LOUISIANA DEPARTMENT OF AGRICULTURE & FORESTRY
MIKE STRAIN DVM, COMMISSIONER

Louisiana Specialty Crop Program
Final Performance Report

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CONTACTS

Program Administration: Michelle Estay, Director Commodity Promotions & Research
Louisiana Department of Agriculture & Forestry
47076 N. Morrison Blvd.
Hammond, LA 70401-7308

Financial Officer: Craig Gannuch, Assistant Commissioner
Office of Management & Finance
Louisiana Department of Agriculture & Forestry
P.O. Box 3481
Baton Rouge, LA 70821-3481

CONTENTS

Program Overview …… 2
Market Research
(fruit, vegetable, sweet potato) (horticulture) (floral, nursery)..... 2
Trade Promotions..... 5
Point of Sale –Bin Signs and Shelf Talkers……. 10
Point of Sale – Product Demonstrations 14
Point of Sale – Collateral Materials 18
Advertising – Farmers' Market Support 23
Advertising – Specific Commodity Seasonal Support..... 25
Attachments…… email files

PROGRAM OVERVIEW

Specialty crops have formed an important role in Louisiana agriculture since the founding of the territory. Today specialty crop farmers in Louisiana produce a wide range of crops including nursery stock and foliage, Christmas trees, strawberries, cabbage and other winter vegetables, tomatoes, sweet and hot peppers, okra, southern peas, watermelons, pecans, citrus, sweet potatoes, mushrooms and wine.

These and other specialty crops have enabled the continuance, and even growth of the family farm. Many of whom have increased their production to a point where they are able to sell their products to local retailers and chain stores.

The Louisiana Specialty Crop Program projects focused on furthering that growth with support in generic programs that inform consumers of the availability of Louisiana specialty crops, expanding producer direct market opportunities and furnishing point of sale material, advertising, and buyer development resources to our specialty crop producers. Louisiana Department of Agriculture and Forestry (LDAF) projects were designed to improve the competitiveness of Louisiana's specialty crops and capitalize on the growing demand for local foods and freshness.

MARKET RESEARCH

FRUIT, VEGETABLE AND SWEET POTATO
FLORAL AND RETAIL NURSERY STOCK
HORTICULTURAL STOCK

Project Summary

Louisiana, like many other states, has seen an increased demand for buying local. However, most specialty crop farmers operate small farms and have limited ability in funding marketing efforts to promote their products and increase their competiveness in the domestic marketplace. In order to assist Louisiana specialty crop producers in capitalizing on this growing economic opportunity it was determined beneficial to conduct market research in three areas designed to ascertain the most efficient strategy to promote Louisiana fruits and vegetables including sweet potatoes, floral and retail nursery stock, and horticultural stock.

The project was intended to enhance competitiveness of Louisiana's specialty crops through identification of efficient strategies to promote Louisiana produced fruits, vegetables, sweet potatoes, floral and retail nursery stock, and horticultural stock. Many other states appeared to be following strategies that targeted particular kinds of markets and promotions that emphasized the quality and value of specialty crop products from those states. Efforts in Louisiana had been more diffused. This project was intended to provide direction to strategy and promotion efforts by firms and public entities.

Project Approach

LDAF and the Louisiana State University Ag Center (AgCenter) have worked together for many years to support and advance Louisiana agriculture. AgCenter professor Roger Hinson, PhD agreed to perform the study on behalf of the LDAF. The AgCenter developed a strategy to accomplish the research, identified and procured the resources necessary and began work in June 2008. The methodology used started with a literature review to form the basis for development of promotional strategies for each area. This was followed by a review of strategic ideas by a group of collaborators using the Delphi method and an interactive digital survey system. The respondents included industry participants and those with public sector involvement in the industries.

Work continued on the survey portion of this project in all three areas. Once a consensus was reached on the importance of these strategies and promotion approaches tabular analysis was used to identify the ideas with most potential. Then the researcher took the major ideas to stakeholder focus groups for comment and refinement. These focus groups were held and moderated by the AgCenter, attended by industry representatives. Most significant was the overall agreement across sectors that market studies were needed to identify major opportunities and niches and that a branding and public relations/advertising campaign designed to create equity, generate loyalty and establish long-lasting relationships was needed.

Two reports were prepared by the AgCenter at the end of the project designed to promote industry growth, titled “Vegetables, Sweet Potatoes, Nuts and Fruits” (Attachment A) and the second “Horticultural Stock Producers and Retailers of Nursery Stock” (Attachment B). The reports were made available to industry and producer stakeholders.

Goals and Outcomes Achieved

The goals of this project were to develop a strategy to conduct the research study, contact and receive input from consumers, producers, wholesalers and retailers, farmers’ market managers and academia, evaluate responses, and provide direction and support to producers and LDAF through the release of the strategies and promotional recommendations reports derived from analyzing research results.

Questionnaires were created to address opinions about usefulness of a variety of marketing, promotion and merchandising activities. Respondents rated the items in the questionnaire in terms of usefulness on a Likert scale of 1 (not useful at all) to 5(very useful). Space was also offered to provide comments. These activities were conducted at different venues such as extension events, AgCenter research stations, and at regularly scheduled commodity group board meetings.

The market research study was conducted and completed in all three areas. It was deemed beneficial to combine the information derived into two reports. Two reports

were prepared by the AgCenter at the end of the project designed to promote industry growth, titled "Vegetables, Sweet Potatoes, Nuts and Fruits" and the second "Horticultural Stock Producers and Retailers of Nursery Stock." The reports were made available to industry and producer stakeholders.

All project activities were conducted, analyzed and completed in a timely manner with some aspects of the research and survey portions delayed due to Hurricanes Gustav and Ike in 2008. A long term goal specific to this project is to use the research findings to shape future Louisiana specialty crop marketing efforts by development of a statewide branding and public relations/advertising campaign designed to create equity and generate customer loyalty.

Beneficiaries

All Louisiana specialty crop producers are beneficiaries of this project's research study findings. Results obtained from these three specific study efforts provide a framework to help increase consumer awareness and sales. Industry organizations such as the Louisiana Sweet Potato Commission, the Louisiana Strawberry Promotion Board, the Pecan Growers Association, farmers' markets and others, including growers, will benefit by better understanding the need to combine business strategy with promotion efforts to create efficiency and focus marketing efforts based on consumer preferences.

Other beneficiaries are the LDAF and AgCenter who will use the research results to shape their marketing efforts and develop support materials consistent with a central theme and branding. The Louisiana consumer of specialty crops is also a beneficiary. By using results derived from the research, the consumer will benefit from a more conscience marketing and messaging plan resulting in a better informed consumer.

Lessons Learned

There were several lessons learned during this project, and we have listed four lessons learned by project staff.

(1) The better strategies and promotions were quickly recognized by respondents in the Delphi.

(2) There was broad agreement across segments of the industries about problems and potential actions to solve those problems.

(3) A state-level branding program was strongly supported across the board.

(4) The internet survey did not spark as much debate as expected, but responses were prompt.

Additional Information

Attachment A - Vegetables, Sweet Potatoes, Nuts and Fruits
Strategies and Promotional Recommendations

Attachment B – Horticultural Stock Producers and Retailers of Nursery Stock
Strategies and Promotional Recommendations

TRADE PROMOTIONS

Project Summary

With the increased demand for fresh locally grown fruits and vegetables, as well as other specialty crops, Louisiana has seen an increase in farmers' markets and roadside stands. Even with the growth of farmers' markets the small producer has found it extremely difficult to grow their business and take advantage of direct market sales in the retail and restaurant industries. Due to the high cost of advertising and marketing efforts it is hard for new and small producers to enter or expand in the marketplace. This project assisted producers with direct marketing their products at industry trade shows. Visibility at the trade shows provided marketing opportunities to showcase producer products to gain market penetration and build long-lasting vendor relationships.

Project Approach

In order to assist Louisiana specialty crop producers expand their sales opportunities, LDAF conducted five trade promotion activities designed to assist producers with costs and staffing associated with participation at local, regional and national trade shows. This trade show project provided opportunities for companies to participate in a Louisiana Department of Agriculture and Forestry pavilion or multiple booth area to showcase their products and market to food and agricultural interests, i.e., retail, food service, distributors, brokers, and specialty markets for gifts and gourmet products.

Surveys were mailed to trade show participants and responses were recorded to assess business leads made and the increase in sales made as a result of participating in the trade show events.

1. The LDAF sponsored a generic double booth (10' X 20') at the 2008 Louisiana Restaurant Association (LRA) Expo in New Orleans, August 2-4, 2008. The LRA Expo is the largest food service focused trade show on the Gulf Coast. The 2008 version drew 13,000 visitors who shopped at 500 booths at the Morial Convention Center. For more information on this event, see http://www.lra.org/lra/expo/expo.asp.

LDAF recruited specialty crop producers to display their products in the space. Invitations were mailed to over 250 known specialty crop producers throughout Louisiana alerting them to the opportunity and soliciting their participation. This was followed by LDAF and LRA news releases and personal visits with farmers by LDAF staff at their roadside stands and farmers' markets.

More than 30 growers provided product for the display including pecans, chestnuts, several varieties of watermelons and peaches, fresh figs, onions, tomatoes, pears, red and green okra, cantaloupes, white and portabella mushrooms, giant green beans, several varieties of southern peas, sweet and white potatoes, mirlitons, miniature squash, bean sprouts, hot and sweet peppers, and mock strawberries.

2. In cooperation with the LRA, the LDAF sponsored a "Farm to Table" chef demonstration stage at the LRA Expo 2008. During the three days of the Expo, eight chefs from throughout Louisiana prepared dishes and provided seminars on using fresh Louisiana produced specialty crops. While at the Expo, the chefs visited the specialty crops generic booth to visit with buyers and discussed the advantages of buying local and drew many of the produce items they used during the cooking demonstration from the booth.

3. The LDAF participated with the Louisiana Sweet Potato Commission with a sweet potato booth at the Produce Marketing Association Fresh Summit held in Florida during October 24-27, 2008. This event drew an East Coast record number of produce sellers and buyers. 17,503 attendees from 61 countries attended the event with 3,842 identified buyers registering. Two LDAF staff members attended the PMA and provided attendees and buyers information on Louisiana specialty crops. Pamphlets and directories of Louisiana farmers and distributors were handed out. Food sampling and recipe cards were also provided. The Louisiana Sweet Potato Commission paid for booth related expenses and travel expenses. Food sampling costs were covered with specialty crop grant funds. Sweet potato pies were sampled as well as sweet potato chips.

4. The LDAF sponsored and participated in the 13th Annual Epcot International Food and Wine Festival (Festival) held in Orlando, Florida. The Festival took place September 26, to Sunday, November 9. Louisiana was invited to take part in the Festival as a featured state. *The Louisiana Experience-"My Louisiana"* featured food and beverage kiosk, cooking demonstrations, entertainment and artisan shops modeled after the French Market. The Louisiana Experience was custom-built by Walt Disney Imagineering to offer visitors a sense of Louisiana's unique culture, heritage and food. Louisiana specialty crops were utilized in recipes featured in cooking demonstrations; value-added specialty crop products were also featured and available at the kiosks and shops. The Festival provided an opportunity for Louisiana to showcase its unique culture and commodities to an international audience.

   Two LDAF staff members traveled to the Festival and manned the Louisiana specialty crop booth at a special featured event held on November 7, 2008. LDAF

contacted Louisiana specialty crop producers and specialty crop value added companies to encourage and recruit their participation in the Festival. Pecans, mayhaws, and sweet potatoes were represented by sampling at the specialty crop booth. Informational pamphlets and recipe cards were also available and distributed. Chefs at this event provided cooking demonstrations and discussed advantages of buying Louisiana produce and products and the special flavors they provide.

5. LDAF reserved space at the 2010 North Louisiana Agri-Business Council Annual Expo (Ag Expo). Invitations were mailed to over 280 growers and specialty crop value-added producers to participate and provide product. Ten producers responded and were represented at the trade show. Event attendees were provided food sampling and demonstrations of new recipes featuring strawberries, blueberries, pecans and sweet potatoes. Producer information and recipe cards were disseminated to the more that 11,000 attendees. The 2010 Ag Expo was held January 15-16 in West Monroe, Louisiana.

LDAF contracted with an advertising agency to develop, design and purchase a trade show retractable booth display to use at varying trade show events. The retractable booth display consisted of four 4'wide x 10'high panels; when combined it creates a display for a 20 foot booth. Panels separate and can be used individually when a smaller space is available.

Goals and Outcomes Achieved

The goal of this project was to supply the opportunity for 25 producers of specialty crops to participate in local, state, regional and national trade promotions exhibiting their products to over 7,000 restaurant operations and related businesses. Projected sales within one year of events are $50,000.

Goals were met and exceeded with more than 40 producers participating in the trade shows and with producers gaining exposure by more than 40,000 restaurant operations and related business attendees. LDAF will continue the program with additional funds from the following Specialty Crops Block Grant.

Post event mailed surveys were not returned. LDAF staff followed up with phone calls to seek verbal survey responses. Of those that were reached and chose to participate, the following sales related information was provided.

Fourteen producers provided survey data. Of the 14 that responded nine producers stated that due to the leads made at the above listed trade show events each saw an increase between $1,000 and $10,000 in sales. This was the sales range that was chosen by the nine producers. No producers chose the ranges of $10,000 - $20,000, $20,000 - $30,000, or above.

Producers were reluctant in providing more details of their sales brake downs other than by range. The cumulative results of those surveyed showed and increase of $9,000 to 90,000 in sales due to trade show participation. Due to the lack of specific

sales figures it is inconclusive if the exact goal of $50,000 in increased sales was met. However, when using the sales range scale it is probable that the goal was met and exceeded.

Beneficiaries

The project directly impacted more than 40 specialty crop producers whose products were showcased at local, regional and state trade shows. At least nine producers benefited with increased sales. More benefited financially, but with limited survey responses the exact figure could not be tabulated. Indirectly, all specialty crop producers benefited by the retail industry and consumers being better informed as to the availability of Louisiana specialty crops.

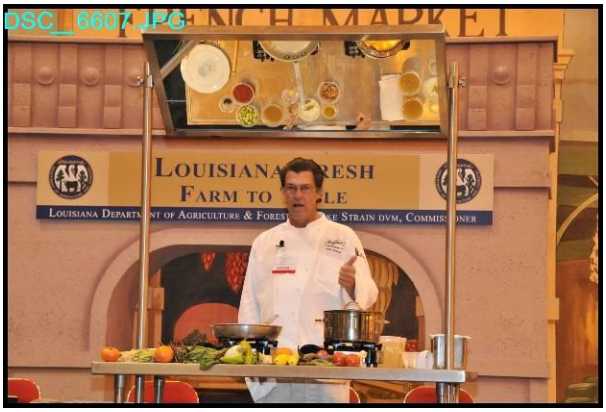
Lessons Learned

We learned that it is very difficult to achieve post event data collection on leads made and post event sales data due to the lack of responses by producers to follow up surveys. There was a zero response to post event mailed surveys. In an attempt to collect measurable post event sales data personal phone calls were made and as a result several responses were able to be recorded.

Due to the difficulty in acquiring follow up data, event day surveys were developed and used at the most recent trade show event. Participants were required to complete leads made surveys prior to leaving the event. In future projects we will utilize personal calling or producer visits, when possible, to increase post event sales data collection.

We also learned that the out-of-state event showcasing to the gourmet industry did not prove beneficial to our producers. One hundred percent of producers that provided product for showcasing at this event expressed that they received no interest or follow-up calls on their products. We have no plans to participate in this type of event in the future.

Additional Information



2008 Louisiana Restaurant Association Food Expo

2008 Produce Marketing Association

2010 North Louisiana Agri-Business Council Annual Expo

4 Panel Tradeshow Booth Rollup Display

POINT OF SALE PROMOTIONS

BIN SIGNS AND SHELF TALKERS

Project Summary

The increased demand for fresh locally grown fruit and vegetables has been responsible for the growth in local farmers' markets and roadside stands in Louisiana. From a base of eight community based farmers' markets in 2000, we have grown to more than twenty. This project's purpose is to identify locally produced specialty crops available at these markets as well as in retail stores to increase their visibility and value.

Project Approach

LDAF contracted with *GMc Advertising* to assist in working with retailers and producers to identify the types of point of sale material that would be most beneficial, design the materials, and purchase and distribute the pieces. The purpose of this project was to identify locally produced specialty crops available to the consumer. Meetings were held with retailers and input from specialty crop producers was received. Taking into account the messaging desired by the producers and the size and scale requirements desired by the retailer a bin sign was developed and two different shelf talkers were developed. Five thousand bin signs were produced, 25,000 shelf talkers version 1 were produced and 2,000 shelf talkers version 2 were produced. LDAF staff, GMc, Farmers' Market Managers and the Louisiana Retail Association worked together to supply the printed materials.

Goals and Outcomes Achieved

The goal of this project was to provide materials and supplies to growers, wholesalers, and retailers in order to encourage increased sales of specialty crops by creating consumer awareness of local products. The goal to develop and provide 5,000 bin signs to producers at 20 farmers markets/roadside stands was met. Bin signs were purchased and distributed to more than 26 farmers' markets/roadside stands. The goal to develop and provide 25,000 shelf talkers to producers, markets and retailers was met. 27,000 total shelf talkers were developed in two different styles and provided to producers to distribute to their merchants, farmers' markets and Louisiana retailers. LDAF and GMc staff distributed materials as well. Retailers and producers reported that the distributed materials were a valuable tool that created awareness of the local products available. Several retailers expressed their commitment to purchase more local produce due to requests from their customer base.

Beneficiaries

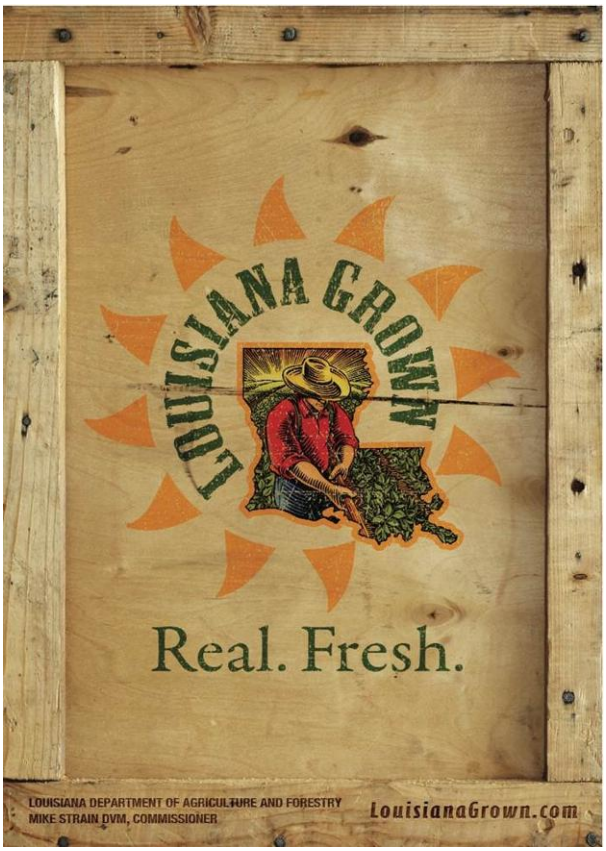
Direct beneficiaries of this project are the more than 26 farmers'markets/roadside stands who received the bin signs purchased by this grant funding and the vendors that sell at these markets. Retailers of Louisiana specialty crops, producers of specialty crops and consumers of specialty crops all benefited by the development and use of these materials with increased awareness of local produce available.

Lessons Learned

Several lessons were learned during this project. Louisiana faced delays and a major loss in specialty crop production due to the repercussions of Hurricanes Katrina, Gustav and Rita. Louisiana was also hit with severe droughts and flooding during the timeframe of this grant. We learned that we must be flexible when working with producers seeking their input. They are dealing with so many different impediments that scheduling around their growing seasons is a must to yield participation. We also learned that working with retail associations is a very valuable tool to expedite efforts. This collaboration helped when designing sizes and shapes acceptable to most stores. It is imperative to develop a product that the retailers will actually use and put in their stores. Dealing with individual retailers would be too inefficient when working on a large scale or state-wide.

Additional Information

Shelf-talker 1



Shelf-talker 2
Outside - Cover

Inside

Bin Sign

PRODUCT DEMONSTRATIONS

Project Summary

The purpose of this project was to develop and implement a product demonstration program featuring Louisiana produced specialty products. The product demonstrations featured new and reinforced current uses of specialty crops at the point of sale. Louisiana has more that 1,000 retailers that sell specialty crops and more than 20 farmers' markets where at least 75 in-store demonstrations could be conducted to raise consumer awareness of the uses of such products and increase sales.

Project Approach

In order to assist Louisiana specialty crop producers increase their sales opportunities and demonstrate to the consumer new and current uses of specialty crops and their availability, the project conducted phases of product demonstrations during this project's grant period.

1. LDAF staff worked with Whole Foods Market to host five product demonstrations in their stores in April 2008. These demonstrations were scheduled during strawberry season and proved to be a great opportunity for an in-season product demo. Product demonstrations were held April 18th, 19th, 24th, 25th, and 27th.

2. LDAF sponsored and participated in the 13th Annual Epcot International Food and Wine Festival held in Orlando, Florida as a trade show as detailed above. During this event LDAF staff manned the Louisiana specialty crop booth at a special featured event held on November 7, 2008. LDAF staff conducted product demonstration sampling of pecans, mayhaws, and sweet potatoes at the specialty crop booth.

