same customers weekly. They love the flavor and texture and that there is no grit... The taste is milder than wild and the texture is not as chewy like a rubber band. A lot of people overcook them and that makes them more chewy. I've gone through about 30 clam companies and (name of Florida farm-raised clam company) has been an excellent product.

(Wholesaler, AL) The challenge we have as a distributor is getting the clams live and fresh but improperly graded. I expect a littleneck and I get everything from a middleneck to a cherrystone, including cracked shells. They make the whole bag stink and I will loose the entire bag.

Detailed Findings - Trade

Safety was another issue that emerged. Companies discussed a range of issues revolving around the number of certificates needed to satisfy government requirements, the tagging system used for tracking bags of clams from production to retail, and the impact safety can have on consumer consumption.

(Wholesaler, Pacific coast) Another area that probably should be mentioned is inspection and certificate handling. I have more certificates on my wall than a doctor. And I really don't think that is emphasized enough. Everyone on this phone would agree that we are inspected to death. We're required to carry more licenses than I've ever known possible. The way the government comes in, you would think we were operating out of the dark ages. The criteria were necessary in the beginning, but it is a little overkill now.

(Restaurant, eastern U.S.) There is concern over the origin and cleanliness of beds and where clams come from. There are publications showing people getting sick from shellfish. For example, when I was growing oysters, it had a dramatic impact. The top end users that were trusted were Hemmingway's, but the others were on the marginal side, and their customer base went away.

(Restaurant, eastern U.S.) We have signs now for raw seafood (as required by law) and it makes people even more fearful.

(Wholesaler, CA) We have to have posters at any retailer warning about the dangers of eating seafood. You think you will walk out the door and you may drop dead.

(Wholesaler, IL) People are afraid of being sick and the media jumps in. Here in Chicago we hear about how bad seafood is and that it is bad for you.

(Wholesaler, Pacific coast) We need to do more with shellfish in general because people only read the negative. How many people are actually killed with oysters out of the Gulf? You never see anything (positive) about safety, the (cleanliness of the) water. We get a lot of negative press in the industry in general.

As highlighted in the comments below, some company representatives took the issue of **safety** and made suggestions to turn this negative into a positive—market United States farm-raised clams as safe or organic:

(Wholesaler, Pacific coast) We should sell the safety of the supply chain. The farmers are local, versus clams from China or Vietnam where God knows who you are buying it from. These waters (in the U.S.) are federally and state monitored. It is big

Detailed Findings - Trade

safety issue. Our parent company likes to hear that they aren't going to have a million dollar lawsuit because of clams that came out of a river downstream from the largest pig farm in China."

(Wholesaler, OR) I agree. One thing on our end is that we've noticed the organic situation. They've come out with this dye warning out of California (regarding the farm-raised salmon being fed red dye) and since we sell nothing but troll caught (wild) chinook or coho up here, it was a boon overnight (for us). They had lawsuits against some of the larger food chains and the publicity that came out of this is like free advertising (for wild fish). If Florida could work to get an organic label on their clams, and prove it. I'm on the Oregon salmon commission and we just shipped some salmon off to California to get the organic label and if we get it, the Governor is behind this thing. And it is going to push organic down people's throats, whether they like it or not.

Shipping and packing issues were also discussed in the context of quality and consistency of the product. Companies on the Pacific coast clearly had unique concerns (with shipment by air versus truck), but regional wholesalers and retailers also had packing concerns. While it seemed that many wholesalers had solved their shipping and packing problems, it is important to keep in mind that these transportation issues (highlighted below) would be barriers to companies outside of Florida that do not currently deal with fresh clams.

(Wholesaler, CA) We buy our products out of New Zealand and out of Cedar Key. A truck takes them to the airport then by air. They are shipped in 10-pound units or 60- or 100-pound master units... Sometimes you go through a lot of suppliers to get through the issues if consistency and quality. Sometimes it can take time. It is a shake down process. You don't put all your eggs in one basket. We buy from more than one producer to solve issues with quality, or if one has problems with the weather or storms or trucking problems, we have enough supply.

(Wholesaler, CA) Ours come in Mylar bubble wrap. The thermo temperature allows us to ship and not deal with temperature issues with airlines. If it is coming out on United Airlines, they may have non-stops, and now it changes planes somewhere, the packaging is important. There is a Federal limit as to the temperatures you can have. It has nothing to do with preserving a live clam. It has a lot to do with logistics and understanding what hubs to use and temperature issues. We don't send clams through Dallas in August. We make sure it is tempered properly before it is shipped with gel packs in every box. Every box has insulation. Our units range from 40 pound to 70 pound units packed to customers' orders so there is less handling involved (no middleman).

Detailed Findings - Trade

(Wholesaler, CA) Really, the biggest area of improvement is the transportation step. (Understandably) airlines have a bigger issue going on than clams these days. There is going to be an abuse on temperature. Shipments like shrimp out of Florida, we send a temperature recorder with every one. It is more a function of \$8 a pound stuff vs. \$2 a pound stuff. We tell the airlines to absolutely put it in the cooler if it is going to be more than x amount of hours in the station. If the State of Florida has any influence on how the airlines conduct business with shellfish, that would go a long way for improving the perception of the Florida clams.

(Wholesaler, CA) We're in the same boat... The guys at the airlines can give a darn about your shellfish or your finfish. It could be sitting on the tarmac for five hours even though they have a cooler. The main problem is getting their head out of their butt and putting your stuff in the refrigerator. Whomever you are purchasing from, you have to go through several people before they get it right. One gel pack in 50 pounds of clams isn't going to do a whole lot of good.

(Retail Market, FL) This is our best year. It used to be that the wholesalers didn't know how to handle them once they received them. They threw them into a cooler coming from 80-degree water (in Florida) into a 35-40 degree cooler, then the clams went into a truck, where you don't know what the temperature is in the truck, and the temperature varies every time the door opens. Now, all of our clams are delivered in Styrofoam boxes. The temperature remains constant, and that is the secret. If can keep it constant without varying it. The container has a vent. They are kept dry. They used to pour ice on them. They used to do all kinds of things to them. The people who harvest clams have learned a lot.

Finally, a supermarket located in the southeast expressed concerns with **turnover:**

(Supermarket, southeastern U.S.) The shrink is the number one factor... They're trained to really pay attention to their shrink. And even if we get them excited on a fresh item, they are a little stand-offish because (the store managers consider), 'Well, let's see, if I really go out on a limb here and try to sell 15 cases of these clams and I end up with 5 of them left, with a nine day shelf life... Oh, my goodness! It would probably be better if I just ran out.'

Detailed Findings - Trade

Marketing Recommendations

Each segment of the industry – wholesalers/distributors, specialty retail markets, and restaurants – had their own unique perspective of how to alleviate the challenges they have with clams, and, subsequently increase the sales of clams through marketing efforts.

Most recommendations pointed towards the need to focus on the consumer and mass-market channels of distribution. These recommendations focused on overcoming misconceptions about Florida clams harvested in the summer, educating the public about safety, generating initial trial, and educating the public about the ease of preparation.

(Retail Market, eastern U.S.) It would take a major education initiative (by the state or federal government) to communicate the value of clams and how good they are.

(Wholesaler, FL) Even if they decrease the price of clams, it won't translate to more sales in restaurants. (People who already like them are buying them—price is not the barrier.) Maybe if you increase demand in stores (you would increase the market).

(Wholesaler, FL) I'm involved with the seafood commission in Florida. One thing that needs to be done is to help the consumer to understand how to prepare the product at home, so that the retailers and supermarkets can actually sell more of these products. From my point of view, I'm not sure we can sell more (as wholesalers). Maybe if more restaurants open up. The key is in the retail sector, consumers who use it at home. Now people are bringing salmon home from Costco (so it is feasible).