3. LDAF contracted with GMc Advertising to assist in working with retailers to identify stores throughout Louisiana to host product demonstrations of Louisiana specialty crops. Collaboration with Louisiana Retailers Association was extremely helpful in coordinating this effort and streamlining efforts to find a host retailer. Meetings were held with several retailers and Rouses Supermarket was eager to host demos and offered 25 of their store locations throughout Louisiana. In addition to hosting demos, Rouses also provided additional advertising exposure by placing demo ads on their website and in store flyers at no cost to the project.

   The 25 store locations chose five specialty crops (i.e., sweet potato, squash, zucchini, eggplant and pecans) to conduct in-store product demonstrations. The demonstrations were held throughout the week of October 3-7, 2010.

Goals and Outcomes Achieved

The goal of this project was to conduct at least 75 product demonstrations at point of sale, farmers markets, or televised etc., showcasing new, or reinforcing current uses of specialty crops, thereby increasing sales of specialty crops by 50%.

This project met and surpassed the goal of conducting 75 product demonstrations. During this grant period we were able to conduct 133 specialty crop product demonstrations. Additionally, the goal was to also increase sales as a result of conducting the product demonstrations. As a whole this project met this goal. Individual location sales results varied from no increase to increases, but overall sales were increased as a direct result of the presence of product demonstrations held at the point-of- sale.

Whole Foods Demonstrations 2008

Date of Event	Starting Unit/Container Inventory	Sold	Increase in Sales
April 18	398	129	32 %
April 19	94	92	97%
April 24	194	136	70
April 25	254	196	77
April 27	327	259	79%

* The average of all Whole Foods product demo locations was 71% in sales. These demos proved to be very successful.

Epcot Food and Wine Event 2008

These product demonstrations were not at a selling event so sales monitoring was not conducted; however, follow-up with the producers was conducted to determine if sales matured due to the event. None of the participants reported any sales from this product demo event.

Rouses Supermarkets 2010

PRODUCT	**INCREASE SALES BY POUNDS**
Sweet Potato	164 pounds
Squash	0 increase
Zucchini	16 pounds
Eggplant	14 pounds
Pecans * Rouses reported that they could only pull sales from produce dept., Typically pecans sales would come from the grocery dept. There could have been an increase from purchases of bagged pecans, but without figures this was inconclusive.	0 increase
	194 pounds

Of the 25 locations that hosted product demonstrations 11 of the stores realized an increase in sales. Rouses was very pleased with the results and expressed the desire to work with LDAF or directly with their produce suppliers to conduct product demonstrations in the future. The reporting from the Rouses retailer was not based on actual sales of inventory but by comparing pounds of produce sold on the day of the demo to that of the day prior.

Beneficiaries

Direct beneficiaries of this project were the specialty crop producers that supplied the retailers where product demonstrations were conducted. The additional sales prompted the retailer to order additional inventory for their stores. Thirty retail locations also benefited from having the product demonstrations hosted at their locations. The retail locations benefited from the sales from the day as well as from the advertising opportunity and customer involvement in their store. The consumers and their families that patronized the product demonstration locations also benefited from product awareness and new preparation ideas for fresh specialty crops and their availability.

Lessons Learned

In conducting this project we learned several lessons. We learned that focusing on one specific commodity is much more successful than conducting several different crop demos on one day. It was also determined that product demonstrations at non-point-of-sale venues such as televised or like the one we conducted at the Food and Wine event did not prove beneficial and are not useful in measuring the impact on sales. We also learned from the Rouses' demonstrations and through post event meetings with host retailers that product demonstration in the produce department would be more beneficial if conducted on Saturday, Sunday and Mondays. Store records indicate that consumer tendency is to purchase fresh produce on the weekend instead of during the week. Focusing demonstrations of fresh produce during weekends when the consumer is more inclined to buy and has time to prepare fresh ingredients is the more ideal time to conduct future produce demonstrations.

Additional Information

In-store demos

COLLATERAL MATERIALS

Project Summary

This project's purpose was to develop, produce and distribute recipe cards, nutritional information, brochures and other collateral material promoting Louisiana produced specialty crops. This project was an advertising campaign to provide the producer and the consumer materials to educate the public on the availability and uses of specialty crops in an effort to increase sales.

Project Approach

LDAF in collaboration with Louisiana State University Ag Center (AgCenter) developed a Specialty Crop Agri-Tourism Brochure in March of 2009. 2,000 copies were printed and have been distributed by the LDAF and the AgCenter. The brochure can also be viewed online at:

http://www.lsuagcenter.com/NR/rdonlyres/CADC09FB-B22C-4F0C-90AC-16884C316544/55997/AgritourismBMPandPlanofOperationLOWRES.pdf

LDAF contracted with GMc advertising to assist in working with retailers and producers to identify the types of collateral materials that would be most beneficial, design the materials, and purchase and distribute the pieces. Meetings were held with retailers and input from specialty crop producers was received. It was determined that a recipe brochure featuring several fall crops would be desired by the consumer. With all the wonderful fall crops available some producers noted that when talking with customers they always seem to express that they don't really know what to cook or a good way to use the crop.

It was also determined that a harvest calendar brochure should be the second brochure piece. This piece was designed with hardy paper stock so the public could keep it as a reference as to what kind and when crops are in season. LDAF and GMc conducted many meetings and brainstorming sessions to determine the recipes, messaging and styling for the brochures. Twenty-five thousand recipe brochures and 25,000 harvest calendar brochures were purchased. LDAF staff worked to distribute the materials along with GMc staff working with the Louisiana Retail Association member. Farmers' markets and producers were also individually provided both brochures for distribution to their members and customers by LDAF staff.

Goals and Outcomes Achieved

The goal for this project was to develop and produce 50,000 recipe cards, nutritional information, brochures and other collateral materials promoting Louisiana specialty crops to potential specialty crop consumers in Louisiana, thereby increasing sales. This goal was met with 25,000 fall recipe brochures being developed and 25,000 harvest calendar brochures developed. Both brochures were distributed to industry stakeholders such as retailers, farmers' markets, roadside stands and individual producers.

Louisiana faced delays and a major loss in specialty crop production due to the repercussions of Hurricanes Katrina, Gustav and Rita. Louisiana was also hit with severe droughts and flooding during the timeframe of this grant. LDAF also experienced delays in completing the contract process to acquire the assistance of an advertising agency. The timeline for producing and distributing collateral materials was delayed and not enough time had passed before the grant end date to gauge the effects on sales.

Beneficiaries

The beneficiaries of this project are the more than 200,000 potential specialty crop consumers in Louisiana that gained access to the developed collateral materials. Through the recipes and harvest calendar, the information provided in the brochures provided consumers information on how to prepare crops and when they are in season. All specialty crop producers benefit from a more educated and informed consumer as to the health benefits and great taste of preparing fresh specialty crops. Demand for products relates to increased sales.

Lessons Learned

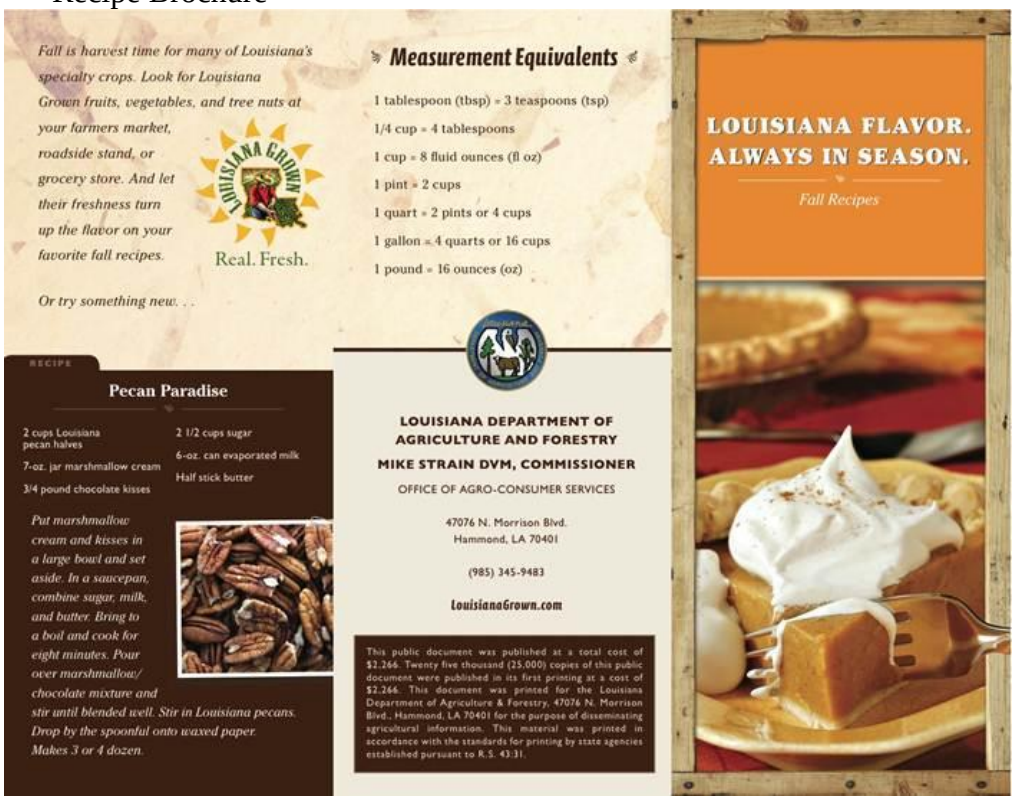
Lessons learned during this project were to work closely with producers and really discover what they desire in an informational piece. Most small producers direct sale to the public and have a good idea what the consumer is looking for. The producers were really excited to have a harvest calendar produced to distribute. Of the producers participating they all agreed this was the most valuable piece consumers would appreciate. Producers also stated that if a consumer doesn't know how to prepare a good tasting dish with the crop they are not going to by it. With our recipe brochure we developed recipes that we actually tried to insure they were easy to make and actually tasted good when prepared.

Louisiana faced delays and a major loss in specialty crop production due to the repercussions of Hurricanes Katrina, Gustav and Rita. Louisiana was also hit with severe droughts and flooding during the timeframe of this grant. The timeline for producing the collateral materials was delayed and we also experienced delays in completing the contract process to acquire the assistance of an advertising agency. From these delays we learned to issue one combined RFP for all specialty crop creative design work to be performed on behalf of the LDAF. This will streamline efforts.

Additional Information

Recipe and Harvest Calendar Brochure Images

Recipe Brochure



Fall is harvest time for many of Louisiana's specialty crops. Look for Louisiana Grown fruits, vegetables, and tree nuts at your farmers market, roadside stand, or grocery store. And let their freshness turn up the flavor on your favorite fall recipes.

Real. Fresh.

Or try something new. . .

RECIPE

Pecan Paradise

2 cups Louisiana pecan halves
7-oz. jar marshmallow cream
3/4 pound chocolate kisses
2 1/2 cups sugar
6-oz. can evaporated milk
Half stick butter

Put marshmallow cream and kisses in a large bowl and set aside. In a saucepan, combine sugar, milk, and butter. Bring to a boil and cook for eight minutes. Pour over marshmallow/chocolate mixture and stir until blended well. Stir in Louisiana pecans. Drop by the spoonful onto waxed paper. Makes 3 or 4 dozen.

Measurement Equivalents

1 tablespoon (tbsp) = 3 teaspoons (tsp)
1/4 cup = 4 tablespoons
1 cup = 8 fluid ounces (fl oz)
1 pint = 2 cups
1 quart = 2 pints or 4 cups
1 gallon = 4 quarts or 16 cups
1 pound = 16 ounces (oz)

LOUISIANA DEPARTMENT OF AGRICULTURE AND FORESTRY
MIKE STRAIN DVM, COMMISSIONER
OFFICE OF AGRO-CONSUMER SERVICES

47076 N. Morrison Blvd.
Hammond, LA 70401

(985) 345-9483

LouisianaGrown.com

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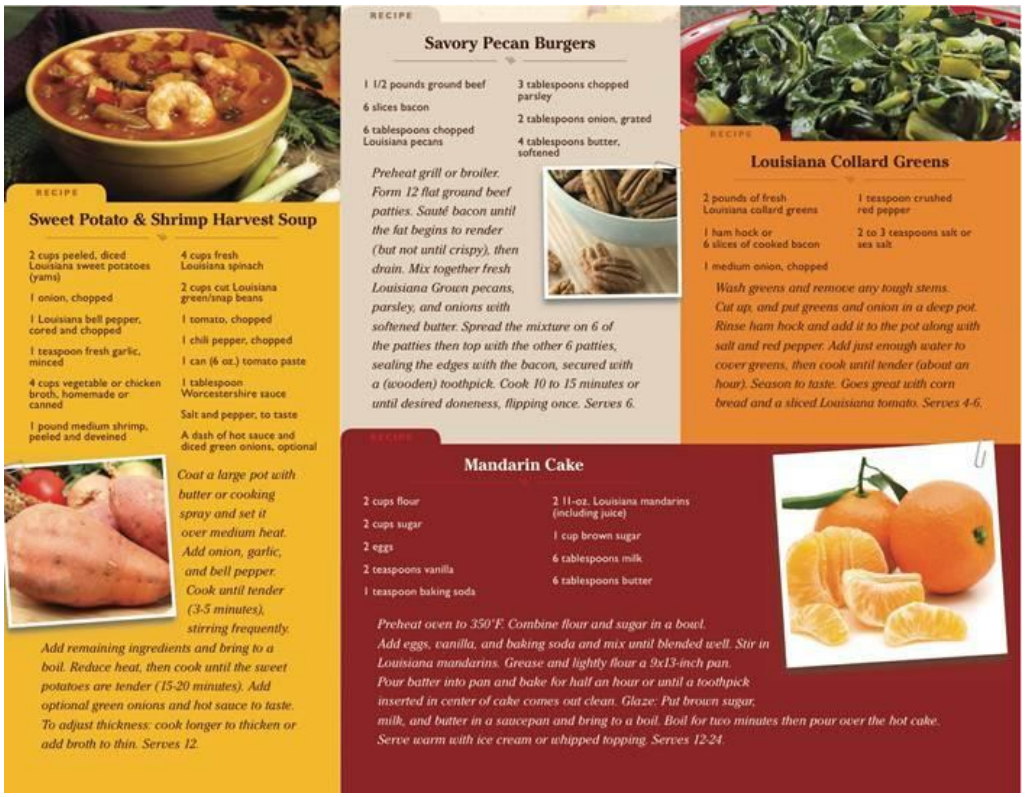
LOUISIANA FLAVOR. ALWAYS IN SEASON.

Fall Recipes



RECIPE

Sweet Potato & Shrimp Harvest Soup

2 cups peeled, diced Louisiana sweet potatoes (yams)
1 onion, chopped
1 Louisiana bell pepper, cored and chopped
1 teaspoon fresh garlic, minced
4 cups vegetable or chicken broth, homemade or canned
1 pound medium shrimp, peeled and deveined
4 cups fresh Louisiana spinach
2 cups cut Louisiana green/snap beans
1 tomato, chopped
1 chili pepper, chopped
1 can (6 oz.) tomato paste
1 tablespoon Worcestershire sauce
Salt and pepper, to taste
A dash of hot sauce and diced green onions, optional

Coat a large pot with butter or cooking spray and set it over medium heat. Add onion, garlic, and bell pepper. Cook until tender (3-5 minutes), stirring frequently. Add remaining ingredients and bring to a boil. Reduce heat, then cook until the sweet potatoes are tender (15-20 minutes). Add optional green onions and hot sauce to taste. To adjust thickness: cook longer to thicken or add broth to thin. Serves 12.

RECIPE

Savory Pecan Burgers

1 1/2 pounds ground beef
6 slices bacon
6 tablespoons chopped Louisiana pecans
3 tablespoons chopped parsley
2 tablespoons onion, grated
4 tablespoons butter, softened

Preheat grill or broiler. Form 12 flat ground beef patties. Sauté bacon until the fat begins to render (but not until crispy), then drain. Mix together fresh Louisiana Grown pecans, parsley, and onions with softened butter. Spread the mixture on 6 of the patties then top with the other 6 patties, sealing the edges with the bacon, secured with a (wooden) toothpick. Cook 10 to 15 minutes or until desired doneness, flipping once. Serves 6.

RECIPE

Louisiana Collard Greens

2 pounds of fresh Louisiana collard greens
1 ham hock or 6 slices of cooked bacon
1 medium onion, chopped
1 teaspoon crushed red pepper
2 to 3 teaspoons salt or sea salt

Wash greens and remove any tough stems. Cut up, and put greens and onion in a deep pot. Rinse ham hock and add it to the pot along with salt and red pepper. Add just enough water to cover greens, then cook until tender (about an hour). Season to taste. Goes great with corn bread and a sliced Louisiana tomato. Serves 4-6.

RECIPE

Mandarin Cake

2 cups flour
2 cups sugar
2 eggs
2 teaspoons vanilla
1 teaspoon baking soda
2 11-oz. Louisiana mandarins (including juice)
1 cup brown sugar
6 tablespoons milk
6 tablespoons butter

Preheat oven to 350°F. Combine flour and sugar in a bowl. Add eggs, vanilla, and baking soda and mix until blended well. Stir in Louisiana mandarins. Grease and lightly flour a 9x13-inch pan. Pour batter into pan and bake for half an hour or until a toothpick inserted in center of cake comes out clean. Glaze: Put brown sugar, milk, and butter in a saucepan and bring to a boil. Boil for two minutes then pour over the hot cake. Serve warm with ice cream or whipped topping. Serves 12-24.

Harvest Calendar

Food Less Traveled

Louisiana Grown fruits and vegetables may come from places with exotic names like Ponchatoula, Dubach, and Keatchie. But they get to market fresh in a matter of hours, not days. No trip through customs. No layover in Atlanta. Just a breezy ride in the back of your farmer's truck.

Helpful Tips

- Always use a stainless steel knife when cutting a sweet potato. Using a carbon blade will cause the yam to darken.
- Pecans stored below freezing can keep for two years. Be sure kernels are dried properly before freezing. Kernels should be crisp and break in half easily if dried properly.
- Prior to zesting a citrus fruit, scrub the fruit with soap and water and pat it dry with a paper towel. Only remove the outermost layer of the peel and not the bitter white part.

LOUISIANA DEPARTMENT OF AGRICULTURE AND FORESTRY

MIKE STRAIN DVM, COMMISSIONER

OFFICE OF AGRO-CONSUMER SERVICES

47076 N. Morrison Blvd.
Hammond, LA 70401

(985) 345-9483

LouisianaGrown.com

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YOUR PRODUCE SHOULDN'T HAVE MORE FREQUENT FLYER MILES THAN YOU DO.

Harvest Calendar

Love Thy Farmer

Meet the folks behind your fruit. Greet the guy who grew your greens. Buying Louisiana Grown helps close the circle and strengthen our state's economy. And it builds community through a vibrant network of farmers markets, roadside stands, and more.

Food, Food Everywhere

Louisiana Grown fruits and vegetables are all around us. They're easy to find at farmers markets or direct from the farm, but they're available at most grocery stores as well. Just look for the Louisiana Grown symbol or ask your grocer.

Real. Fresh.

What's In Season, Louisiana?

When you shop, cook, and eat in season, you know that you always have the freshest food direct from harvest. Here are the best times to buy Louisiana Grown crops at farmers markets, roadside stands, and grocery stores.

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEPT	OCT	NOV	DEC
APPLES						•	•	•	•			
ARTICHOKES		•	•	•	•	•						
ASPARAGUS		•	•	•	•	•						
BELL PEPPERS					•	•	•			•	•	
BLACKBERRIES					•	•						
BLUEBERRIES					•	•						
BROCCOLI	•	•	•	•	•					•	•	•
BUTTER BEANS						•	•	•	•	•		
BUTTERNUT SQUASH						•	•	•	•	•		
CABBAGE	•	•	•	•	•					•	•	•
CANTALOUPES						•	•	•	•	•	•	
CAULIFLOWER	•	•	•	•	•					•	•	•
COLLARDS	•	•	•	•	•	•			•	•	•	•
CUCUMBERS					•	•	•	•	•	•	•	
EGGPLANT					•	•	•	•	•	•		
FIGS						•	•	•	•	•		
GARLIC			•	•	•	•	•					
GRAPEFRUIT	•	•	•									•
GRAPES (BUNCH)						•	•					
HOT PEPPERS					•	•	•	•	•	•	•	
KALE	•	•	•	•	•						•	•
LEMONS	•	•										•
LETTUCE	•	•	•	•	•					•	•	•
MANDARINS	•	•									•	•
MELONS						•	•	•	•	•	•	
MUSTARD GREENS	•	•	•	•	•	•			•	•	•	•
NECTARINES					•	•						
OKRA						•	•	•	•	•	•	
ONIONS			•	•	•	•	•					
ORANGES	•	•										•
PEACHES					•	•	•	•				
PEARS							•	•	•			
PLUMS						•	•	•				
POMEGRANATES										•		
PUMPKINS							•	•	•	•	•	
RADISHES	•	•	•	•	•					•	•	
SATSUMAS	•	•							•	•	•	•
SNAP BEANS					•	•	•			•	•	
SOUTHERN PEAS						•	•	•	•	•		
SPINACH	•	•	•	•	•					•	•	•
STRAWBERRIES		•	•	•	•							
SWEET CORN					•	•	•					
SWEET POTATOES	•	•	•	•	•	•		•	•	•	•	•
TANGERINES	•	•									•	•
TOMATOES					•	•	•	•	•	•	•	
YELLOW SQUASH					•	•	•	•	•	•	•	
ZUCCHINI SQUASH					•	•	•	•	•	•	•	
WATERMELONS						•	•	•	•	•	•	

Harvest seasons may vary based on weather and location. For a complete harvest calendar, visit LouisianaGrown.com.