(Retail Market, FL) A lot of customers ask how long they keep, how to steam them. They could be doctors and lawyers and they don't know how to cook clams. They call me on the phone saying, 'How do I do this again?' Years ago, the Florida Department of Agriculture used to send out recipes and they quit doing that.

(Wholesaler, eastern U.S.) You don't have to know how to cook to serve good clams. You can just whip out cocktail sauce or melt some butter with a little garlic. You just need to be able to boil some water, and there you go. That is the part that is really good. It is the type of cooking we see going on in this country and clams lend themselves to it. It is an absolute no-brainer. You can turn out a product that is absolutely delicious, serve it with some white wine, and absolutely wow your friends. If they know that, and have the confidence that they can do it, we can sell more.

(Wholesaler, VA) Handling is not that bad with clams. The norm is 10-14 days of shelf life if they are handled correctly. If they were in Costco, you wouldn't expect salmon to be on the shelf any longer than that.

Detailed Findings - Trade

(Wholesaler, IL) Shelf life is a concern. We need consumer education regarding storage of clams (if they are going to push for sales in retail). Many people still think clams should be in water, other than a cool and dry place, away from a fan. We find restaurants that don't tell customers how to handle them when they get them home.

(Wholesaler, FL) Florida clams have a bad reputation in the summer. It is a challenge getting them to try them out of Florida. Clams have the stigma that they are bad in the summer, like eating an oyster in the summer... People want more clams from Florida in the winter, since they are perceived as having a better shelf life and firmer meat during the winter, when the water is cooler. People are more receptive to buying in the winter.

(Wholesaler, VA) I agree with him. The emphasis should be to the consumer on how to handle and how to cook clams. It is easy and if we could get the consumer to try it, that may be a way to step up some of the consumption.

(Retail Market, eastern U.S.) Oysters gave clams and other shellfish a bad name. They write so much bad stuff about shellfish.

(Retail Market, eastern U.S.) We need to explain the difference.

(Restaurant, FL) I love clams. They taste great, but what can I tell anyone about a clam? Is it good for you? Is it nutritious? If you like it you like it. There are no commercials about how 'clams are good for your heart.' They just taste great.

(Wholesaler, IL) Recipes makes such a difference and knowing what to do at home.

Each type of company within the supply chain, with the exception of wholesalers, can touch the consumer and impact trial.

Recommendations specific to each type of company within the supply chain are outlined below:

Restaurants

A national campaign would help restaurants, since most restaurants did not advertise their specific menu items, including clams. They simply have them on the regular menu, place them on their specials board or specials menu flyer, or have the wait staff mention the item at the table.

Detailed Findings - Trade

Some restaurants explained that new menu items become popular by “word of mouth”. However, they did have some ideas that the industry could provide in order to boost sales of clams, including the following:

- Provide samples to restaurants, so that they can sample to their customers
- Tabletop tents
- Materials to help educate the wait staff, so that the staff can effectively promote the feature item (paired up with a wine)
- Proactively promote the safety and cleanliness of clams (to combat negative publicity)
 - Restaurants are required to post signs and mention the potential health risks of raw shellfish, yet the industry can help combat the consumers’ negative perceptions through national campaigns.
- Position Florida farm-raised clams as unique, special, and desirable.
 - Some restaurants made analogies to other specialty products (imported from Hawaii and Florida – e.g. alligator), indicating one potential marketing angle for Florida to consider.

Complete explanations of the above tactics are outlined below:

(Restaurant, CT) The industry should provide samples and guarantees on the quality and what days we could get them. Promote clams to the public with tabletops, and that kind of thing.

(Restaurant, eastern U.S.) The best thing is when a server tries and we do a feature focus with the staff during a pre-meeting meal. We pair it up with a wine and put it in their minds. We do not use table tents since we are white tablecloth. A soft sell with the wait staff works well.

(Restaurant, MD) We advertise on our menu. Usually the waitress will promote clams casino and it picks up again.

(Restaurant, eastern U.S.) Calm their concerns about the cleanliness and explain the depuration of the product and how it is cleansed. Take a proactive vs. a reactive position to help with their concerns.

Restaurants in the northeast continued to have reservations about the viability of selling Florida farm-raised clams in their part of the country. They made some analogies to other specialty products imported from Hawaii and Florida, indicating one potential marketing angle for Florida to consider.

Detailed Findings - Trade

(Restaurant, NH) It would be tough up here. We get our mahoganies out of water on July 10th and it is in my door on the 11th. That fresh of a product from Florida would be a lot more money with shipping alone.

(Restaurant, CT) When we had stuff flown in from Hawaii it arrived in one day packed in a cardboard box lined with Styrofoam and bubble wrap bag inside. It had frozen gel packs inside that with the fresh fillets. The company itself is going the extra mile to ensure freshness of these giant Hawaiian prawns. They are advertised as Hawaiian Prawns on my daily special on a special handout. Maybe if Florida clams could do the same thing.

(Restaurant, eastern U.S.) You need to remember that Hawaii is selling something that we can't get in our back yard.

(Restaurant) When we bought the alligator, we sold it as alligator from Florida, but you are right, we can't get alligator here (in the northeast).

Restaurants seemed to conclude that an effort to position clams in this niche would require expensive television advertising targeted at the public, positioning the product as unique, special, and desirable.

Specialty Seafood Retail Markets

Many of the companies selling to the public through retail markets were also selling seafood wholesale, and a few were selling prepared foods and operating restaurants. Hence, their perspectives were varied due to their vertical integration.

In reflecting on their own positioning strategy, retail markets made suggestions to the producers of clams – to provide service and a quality, consistent product. Their own marketing efforts were not specific to clams, and in many instances, they did not necessarily advertise. This reality continued to point to the fact that advertising on behalf of the industry may be necessary.

(Retail Market, FL) I have built up my clientele over the years and sell all quality seafood. It is a higher price, but I talk to chefs every day and my quality and shelf life is there. I don't do any marketing. I have been in business for 35 years and I take care of my customers.

(Retail Market, VA) We do not do any marketing or advertising, not specific to clams. We just do generic advertising to come down to the store through local newspapers.

Detailed Findings - Trade

(Retail Market, ME) We do the same, just local newspaper advertising, but no ads specifically for clams.

One-on-one selling at the counter in retail markets seems to be integral to the success of a product. If a retailer is making a good margin on a product, they will make an effort to push the product out the door by verbally recommending the product to consumers at the counter.

Prepared or packaged, ready-to-eat items also emerged as marketing ideas, and a few retailers mentioned the popularity of brochures available at retail. Comments were as follows:

(Retail Market, FL) We try to give as much information as possible. All our people are knowledgeable on how to store clams. We tell customers that they can't put clams in the coldest part of the refrigerator because Florida clams come from 80-degree water and if you put them in 45-degree water, you are going to kill them. We sell a lot of clams. We get a lot of information from Florida and we make copies and hand them out.

(Retail Market, MA) I have seen some clams in the freezer section and oysters already shucked. That is the best promotion where they are shucked or chopped up, and have certain dishes like clams Rockefeller or clams casino and package them up at the retail frozen.

(Retail Market, IL) We're constantly doing cooking classes and educating the public on the local level. We're offering recipes and showing people how to do the recipes, we have had a lot of success.

(Retail Market, FL) We have several different brochures from The Department of Agriculture. We can't keep them in the store. I have one left for mullet. You can't give away mullet.

(Retail Market, eastern U.S.) In our store, we have the same problem (with keeping brochures on hand). When we put them in the store, they don't last a week. We tell the Department we need some more and it may take six months before we get some more. We need a constant supply of educational material for consumers. Make it easy.