Advertising

FARMERS' MARKET SUPPORT

Project Summary

This project was to develop and purchase advertisements for Louisiana's farmers' markets to inform the consuming public as to locations and hours of operations of the markets in Louisiana.

Project Approach

LDAF under this project developed and purchased radio advertisements for Louisiana farmers' markets to inform the public as to their locations and hours of operations. Radio allows for quick response, low cost production, and heightened frequency at peak times. The ads also pointed the listener to LDAF's new internet page that lists all of Louisiana farmers markets and roadside stands (http://www.lafarmers.net/). This provided the listener one location to look up the markets closest to them and their hours of operation.

Louisiana Radio Network (LaNetwork) was contracted as the media outlet to air the radio spots. LaNetwork is a statewide sole source news network that provides news, weather (including 24/7 Hurricane coverage), sports, feature programming and agri-news to 64 radio stations throughout Louisiana.

There were two different airing phases of commercials. The first airing was conducted during the fall/winter and the second airing was conducted during summer harvesting season. The fall/winter advertisements aired during December 2007 and the summer advertisements aired during June 2010. A total of 1,600 advertisements aired to a household exposure of over one million. Of the commercials purchased, 576 aired during fall/winter 2007 and 1,024 aired summer 2010.

Due to the damages producers faced during Hurricanes Gustav and Ike in 2008, it was determined beneficial to wait until the 2010 growing season to air the second phase of commercials. Input from producers that had suffered loss of crops and financial hardships in replanting recommended that the 2010 season would be a more productive season, and they would have more crops for the public to purchase. The timing of the airing of commercials was delayed to give specialty crop producers time to replant and rebuild their production.

Once the advertisements began airing LDAF received numerous phone calls and emails expressing gratitude from producers for the purchasing of the commercials under this specialty crop project. One farmers' market reported to our office they had

record number attendance and sales at their market the weekend after the commercials began airing.

A sampling survey was conducted to determine the effectiveness of the commercials upon attendance/sales.

Goals and Outcomes Achieved

The goal of this project was to purchase 40 advertisements for Louisiana's farmers' markets and inform the public as to the location and hours of operation resulting in an increased attendance at the markets by 20%.

We surpassed the goal by utilizing LaNetwork's statewide news network of 64 stations. Twenty-five spots were purchased and the 30 second ads aired on 64 stations throughout Louisiana for a total of 1,600 advertisements.

In order to assess the second goal of this project to increase attendance at the markets therefore increasing sales, LDAF conducted a sampling survey of 20% of Louisiana's farmers' markets. Of those markets surveyed, we asked if the markets had heard the commercials and if their customers had expressed they had heard the commercials. Of the markets, 100% reported that they had heard the commercials at least once. Secondly, we asked if the market had seen an increase in attendance/sales during the actual airing times of the two commercial phases. Of the markets, 100% reported that they did see an increase in attendance/sales during these times. When asked for actual statistics on attendance/sales the markets reported varying results that ranged from a 5% increase to a 25% increase. By taking the reported increases and averaging the results reported it was concluded that attendance/sales increased an average of 20%.

Beneficiaries

Direct beneficiaries of this project were Louisiana's 30 farmers' markets and the producers selling at those markets. As the commercials aired the consumer was informed as to the specialty crops that were in season and directed to the website to find their local farmers' market location and hours of operations. The producers benefited from the increase in traffic/sales and consumers benefited by being better informed of the availability of fresh local products and where to find them. The website also listed more than 90 roadside stand locations so those producers also benefited by the exposure resulting from traffic to the site.

Lessons Learned

The lesson learned was to really work with the producers and listen to their needs. We learned to be flexible in our work plan. It wouldn't have proved beneficial to strictly stick to an advertising schedule to promote crops that were not readily available due to unavoidable growing conditions. We also learned that we could penetrate the market better and have a better presence within the consuming public by utilizing a sole source radio network with statewide presence. This provided us the opportunity

to use the limited project funding and stretch it further than would have been possible by purchasing directly through individual radio stations.

SPECIFIC COMMODITY SEASONAL SUPPORT

Project Summary

This project provided specific commodity advertising during its growing season. The commodity chosen was strawberries. This project promotes support of the local economy by developing a focused campaign to increase strawberry sales by informing the consumer of strawberry season and where to locate fresh strawberries.

Project Approach

The LDAF in partnership with the Louisiana Strawberry Promotion Board (Board) provided funding to assist in the purchasing of generic advertisements for specific commodity seasonal support for Louisiana strawberry growers, before and during their spring 2009 season. LDAF consulted with strawberry farmers, strawberry industry stakeholders and Board members to determine the industry need and the message to be developed. The Board contracted with *The Gagliano Group* advertising agency after a public presentation before the Board. The purchased television advertisements ran during the months of February and March.

LDAF evaluated the effectiveness of the Specific Commodity Seasonal Support project by surveying strawberry farmers, industry stakeholders, farmers' market managers and Board members. LDAF developed and distributed evaluations to strawberry industry producers after their 2009 season ended.

Goals and Outcomes Achieved

The goal of the specific commodity seasonal support project was to purchase generic advertisements for a specific commodity to alert and educate a potential of 750,000 consumers as to the availability of specialty crops. Strawberry was the commodity promoted in this project and the goal was surpassed. 2,778,294 households were exposed to this projects advertising message. The following is an outline of the advertising campaign placed for strawberries in the Monroe, Shreveport, Lafayette, Baton Rouge, New Orleans and Tangipahoa Parish markets:

Station	Spot	Time Frame	Household Exposure
WWL TV	30 sec.	two weeks	1,047,016
KLFY 10 TV	30 sec.	three weeks	560,000
WVLA TV	30 sec.	four weeks	100,000
WAFB TV	30 sec.	one week	317,550
Charter Television Media	30 sec.	four weeks	172, 000
KSLA TV	30 sec.	four weeks	494,828
Marketron TvSCAN	30 sec.	four weeks	86,900
Total			2,778,294

LDAF developed and distributed evaluations to strawberry industry producers after their 2009 season ended. The consensus of those who responded was positive. Market managers expressed seeing an increase in shoppers at the market requesting strawberries. Roadside stand farmers expressed a higher sales year than in the past and vocalized that many customers stated they saw the television commercials. Most producers saw an increase in sales during the height of the season when the cost per pint or per flat is at its highest. This related to higher sales. Louisiana currently has 89 strawberry producers. In the survey we sampled 10% of the producers. Of those producers that participated, 55% reported an increase in sales during and/or after the commercials aired. The average increase in sales for those reporting an increase was 20%. As a result of the positive interview responses, it was determined that this project was a success and that the goal of increased sales as a result of this project was met. LDAF will continue Seasonal Support for other specialty crop industries in the future.

Beneficiaries

Eighty-nine strawberry producers directly benefited from the seasonal advertising campaign. This project was able to reach a larger audience with advertising than a single farmer would be able to do. Louisiana consumers benefited by being informed of strawberry season and by being referred to the website to find strawberry sales locations most convenient to their location.

Lessons Learned

It was initially thought that the project may be able to support more than one commodity ad campaign. However do to the costs associated with airing of advertisement spots and the budget available, it was determined that it was most beneficial to focus on a single seasonal commodity and not dilute market penetration. Future projects will showcase different commodities.

Increasing Specialty Crop Competitiveness in Louisiana

Vegetables, Sweet Potatoes and Fruits

Strategies and Promotional Recommendations

January 2009

Louisiana State University Agricultural Center
William B. Richardson, Chancellor
Louisiana Agricultural Experiment Station
David Boethel, Vice-Chancellor and Director
Department of Agricultural Economics and Agribusiness
Gail Cramer, Professor and Head

Roger A. Hinson, Professor, Department of Agricultural Economics and Agribusiness
Joann H. White, CFP®

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Jessica Hill, Graduate Assistant
Department of Agricultural Economics and Agribusiness

The Louisiana Agricultural Experiment Station follows a non-discriminatory policy in programs and employment

Executive Summary - *Promotion Strategy Recommendations for Vegetables, Fruits and Sweet Potatoes*

Past promotion efforts to support specialty crops producers and groups have had some positive impacts on direct sales and to, a smaller extent, sales through traditional grocery stores. However, the efforts have been conducted by several independent groups with budgets that limit the professional support they can acquire. Other states have 'brands' that provide support and visibility, allowing farmers and farmer groups to operate under an umbrella of common theme, brand and support. As examples, Mississippi has its *Make Mine Mississippi* program. South Carolina created a marketing and branding program for retail and wholesale promotions to allow stakeholder groups to take advantage of branding and promotion by using a professionally developed program to brand, identify and promote South Carolina grown products.

Louisiana's specialty crop industries can tie into strong consumer trends with the support of a branding and promotion program. In addition, the breadth of goals of Louisiana's Specialty Crops Block Grant requires a consumer-oriented, brand-based approach. We envision a coordinated program that begins with market research to provide information about consumer preferences in Louisiana on a regional basis. That research drives components that include positioning Louisiana specialty crop products consistent with preferences and attributes of Louisiana products, branding, and promotion.

This Specialty Crops program focuses on in-state markets, and complements efforts to sell out-of-state. The outline is:

1. A state-wide *market study* to determine preferences of regional and niche markets and corresponding behaviors, attitudes and demographics, based on consumers as frequent, occasional or non-purchasers.
2. The research study is the basis for *branding*, which is the sum of consumers' feelings. It provides the foundation for an advertising campaign, and creates equity, generates loyalty and establishes long-lasting relationships.
3. A *public relations campaign*, including advertising, will deliver the overview message about product and economic benefits of Louisiana specialty crop products. This supports all direct markets and traditional retail grocer selling channels.
4. The identification of many promotion ideas that were rated in terms of usefulness by a panel of experts. Many of these also provide overall support across channels, such as 'Buy Fresh/Buy Local'.
5. Supporting new (particularly electronic) options for customers to *search for sources*. Examples would be consumers, or foodservice business (restaurant) searches for local products. Specific products to do this include MarketMaker and FoodGalaxy. Louisiana growers who have not developed this access and expertise will experience increasingly limited opportunities.

These actions will provide a framework that can increase consumer awareness and sales, and under which specific organizations such as the Louisiana. Sweet Potato Commission, Louisiana Strawberry Promotion Board, farmers' markets, and others, can get access to professionally developed materials with consistent theme (logo and branding program) for use in their promotion efforts.

Contents

A. Introduction 4
B. Background 4
B.1. Economic Trends – short term 4
B.2. Consumer Trends 5
B.3. Business Trends 6
B.4. Environmental considerations 6
B.5. Trends in production 6
B.6. The demand for fruits and vegetables 7
C. Methodology 8
D. Vegetables and Fruits - Results and Discussion 10
D.1.Discussion of ratings from the Delphi questionnaire 10
D.2. Vegetables and fruits focus group results 13
D.3. Conclusions for vegetables and fruits 18
E. Sweet Potatoes – Results and Discussion 18
E.1. Discussion of ratings from the Delphi questionnaire 18
E.2. Sweet potato focus group results 23
E.3. Conclusions for Sweet Potatoes 28
F. Recommendations for strategy, positioning and tactics: vegetables and fruits, and sweet potatoes 28
F.1. Market Research. 29
F.1.1. Branding. 32
F.1.2. Public Relations. 33
F.1.3. Promotional tactics. 34
F.2. Sweet potato 39

Louisiana Specialty Crop Competitiveness Program

Report for Vegetables and Fruits

Report for Sweet Potatoes

'Vegetables and Fruits' and 'Sweet Potatoes' are grouped into this report because they have many similar characteristics, including labor intensive production and kinds of benefits to consumers. In addition, production trends have shown similarities. Whereas Louisiana once was an important source area for regional markets (and remains so for sweet potato), she declined dramatically in importance for vegetables and fruits as highway transportation and mobile refrigeration technology enabled the advantages of California and other distant production areas to be exploited. But more recently, products from both groups have received much positive publicity for their actual and potential contribution to improved nutrition in the nation and for benefits in terms of chronic disease, and have been criticized for levels of pesticide use and residues in products. While they differ in terms of storability, much of discussion of strategy and promotion applies to both, and their consideration together provides for a more efficient and brief presentation of procedures, results and recommendations.

A. Introduction

The Louisiana Department of Agriculture and Forestry (LDAF) funded this research based on the importance of specialty crops to the state's agriculture. A statement from the grant proposal indicates some of the values of these crops.

> *Specialty crops have formed an important role in Louisiana agriculture since the founding of the territory. .... Today specialty crop farmers in Louisiana produce a wide range of crops including nursery stock and foliage, Christmas trees, strawberries, cabbage and other winter vegetables, tomatoes, sweet and hot peppers, okra, southern peas, watermelons, pecans, citrus, sweet potatoes, mushrooms and wine. In 2006, Louisiana's 2,484 vegetable farmers produced more than 30 different vegetable crops on 10,281 acres, worth $49 million at the farm gate. In addition to the vegetable crop, the 106 Sweet Potato farmers in Louisiana produced $59 million in farm value, on 17,285 acres.*
>
> *These and other specialty crops have enabled the continuance, and even growth of the family farm. The success of the USDA Farmers' Market Nutrition Program has added to the growth of farmers' markets in Louisiana and given those family farms a market for their fresh and fresh processed products. Many of them have increased their production to a point where they are able to sell their products to local retailers and chain stores.*

Clearly, there have been successes in production and sales of specialty crops. Implementing strategy and promotion principles at the industry level can support efforts of individual and groups of farmers. In conjunction with changes in consumer preferences, expansion of production and sales can be achieved.

Objectives

The stated goal of LDAF's state plan is to increase the competitiveness of Louisiana's specialty crops, and to provide benefits to Louisiana's specialty crop producers from proposed marketing programs through increased consumer and buyer awareness of locally grown products, increased sales for producers and higher market value for Louisiana specialty crops. The stated goal of this grant was to support industry growth through both industry and farmer level generic and promotion strategies in the four specialty crop areas specified.

B. Background

B.1. Economic Trends – short term

The effectiveness of marketing and promotional activities, and the effectiveness of specific actions, are at least partly dependent on overall economic activity and outlook. Important

short-term economic impacts beginning in 2007, and continuing through 2008 and beyond, are mostly the result of credit issues and include:

- major economic weakness at the consumer level has reduced discretionary spending, particularly for nonessentials
- loss of value as prices decline in the residential housing sector
- dramatic decline in home sales and construction
- reduced funding for commercial sector construction
- government deficit affects public sector construction projects
- government spending to stimulate the economy
- increase in unemployment

Also related to the economic downturn in the US and abroad are oil and other energy sources. Fuel costs have moderated, but the dynamic that created the spike in 2008 – economic growth in densely populated developing countries – will drive energy prices again following economic recovery.

There are regional differences in the US short term economic situation. The Louisiana economy to date has seemed relatively insulated, but typically the state's economy lags national economic activity. There was little 'bubble' in residential housing values, and the state has appeared to be stronger in that measure than much of the nation. However, an increasingly volatile national economy coupled with a global downturn differs from normal. And, a national economy built on consumer spending suggests that tightening family budgets may accelerate an economic slowdown. Louisiana has not yet seen the unemployment rate surge that fuels worries about a deeper and prolonged recession. The price of oil will continue to be an important driver of the state's income and thus drive state spending or budget cuts. Recently, budget projections have led to reduced spending for 2008 and 2009. With longer-term, economic recovery, it is to be expected that trends in place before the recession would reassert. In the meantime, businesses should expect consumers to become more conservative financially, significantly reducing nonessential expenditures.

B.2. Consumer Trends

Futurists provide a perspective about consumer behavior and business opportunities by discerning causes of behaviors and translating them into statements of major trends. A few that seem particularly relevant for purchase decisions regarding specialty crop products follow:

- environmental awareness and action
- desire for higher quality of life; indulgence
- convenience - the demand for easier, faster – answering the question 'what's for dinner?', grocers suggest solutions and bring the items together
- income complexity - parallel movements towards everyday luxury and anti-luxury, where consumers curb spending in one area to splurge in others
- homing - consumers are more rooted in home and family life; downshifting, cocooning; comfort foods; safety

- sensory, actively seeking out more intense experiences
- health - physical and mental well-being

B.3. Business Trends

In the same way, there are trends based on various incentives and development of opportunities that drive business decisions. A few are noted here:

- there are fewer but large retailers in most sectors; they are powerful market forces
- business success increasingly is more dependent on cooperation within a supply chain, and less on competition between firms in a chain
- generally, population demographics are changing; baby boomers still are a major consumer segment, but others such as Generation Xer's and Millennials receive much attention from marketing
- long term government and commercial spending priorities
- increasing applications of computer technology
- a strong foodservice industry, where consumers spend about half of all food dollars
- growing counter-trends, such as concerns about sustainability in many forms and efforts to have foods produced close to home

B.4. Environmental considerations

In most states, environmental issues are an important consumer concern and play a very influential role in legislation and regulation. Sustainability – producing food products at the farm level, in processing, in distribution and through sale to the customer in ways that protect the environment and enable firms to survive – is a concept important to many. Organic production of food may be the image held by most consumers, where producers on small farms produce the healthiest and freshest food and coexist with and have little impact on nature. Most organic product available at grocers is from very large farms using the same business model as conventional growers. But this concept has been embraced by businesses such as food retailers. WalMart, for example, recycles cardboard boxes and has in place programs that seek to reduce energy consumption by 40%. Other businesses have similar initiatives, based on cost reductions to be more competitive and on responding to consumer concerns.

B.5. Trends in production

Vegetables and Fruits. Production volumes and values are available in Fruit and Vegetable Outlook and Annual Reports publications from the US Department of Agriculture, for major production areas and for imports. Generally, per capita and total volume of consumption have increased steadily over the past three decades. The increase has been higher for fresh product than for processed, and higher for frozen product than for canned. Value of production has increased faster than volume as consumer demand increased and as the result of general price increases. Consumer demand for year-round availability has led to a

rising share of the total from imports, principally Mexico and Central and South America. Imported off-season product is important to the 'self-distributed' and the 'wholesale-distributed' retail grocers.

Sweet Potatoes. Over the period 1977 to 2007, farm value of production in the US increased by about 55% while total value of production increased by about 200%. This relationship resulted from increased consumer demand from a larger population, higher fresh market prices, and increased sales of processed products. Canning, flaking, chipping, frying, freezing, and baby food comprised the set of processed products. Some specific applications in the foodservice industry include sweet potato fries as an alternative to white potato fries, mashed sweet potatoes as a side dish, and sweet potato as a ravioli component in a center plate dish.

Louisiana's industry has not fully participated in this growth, as farm value of production increased about 20% over the period, and the state's ranking in terms of acreage slipped to 4th, passed by Mississippi and California. States with large growth over the period were North Carolina and Mississippi.

B.6. The demand for fruits and vegetables

Consumers are interested in fruits and vegetables because:

- they are nutritious, containing important vitamins and minerals needed for health
- they are aids to health and wellness
- there is evidence that they help prevent chronic disease, including some cancers

There are issues and concerns associated with consumption

- episodic outbreaks of illness and deaths from viral and bacterial contamination. These events have occurred with some regularity over the years. Causes are pursued and identified when possible by FDA. Initial reports of causes often are not accurate. Events are well underway when identified. Concentration of sources for large retailers leads to large impacts when events occur. Publicity is fed by media. Consumption declines until source of outbreak is identified.
- some crop protection products have been labeled as carcinogens. Consumers balance benefits of consumption against increased risk. USDA and FDA regularly test for residues. Tolerances based on extensive testing have been established, and about 98% are within tolerances.

According to Extension Specialist James Boudreaux, most Louisiana-produced vegetables and fruits move to consumers via *direct channels* – private vending stands, roadside vendors, public farmers' markets, pick-your-own, restaurants, and other similar outlets. This also might include product sold directly to individual grocery stores.

A smaller portion of this product is sold to regional and national wholesale markets to be retailed by grocers of varying sizes. These include purchases by local grocery chains through businesses organized as cooperatives - such as Associated Grocers - that serve small chain and individual stores. By selling at wholesale, farmers allow the wholesaler and

grocer to distribute, market and sell, while they concentrate on production. Upscale stores such as Whole Foods also represent opportunities for specialty produce, including organic, sustainable and/or local. This is significant to the position of a store in a given market.

Most consumers use the grocery store as source of their at-home food. That outlet is important to growth. Grocers provide marketing and advertising support, and many respond positively to the 'local product' opportunity. Some individual stores belonging to large grocery chains purchase some product locally, but their volume and other requirements encourage them to use sourcing relationships with very large producers and organizations.

The at-home portion of food purchases is moving away from the traditional large regional or national grocery chains, to the mass merchandiser with grocery section such as Wal-Mart. For these stores, regular visits for food items attract customers and drive purchases in other sections of the store. Another segment of food retail that is holding its market share is the local independent individual store or small chains. Local product fits well with the business models used by local stores.

C. Methodology

We analyze promotion strategies and actions based on

- growth potential in alternative market channels, particularly direct local marketing and wholesaler/distributor supplied grocers, and
- strategies based on characteristics of industries. These are based on competitive forces that affect opportunities. Louisiana farmers are small, and cannot attain economies of scale and scope. They can move to differentiate themselves, or to focus on particular segments of markets. These efforts usually involve
    1. a differentiation strategy, where the product is and/or is perceived to be different from competing products in characteristics preferred by consumers. This strategy is available and is the direction farmers often take, or
    2. a focus strategy, in which a specific segment of the market is targeted because the firm has some competitive advantage in the segment. Direct marketing is an example of focus.

These are incorporated into analysis and discussion presented below.

The research included three steps, described below:

Step 1. A literature review provided the initial basis for development of promotional strategies and implementation actions generating a set of factors that drive product choice, and/or suggest strategy and promotional alternatives.

Step 2. People who have expertise, skill sets and experience in produce marketing, were identified. They included research and extension personnel in the AgCenter, in other segments of the public sector, and in the private sector. These individuals were

collaborators at different points in working toward the objectives of this project. Information from the literature and from the collaborators was used to develop a draft of strategy ideas.

To build on information in the literature and various other relevant sources, the Delphi method was chosen to help develop discussion on usefulness of the strategy and promotion actions and ideas that were suggested. Delphi works as follows. A moderator assembles issues and distributes them to the expert panel, then the individuals respond. The moderator assembles the responses into areas of agreement and disagreement, and a subsequent round is conducted in which information about results from the first round are disseminated. After consideration of these opinions, the group again responds and there is evaluation of whether the group has reached agreement. These refinements in sequential rounds are the essence of the method (REFERENCE). We used a shortened and electronic version to gather perceptions of the usefulness of the strategy and implementation actions from the group of experts.

A questionnaire was created to address opinions about usefulness of a variety of marketing, promotion and merchandising activities that have been common in promotion and selling of vegetables and fruits. In addition, marketing strategies and promotions are conducted at several levels. The questionnaire included items relevant to the industry level, organization level and individual farm approaches. Full instructions provided to respondents and the complete text of the questions are in Appendix Table 8. An abbreviated version of each question, used to facilitate efficient discussion, and the overall averages of ratings, are in Appendix Table 3. The respondents had varying backgrounds, which are specified under the 'section' column of Appendix Table 3. To have a more efficient process for collecting responses into a database, an online survey service was used. The study's objectives and procedures were discussed with all respondents prior to distribution of the questionnaire, and all agreed to participate. A few respondents did not have computers or preferred regular mail, so the Postal Service was used in those cases.

Respondents rated the items in the questionnaire in terms of usefulness on a Likert scale of 1 (not useful at all) to 5 (very useful). They also were offered a space to provide comments. We provide some statements based on those comments, which are included in Table 2. Then, we emailed each respondent a spreadsheet containing the original question, the number of responses for each unit on the Likert scale, the respondent's rating of the question, and all comments. Respondents were asked if, based on information about how others had responded, they wished to change their rating and a space to do that. Results from the database were generated by straightforward sorting and averaging of the ratings. The qualitative comments were categorized and summarized.

Step 3. Results from the collaborators' efforts and the Delphi effort were the basis for further refinement at stakeholder focus groups. These activities were conducted at different venues – as independent events at Extension offices and LSU AgCenter research stations, and at regularly scheduled commodity group board meetings These qualitative results were presented to the groups as a series of questions. Outcomes from the groups were presented as responses to questions. They were reported under headings that

included respondents' recognition of consumer concerns, our opinions of strengths and weaknesses represented by the comments, and our suggestions for actions.

D. Vegetables and Fruits - Results and Discussion

D.1.Discussion of ratings from the Delphi questionnaire

The work that forms the basis of this report was conducted during a period of significant economic contraction and uncertainty in the financial industry, based on unsustainable lending practices that have affected home values in many parts of the country. This instability has extended from those issues to other sectors of the economy and the country, and appears likely to affect decisions for several quarters.

Because most vegetables and fruits produced in Louisiana are sold locally, we focus on in-state opportunities.

All respondents invited to participate in the first round did not participate. However, from Appendix Table 1, respondents were well distributed across the groups, except for farmers' market managers and sweet potato growers (2 respondents each). Data were grouped by industry segments and a group of educators and agricultural associations' employees. Overall averages of the usefulness ratings and averages by groups were calculated. Comments in individual items and general comments on sections of the questionnaire were collected. These were organized and condensed into materials of manageable size and returned to respondents, with their original ratings scores and the distribution of ratings by others. Respondents were asked if they wanted to change their ratings based on scores and comments from others in the group. In the second round, there were changes in ratings by a few respondents. There were no large changes in ratings by any individual, and no additional comments were received.

The questionnaire was organized by industry segments or functions, and general results are presented in this section. To maintain the context of the questionnaire in presentation of results, the items were analyzed by section. Within each function, items were grouped based on overall rating reported in Table 1 into those called 'highly' rated and another group termed 'intermediate'. These designations were arbitrary and relative to their group, so a rating that might have garnered a high rating in one section might have been viewed as intermediate in another.

First, note that most groups of respondents rated these items at least average in usefulness based on the rating scale shown in Appendix Table 2 (a rating of 1 was 'not useful at all' to a rating of 5 which was 'very useful'). Farmers' market (FM) managers and the wholesalers/ retailers groups gave lower ratings overall, particularly for selected items that did not fit their businesses. Thus, all these actions and ideas were perceived to have potential benefits as strategies or in their implementation.

In the industry-wide actions section, a public relations and advertising (PR) campaign was highest rated in terms of usefulness. Other items whose ratings placed them in the high and intermediate range also might be viewed as part of a PR campaign or other development effort, including label/package, brand and logo. Respondents thought that looking to other successful programs for ideas could be useful, and use of the Internet for promotion and other functions was in the upper half of the averaged ratings.

Table 1. Overview of Delphi questionnaire results for vegetables and fruits, based on average ratings of items by industry segment, Louisiana, 2008.

Section	High ratings	Intermediate ratings
Industry-wide activities	PR/advertising program Distinguishing label or package	Brand development Borrow from other promotions Use Internet for promotion New products 'Certified' logo Products for new markets New packaging
Actions supporting direct sales by farmers	Free print advertising Support all kinds of direct markets Have more farmers at FM	Develop loyalty Govt. supplied incentives Organize and support events Get/use shopper feedback. More frequent FM
Actions supporting sales to grocers and foodservice	Relationship with large grocers Internet order system for restaurants	Serve restaurants thru organizations Institutions as customers
Promotional activities in grocery stores	In-store promotions 'Buy Fresh/Buy Local' program Farmers support grocers Local farmer visibility Seasonal events State logo in ads	Special 'environmental' products Special displays for local foods
Consumer issues, vegetables and fruits	Food safety Support local farmers Health / Nutrition Locally produced	Sustainably produced Food miles Organically produced
Consumer issues, sweet potatoes	Support local farmers Food safety Health / Nutrition Locally produced	Sustainably produced Food miles Organically produced

Section II explored actions that support direct sales. Free advertising was rated highest in usefulness (Table 1). Respondents also recognized that supporting all the direct sales formats - farm stands, roadside vendors, and sales directly to retailers - was important. They also indicated that it would be useful to have more farmers (and product) at farmers' markets. Among items with lowest ratings (but these still were rated above average) were issues like farmers' use of the Internet to inform the public about product availability and location, and convenient payment alternatives (credit cards, for example).

In Section III, the relationship between farmers and retail and foodservice customers is explored. Building relationships with grocers and foodservice companies, and restaurants' use of the Internet for ordering and sourcing, had the two highest ratings.

For promotional activities inside grocery stores (Section IV), almost all the items evaluated were very positively received. These included merchandising ideas with ties to seasonal and other events, the 'buy fresh' program, farmers' supporting sales of their products in groceries by appearances in stores, and logos, signage and displays. Ratings for all items in this section except one were similar and the averaged ratings were higher than the moderately useful category. The lone exception was use of the Internet, which was expected since most grocers are supplied by wholesalers or their own distributors.

Section V reveals opinions about a set of issues that, according to academic and popular press reports, are important to consumers. Safety, health and nutrition, and locally-produced were highly rated, as expected. On the other hand, respondent groups rated sustainability and environmental issues substantially lower in terms of consumer concern.

Following the overall comparisons reported above, the items were evaluated in terms of responses from each of the kinds of respondents by section of the questionnaire. There did appear to be differences in opinion about usefulness of the individual items (Appendix Table 3). For example, in the industry level actions section, farmers and farmers' market managers had more similar patterns, while the wholesalers/retailers had ratings more similar to the university and agricultural association sections. As examples, use of Internet for promotion was rated higher by farmers, but lower by wholesalers and retailers. This relationship was reversed for the 'products for new markets' item. For actions to support direct markets, wholesalers and retailers tended to give relatively high ratings to government-supported incentives, free and paid print advertising, mailed newsletters, and events-oriented promotion. For actions relating farmers to retail grocers and foodservice, wholesalers and retailers had higher average ratings for sales through grower cooperatives or the for-hire packer model, which should increase quantity and facilitate sales to the wholesale system. But farmers rated this less highly. With respect to the issues of consumer concern, the farmers' market managers rated these concerns higher than did the other groups, and there was less difference between the health/safety/nutrition issues and the environmental issues for these managers.

In summary, we saw

- strong support for promotional and merchandising effort, but questions about who would pay for those efforts
- moderate support for the Internet as a enabling tool
- many good ideas to support implementation of strategies

In addition, respondents were invited to write in comments for each question, and to add ideas to the list, for each section. These are included in Appendix Table 3. Generally, there was much diversity in comments received. Most issues that received comment were extensions of thoughts presented in the questionnaire. In most cases, the responses were

positive, reinforcing the thrust of the question. An example would be emphasis about the need to support a public relations effort and related activities such as logos. Farmers' markets need additional promotion, and other states provide excellent examples in letting consumers know about buying opportunities.

There were several comments on cooperatives, some of which addressed the Associated Grocers cooperative specifically. Interest in accumulating product from a number of farms, to be packed and sold by a cooperative, was usually but not always positively received. Cooperation between farmers and others in the chain to retail grocers was mentioned as a need, and working together in the chain and in stores might increase the market. Also of particular note was agreement that while there is a consumer niche interested in sustainability and organic product, for the majority in Louisiana these issues had little traction. And finally, while the Internet is perceived to be an opportunity, many barriers to use in either direct marketing or commercial applications were noted.

D.2. Vegetables and fruits focus group results

As a qualitative means of gaining information, the value of focus groups is to provide more in-depth knowledge on the attitudes and opinions respondents hold about the strategies presented from the Delphi groups. As previously stated, more highly rated strategies from the Delphi groups were presented to focus group participants in the form of closed-end questions. Although the sample is too small for statistical analysis, information gained is useful in validating and extending responses to the questions originally posed to the Delphi groups. Sessions were recorded then transcribed for coding or categorizing responses. These groups resulted in the development of greater insight into why certain opinions are held. For example, some ideas presented to the participants had failed in the past. Using the collective perceptions of these groups helps uncover modifications needed to sustain or improve existing programs. Groups function like brainstorming sessions, allowing participants to build upon each other's thoughts and experiences, in turn, generating new ideas. It has been reported that individuals participating in focus groups often develop greater buy-in of subsequent plans.

Focus groups were conducted as described in the methodology and the description above. A $50 participation incentive was offered. The target number of participants in each group was 10 to 12. The vegetables activity was coordinated in Tangipahoa parish. Letters were followed by telephone contact, and these individuals confirmed that they would attend. The session was recorded. The number of actual participants was six, five of whom used farmers markets and one supplied at least one store of a national chain grocer. Two of the farmers were young, while the others spoke of quitting farming and of retirement. The questions list and a general 'transcription' are in Appendix Table 4. Questions that were not asked due to time constraints are indicated. These farmers knew each other well, their responses were straightforward and they appeared to enjoy the exercise. The question and response session stopped after just more than an hour.

A summary of the activity is included in Table 2. Participants, we felt, had an appropriate concept of quality given their farmers' market orientation. Their comments also suggested their appreciation for factors that affect demand for that channel. The factors mentioned included observations that their customers were not poor, that they wanted freshness, and that some younger customers had little knowledge of preparation for some of the products (such as shelled peas) sold at those markets. With respect to marketing, the growers wanted to farm more acres, but perceived the market was too small ("no place to sell it"). This contrasted strongly with the argument of 'huge unmet demand' noted in the Delphi comment. There was some limited awareness of Community Supported Agriculture and other subscription farming approaches. Farmers were aware of the potential of programs like 'buy fresh/buy local'. They believe customers want appearance, freshness, and are concerned about 'where grown, not how grown'. They also were aware that some customers were price sensitive, and that there were other limitations to markets. One of the farmers had sold vegetables for an extended period directly to a chain grocery. He indicated satisfaction that he didn't have to spend time selling. The other farmers were not happy with the hours associated with farmers' market selling. They find it difficult to be both producers and marketers. But they did not follow up on this grower's comment to get more information. There was, however, the perception that 'knowing someone' was the key to selling to those stores.

We made an evaluation of strengths and weaknesses represented by responses based on our perception of the group's comments, and provided some specific suggestions for actions and initiatives that might address the point of the comment in the right hand column of the table.

Table 2. Summary of vegetables and fruits stakeholders' focus group - Tangipahoa Parish, mostly farmers' market vendors, 2008.				
Concerns/ Comment	***Participant Suggestions***	***Strengths***	***Weaknesses***	***Strategic Actions/Initiatives***
FM quality – fresh, appearance, personal service		Growers understand this aspect of customer preference		
Problem is just the publicity with pesticides, health concerns, in canned food			Misperception of attitudes toward food safety, both pesticide residues and microbiologicals	Suggests need for fact sheets and inclusion in education programs
If they don't have money, they don't buy fruits and vegetables			Misperception of lower income consumers who want nutrition and safety benefits	Suggest need for fact sheets and inclusion in education programs
Securing seasonal/ part time labor *			Barrier to expansion that is not addressed	
Supervision of harvest labor			Delayed awareness of quality issues	
Younger consumers hesitate to purchase due to lack of preparation knowledge		Demonstrates understanding of limitations of target markets	Absence of activities to build markets based on limitations	Cooking tips and demonstrations at farmers' markets
Finding markets – "would like to plant more, but we have no place to sell it"	Need program modeled on *Make Mine Mississippi* program (Ms. has *MarketMaker®)*	Positive towards use of Internet and e-mail for sales generation/some current use	Growers are dependent on FM for majority of sales	Expand use of Internet and e-mail for marketing; form a cooperative to expand outlets to include grocery chains, restaurants; participate in MarketMaker®

Table 2. Summary of vegetables and fruits stakeholders' focus group - Tangipahoa Parish, mostly farmers' market vendors, 2008.				
Concerns/ Comment	***Participant Suggestions***	***Strengths***	***Weaknesses***	***Strategic Actions/Initiatives***
Senior citizens with vouchers don't become repeat customers	Expand voucher award to targeted groups (except for WIC recipients)	Potential to increase sales	Relationships were not built	Multiple coupons; voucher and product availabilities should coincide with harvest period
Finding markets for their produce – CSA and other direct, and cooperatives			One of the group had heard of CSAs as successes in other states; positive comment on coops	Suggest need for fact sheets and inclusion in education programs
Growers all trying to sell to same buyers		Growers are customarily cooperative with one another	Creates price competition that undermines relationships and drives prices down	A cooperative could provide convenience to buyers and less price-based competition to farmers; could add value in the chain and expand the market
Direct sales places extra demands on time and energy *	Having a state - sponsored distribution system for sales		Past programs faltered	Investigate arrangements for state-sponsored distribution system to public institutions in other states
Perceive that selling to grocery stores results from having the right connections		Existing relationships often operate at *status quo*	Discourages business development efforts/sales initiatives by growers, and higher quality and safety standards	Provide business development training and techniques to growers
'Buy Fresh/Buy Local' program	Increases sales	Awareness and positive response by the public; ready to use	Already adopted many places; might not be perceived as original/authentic	'Buy Fresh/Buy Local' - consumers identify with their immediate communities

Table 2. Summary of vegetables and fruits stakeholders' focus group - Tangipahoa Parish, mostly farmers' market vendors, 2008.				
Concerns/ Comment	***Participant Suggestions***	***Strengths***	***Weaknesses***	***Strategic Actions/Initiatives***
Price sensitivity of some consumers			Narrows potential of these markets	Promotional messages emphasizing value (nutrition, fresh and lasts longer); determine demographics and target less price-sensitive consumers
Production is limited to available funding or sources of financing, historical sales experience			Possibly not much desire to increase production on behalf of older farmers	Conduct research to assess unmet demands; expand awareness of financing options state or cooperative
Old farmers, few replacements				Demonstrate profit opportunities
Consumers are more concerned with 'where' produce is grown rather than 'how'		Build on momentum to sell Louisiana-grown produce; consistent with information from other geographic areas	Not addressing the sustainability or organic niches	Promotion of organically or sustainably produced fruits and vegetables not productive

D.3. Conclusions for vegetables and fruits

The responses from our panel suggest strong opportunities for local farmers who choose to sell through direct markets. In this situation, they can differentiate themselves in terms of product characteristics preferred by this niche market. Those customer preferences include locally produced, a fresh and high quality product, an emphasis on service, and a face-to-face transaction. In addition, the farmers' market environment is particularly attractive to many consumers, particularly at larger markets that have other products and services that contribute to a street fair atmosphere. And while the panel as a whole did not feel that the broad customer base demands organic product, the safe food issue was prominent. Sustainability and the 'how' of production were important issues for a minority of the panel. We believe, based on information from many other sources, that sustainable and organic are likely to grow as defining issues as the new generations of consumers become purchasers of produce.

The issue of channel also was part of the discussion. Most consumers get their vegetables, fruits and sweet potatoes from grocers. Though a large majority of produce is ordered from wholesalers and distributors, there are deliveries of local produce directly to stores. For deliveries from wholesalers, there are barriers for most Louisiana growers that include stage of maturity at harvest, preparation including grading and packing, cool storage, and transportation. Growth in Louisiana's production acreage might increase significantly if they took advantage of this opportunity. Customer-preferred characteristics of products would be similar in many ways to those applicable to direct markets. While not 'straight from the field', freshness still is an attribute, products are local, grading assures quality, and attributes such as organic, sustainably produced and low food miles can attract niche customers. Retailers indicated they can't get the quantity of local produce their customers would like to buy. Retailers have resources to allocate to promotion and merchandising. The lower price at wholesale is a large issue to farmers.

Recommendations are in Section F.

E. Sweet Potatoes – Results and Discussion

E.1. Discussion of ratings from the Delphi questionnaire

For sweet potatoes, comment and analysis of results should be considered in the context of recent weather events. In September 2008, Hurricane Gustav's rains moved across Louisiana's major production areas, bringing flooding that submerged many fields for days and in some cases weeks, just as the harvest season arrived. Loss estimates for the Louisiana

crop were estimated to approach 50%. US production areas outside Louisiana were unaffected, so there was little overall price impact from flood losses. The results to Louisiana were loss of production, revenue, and the task of regaining markets that had been served by Louisiana growers.

Sweet potatoes are quite different products than vegetables and fruits. They are storable when held at appropriate temperature and humidity levels, resulting in an extended shipping season from harvest in the fall and usually beyond the Easter season. As noted, Louisiana is an important supplier and most of output is shipped outside the state. Some sales are made through direct markets and to local grocers, but sweet potato is not thought of as a significant 'attraction' for farmers' markets. Most of the crop is sold by a few grower/shippers with storage facilities, to wholesalers and retailers, and shipped to distribution centers. Most of the product is sold as fresh product. A substantial volume of a farm's output is sold to processors for canning or freezing, because of damage or size. The foodservice industry has become more interested, particularly in processed product because of information and publicity about its nutritional value. It also is an alternative, little but increasingly used 'side' dish. These considerations provide a background for assessment of comments.

The Delphi questionnaire, distributed as an electronic document, was described above. Individual farmers and businesses from farming, shipping, processing and retail segments of the industry were invited by telephone to participate. Two grower/shippers and one individual from industry completed the questionnaire. In addition, three respondents from LSU who have worked extensively with the sweet potato industry also responded. When considered together and with the large focus group, substantial stakeholder input was achieved. First and second rounds were conducted with the sweet potato group. The first round responses were averaged, comments were organized by question and section, and returned with the individual's original responses. Each respondent was requested to consider whether their opinion changed based on information from the other panel members. This round resulted in few changes in ratings by respondents. There were no large changes in ratings by any individual, and no additional comments were received.

The questionnaire was organized by industry segments or functions, and the analysis follows that format. Results for the distribution, wholesale and retail components of the industry were presented in the previous section. In the sweet potato section, we discuss the following from Appendix Table 3:

- grower/shippers
- university and farmer association experts working closely with the industry

First, please note that most groups of respondents rated these items at least average in usefulness based on the rating scale shown in Appendix Table 3, where a rating of 1 was 'not useful at all' to a rating of 5 which was 'very useful'. Thus, all these actions and ideas were perceived to have potential benefits as strategies or in strategy implementation.

For industry wide efforts, growers rated the public relations and advertising item highest, followed by using good ideas from other promotional efforts. The intermediate group had a strong product focus, including new products, packaging, and using products in new markets. They also included Internet marketing applications in this group. An interesting note is that the four items rated lowest by vegetable growers were rated at the intermediate level by sweet potato farmers, and that a distinguishing label/package was rated lowest by vegetable growers. Internet applications for marketing were rated in the group's middle.

For the university and association respondents, the top rated items were led by distinguishing label/package, followed by the logo, brand and public relations items. An interesting note is that the bottom three ratings by growers were the top three rated items by the university/association respondents. Growers rated public relations campaign, borrowing ideas, and new products highly, but these received intermediate to low ratings by others. Growers rated internet promotion, spokesperson and new packaging in the middle range, while the others rated those items among the lowest in usefulness.

Table 3. Overview of Delphi questionnaire results for Sweet potatoes, based on average ratings of items by industry segment, 2009.