Detailed Findings - Trade

(Retail Market, VA) In terms of clams, if there were some promotional materials provided. I search regularly at the food network and download recipes and I always have a recipe of the day. With clams, if there were some nice promotional materials distributed to retail outlets, such as methods of cooking, recipes, different ideas. Some are very familiar with clams, some are comfortable, but others go out to eat them rather than cook them. We could tell them dressings, methods of preparation. I verbally convey to customers some of this information, but a handout would be nice. Include how clams are grown, where they are grown, etc. This is a university town and they are very concerned about the environment. Tell them the positive things about environmentally harvested clams.

A few retailers mentioned the popularity of brochures available at the retail counter. Some ideas emerged to share brochures with retailers:

- A registry or list (based on lists obtained from the distributors and wholesalers)
- A list based on the government's registration process
- Website (or a clearinghouse for information)
- 800 numbers
- Brochures passed out by the distributor

These techniques would avoid a “shotgun approach” to sending out brochures. Complete descriptions of these tactics and ideas are outlined in the following quotes:

(Retail Market, eastern U.S.) It needs to start with the producers. They know where their product is going. Get the names from producers.

(Retail Market, eastern U.S.) Give brochures to the producers (for them to pass out). They should want to do it because it would increase their sales as well.

(Retail Market, eastern U.S.) My distributor said it is not his department. It is more paperwork for him.

(Retail Market, eastern U.S.) Everyone who has a license should get an order form before the season starts. Send out hats, aprons, recipe books, t-shirts, etc.

(Retail Market, eastern U.S.) I wouldn't go to a website. I don't care for the computer.

Detailed Findings - Trade

(Retail Market, VA) I would want to see the brochures before I order. What if they are not what I want? They can send a catalog or sample brochure. Then I could decide what I want and how many.

Proactive methods (where the company needs to seek proactively seek the information), such as an **800 number or website**, were somewhat realistic to most retailers. They explained that they simply are not aware of such resources. As one retailer enthusiastically replied, “*I’d be on there in 5 minutes*” at the website.

Some retailers discussed **promotional campaigns** from other seafood products in the industry, such as lobster and salmon. For example, in Maine, the entire region has a week in August to promote lobsters. The event includes lobster recipes, chefs, a panel of judges, and the Governor, as outlined below:

(Retail Market, ME) We have a lobster promotion council and there is a surcharge on our license to help market it. We have a lobster week in August. The chefs from local restaurants come up with their best lobster recipes. The Governor comes in for the panel of judges. It is a big deal. We give out lobster kits explaining how to eat it, we promote it as eco-friendly, and that it is harvested in a responsible manner. It really does help.

In summary, an event such as the one described above may be the key to the success of clams. Retailers explained that not only is there a challenge with trial, consumers need to know how to prepare clams. Consumers can try clams in a store taste test, or in a restaurant, but then they need to overcome the perceived challenge of cooking them at home. It can be quite a hassle for retailers to push the product and then answer the incoming calls regarding preparation of clams.

(Retail Market, FL) They are used to trying clams at a restaurant, then they come in the store and buy some and take them home and call in again saying, ‘They’re not open yet. What do I do?’

Brochures, and perhaps even an 800 number for consumers, sponsored by the industry, could help to alleviate some of the pressure on the retail establishments.

Detailed Findings - Trade

Supermarkets

The supermarket chain from the northeast explained a few of his current marketing tactics, lending ideas for producers to explore.

(Supermarket, northeastern U.S.) Our stores have a tremendous influx of vacationers in the summer, from May to September. We heat up our ads on the NJ shore and sell 50 count bags for \$5.