Section	Farmer respondents		University / industry respondents	
	High ratings	Intermediate ratings	High ratings	Intermediate ratings
Industry-wide activities	PR / advertising program Borrow from other promotions	New products Use Internet for promotion Spokesperson New Packaging Products for new markets	Distinguishing packaging	Certified logo Brand development PR / advertising program
Actions supporting direct sales by farmers	More frequent FM Comfortable shopping experience Gov't supplied incentives Free print advertising Events promotions	Support all kinds of direct markets Buyer loyalty Convenient ways to pay Alternatives such as CSA Farmer Internet sites	Govt. supplied incentives Free print advertising Have more farmers at FM	Develop loyalty Support all kinds of DM Convenient ways to pay Organize and support events Get/use shopper feedback.
Actions	Org. for restaurant	Develop chain grocer	Develop chain grocer customers	Internet ordering for restaurants

Table 3. Overview of Delphi questionnaire results for Sweet potatoes, based on average ratings of items by industry segment, 2009.

Section	Farmer respondents		University / industry respondents	
	High ratings	Intermediate ratings	High ratings	Intermediate ratings
supporting sales to grocers and foodservice	buyers Institutional customers	customers Create/use a cooperative	Org. for restaurant buyers Institutional customers	Use a for-hire packer Create/use a cooperative
Promotional activities in grocery stores	Seasonal events Public/private internet sites	In-store promotions Displays for local food 'Buy Fresh/Buy Local' Local farmer visibility Sell environmental products Farmers support grocers State logo in ads	Farmers support grocers 'Buy Fresh/Buy Local' Local Seasonal events Displays for local foods	Sell environmental products Local farmer visibility State logo in ads In-store promotions
Consumer issues, sweet potatoes	Health / Nutrition	Food safety	Health / Nutrition	Food safety Support local farmers Locally produced

For the industry level items (Section I in Appendix Table 3), differences between farmer groups were expected as the result of the different structure exemplified by the direct market/ wholesale market differences. As an example, the distinguishing label item received high ratings from vegetable farmers, but was the bottom item for sweet potato farmers. In addition, new products, new and better packaging, spokesperson, and products for new markets were rated low by vegetable growers but in the middle range by sweet potato growers. Internet applications for marketing were similar and rated in the group's middle. Specifically with respect to sweet potato growers, the items with intermediate ratings were product oriented, and the lowest rated were items associated with brand and logo development.

For the university/association group of respondents, label, logo and brand development were the highest rated items, a contrast to the low ratings growers. The public relations campaign, borrowing good promotion ideas, and new products received intermediate to low ratings.

Among the highly rated actions to support direct sales by farmers were frequent farmers' markets, comfortable shopping experience, incentives from government, and free advertising. Generally the other items were intermediate in usefulness ratings. The university group ratings were not as high, but ratings of items were in similar order compared to growers.

For actions supporting sales to grocers and foodservice, using organizations to contact and serve restaurants was viewed as important by both growers and the university/association groups, and as was having institutional customers. Growers also rated the packing and selling through a cooperative item highly. The university/association group had three highly rated items, and the others including Internet ordering for restaurants and ideas about increasing volume to attract interest of larger buyers all were in the intermediate group. Growers rated these items substantially lower.

The sweet potato farmers gave high ratings to cooperating in seasonal events and using Internet sites, and to a variety of other ideas that centered around displays, buy local signage, and farmer cooperation with grocers to enhance visibility of the product. The university/association group gave high and intermediate ratings to much the same group of ideas, but in a somewhat different order.

The final section addressed respondents' perceptions of the level of customer concern about some current issues related to demand. Growers believe that concern is heavily focused on health and nutrition, and on food safety. The university/association group added support for local farmers and locally produced to that list. Both groups gave low ratings to the environmentally oriented items. There were comments from individuals regarding these as important niche opportunities, but there was not the perception of broad customer concern about these issues.

E.2. Sweet potato focus group results

Focus groups were conducted as described in the methodology and in the description of the vegetables and fruits focus groups. The target number of participants for this group was 10 to 12. Arrangements were made to conduct the focus group just prior to a meeting of the Louisiana Sweet Potato Commission Board. Letters were sent to 12 individuals, and these were followed by telephone contact. Confirmation was received that all would attend. The number of actual participants was 11, most of whom were growers or grower/ shippers. The session was recorded. The questions list and a general transcription are in Appendix Table 5. Questions that were not asked due to time constraints are indicated there. These individuals knew each other well, and they were appropriately responsive and provided valuable information. The question and response session was stopped after just more than an hour.

A summary of the activity is included in Table 4. Participants understand they are in a commodity environment and a mature market, with most product shipped to customers outside Louisiana. Commodities are traded based on grades and standards. A buyer's objective is to secure the needed quantities. Product from one grower or production area is a substitute for Louisiana potatoes, and price is the determining factor, though consistent quality and service over time can help. The focus group participants were aware of these facts, as indicated in their responses. They mentioned the following:

- awareness of the inability to distinguish Louisiana product from others. Appearance matters most, they said, and not eating quality.
- the nation has important issues with public health to which sweet potato consumption might make an important contribution. This issue is addressed on the Web site and in other ways, but individual consumers do not perceive sweet potato as a solution with respect to these issues
- there are convenience issues associated with consumption, such as cooking time. Ideas for processed products and gas permeable films have been advanced but have not been widely accepted
- convenience issues in foodservice, particularly institutional such as schools, are exacerbated because cooks make no effort to improve flavor, and children learn to dislike the product. The group questioned whether there was long term benefit from having product in the school lunch program
- competition is intense. Mississippi farmers are expanding and selling to customers in Louisiana. The group noted that Mississippi's product is similar in taste and quality to Louisiana's, and therefore, presents a serious threat. It suggests that entry into the market by other producers is feasible. Since this is a commodity market, we hypothesize that markets are being lost because new producers are selling for less
- when questioned about Internet sales, growers discussed demand building through recipes.

- Responses indicated that the industry has tried to move away from commodity status. Comments that the product is better received when labeled a yam, and suggestions to use that name, were made.

There was some discussion of the progress made through promotional effort through the Commission, particularly the Web site and other activities by the PR firm. The group did not mention, nor was it asked, whether there was sufficient promotion resource money to make a difference, or whether cooperation with other states in promotion might be beneficial.

Table 4. Qualitative Focus Group, Summary for Sweet Potato Stakeholders, Commission meeting in Oak Grove, LA, participants from all industry segments, January 2009.

Concerns/Comment	***Suggestions/ Recommendations by Participants***	***Strengths***	***Weaknesses***	***Strategic Actions/Initiatives***
Consumer values appearance over other attributes		Awareness of consumer concerns	Understanding that consumer preference rules. So, blemishes reduce the yield for fresh product, leaving more smalls and jumbos for processing	Opportunity for more processed sweet potato products. Expand processed market to non-human consumption such as dog treats, deer bait
High service is on-time delivery, long term product consistency		Awareness of distribution system requirements	Premium quality impossible to achieve every year	Comment serves notice of length of the distribution chain
Mentioned health, obesity problem, nutrition	Industry products can help with these issues	Awareness of consumer concerns		Place facts on the Web site, in ads, etc
Internet selling/Sweet Potato Commission Web site	Use the Web site to promote sweet potato gift packages			Use pay-per-click ads and/or sponsor recipe-related Web sites to promote

Table 4. Qualitative Focus Group, Summary for Sweet Potato Stakeholders, Commission meeting in Oak Grove, LA, participants from all industry segments, January 2009.

Concerns/Comment	*Suggestions/ Recommendations by Participants*	*Strengths*	*Weaknesses*	*Strategic Actions/Initiatives*
				superior quality of Louisiana sweet potatoes
Sweet potato requires long preparation/ cooking times			Hinders use in commercial applications and homes	Provide and promote convenience products; but it fits with slow cooking trend
Consumption of sweet potatoes is associated with Easter, Thanksgiving and Christmas holidays		Does have visibility to build on	Haven't succeeded in building higher fresh or processed consumption, or to different consumers	Use multiple positions for product: year-round health food; "Bubba Gump Shrimp Company" approach to all the ways sweet potatoes can be prepared; Cajun food for out-of-state sales; substitute for white potatoes
Currently available processed products like frozen sweet potato fries and mashed sweet potatoes (Pillsbury and Betty Crocker) are of poor quality; deters development of new products	They just need some help (didn't suggest who would offer that help)	Consumer packaged goods companies are interested, working on sweet potato products	Were discussing product from Sam's Club. Wal-Mart has reputation for cost pressure on suppliers that can affect quality; provide feedback to retailers and processors	View as an opportunity; create a business develop program encouraging processors to substitute Louisiana's potatoes (Example: George Foods in North Carolina is exclusive Sweet Potato provider to Green Giant.)

Table 4. Qualitative Focus Group, Summary for Sweet Potato Stakeholders, Commission meeting in Oak Grove, LA, participants from all industry segments, January 2009.

Concerns/Comment	*Suggestions/ Recommendations by Participants*	*Strengths*	*Weaknesses*	*Strategic Actions/Initiatives*
Buyers for chain stores are time-pressed and buy multiple products from same source; may bypass direct purchases from Louisiana growers			Retailers want lean supply chain, this affects the traditional supply chain relationships	Cooperate marketing to expand sales outlets and offer larger quantities; consider membership in MarketMaker® for more local sales; B2B internet selling platforms
Increased competition from Mississippi growers that have similar quality potatoes	Use 'Louisiana yam' on labels and in promotions; addition to the required 'sweet potato'			Continue use of 'yam' at every opportunity; educate consumer as to superior flavor, sweetness and moisture of Louisiana product
Must have sufficient supplies before aggressive sales efforts made				Determine Louisiana's market share position for in-state per capita consumption; communicate same to producers
Cooperatives are viewed favorably but only exist informally; farmers dislike acting as business equals in co-ops		Can attract buyers by increasing volume offered	Many pressures on cooperatives, they often fail	Consider legal/organizational structure in which voting rights and ownership are correlated

Table 4. Qualitative Focus Group, Summary for Sweet Potato Stakeholders, Commission meeting in Oak Grove, LA, participants from all industry segments, January 2009.

Concerns/Comment	***Suggestions/ Recommendations by Participants***	***Strengths***	***Weaknesses***	***Strategic Actions/Initiatives***
Positive response to institutional distribution including public school system		Opportunities for future sales	Food habits become ingrained across generations	To cultivate future markets, supply chain works together to improve attributes of product for institutional applications
Negative response to institutional use, including public school system			in schools, cooks only heat product, it may not be good. Students learn to dislike this product	To cultivate future markets, supply chain works together to improve attributes of product for institutional applications

E.3. Conclusions for Sweet Potatoes

Sweet potato has many similar characteristics to vegetables, and many significant differences. Storability, a long selling season, sales based on established grades, and sales into the regional and national wholesale markets characterize the sweet potato. There also are product characteristics that favor consumption, while others discourage use.

These similarities and differences have implications for promotions. There is opportunity to provide effective promotion to support sales of Louisiana product to Louisiana consumers. Some respondents urged caution in promoting 'buy local' because of the share of production shipped out-of-state, arguing that this might hurt the export market. We feel that is not likely. Most other states have promotional programs for products produced in-state without attracting notice from most consumers. That is the likely outcome if a similar program were established in Louisiana.

With respect to general promotion, demand-building programs may offer most promise. We discuss these further in the recommendations section of this report.

F. Recommendations for strategy, positioning and tactics: vegetables and fruits, and sweet potatoes

The grant stipulates a very broad scope of those who should benefit from the subsequent strategies, encompassing all those along the supply chain. This suggests the overall strategy must also be very broad. Having a unique selling position—or a single, distinctive reason for making a purchase—for each and every specialty crop is impracticable and lessens the impact potential of cooperative promotional efforts. The breadth of the grant requires a brand-based approach. A well-developed brand becomes the platform on which the consumer makes an emotional connection with a product. It is integral in securing a place in the consumer's mind. (A discussion about brands appears later in this section.) Communication must concentrate on the end-user, the consumer, so all parties within the supply chain benefit. Furthermore, it has to develop the connection between the buyers and the farmer.

We also provide further insight into the purpose for consumer market research, areas of questioning, suggestions for a public relations campaign, promotional tactics and brief descriptions of some of the actions study respondents rated as useful. Recommendations are both general and specific, with examples given to help clarify proposed tactics.

The strategy and promotion ideas included here are not new. They have been used in other states, and are being used by at least some Louisiana growers. The ideas were included in this report because they were found to have merit or to have been successful in other states or with other products.

We he begin this section with an explanation of why further research is recommended It also includes promotional activities that, given funding, can begin now.

F.1. Market Research. As stated previously, focusing on target market segments is the most suitable marketing strategy for specialty crops. Therefore, it is vital to collect primary data to increase knowledge of the population segments that currently purchase sweet potatoes and fresh produce, reasons for doing so, and to provide a gauge of future markets. Secondary data can be very useful, is less expensive, and often is available without cost. Periodicals, trade industry associations, university studies, and government agencies abound in data. Information gained through secondary sources can be used in devising an initial public relations campaign for Louisiana specialty produce and as a starting point in developing primary research. However, when resources are limited, well-informed decisions become crucial. For example, consumer demand for organically-grown produce varies in different regions of the country. Based on surveys and focus groups that we conducted, respondents suggest a small market for organic foods in the Louisiana market. However, other indicators suggest growing consumer interest in that market and in related issues such as sustainability. Primary research findings will be used to develop branding, product positioning, new market identification, and communication strategy that considers all these results.

Conduct statewide[1] market research to determine markets and corresponding behaviors, attitudes and demographics. The studies should include the general population, so we suggest it be accomplished by a telephone survey, which allows interviewer to further probe into consumer responses. Additionally, telephone interviews allow the researcher to redirect the line of questioning based on responses. One study should focus on data collection concerning fresh fruits and vegetables, classifying consumers as frequent, occasional or non-purchasers. The major part that sweet potatoes play in the Louisiana economy and differences in perishability merits a separate study. The sweet potato research would follow the same format and include similar questions, but would be designed to gain further insight into increasing consumption of sweet potatoes. Both questionnaires will include the following list and questions specific to sweet potatoes are included in the next section:

a) Purchasing behaviors and corresponding demographics.

b) Which attributes of fresh produce appeal to customers and the order of preferences—health, safety, taste, freshness, support for local farmer, social aspects (for farmers' markets), etc. by demographic.

[1] Success of farmers' markets is related to population size of the market. Therefore, respondents should be selected on the basis of proximity to or residence in metropolitan areas.

c) Supply channel preferences and corresponding attributes of same that appeal to consumers (competitive landscape research).

d) Purchase frequency, preferred shopping days and distance consumers may be willing to travel for purchases.

e) Which products draw customers to which channel. For example, availability of high quality, good tasting tomatoes may draw shoppers to direct markets.

f) Preferences for or willingness to purchase Louisiana produce and motives for doing so (basis for differentiation).

(1) Determine where connection to producers is best made—at a local community versus state level. Factors that might encourage switching behaviors.

(2) How consumers define quality. Appearance, firmness, color, vitamin content, safety, organic, etc.

(3) Assess demand and possible unmet needs/wants.

(4) Expectations of price.

(5) Message content and best media channels to promote produce.

g) Define or refine niche/target markets.

(1) Use data to classify customers according to propensity to purchase Louisiana products (primary or occasional users).

h) Test appeal of alternative direct sales outlets such as Community Supported Agriculture and subscription farming.

i) What behaviors and attitudes that can be correlated to buying fresh produce/Louisiana sweet potatoes, vegetables and fruits (For example, what might be some corresponding attitudes toward other values such as exercising to improve health.)

j) Ascertain attitudes toward packaging. Those consumers most interested in buying local may object to certain types of packaging or perhaps value it for lessening perishability.

2 Infrequent buyers and non-users. Resource sufficiency allowing, further research should be performed to determine the opportunities of expanding sales into new markets.

a) Determine levels and form of vegetable and fruit consumption (canned, frozen, dry processed).

b) Determine reasons for not purchasing fresh vegetables and fruits.

c) Examine purchasing behaviors (channels used—independent grocery stores, health food stores, supermarkets, supercenters, etc.) and why those are important to the consumer.

d) Use data to identify infrequent or non-users with few switching barriers.

3 Questions specific to sweet potatoes.

a) Assess awareness of product characteristics that differentiate Louisiana sweet potatoes.

b) Frequency and form of consumption.

c) Conditions under which consumers might increase consumption.

(1) Processed. Example: Sweet potatoes would be ready-to-eat or use as an ingredient in recipes.

(2) Packaged. Specially washed and wrapped ready to microwave.

(3) New products. Baked, mashed sweet potatoes for refrigeration, reconstituted, flour, shredded, etc.

4

Over time, less formal methods may be used. For example, some data may be gathered via shopper intercepts. Interviews at farmers' markets could provide more opportunity to gain insight into loyal, direct purchasers of Louisiana produce. Farmers' markets are excellent venues to determine shopper's area of residence by using a 'dot survey'.

F.1.1. Branding. While survey respondents rated the development of a brand secondary to that of an advertising campaign, from a strategic marketing perspective the brand should be created first. Advertising is part of the *visible* elements of a brand and vital to audience communication. However, a brand is far more than a logo or an ad slogan—it is the sum of feelings consumers have towards a product. The brand should provide the foundation upon which an advertising campaign is built. An actively managed brand creates equity, generates loyalty and establishes long-lasting relationships. Findings from the primary research study are the basis for development of the brand.

1. Develop *origin-based* branding strategies from findings.

   a) Product differentiation/positioning strategy. Development of a brand for a product includes differentiation. Differentiation takes place in the consumer's mind. When products are essentially similar it becomes problematic for consumers to distinguish between them, thus making differentiation based on *observable* features extremely difficult. The inability to make a distinction is particularly true of agricultural products. To a consumer, appearance differences between Louisiana-grown produce with that of other states may be negligible. Therefore, an *origin-based* differentiation strategy (meaning where the product was grown, not necessarily how) may best be suited for Louisiana specialty crops. Perceptions of nutrient content, safety, and/or other attributes would be verified through testing.

   b) Design unique logo for vegetables and fruits. Because individual specialty crops are seasonal, use of a single logo as an immediately identifiable image can foster awareness for all Louisiana produce and has the potential to strengthen the brand. The present certified Louisiana logo may best communicate to out-of-state consumers wishing to buy processed foods. While there is no argument of the importance of having such a logo, the right design choice for a logo says volumes about a product. The graphic should be simple, reflecting the attributes consumers value most in buying Louisiana produce and easily distinguishable from other industry logos. It is recommended the new logo be distinctly different from the existing 'certified' Louisiana logos. Use of a visual element suggesting plant growth as a basic design component could be adapted to Louisiana-grown nursery stock, thus strengthening the brand. It is suggested the predominant visual element should picture from the ground. The basic design component could be adapted to Louisiana grown- nursery stock, thus reinforcing the brand. Sellers should place stickers on individual product units where feasible. This allows for

quick identification and reduces the reliance on others for point-of-sale displays. (Generic Louisiana-grown stickers can be used in the interim until the logo is developed.)

2. Advertising. While specific concept development is premature, one strategy can be recommended presently in this report. Grocers, large and small, have an advantage in selling fresh vegetables and fruits. They compete by taking advantage of 'the moment of value marketing' when the customer is in the store. In other words, they provide what the consumer wants as soon as he or she wants it. Many specialty products are available to Louisiana consumers year round from out-of-state suppliers. These are substitutes for Louisiana-origin products, but also are complements as they supply a full line of products, particularly during non-harvest seasons. Such competition means that the advertising must carve out and hold a place in the minds of consumers for seasonal Louisiana products. According to the well-respected marketing strategist Al Ries, "it is better to be first in the mind than to be first in the marketplace." Employing tactics to create desire for Louisiana produce well before the harvest takes place can impact a consumer's purchasing decision early in the buying cycle. It can create greater awareness of and eagerness for the season. . As an example, one approach to doing this could be to collaborate with a Louisiana photographer in the development a calendar with high quality photos of mouth-watering fruits and vegetables depicted in corresponding harvest months. To further enhance the value to consumers it could contain tips on selecting the best produce, information on preserving freshness, recipes and introductions to Louisiana's farms and farmers. Being free or low cost is likely to increase its the use. As with any effective brand advertising, continuity and constancy are key. There must be an ongoing commitment to maintain the campaign year after year. A continuous source of funding to develop ads and purchase media must be available. In some states, producers participate in cooperatives to do this.

F.1.2. Public Relations. Respondents, regardless of their respective place in the supply chain, agreed on several concepts that became the basis for the overall strategy for vegetables, fruits and sweet potatoes. Highly rated were advertising and state sponsored a public relations campaign. Application of both strategies can benefit all Louisiana specialty crops. While brand development and advertising concepts for Louisiana specialty crops necessitate more consumer research, a public relations campaign can be initiated quickly. The most important goal of the campaign is to bring change by deepening the relationship among Louisianans—not just consumers, but those in the food supply and service industries—and growers. This connection has been set in motion by farmers' markets presently operating around the state. Success of the campaign may be more likely at the community

rather than state level. Such determination should, however, be ascertained by research as suggested above.

1. Cause-related educational campaigns can improve knowledge and understanding while at the same time providing goodwill and awareness. Education can help Louisiana consumers understand how the purchase of a homegrown product helps them, the environment, farmers, and the communities and state in which they live.
2. Consider enlisting the support of LSU and other universities. Graduate students in agribusiness and marketing could participate in a joint service learning project to develop a public relations campaign.
3. Develop a blogging site for 'locavores'. As one commentary put it, "Buying local is a powerful consumer choice—it is an altruistic choice—sacrificing one's own economy for that of the local communities."
4. Restaurants that commit to buying and featuring local produce in their recipes could further their standing in communities by participating in the Chefs Collaborative (www.chefscollaborative.org). The organization works to educate member chefs on the benefits of working with local farmers.
5. Involvement in the economic success and social wellbeing of a community differentiates the constituents of a community from those that have merely purchased real estate. Those involved in bringing locally grown produce to market should use every opportunity to make the public aware of the support they provide to their local communities through their good agricultural practices. Help shoppers see themselves as helping their communities by buying locally.
6. The public relations campaign can further educate consumers and growers by building on findings of the survey/s.
7. Encourage farmers to have on-farm events, expanding contact between growers and consumers beyond the grocery store and farmers' markets.

F.1.3. Promotional tactics. There are promotional activities that can be conducted in tandem with the public relations campaign and while research is being conducted to determine the best markets and how to reach them.

1. Buy Fresh, Buy Local**.** According to the Web site for *FoodRoutes Network* "…is a non-profit organization based in Pennsylvania that provides communications tools, organizing support, and marketing resources to our grassroots chapters throughout the US that are working to rebuild local food systems and promote sustainable agriculture. Buy Fresh/Buy Local chapters are connecting consumers in communities throughout the country to the freshest, most delicious locally grown and produced foods available. Through outreach events, local food guides, and educational

materials, Buy Fresh/Buy Local makes it easy for consumers to find and connect with local food from farmers they can know and trust." Buy Fresh/Buy Local has a proven track record of consumer appeal in many other states. BREADA (Big River Economic Agricultural Development Alliance) that runs two Baton Rouge markets currently has a chapter. Buy Fresh/Buy Local has been introduced to Louisiana through a grant to the Louisiana Vegetable Growers' Association, so a foundation exists to be built on. Associated Grocers Inc. in Baton Rouge built a similar program to support sales of local products in their members' stores. This provides another powerful support tool.

2. Incorporate Internet technology into selling processes by individual farmers. The success of many firms is built on the use of information technology that contributes to customer service and cost control. Technology has transformed so many industries that it is difficult to imagine success in any industry without its use. Use of technology will only increase in the future.

    a. Facilitate communication between growers and buyers (consumers, grocery stores, restaurants, etc.).

        i. Interactive Web sites, searchable database containing product availabilities including all sales outlets.

        ii. Dates, times and locations of farmers' markets.

        iii. Ability to copy or download event data to consumer online calendars.

        iv. Identify potential markets.

        v. Online newsletters and blogs.

        vi. Provide convenient access to information for farmers concerning regulations.

    b. Conduct online commerce.

    c. Take advantage of social networking sites like *facebook*. These sites are analogous to electronic word of -mouth selling.

    d. Use e-mail to let customers know about produce availability at farmers' markets.

3. Consider purchase/participation into MarketMaker® program. Farmers repeatedly expressed concern for finding markets for their produce. Ten states currently participate in the MarketMaker program and two other states are in the enrollment process. The program has grown rapidly. A team from the University of Illinois Extension first created MarketMaker in 2004 and continues to host and maintain the program, but MarketMaker is now a partnership of land-grant institutions and State Departments of Agriculture in ten states, and is supported by a range of organizations, including CFAR, the National Ag Marketing Resource Center. The following information, which appears on the USDA Web site, explains what the program is and how it operates:

    a. "MarketMaker is a comprehensive, interactive database that connects food producers to new and economically viable markets, and promotes the development of quality driven food supply chains. MarketMaker is collaboration between the University Of Illinois Extension, the Initiative for the Development of Entrepreneurs in Agriculture, the Illinois Department of Agriculture, and Illinois Council on Food and Agricultural Research (C-FAR).

    b. By registering their businesses, food producers and marketers can take part in a "Buy and Sell Forum" that includes diary, produce, fruit and vegetables, grains, meat, and other food commodities, as well as services and transportation.

    c. MarketMaker includes demographic information that can be used to screen for preferred customers.

    d. Use relative failures/successes experienced by nearby states as means of evaluating program.

    e. Incent farmers to use technology to increase sales by providing state-supported Web sites.

    f. FoodGalaxy. The Internet firm FOODgalaxy.com recruits suppliers and restaurants by promising to make the purchasing process more efficient. FoodGalaxy provides software that allows a restaurant to automatically split orders among suppliers based on the lowest price for individual items (see their Web site for additional information). Restaurants are promised reductions in costs

through less time spent on ordering. It is somewhat similar to MarketMaker, but emphasizes the foodservice industry.

g. Because farm survival is an issue with other entities, Web sites such as *Southern Living's* offer free linking services to local farmers' markets. As of this writing, five Louisiana farmers' markets are included on the site. Availability of this service through other sites should be actively sought.

4. Employ the use of specialty items. Specialty items or customized advertising promotional items when employed correctly can boost brand awareness and support public relations efforts. Items are most effective when the utility of the item is closely connected to the concept being promoted. When the items are used by consumers it demonstrates the bond with the brand or in this case buying locally. Concern for the environment is a mind-set often held by fresh produce consumers. The United States Environmental Protection Agency estimates between 500 billion and a trillion plastic bags are consumed worldwide each year (National Geographic News, 2003). Providing consumers with canvas shopping bags promoting buying local may expose other shoppers at critical buying times in grocery stores or other indirect outlets.

5. Provide business development training and techniques to growers to help them sell produce to grocery stores.

6. Suggest need for fact sheets and inclusion in education programs as growers believe the public has issues with pesticides, health concerns, in canned foods.

    a. Grocery stores, even larger retail chains, help differentiate their businesses by what is sold in the perimeters. Demonstrate to independent grocers how supplying locally grown produce can help further differentiate them from the big box stores.

    b. Merchandising.

        i. Set up store displays in which foodstuffs needed to make complete meals are grouped together. For example, red, green and yellow bell peppers can be grouped with chips, salsa, burritos and canned refried beans to suggest Mexican dinners.

        ii. Independent grocers marketing Louisiana produce may profit from using farmers' market-like display techniques.

Handmade signs on chalk boards, baskets and hampers have a farm-fresh feel. Display tables set apart from basic produce help draw attention to local produce. 'Take-one information' about the farm and producer should be displayed near the produce.

iii. One food retailer positioned as sustainable, organic and local, uses a display technique that slows eye movement down, resulting in greater attention to items for sale. Employing variations of display heights is a vital marketing technique for this retailer. Patrons are treated to samples by gracious, welcoming employees who refer to their customers as guests. Counter personnel provide samples of many foodstuffs upon request.

iv. Placing complementary colors in juxtaposition of orderly stacked, uniformly sized clean vegetables and fruits can further draw attention. Display fruits and vegetables varying textures of produce.

v. Use cross-merchandising techniques. Mixing decorative items with fresh fruits and vegetables.

vi. Develop specialized sections in the store such as a 'kids only' or 'vegetarian' display.

vii. Prominently label foods grown in Louisiana. Use geographical names for produce such as Ruston peaches.

viii. Develop annual awards (recognition and cash) program for store/produce managers in which successes and efforts to promote Louisiana specialty crops are recognized. Create door decals and/or fruits and vegetables bin stands for same.

c. New products.
   i. Offering semi-processed produce or near ready-to-eat food eliminates one switching barrier time-pressed consumers may have.
d. Borrow ideas from other marketing programs.
   i. The Internet makes it easy to examine promotional strategies of other states. USDA trend data can be used to identify successful programs.
e. New packaging. Packaging that uses gas permeable films may reduce perishability (some applications currently exist)
f. Use of specialty items.

7. Readiness for coming of organics. Although consumer demand in Louisiana is modest, actions to ensure future supply should begin now.
8. Actions supporting direct sales by farmers – highly rated.
    a. Free print advertising. Public relations campaign, in part, addresses this. Need to establish methods to ensure producers have knowledge of availability when it occurs.
    b. Have more farmers at markets. Consumers want variety and gravitate to shops and stores where there is greater selection. This can be an area of competitive advantage for farmers' markets.
    c. Support all kinds of direct markets. Educate growers on other forms of direct selling (CSAs, subscription farming by individual or groups of farmers, etc.) and provide marketing education/guidebooks to assist with establishment.
9. Actions supporting direct sales by farmers – moderately rated.
    a. Get shopper feedback. Individual farmers can benefit by having very brief customer surveys. A survey offers an opportunity to deepen the relationship with customers and learn about their preferences and how services or products can be improved.
    b. More frequent farmers' markets. Some farmers complained they were unable to associate with existing markets. This may be an opportunity to begin new markets, held on different weekdays.
    c. Develop loyalty. The basics are unchanged in that attentiveness, genuine friendliness and helpfulness make the customer feel cared for and valued. Other activities can include offering serving suggestions, cooking demonstrations, coupons, and tips on how to pick the best produce.
    d. Government supplied incentives. Increasing the number of discount coupons given to seniors and other groups of consumers can increase market foot traffic. Suggest frequency be increased and distribution more closely aligned with optimum selling times.
    e. Organize and support events. Leverage the social aspects of farmers' markets.
    f. Provide cooking tips and demonstrations at markets.

F.2. Sweet potato. This section pertains to sweet potatoes. Many of the ideas and comments in the vegetables section also apply here. These ideas and suggested actions also recognize the important differences in product characteristics, and the history of available promotional funds in the sweet potato industry.

1. Use pay-per-click ads and/or sponsor recipe-related Web sites to promote superior quality of Louisiana sweet potatoes.

2. Add grower profiles to the Louisiana Sweet Potato Commission Web site.

3. Investigate export potential.

4. Create more sales by offering processed/convenience products.

5. Use multiple positions for product: year-round health food; "Bubba Gump Shrimp Company" approach to all the ways sweet potatoes can be prepared; Cajun food for out-of-state sales; substitute for white potatoes.

6. Create a business development program to contact current sweet potato processors (such as Betty Crocker and Pillsbury). Promote substitution of Louisiana-grown potatoes in their products.

7. Continue use of 'yam' at every opportunity.

8. Opportunities for future sales are affected by food habits that become ingrained. Identify and address these barriers. An example is getting quality product that children like into schools.

9. Alternative products (dog treats, deer bait).

10. Promotional messages for lower income households should emphasize value (nutritional value of sweet potato cost per pound); research results will help determine demographics to target less price-sensitive consumers.

11. Current sweet potato recipe contests should emphasize multiple forms of the product.

12. Publish a single cookbook with Louisiana sweet potato recipes that is available in grocery stores and farmers' markets next to sweet potatoes at low or no cost. Or use part of the proceeds to support further promotional expenses.

13. Reinforce awareness for the Louisiana sweet potato superior attributes of Louisiana sweet potatoes—sweetness and moisture. Examples: national sweet potato spokesperson includes the word "Louisiana sweet potato" within ingredients list for recipes she creates for the commission. Recipes on the commission's Web site should do likewise.

14. Emphasize the nine non-holiday months for sweet potato recipes. Featuring sweet potato articles/recipes during Easter, Thanksgiving and

Christmas reinforces idea that the vegetable is to be eaten in that season only.

Note on promotion expenditures under Louisiana Sweet Potato Commission:

The Diane Allen agency has been retained for several years to provide advice, guidance and placement of promotional activities. We contacted the agency's representative and had an informative conversation. We generally support the activities conducted under their auspices. There is excellent record of those activities. Our comment is that determining effectiveness and impact of those programs is an issue. If the following assessments have not been done, we suggest the following:

- Conduct a return on investment (ROI) analysis on past five year expenditures for sweet potato promotions.

- Provide data on media mentions resulting from releases in addition to number of releases written.

- Conduct a media audit to determine best advertising vehicles for sweet potatoes sales. Have agency conduct a share of market, share of voice study to help determine effectiveness of campaigns.

Appendix Tables

Appendix Table 1. Number of invited and completed questionnaires for Delphi procedure, vegetables and Sweet Potatoes, 2008.

Vegetable farmers		Sweet Potato farmers		Wholesale and retailers		Farmers' market mgrs		Universities / ag. associations	
invited	completed	invited	completed	invited	completed	invited	completed	invited	completed
5	4	4	2	7	5	5	3	12	10

Appendix Table 2. Overall averages of ratings for vegetables and fruits.

	Average rating		Average rating
Section I. Actions at Industry level		*Section IV. Promotional activities in grocery stores*	
PR / advertising program	4.48	In-store promotions	4.52
Distinguishing label / package	4.38	'Buy Fresh/Buy Local' program	4.45
Brand development	3.98	Farmers support grocers	4.38
Borrow from other promotions	3.95	Local farmer visibility	4.37
Use Internet for promotion	3.93	Seasonal events	4.28
New products	3.69	State logo in ads	4.26
Certified logo	3.62	Offer environmental products	4.10
Products for new markets	3.59	Displays for local foods	4.08
New packaging	3.27	Public/private Internet sites	3.62
Celebrity spokesperson	3.13		
Section II. Actions that support direct sales		*Section V. Consumer issues*	
Free print advertising	4.61	*Vegetables and fruits*	
Support all kinds of FM	4.49	Food safety	3.67
Have more farmers at FM	4.28	Support local farmers	3.64
Develop buyer loyalty	4.11	Health / Nutrition	3.38
Govt-supported incentives	4.02	Locally produced	3.37
Organize and support events	3.85	Sustainably produced	2.74
Get/use shopper feedback	3.82	Food miles	2.60
More frequent FM	3.75	Organically produced	2.43
Paid print advertising	3.61		
Farmer Internet use	3.57	*Sweetpotatoes*	
Alternatives such as CSA	3.57	Support local farmers	3.71
Mailed newsletters	3.50	Food safety	3.58
Comfortable shopping experience	3.48	Health / Nutrition	3.44
Convenient payment alternatives	3.05	Locally produced	3.30
Section III. Actions for retail grocers and foodservice		Sustainably produced	2.81
Relationship with large grocers	4.18	Food miles	2.79
Internet ordering for restaurants	4.09	Organically produced	2.11
Organizations for restaurant buying	3.71		
Institutional customers	3.58		
Create/use a cooperative	3.38		
Use for-hire packer	2.83		

FM = farmers' markets; CSA = Community Supported Agriculture;

Appendix Table 3. Vegetable and Sweet Potato results, by section, in descending order by overall rating.											
Section I. Overall Industry Strategies											
Vegetable Farmers		Sweet Potato Farmers		Wholesalers and Retailers		Farmers' Market Managers		Vegetable Gov't/Educ		Sweet Potato Gov't /Educ	
Question	Avg Rating	Question	Avg Rating	Question	Avg Rating	Question	Avg Rating	Question	Avg rating	Question	Avg rating
Distinguishing label / package	4.75	PR/Advertising Program	5.00	PR / advertising program	4.83	Distinguishing label / package	4.50	Brand Development	5.00	Distinguishing label / package	4.57
Borrow from other promotions	4.75	Borrow from other promotions	5.00	Products for new markets	4.25	PR / advertising program	4.00	PR/Advertising Program	5.00	Certified logo	4.38
PR/Advertising Program	4.50	New Products	4.50	Brand Development	4.00	Use Internet for promotion	4.00	Distinguishing label / package	5.00	Brand Development	4.25
Use Internet for promotion	4.33	Use Internet for promotion	4.50	Distinguishing label or package	4.00	Borrow from other promotions	4.00	Certified logo	4.00	PR/Advertising Program	4.25
Brand Development	4.25	Celebrity Spokesperson	4.50	New Products	3.80	Brand Development	3.50	New Products	4.00	Products for new markets	3.88
Certified logo	4.25	New Packaging	4.00	Certified logo	3.67	New Products	3.00	Use Internet for promotion	3.50	Borrow from other promotions	3.88
New Products	4.00	Products for new markets	4.00	Celebrity Spokesperson	3.67	Products for new markets	3.00	Celebrity spokesperson	3.50	New Products	3.75
New Packaging	3.75	Brand Development	3.50	Use Internet for promotion	3.60	Certified logo	2.50	New Packaging	3.00	Use Internet for promotion	3.75
Celebrity Spokesperson	3.33	Certified logo	3.50	Borrow from other promotions	3.40	New Packaging	2.50	Products for new markets	3.00	Celebrity spokesperson	3.57
Products for new markets	3.25	Distinguishing label or package	3.50	New Packaging	3.33	Celebrity Spokesperson	1.50	Borrow from other promotions	2.50	New Packaging	3.50

Appendix Table 3. Vegetable and Sweet Potato results, by section, in descending by overall rating.

Section II. Actions That Support Direct Sales

Vegetable Farmers		Sweet Potato Farmer		Wholesale and Retail		Farmers' Market Managers		Vegetable Gov't/Educ		Sweet Potato Gov't /Educ	
Question	Avg Rating	Question	Avg Rating	Question	Avg Rating	Question	Avg Rating	Question	Avg Rating	Question	Avg Rating
Support all kinds of FM	5.00	Have more farmers at FM	4.50	Support all kinds of FM	4.00	Support all kinds of FM	5.00	Support all kinds of FM	4.50	Gov't supported incentives	4.63
Have more farmers at FM	5.00	More frequent FM	4.50	Free print advertising	4.00	More farmers at farmers' market	5.00	Develop buyer loyalty	4.50	Free print advertising	4.63
Free print advertising	5.00	Get/use shopper feedback	4.50	Promote events	4.00	Free print advertising	5.00	Get/use shopper feedback	4.50	Have more farmers at FM	4.43
Farmer Internet use	4.50	Comfortable shopping experience	4.50	Paid print advertising	3.83	Develop buyer loyalty	4.50	Free print advertising	4.50	Develop buyer loyalty	4.29
More frequent FM	4.33	Gov't-supported incentives	4.50	Alternatives such as CSA	3.80	More frequent FM	4.50	Have more farmers at FM	4.00	Support all kinds of FM	4.25
Gov't-supported incentives	4.25	Free print advertising	4.50	Develop buyer loyalty	3.60	Get/use shopper feedback	4.00	Convenient payment alternatives	4.00	Convenient payment alternatives	4.25
Mailed newsletters	4.25	Promote events	4.50	Comfortable shopping experience	3.60	Gov't-supported incentives	4.00	Comfortable shopping experience	4.00	Organize and support events	4.25
Develop buyer loyalty	4.00	Support all kinds of FM	4.00	Mailed newsletters	3.60	Farmer Internet use	3.50	Gov't supported incentives	4.00	Get/use shopper feedback	4.00
Get/use shopper feedback	4.00	Develop buyer loyalty	4.00	Farmer Internet use	3.40	Paid print advertising	3.50	More frequent FM	3.00	Alternatives such as CSA	3.86
Comfortable shopping experience	4.00	Convenient payment alternatives	4.00	Gov't-supported incentives	3.25	Mailed newsletters	3.50	Paid print advertising	3.00	Paid print advertising	3.75
Paid print advertising	4.00	Alternatives such as CSA	4.00	Have more farmers at FM	3.00	Promote events	3.50	Alternatives such as CSA	3.00	Mailed newsletters	3.75
Promote events	3.75	Farmer Internet use	3.50	Get/use shopper feedback	3.00	Alternatives such as CSA	3.00	Farmer Internet use	2.50	Comfortable shopping experience	3.57
Alternatives such as CSA	3.67	Paid print advertising	2.50	Convenient payment alternatives	3.00	Comfortable shopping experience	2.50	Organize and support events	2.50	Farmer Internet use	3.38
Convenient payment alternatives	3.25	Mailed newsletters	2.00	More frequent FM	2.80	Convenient payment alternatives	1.50	Mailed newsletters	2.00	More frequent FM	3.38

Appendix Table 3. Vegetable and Sweet Potato results, by section, in descending by overall rating.											
Section III. Actions for Retail Grocers and Foodservice											
Vegetable Farmers		Sweet Potato Farmers		Wholesale and Retail		Farmers' Market Managers		Vegetable Gov't/Educ		Sweet Potato Gov't /Educ	
Question	Avg Rating	Question	Avg Rating	Question	Avg Rating	Question	Avg Rating	Question	Avg Rating	Question	Avg Rating
Relationship with large grocers	4.75	Organizations for restaurant buying	5.00	Use a for-hire packer	4.40	Organizations for restaurant buying	4.00	Relationship with large grocers	4.00	Relationship with large grocers	4.50
Organizations for restaurant buying	4.50	Institutional customers	5.00	Work through cooperatives	4.33	Relationship with large grocers	4.00	Organizations for restaurant buying	3.50	Organizations for restaurant buying	4.25
Internet ordering for restaurants	4.00	Relationship with large grocers	4.00	Relationship with large grocers	3.80	Work through cooperatives	3.50	Use a for-hire packer	3.00	Institutional customers	4.25
Work through cooperatives	3.75	Create/use a cooperative	3.50	Institutional customers	3.75	Institutional customers	3.00	Internet ordering for restaurants	3.00	Internet ordering for restaurants	3.86
Use a for-hire packer	3.75	Use a for-hire packer	3.00	Organizations for restaurant buying	3.67	Use a for-hire packer	2.00	Create/use a cooperative	2.50	Use a for-hire packer	3.75
Institutional customers	3.00	Internet ordering for restaurants	1.00	Internet ordering for restaurants	2.67	Internet ordering for restaurants	2.00	Institutional customers	2.50	Create/use a cooperative	3.57