(Supermarket, northeastern U.S.) Our clam customers are also the guy on a weekend having his buddies over. When clams are on sale, particularly around the holidays such as the Fourth of July or Memorial Day, our stores do neat things. We have to be creative with the displays. We take something plain and put a new twist on it. One store went out and bought a kiddie swimming pool and filled it with ice and clam bags. It sold great. The results were phenomenal. It creates excitement in the store. But not all stores are doing... We (headquarters) sends notices to the stores about the ads being run in the local newspapers...we put the idea out there and the local managers decide to participate (with in store promotions). They need to take the bull by the horns. If there is no follow through at the store then the ad won't matter... Merchandising is key. It is about atmosphere. We are at ground zero with the development of seafood departments. Companies are starting to realize now that they are viable departments. When a customer walks into a store, it is like walking into a restaurant. People watch cooking channels and are more adventurous than before. That is why we have more stuffed and prepared products. I look at what the best restaurants are selling and try to offer that.

Similarly, the larger supermarket chain located in the southeastern part of the U.S. explained that it is difficult to convince managers at the store level to promote clams. This seemed to be both a logistical issue, a financial issue, and a turnover issue. On the other hand, while he described the challenges, he also explained a recent clam promotion that was quite promising:

(Supermarket, southeastern U.S.) We've only just dabbled a little bit here and there with Florida farm-raised clams. I couldn't count on one hand what we sold. There are a couple of reasons. Obviously, of our total seafood volume, it is less than 1% of our sales. It is kind of difficult to convince our retail stores to step out on promoting this item. Whether it's in Florida clams or clams from elsewhere. Shrink factors are probably the biggest hindrance in the retail sector. In our retail stores, we've changed some things over the past three years in which we've since restructured and shrink has become a big part of our focus.

Detailed Findings - Trade

(Supermarket, southeastern U.S.) Obviously when you have an item that has anywhere from a 7 to 8 to 10 day shelf life when it is received at our distribution center, that makes it difficult to get the 'buy in' from our retail stores. I think that's a big factor. The other big factor is I don't think it is promotable friendly when you start looking at price points and how do we get it to the customers. However, we just finished a demo this weekend at one of our stores here in Jacksonville, offering some Florida farm-raised clams in a netted bag with a scanable UPC on them. Those results were pretty darn good. They sold in two days through this demo-ing program. Some 35 cases that were packed 6 bags to a case. So you're talking about 210 retail type of units at about \$700 or so. That was pretty impressive and so it's something that we are looking at now and how can we step out and take advantage of this.

The southeastern supermarket chain explained the financial realities of the situation:

(Supermarket, southeastern U.S.) I would love to tell you that I have all kinds of time to help build clam sales. Unfortunately, it doesn't work like that. Especially, if clams were shrimp, shrimp is about 45% of our business, which, needless to say, you can figure out where I spend about 45% of my time... We've got to promote the things that get them excited at the store level. In a world of 'buy one- get one free', and '2 for \$5', and '3 for \$10', and all kinds of gimmicks and things like that... Whether its promotional dollars to help buy down the cost a little bit or promotional offerings paid for, whether its some kind of an ad in the newspaper support, or the demo program currently in place in the company, whether its via some of those vehicles there, those types of things get them excited. Kind of like what we did this weekend.

In summary, beyond financial incentives, these supermarkets indicated that producers or the industry should assist retailers in promotional efforts, such as taste tests and merchandising, particularly during the holidays since consumers are more frivolous in their spending. Many promotional materials would be helpful, but it is more complicated than a simple ice pick or signage.

(Supermarket, southeastern U.S.) It is all about getting our people in retail excited.

Shoppers need to try new products if you want to grow the industry beyond current users. If someone already eats clams, they may pick up a brochure that includes recipes. However, a brochure alone will not encourage a non-user to try clams for the first time. Another barrier exists for supermarkets. Since they are often union shops, it can be challenging to get the seafood department to make new value-added preparations or go the extra mile in merchandising. Producers may need to provide these services.

Detailed Findings - Trade

Wholesalers

Wholesalers do not view themselves as having an ability to push clams to their retail clients. They simply supply the products that their clients ask for. Wholesalers believe that restaurants, chefs, and retail establishments must encourage the public to try clams in order to generate more demand.