Appendix Table 3. Vegetable and Sweet Potato results, by section, in descending by overall rating.											
Section IV. Promotional Activities in Grocery Stores											
Vegetable Farmers		Sweet Potato Farmers		Wholesale and Retail		Farmers' Market Managers		Vegetable Gov't/Educ		Sweet Potato Gov't /Educ	
Question	Avg Rating	Question	Avg Rating	Question	Avg Rating	Question	Avg Rating	Question	Avg Rating	Question	Avg Rating
Seasonal events	5.00	Seasonal events	5.00	'Buy Fresh/Buy Local' program	4.83	In-store promotions	5.00	State logo in ads	4.50	Farmers support grocers	4.43
Public/private Internet sites	5.00	Public/private Internet sites	5.00	Local farmer visibility	4.50	Local farmer visibility	4.50	'Buy Fresh/Buy Local' program	4.00	'Buy Fresh/Buy Local' program	4.38
In-store promotions	4.50	In-store promotions	4.50	In-store promotions	4.33	Offer environmental products	4.50	Farmers support grocers	4.00	Seasonal events	4.38
Displays for local foods	4.50	Displays for local foods	4.50	Displays for local foods	4.00	Farmers support grocers	4.50	In-store promotions	3.50	Offer environmental products	4.25
'Buy Fresh/Buy Local' program	4.50	'Buy Fresh/Buy Local' program	4.50	Farmers support grocers	4.00	State logo in ads	4.50	Displays for local foods	3.50	Local farmer visibility	4.13
Local farmer visibility	4.50	Local farmer visibility	4.50	State logo in ads	4.00	Seasonal events	4.50	Local farmer visibility	2.50	State logo in ads	4.13
Offer environmental products	4.50	Offer environmental products	4.50	Seasonal events	4.00	Displays for local foods	4.00	Offer environmental products	2.50	In-store promotions	4.00
Farmers support grocers	4.50	Farmers support grocers	4.50	Offer environmental products	3.33	'Buy Fresh/Buy Local' program	4.00	Seasonal events	2.50	Displays for local foods	3.71
State logo in ads	4.50	State logo in ads	4.50	Public/private Internet sites	2.80	Public/private Internet sites	4.00	Public/private Internet sites	2.50	Public/private Internet sites	3.71

Appendix Table 3. Vegetable and Sweet Potato results, by section, in descending by overall rating.											
Section V. Current issues that may affect consumer purchase behavior											
Vegetable Farmers		Sweet Potato Farmers		Wholesale and Retail		Farmers' Market Managers		Vegetable Gov't/Educ		Sweet Potato Gov't /Educ	
Question	Avg Rating	Question	Avg Rating	Question	Avg Rating	Question	Avg Rating	Question	Avg Rating	Question	Avg Rating
Fruits and Vegetables											
Health and Nutrition	4.00	Health and Nutrition	4.00	Support local farmers	3.33	Locally produced	4.00	Health and Nutrition	4.00	Health and Nutrition	3.50
Food safety	4.00	Food safety	3.50	Food Safety	3.33	Health / Nutrition	4.00	Food safety	3.50	Food safety	3.50
Locally produced	3.75	Locally produced	3.00	Health / Nutrition	3.00	Food Safety	4.00	Locally produced	3.00	Support local farmers	3.38
Support for local farmers	3.50	Support for local farmers	3.00	Locally produced	2.83	Support local farmers	3.50	Support local farmers	3.00	Locally produced	3.25
Sustainably produced	3.00	Food miles	3.00	Sustainably produced	2.67	Food miles	3.50	Sustainably produced	2.50	Sustainably produced	2.43
Organically produced	2.75	Sustainably produced	2.50	Organically produced	2.17	Organically produced	3.00	Food miles	2.50	Organically produced	2.25
Food miles	2.75	Organically produced	1.50	Food miles	2.00	Sustainably produced	3.00	Organically produced	2.00	Food miles	2.00
Sweet Potato											
Locally produced	4.00	Health and Nutrition	4.00	Health / Nutrition	3.33	Locally produced	4.00	Health and Nutrition	3.50	Health and Nutrition	3.50
Health and Nutrition	4.00	Food safety	3.50	Support local farmers	3.17	Health / Nutrition	4.00	Locally produced	3.00	Food safety	3.38
Food safety	4.00	Locally produced	3.00	Food Safety	3.17	Food Safety	4.00	Support local farmers	3.00	Support local farmers	3.25
Support for local farmers	3.50	Support for local farmers	3.00	Locally produced	3.00	Support local farmers	3.50	Food safety	3.00	Locally produced	3.13
Sustainably produced	3.25	Food miles	3.00	Sustainably produced	2.83	Food miles	3.50	Food miles	3.00	Sustainably produced	2.38
Food miles	3.25	Sustainably produced	2.50	Food miles	2.25	Sustainably produced	3.00	Sustainably produced	2.50	Organically produced	2.13
Organically produced	2.75	Organically produced	1.50	Organically produced	2.00	Organically produced	2.00	Organically produced	2.00	Food miles	2.00

Appendix Table 4. Focus group questions and general transcription for vegetable growers, Hammond Research Station, December, 2008.

Question and general transcription of responses

Section I - Actions at the Industry Level

1. At a recent Agribusiness Summit the issue of marketing quality Louisiana produce was addressed and a decision made to develop a certification process and logo. In marketing circles, this in part is what is known as branding. High quality and service are essential to the success. What does higher quality and service mean to you? (Ask if there is a need to stimulate discussion – What actions do you take to assure these?)

Responses:

"Deliver produce on the day it is picked—pick and sell that same day. I think that is what the consumer wants." "They want to know where did this come from." "It is a personal thing. People now are not satisfied to walking into a supermarket and picking up California strawberries. They know we are responsible, too." "We all got the same stuff every week." It is a lot of business you build yourself—it is all about your demeanor—how you greet people, how you work the crowd, put your stuff out, if they like your tomatoes if they don't like your tomatoes." "They look for you. We sit in the same spot every week." "Since we all utilize outside labor to pick the stuff—you got to be able to control your hands, you have to teach them what you want and how you want it done. For strawberry farmers, the pickers are grading and packing it in the field." "If they are messing it up in the field, you're not going to find out about it for a couple of days when that guy doesn't want to buy anymore of yours or you have to give him a credit…" "…If they take it home and they like it, they'll come back…" "A lot of it is just the publicity with pesticides and health concerns and preservatives put in canned food, people get tired of that." "Fruits and vegetables are luxury items." "Most of those in our audience are people who have money. If you don't have money, you really don't buy fruits and vegetables, you buy Mac and Cheese—staples like potatoes (at Wal-Mart). "That's not our target audience." "Another subgroup in that… [is] the younger women, they are not going to buy raw snap beans, or red beans, shell peas…they have no idea how to cook that." "It's just the older ladies that will buy that type of thing." Younger women want safe, healthy food for their families and are willing to learn how to cook vegetables.

Section II - Actions for Direct Sales

2. Over the past decade, promotion and advertising over the Internet has grown immensely. How could use of the Internet improve communication of product availability and location?

Responses:

"I don't want anybody to come to my farm while I am working. By having a Web site and telling them what I have will do me no good." Participants were positive about this mode of communication through the farmers' markets and e-mails are presently being sent out to let consumers know what they will be selling. "We'd like to plant more, but we have no place to sell it…if we didn't have the farmers' market, we might as well close the business." "We all bring a limited amount because that is all you can sell." Group was very positive about having a coop. "You tell them what you're going to raise and how much you're going to raise and they would be able to sell it in the coop. It would go into a refrigerated truck." The group questioned how Mississippi is able to work the coop. It is state run and farmers get checks for sales within seven days. Other states like Georgia and Alabama were also mentioned as having programs. Were there any issues with coops? Had to have guaranteed funds from buyers. Produce was inspected when it was loaded onto the truck and occasionally would be "kicked back." "If there is to be a future in Louisiana for the small farmer…a coop will be essential." There are problems with adding new farmers to farmers' markets. Group mentioned it could be a way of getting young people interested in farming.

3. What types of activities do you engage in to develop long-term relationships with your customers? What do you do to encourage loyalty?

Question skipped due to time.

4. Discount coupons for seniors at farmers' markets and roadside stands have been available for a while now. How do you feel about promoting these government-supported incentives that encourage use of local markets by targeted groups? (If time allows - Can you think of new incentives that should be put in place?)

Responses:

"it is a good idea and we need more of it." "It is a double-edged sword." "Last year they tried some WIC recipients and…it didn't work. " "It is not our market. We do get

to service these people." "The administrative costs have got to be exorbitant." Group agreed that the timing at which the coupons are sent is very important—they want coupons sent out twice a year. "It's a good program, but just too sporadic."

5. In some parts of the country, community supported agriculture is popular. What are your thoughts about such programs in which agreements between individual farmers and groups of consumers are made?

Responses:
All in group were not familiar with the concept. Only a few farmers have participated in CSAs. "It is for urban areas." "Up north there is a lot of support for things like this."

Section III - Selling to Retailers and Food Service Companies

6. How could forming or joining cooperatives that would provide standard 'packer' services like receiving, grading, packing, shipping, and perhaps even selling help growers? How could cooperatives hurt?

Responses:
"There was a hired state inspector that would come out. We had a big packing shed and had an inspector there all day. We used to load a trailer truck each day." "There were so many cooperatives at one time [in the past]. "If there was something that everyone could participate in…having a place to sell." Growers would let one another know what they were planning on growing. "Today we're the grower, we're the seller, we're the truck driver...the whole nine yards. If we could just concentrate on growing it and doing the best job of growing it and having someone else sell it for us for a fair price." "…we're shooting ourself in the foot…[because we are all calling the same buyers.]

7. How would selling to institutional customers such as schools and hospitals through government-sponsored procurement systems impact your business?

Responses:
You have to have a distribution center. "…it floundered." "I think another reason for it is that you go into a public school you don't have cooks anymore you have heaters. All they do is stick something in the heater and heat it up and put it out there." Discussion about hospitals and detention centers developed and some in the group think this is a good idea, but have concerns about having time to farm and also sell their produce. A state-sponsored distribution system had strong appeal. "The money won't have to leave the state."

8. (Ask for a show of hands of those who are currently selling to grocers.) For those of you who sell your produce to grocers, how do you go about developing relationships with store managers? For those of you who do not presently sell to grocers, what are some of your reasons for not doing so?

Responses:
"It's a hard job to do it." "You just happen to know somebody to get in and you get friends with them and they like your product and since we've been on the Louisiana deal, they look forward to me to get the fresh stuff in there." "I deal with the produce managers. They don't even check it anymore." Grocery stores have conference calls every Friday and they tell one another what they secured and where.

Section IV - Promotion Ideas in Grocery Stores

9. How have using 'Buy Fresh/Buy Local' signage and other promotional support materials helped your business?

Responses:
"I think it helps a lot." "I think people prefer to buy local. If given the option, they will buy local." "Well, you have two classes of people--you are going to have some that will buy the freshest, the best, some don't care about nothing but price--the cheaper the better."

10. What do you think about selling to your customers by describing how your products were grown? For example, telling your customers about your good agricultural practices such as being mindful of the environment.

What is it about Louisiana products that would enable that person to sell it? Do people want more Louisiana products? Responses:
"Promotion at the state level." "…Louisiana had a reputation [for quality stuff.]" "They used to wait for our stuff to come in." "You pick stuff up like this from talking to these truck drivers." Do you think that…is that quality there now in terms of what people want? What are the concerns of consumers? "Freshness." "I am part of the community." Can we take products from Louisiana and say that we have as good or better quality as other states? Are we pushing toward what many of those consumers want? Good agricultural practices. Are we thinking about that? If you say quality, it has to be how that product looks…maybe not Louisiana customers but in others states—there will be more expectations. Where are the customers? "We need to concentrate on grocery stores in Louisiana." Larger farmer who sells to grocery

stores recognizes that if we want to sell to grocery stores there will be more demands "on us" to make sure that there is product safety. Smaller farmers can monitor pickers better than larger growers. What can we learn about Louisiana and Louisiana farmers that we can use to build a program around to support what you are doing?

11. What are some affordable ways for farmers to support sales of their products in local grocery stores? Question skipped due to time.

Section V. Issues That May Affect the Purchase of Vegetables, Fruits, and Sweet Potatoes

12. How do you determine what you will produce and the quantities? Are you producing as much as you want to? If not, why not?

Responses:

"We've got these dice. [laughter]" "The demand—you learn over the years that if you can't sell---it's experience—it's called the school of hard knocks." "Whatever money I have to throw into the ground, that's what I plant." Younger farmer in room mentioned he is trying to get bigger every year. "I plant more and look [to others] to help me sell." "I was tired of paying my labor and they knew what they were going to get every day. I had to wait until May."

13. How should grocers price locally sourced fruits and vegetables?

Responses:

"It doesn't have to be priced that much differently. It can be competitively priced as long as they buy our stuff." "And won't buy everybody else's stuff that is dumped in." Participants claim New Orleans is a 'dumping ground' for the United States. When you sell to grocery stores, do they ask you any questions about how your produce is grown? "The main thing they are concerned about is [was it] grown in Louisiana." "Not too much is organic…if all you raise is organic, you'll go out of business."

14. Of all the ideas that we have talked about today, which are most important to you?

Responses:

"A shipping point." It could be state operated. "I want to work for the state." We want to sell our stuff for a fair price. "The main thing is, is a central place to sell."

Appendix Table 5. Focus Group questions for Sweet Potato industry, Oak Grove, Louisiana, January, 2009.

Question and general transcription of responses

Section I - Actions at the Industry Level

1. At a recent Agribusiness Summit the issue of marketing quality Louisiana produce was addressed and a decision made to develop a certification process and logo. In marketing circles, this in part is what is known as branding. High quality and service are essential to the success. What does higher quality and service mean to you? (Ask if there is a need to stimulate discussion – What actions do you take to assure these?) Some of the participants in other focus groups felt like consumers didn't know how to recognize quality. How do you feel about that?

Responses:

"…high quality and high service opens the door to lots of different aspects." "…quality means that you supply the product to the customer that meets or exceeds their expectation." "…high service means 99.8% on-time delivery." "Must have consistency in the product over the long haul." "As a producer you do a lot to provide quality—starting from seed-bed preparation all the way to pack-out. If you don't have the quality in the box, nobody will want to buy or sell your potatoes." "I find that the key to getting the consumer to recognize quality is to provide a visible point of difference between you and your competition." "…the consumer has an idea of what the prettiest product or best tasting product is—and they expect it to be that way every time they go to buy the product, But in our industry, it's hard to consistently produce that ideal product year in and year out. And if the consumers feel looking for that premium, idealistic product that is not available at that point in a given year, then it hurts industry, because they don't keep an open mind…the consumer is going to want the one that looks the best." "They don't keep a realistic view about the product."

Section II - Actions for Direct Sales

2. Over the past decade, promotion and advertising over the Internet has grown immensely. How could use of the Internet improve

communication of product availability and location? (If comments about the Sweet Potato commission Web site do not come up naturally, further probe, "What are your thoughts about the Louisiana Sweet Potato Commission Web site?" "What results or benefits have come of it?" "What changes could be made, if any, to improve it?") "Can you think of some other applications that could be used to promote sweet potatoes?"

Responses:

…, I think it has gone a long ways to not only getting out about our industry as a whole but it also gives the consumer different recipes, the ease of that and it also gives them access to nutritional information that maybe they were not aware of, where sweet potatoes come from, where in the state. And I think it has been a tremendous help because the commission just a couple of years ago completely reworked our page. But I think that you will find that not only Louisiana but the other states that have promotion programs are relying heavily on that, because that one other thing is that instead of…it costs less money to the commission for advertising because you use POP-- the material you have to have that printed and shipped. But now the warehouses and the buyers can go to that Web page and download that information straight from the Web page. It's convenience, that's another thing." "I was thinking about the new variety—the Evangeline—trying to get the news out to the public. Here is something that is new and certainly improved over what we have been having." "And it does certainly have a visible point of difference with its unusual appearance. The skin color is different and the flesh—certainly something you could leverage against Beauregard or Covington." "I know that we are talking about primary marketing (?) of potatoes, but I know working in the jobs I do we work with the youth and everybody else in promoting potato usage there is a lot of information that Ag and the classroom…that school groups can go on there and get educational information about sweet potatoes—not only learn how they are grown but nutritional wise. So that's another deal…so I guess it's not really promotion, but you are promoting the potatoes themselves. So having stuff on there like that I know there's been a lot of use of that going on up our way… You can put together lesson plans for the teachers to use." "I don't know of anybody—any of the producers in this area are doing gift packages or gift boxes but if they were they could use the Internet as a source of collecting those sales and making those contacts with people around the United States for sales on those gift packages." "One other thing that we could put on the Web site to educate the people that for example some years ago that of all the vegetables, sweet potatoes were the most nutritious of all." One participant suggested connecting sweet potato sales to Mardi Gras because of the association of the purple vine color. "Since Easter is probably the second biggest fresh sweet potato sales time and Mardi Gras is 40 days before Easter so it seems like a good time to promote sweet potatoes."

3. What about the timing? Research supports that sweet potato sales are concentrated in the holidays—Thanksgiving and Christmas. What other things can be done to generate sales all year long?

Responses:

"Right now, I think it is more centered around a healthy food to eat now, rather than just Thanksgiving and Christmas." "It is also accessibility. A sweet potato for lack of a better phrase is an inaccessible vegetable. To eat a sweet potato it takes about an hour in the oven. So you need to create some sort of accessibility such as further processing it so it can be used as a nutritional ingredient. It kind of ties into what [respondent] said…additional processing." Respondent also suggested doing what 'turkey' did, positioning as a "healthy cold cut." Discussion developed about sweet potatoes being an after-school snack years ago. What could be done to get back to that thinking? "Now that everyone is preaching obesity in young—if we could ever get back to there I think we could see our consumption pick up if not half—more." "…you make a real good point and that is part of what the Web page has—Yamster the Hamster. [Respondent]touches on a real issue there with obesity and that is some of the things being addressed through that is nutritional things for the kids. I think that is an excellent point." "My father-in-law he's seventy-something years old and he tells me that the sweet potato is what was there dessert—their afternoon snack…" Respondent claims that even family members did not encourage generational use of sweet potatoes and this, in part, is why sweet potatoes are no longer viewed this way." "Going back to what you said about what can we do to get people to eat them outside of the two holidays, [respondent]said that the Sweet Potato Commission does that year round. There is educational material being sent out all year long." "That is the big push inside both commissions [Louisiana and North Carolina] to increase consumption of sweet potatoes year round…" "The money that we have is consumed in this advertising." "The ease and convenience…there's not a lot of people around in the afternoon to slide them in the oven so that kids can eat them when they come home in the afternoon. So the value-added products and the development of those easily accessible to your modern family…[convenience products] that's where your increased consumption's going to come from."

4. What other products might be considered as value-added or new products we could take advantage of? What is your opinion about other products being marketed now like sweet potato flour and pancake mix? What might duplicating refrigerated, mashed sweet potatoes mean for the industry?

Responses:

"Frozen products—freezing sweet potatoes is very simple and there are other people in the business…I wish would [develop it] a sweet potato tator tot. "As a new grower, I am constantly looking out there for new products that are out there for sweet potatoes. There are sweet potato mashed sweet potatoes at Sam's and Wal-Mart. They also have the sweet potato fries. What I found that when I took them home and tried to prepare them, the quality wasn't there. Those particular products there did not have a good, consistent quality. I tried several different ways of cooking them. Just couldn't hardly eat them and I know people won't be repeat buyers of them." "There is about 8% higher water content in sweet potatoes than there are in white potatoes. And when you fry something, you are substituting oil for water. So consequently, you get a significant portion of your sweet potato French fries are gathering oil as you fry it..." "I am sure down the road there will be better quality…" Pillsbury and Betty Crocker frozen sweet potatoes were mentioned. Consistency of length of fries was missing as there were many different lengths. "They just need some help [making them better.]" "Even the mashed potatoes just didn't have that flavor you would expect to get." "It's a lot of [product] opportunities out there…I noticed that a lot of the health magazines you pick up now-a-days sweet potatoes are always listed as a real healthy choice of vegetables…the public schools don't offer it very often…and there needs to be a way that they can cook the sweet potatoes for the children."

5. What types of activities do you engage in to develop long-term relationships with your customers? What do you do to encourage loyalty?

Responses:

"There's not much loyalty with customers to be honest with you—it's pretty tough out there." (Laughter from the group.) You can try to give good service to people when they need service, but long-term loyalty is hard to come by." "It's good to go and visit your receivers and talk to them face-to-face, that helps a lot to build up a personal relationship with them." "What it all boils down to is price." "I give gift cards." Some of these grocery store chains direct producers to not give gifts. "…most of these buyers consolidate and buy more than one produce…they are in a hurry. When they call you they want a "yes" or "no"—they keep it simple and really the big chains don't want a personal relationship. "I've always found that if you make the call with your broker you get better results—and that's on the processing side and I can't imagine that not being true for the fresh lines." "It's mostly a business atmosphere." "It's a lot of numbers games." "…the state of Louisiana…Bobby Jindal has commercials about buying local. "…we can fend off people [sales] from our neighboring states."That's been happening with our neighboring states." "That's been happening terrible lately." "We got Mississippi potatoes at our back doors—Avoyelles Parish." "Everywhere—all over the state." (Group indicated concern and agreement with shaking heads.) "What [respondent] says about the ease—and you know when a buyer calls up and buy all these vegetables and they can buy from one source, they are not go down right down the road and buy [sweet potatoes] from a different source. And with all these small chain stores that's what we are seeing."

6. "if you had to tell us something that is different about Louisiana sweet potatoes what would you tell us?