Wholesalers believe that restaurants and individuals need to be encouraged to prepare new dishes than they currently offer. New dishes can be features through the following:

- Restaurant trade shows taste-tests
- Magazine articles targeted at chefs
- Taste-tests for consumers at retail and at restaurants

The following comments highlight the perspective of wholesalers:

(Wholesaler, Pacific coast) The industry needs to take the initiative to promote it as a product that will be asked for by the restaurant. If wholesalers aren't carrying it, they will get it. Go to trade shows, go to wherever, on the street corners and give out samples of clams. Get them to ask for the product.

(Wholesaler, Pacific coast) Get the final end user, the consumer, to ask for it. It is great to work on us and the restaurants to promote it, but if the consumer asks for it, we will get it for them... If you put it on a table tent, and if the consumer is eating it, it gets people to think, 'These are the best Florida clams.' Then they go to the supermarket next week and say, 'Do you have some of those Florida clams that I had at the restaurant last week?'

(Wholesaler, Pacific coast) I've seen the state trying to market to the wholesale trade on 'Fresh from Florida' and they had a Key lime Tart. It was the Florida marketing machine, but when it comes to Florida clams, they are promoting a particular company rather than a generic clam. Whereas Alaska just does 'Alaskan salmon' not salmon from ABC seafood. Working closer with restaurants may be a way to do it. We spend a lot of time trying to get consumer awareness. I saw a new ad in the seafood business magazines promoting Florida clams as well as alligator, but do something in Nations Restaurant News or a culinary magazine that is targeted at the restaurant trade. The chefs will get magazines other than the ones I see.

(Wholesale, CA) I don't think I've ever seen anyone do a demonstration of clams.

Detailed Findings - Trade

(Wholesale, Pacific coast) Whole Foods does them occasionally, but you are right. There are not a whole lot of demos going on.

(Wholesale, Pacific coast) At restaurant shows, I go through a lot of places and they give you smoked salmon and they give you this and that, but clams in general are not promoted. Not the different dishes of clams and not Florida clams.

(Wholesaler, Pacific coast) People won't walk into a store and ask, 'Is that a Florida clam?' But if you get the restaurants to see that they have a product that works, at the restaurant trade shows (it could work).

(Wholesaler, AL) We have never had any customer say, 'Please send seven sacks of those Florida clams to Oklahoma City.' They don't care where they are from. They don't know the difference.

(Wholesaler, CA) What about what Red Lobster did in southern California. They started to give out samples of wines before you order. Maybe a hybrid idea of doing demonstrations...some sort of cooperative effort. If the product is supplied (by the producer) and demoed in the restaurant. They could say, 'Hi. Would you like to try one of our clams casino or clams oregano?' Instead of a table tent they are putting something in their mouth.

(Wholesaler, CA) That's a great idea. That is the type of thing we do in our upstairs restaurants where it is display cooking. We pass it out to the guests and that is the way you get people to taste it and they get hooked on it. You need to taste it and get your staff excited about the product and educate them.

In addition, wholesalers explained that producers should consider branding Florida farm-raised clams. They used examples from other industries, such as the Alaskan marketing campaigns.

(Wholesaler, Pacific coast) I think I'd get a hold of someone in Alaska. They have the best promotion on Copper River that I've ever seen. And there is nothing special about the fish at all. It is a gill netted caught pink or Chinook. But the marketing campaign they go through...Alaska received \$27 million from our federal government to promote Alaskan salmon. They have done a wonderful job.

(Wholesaler, Pacific coast) Sterling brand salmon is another example. They promoted at restaurant shows and pounded it into chef's heads and then (Chefs) began to ask for it. It is also in a fancy box. There is a large contingency of people who ask for Sterling salmon and there is really nothing special about them... They went out and said these are better, quality salmon and pretty soon chefs started asking for them.