Responses:

"Sweeter." "Well we have climate and soil." Group began a discussion of "making a mistake" of selling other states potatoes under the Louisiana label." "Louisiana has a good reputation of being the premium sweet potato state. And Louisiana sweet potatoes, as I understand it, can demand a premium in the fresh market price wise." "It used to be that-a-way. It's hard to do it now." "…it's hard to distinguish a Mississippi sweet potato from a Louisiana sweet potato—whereas North Carolina—it is not hard to distinguish between. We have a superior product over North Carolina." "I noticed that there was some of the packing that growers do including myself and there would be some boxes that say yams instead of sweet potatoes. Years ago, they were called yams. Store owners prefer that boxes have 'yams' on them. "I think the USDA requires the use of sweet potatoes on the package. You can use yams, but 'sweet potatoes' has to be on the package. But that is one thing that helped to distinguish Louisiana years ago was calling them yams. I suppose older buyers prefer them. It's always been Louisiana yams…it is a point of purchase term that distinguishes Louisiana sweet potatoes."

7. Paid print advertising in newspapers, local magazines, and trade journals are employed by some as a method of selling Sweet Potatoes. How do you feel about print advertising as a means of promoting your business?

Responses:
"I think at this point and time it is essential and it goes along with the Internet…there's a lot of people including the Baby Boomers that are not computer-literate…so if it is not in print they don't get it." "A regular newspaper you are going to target consumers…" Respondents agreed that sales must be made to consumers and buyers. "I wonder, does anyone have a feel for how much these buyers pay attention to trade journals?" One comment was made that an ad did not draw a single call. "That's telling me that the buyers are not paying attention to the trade journals." "I think most of your buyers will probably be searching the net instead of the trade journals…" "I don't think the buyers will be searching anywhere because they can pick and choose." Comments were made that some of the advertising now is being directed to consumers. "…start to look at doing more promotion in the state instead of doing…nationwide…doing more local." Participants seemed to be somewhat divided on the issue of whether in-state sales would be sufficient, but more believing that out-of-state sales are necessary. Sweet Potato Commission has been targeting advertising to the end consumers. A study was done to determine which areas in the country were more sales were being made—specifically intercity African Americans. "We've been with Texas some and we were told that the governor in Texas did not want their supermarkets or chain stores to buy from out-of-state growers until all their product was gone…" "I think the in-state advertising is important to us. If you have to have all the other states to make the thing work, it has to start in the state of Louisiana--to do the advertising right…" "The one thing for us to be successful is for us to have the supply." Discussion was held that Louisiana growers need financial help to insure sufficient product before attempting to sell in other markets.

Section III - Selling to Retailers and Food Service Companies

8. How could forming or joining co-operatives that would provide standard 'packer' services like receiving, grading, packing, shipping, and perhaps even selling help growers? How could co-operatives hurt?

Responses:
"I've never belonged to a co-op…it's done in California. You do have kind of co-ops established right now without knowing it in a sense—you do have three or four brokers in Louisiana selling the Louisiana sweet potato crop." Each one has certain growers and shippers attached to them. "…in a sense it is a co-op, but there is no membership…[each grower] is attached somewhere, somehow to a broker…." even though it is not a co-op per se. " "Every successful co-op I've ever seen requires the members of the co-op to think of the co-op as the business where they are owners—equal owners and that is a tough pill for farmers to swallow." "I know there are co-ops in other states…they seem to be successful, like Ocean Spray especially with their cranberries."

9. How would selling to institutional customers such as schools and hospitals through government-sponsored procurement systems impact your business?

"I think there is a big opportunity for the government to get involved in putting sweet potatoes in the schools and maybe other institutions where they have the opportunity to put them in…to go a lot further than they have gone." "We've gotten the government to do that at times haven't we on the canned product?" "Have we done that on the fresh product?" "We have and it didn't work too well." "…because of the logistics of the storage and the movement of the sweet potatoes and the warehouses where they were stored wasn't set up to handle the raw sweet potatoes…you had a lot of shipments of fresh sweet potatoes come out of North Carolina to meet some government orders and it just didn't work real well because of the quality storage—not properly handled. A canned product when you go to the military or you go to your school—they seem to be more equipped to handle the canned product than you do with the fresh—so they have a tendency to shy away from it. …for what it is worth, I have been involved with this association for over 20 years. When I first got involved in it there was a big push for schools and the government to increase their sweet potato consumption. Somewhere along the lines there was actually a movement within our association that felt that that was not necessarily a positive thing anymore because of the way these sweet potatoes were put in a can and presented and prepared to the people in schools and some of your kitchens in the military your sweet potato wasn't a good healthy product coming right out of the can and thrown onto the plate. Actually there was a time I remember that we were seriously thinking about dropping that—not pushing that anymore." People were consuming potatoes, but were being taught they were not tasty by inadequate preparation." This was about 15 years ago. "What we are saying is, let's not train the people to dislike sweet potatoes." In Morehouse Parish, sweet potatoes were fried and served to high school children by the growers and the response was "fifty percent people liked them…it really worked good there." An example of the federal government buying sweet

potatoes…USDA purchased them for a school and only charged them a processing fee so essentially the raw material was free. "That makes business sense…discounting the price of the sweet potatoes…it sounds complicated but it was successful…they did a sweet potato 'carrot stick' with ranch dressing as a frozen item and sold them in Detroit's public schools." Some years back there was an industry movement here to provide serving suggestions and demonstrations for school system cooks on baking fresh potatoes and flavoring sweet potatoes once they came out of the can. "We weren't received real well." The preparation staff told them, "…as I recall and there could be more to it, 'You tell the people that canned these sweet potatoes that if you want us to serve them and the kids to like them they'd better do something with them before you put them in the cans you'd better do something to them when you put them in the can because we are just going to heat them and put them on the plates." "…your canning industry has come a long way…you have to be careful when you say let's try to increase the consumption of USDA purchases of sweet potatoes and where and how that's going to take place because there's a lot to it-- it's not that simple." "…from a national council standpoint…it is an integral part of the industry nationwide to have USDA purchases—whether that is fresh, …frozen or canned…there was an increase over 220% over what had been purchased in the past…[USDA purchases] it takes that product out of the market—it's sold, it's moved. That, believe me, is a very integral part of this industry." "So not only did the growers do a good job…and the processors…and the marketing, it worked. "…a regular can of sweet potatoes is not perceived as a viable enough product to gets kids to enjoy it. There are viable, value-added products out there that kids will certainly enjoy it—they have higher sugar content—a fruit ingredient" that can all be part of the canning process.

(Ask for a show of hands of those who are currently selling to retailers.) For those of you who sell your produce to retailers, how do you go about developing relationships? For those of you who do not presently sell to retailers, what are some of your reasons for not doing so?
Not discussed due to time constraints.

Section IV - Promotion Ideas in Grocery Stores

10. How have using 'Buy Fresh/Buy Local' signage and other promotional support materials helped your business? How can this hurt the sweet potato industry in Louisiana?

Not discussed due to time constraints.

11. What do you think about selling to your customers by describing how your products were grown? For example, telling your customers about your good agricultural practices such as being mindful of the environment.

Not discussed due to time constraints.

12. What is the value of having in-store promotions such as signs or boxes labeled 'Louisiana-grown' sweet potatoes? How do the retailers you deal with respond to such labeling?

Not discussed due to time constraints.

Section V. Issues That May Affect the Purchase of Vegetables, Fruits, and Sweet Potatoes

13. Production of sweet potatoes in the United States is increasing. And, North Carolina leads Louisiana in production. What would you tell consumers to convince them that the Louisiana sweet potato is superior to those grown in North Carolina?

See question numbered "6".

14. Further exploring sweet potato sales in North Caroline versus Louisiana, what promotional activities take place at a state level in North Carolina that you believe could or should be undertaken in Louisiana?

Response:
"…it goes back to something [respondent]_ said—it comes back to supply again. "Louisiana's been hit in one area or another for the past ten years." "Mississippi is doing good—they are doing it for $2 less (per box (?)." "The most amazing thing is they are staying in business…"

15. How do you determine the amount of sweet potatoes you will produce? Are you producing as much as you want to? If not, why not?

Response:
"As a state as a whole, we need to grow more potatoes." "Mostly it boils down to how many acres of potatoes we need to cash flow our district. And then how many acres of sweet potatoes we can actually get financing for. We'd all love to grow more—more on fewer acres. All agreed.

16. Of all the ideas that we have talked about today, which are most important to you?

Response: "Production—not only at the farm level but the state level. If you want to sell more, you've got to get the supply up." One participant referred to sweet potatoes as "poor man's food." "In a magazine… per capita consumption is highest in among people with $60,000 or more per year."
17. A description of "Disney Garden" fruits and vegetables in which stickers of Disney characters is placed directly on the product. What do you think the impact could be to the Louisiana industry if we were to do that with a Louisiana brand? Response: "If you can create an image of an adversary…(such as was done with Chinese crawfish)…then having a home team would help you sell product." Participants were generally unsure of Louisiana's certified product efforts. California's efforts were discussed. "They protect their markets price-wise and quality wise—that's what California does."

Appendix Table 6. Sweet Potatoes: US acreage, yield, production and value, 1977-2007

Year	Planted Acreage	Harvested Acreage	Yield per acre (Cwt)	Farm Production (1,000 cwt)	Per unit ($/cwt)	Total Value $1,000
1977	111,800	107,100	111	11,885	10.50	$124,859
1987	92,300	88,900	131	11,611	11.50	$133,512
1997	85,600	82,100	162	13,327	15.80	$211,177
2007	100,600	97,500	189	18,452	20.30	$373,723

Source: National Agricultural Statistics Service, USDA

Appendix Table 7. Sweet Potatoes: Production, by State, 1977-2007 (1,000cwt)

Year	AL	CA	GA	LA	MS	NJ	NC	SC	TX	VA	USA
1977	451	1,170	450	2,430	567	252	4,290	284	903	625	11,885
1987	360	1,353	630	2,470	495	276	4,550	333	840	104	11,611
1997	540	1,989	120	3,400	1,092	116	4,960	121	899	90	13,327
2007	288	4,256	0	2,925	3,500	120	7,095	70	162	36	18,452

1/Maryland, Arkansas and Tennessee. 1990-1994, Maryland only
Source: National Agricultural Statistics Service, USDA

Appendix Table 8.

Department of Agricultural Economics and Agribusiness
101 Agricultural Administration Building
Louisiana State University
Baton Rouge, LA 70803-5604
Phone: (225) 578-2753
FAX: (225) 578-2716
E-Mail: rhinson@agctr.lsu.edu

Promotion Strategies to Increase Specialty Crop Competitiveness

Roger Hinson, John Westra and Joann White are conducting this work.

Fruits, Vegetables and Sweet Potatoes

We have been asked by Louisiana's Department of Agriculture and Forestry to provide reports for fruits and vegetables, and for sweet potato, that suggest efficient and effective promotion strategies for vegetable and fruit crops, and sweet potatoes. As a person knowledgeable about growing and/or selling these products, your opinions about the ideas and activities included below are very important. Our study is based on the belief that

- effectively serving the customer is most important
- quality products, with the right characteristics, are the starting point for effective promotions
- promotions are most effective when they are aligned with consumer wants and preferences
- cooperative and collaborative actions with industry, educational institutions, government agencies and other organizations can make a positive difference in effectiveness of promotions

The ideas we present below are not new. They have been used in Louisiana and/or in other areas of the country to promote consumption of fruits and vegetables, particularly local production direct to customers, and have been found in at least some instances to be effective in attracting and serving customers.

The document is organized into sections as follows:

I. 'Overall Industry Strategies' contains promotion and development items that farmers or group of farmers might use, or that might be done with the assistance of government agencies and educational institutions
II. Actions for direct sales
III. Actions for retail grocers and foodservice
IV. Promotional activities inside grocery stores

Instructions: The promotional activities are listed along with a brief description. Read carefully. Then, based on your experience of having used or seen these used, or if you have an informed opinion about the item, rate each in terms of whether they have been or could be useful in attracting customers and encouraging purchases.

The rating scale is
1 = not useful at all, 2 = not very useful,
3 = somewhat useful, 4 = moderately useful
5 = very useful.

If you are responding by computer, please download the document, mark your rating and type in comments, then save and attach as a reply to this email message. If responding on a paper copy, just circle the rating, write in your comments if any, and return it in the enclosed envelope.

I. Actions at the Industry Level

Problems: Insufficient knowledge of the market; some portion of population trusts in food system, others don't; credibility of sellers; resources for promotions to build image

I.A. Develop Louisiana-grown produce into a brand. "A brand is a name, term, sign, symbol, or design, or a combination, intended to identify the goods and services of one seller or group of sellers and to differentiate them from the competition". It establishes strongly held beliefs and attitudes in the mind of a consumer. *Example*: Kraft Foods is a brand.	Rate 1 2 3 4 5 Remarks

I.B. Initiate a comprehensive, on-going public relations and advertising campaign. Example: Conduct year-round promotions of *Buy Fresh/Buy Local*, which has a proven track record of consumer appeal in many other states.	Rate 1 2 3 4 5 Remarks

I.C. Adopt an effective Certified Louisiana Product logo specific to Louisiana fruits, vegetables and sweet potatoes.	Rate 1 2 3 4 5 Remarks

I.D. Develop new packaging concepts for products. Examples: 1. Gas permeable film packaging to extend product freshness, and to differentiate. This technology is used in sweet potato for some products and markets. 2. Semi-processed, or near ready-to-eat produce, to provide convenience for time-pressed consumers.	Rate 1 2 3 4 5 Remarks

I.E. Develop new products. Example: Address the convenience issue. Mashed sweet potatoes cut food preparation time substantially, thus encouraging use in non-holiday recipes.	Rate 1 2 3 4 5 Remarks

I.F. Develop products for new markets. Examples: Baby Boomers lifestyle will change with retirement –more free time, and many may change their food consumption and other habits to be healthier, age slower, etc. Other groups of customers may be concerned with food safety (pesticides, bacterial contamination), nutrition, or environmental and sustainability issues. Farmers, in cooperation with other entities, may be able to identify and fill these niches.	Rate 1 2 3 4 5 Remarks

I.G. Distinguish Louisiana produce by label and package.	Rate 1 2 3 4 5

Packaging can generating awareness and distinction from competing products, and may allow a higher price.	Remarks

I.H. Promotion and advertising on the Internet. Make information about Louisiana produce available online. Subscription services like MarketMaker provide this and other services. Existing sites such as LDAF could be more useful by adding search by product and locality. Web sites such as *Southern Living's* offer linking services to local farmers' markets. Banner advertising and promotion on related Web sites such as 'AdWords' on Google are an option (businesses purchase keywords, short ads are displayed when a user enters that keyword, and expense is cost per click).	Rate 1 2 3 4 5 Remarks

I.I. Produce 'homemade' video. Use electronic technology like YouTube to introduce farmers to their customers. A homemade video can be cheap.	Rate 1 2 3 4 5 Remarks

I.J. Borrow the good parts of other marketing programs, such as the North Carolina's sweet potato Web site. Programs include featured growers, chefs, kids' activities, and recipe contests communicated via Web site.	Rate 1 2 3 4 5 Remarks

I.K. Hire a spokesperson to promote Louisiana-produced horticultural food crops.	Rate 1 2 3 4 5

	Remarks

I.L. Place Louisiana-produce ads in appropriate print media (newspapers and magazines).	Rate 1 2 3 4 5
	Remarks

I.M. Point-of-purchase materials at every sales location.	Rate 1 2 3 4 5
	Remarks

II. Actions for Direct Sales - Farmers' Markets and Other Direct Venues

Problems: Service issues like limited days of operation, inconvenient location, and relatively few products; knowledge of the market; low level of trust in products from the grocery store system from food safety issues

II.A. Encourage the idea that it is good to support farming and farmers. Develop personal relationships with shoppers – be friendly, develop rapport with customers, encourage them to return and bring friends. Provide information to customers about the farm, production methods, concern for safety and for the land, etc.	Rate 1 2 3 4 5
	Remarks

II.B. Use the Internet for better communication of product availability and location. Make information about markets readily available online. Subscription	Rate 1 2 3 4 5
	Remarks

services like MarketMaker provide this and other services. Web sites such as *Southern Living* offer linking services to local farmers' markets.	

II.C. More farmers selling at markets to assure variety and quantity of produce. Customers want the convenience of fewer stops.	Rate 1 2 3 4 5 Remarks

II.D. Encourage shopper feedback. Use comment cards for attitudes, opinions and suggestions for improvements.	Rate 1 2 3 4 5 Remarks

II.E. Convenient payment methods – credit cards, for example.	Rate 1 2 3 4 5 Remarks

II.F. Customers should be comfortable. Provide climate-controlled shopping space. Many potential customers may avoid farmers' markets for cooler environments. Example: state-owned facilities as in North Carolina, where there is retail service to the public and an outlet to the wholesale market. http://www.agr.state.nc.us/markets/facilities/markets	Rate 1 2 3 4 5 Remarks

II.G. Increase the frequency of markets. Bi-weekly or where possible daily markets provide shoppers with greater convenience.	Rate 1 2 3 4 5 Remarks

II.H. Promote existing state-supported incentives that encourage market use by target groups, and create new ones. For senior citizens, the state provides $20 coupons usable at farmers' markets and approved roadside stands. A discount coupon program for first-timers visitors could generate interest and attract shoppers, and can create a mail or e-mail address list for future contact.	Rate 1 2 3 4 5 Remarks

II.I. Tailgate market. This type of channel has been popular in North Carolina. Tailgate tents are set up by which farmers can sell directly from pick-up trucks.	Rate 1 2 3 4 5 Remarks

II.J. Farmers have to locate grocers who are willing and interested in working with them because they provide unique products and services.	Rate 1 2 3 4 5 Remarks

II.K. Use 'yard signs' for roadside stands. Signs alert drivers about location, and should be positioned to allow ample time to get off the road safely.	Rate 1 2 3 4 5 Remarks

II.L. Pick-Your-Own Operations. These operations can be promoted as recreational family time and harvest saving for the farmer, but may require supervision of consumers harvesting produce. Method could create additional costs and issues for farmers.	Rate 1 2 3 4 5 Remarks

II.M. Outside the farm support of individual farmers. Example 1: *Community Supported Agriculture* is a group of individuals who financially support a farm operation, and share the risks and benefits. Example 2: *In a 'Locally grown' co-op***,** customers do not share in the risk of production, but have the 'first pick' of the crops by paying an annual membership fee. In a Georgia case, customers receive notice of availability and place orders on the internet; growers fill orders and deliver to a central point; customers come to that point to pickup.	Rate 1 2 3 4 5 Remarks

III. Selling to Retailers and Foodservice.

Problem: The wholesale and distribution trade needs product with specific properties to assure efficient buying and handling procedures.

Most Louisiana growers produce small quantities, do not have facilities for packing and cooling, and their product is not consistently boxed/packaged. In addition, there are many sellers. In contrast, product that is in standard pallet compatible boxes, graded, precooled, and supplied in quantities needed to a warehouse, and is available at the cost of a telephone call from one or a few sellers. These suppliers also support promotions. This arrangement is less costly and more efficient.

However, grocers and foodservice companies want to sell Louisiana produce because it is popular, and transportation costs should be lower. The ideas below could help Louisiana growers provide a reliable supply of locally produced quality produce by consolidating supplies and consistently packing into standard boxes.

Why do this? Most of your customers or potential customers shop at grocery stores. It's a growth opportunity.

III.A. *Form or join a marketing cooperative that would provide standard services – it could be a 'sell only' organization, or one that provides the entire package of receiving, grading, packing, shipping, and selling Louisiana produce.* Example: Relationships between food service personnel and farmers are facilitated by Small Farmers Distribution Network, currently providing this service in four southern states. (www.attra.ncat.org)	Rate 1 2 3 4 5 Remarks

III.B. Contract with a private sector entity ***in the distribution system to perform the functions described in III.A.***	Rate 1 2 3 4 5 Remarks

III.C. Contract with a large farmer in the area to provide standard services – it could be a 'sell only' agreement, or one that provides an entire package of receiving, grading, packing, shipping, and selling services for Louisiana produce. The large farm creates or has the capability to provide these services, and already has the expertise. Common in sweet potato.	Rate 1 2 3 4 5 Remarks

III.D. Internet based service providers that can reduce restaurant costs by ordering from many suppliers. The Internet firm FOODgalaxy.com recruits suppliers and restaurants by promising to make the purchasing process more efficient. Its software allows	Rate 1 2 3 4 5 Remarks

a restaurant to split orders among suppliers based on the lowest price for individual items, and further savings through less time spent on ordering.	

III.E. Contact and serve restaurant customers through specialized organizations that have emerged to serve the popular 'local food' culture. Example: Chefs can buy and feature local produce in recipes by participating in the Chefs Collaborative (www.chefscollaborative.org)	Rate 1 2 3 4 5 Remarks

III.F. Supply institutional customers such as schools through government-sponsored procurement systems. The Department of Defense and some state government procurement operations make their procurement and distribution system for fruits and vegetables available to the National School Lunch Program and other institutions. Product must be conventionally packed and meet grade. Growers may need to be GAP certified. http://www.foodsecurity.org/dod_f2s.pdf	Rate 1 2 3 4 5 Remarks

III.G. Provide high service level to customers. Example: An Oregon farmer sells face-to-face to restaurants. He personally harvests the crops, takes each order to the customer, and stores it in the restaurant's kitchen, and rotates out old stock. In the winter, he discusses needs with each chef and plans production according to these needs.	Rate 1 2 3 4 5 Remarks

III.H. Form/develop relationships with large retailers.	Rate 1 2 3 4 5 Remarks

IV. Promotion activities inside Grocery Stores

Problem: Identifying selling activities that work.

IV.A. In-store promotions such as farmers' market-like display techniques. Examples: handmade signs on chalk boards; baskets and hampers for display; tables set apart from standard produce to draw attention.	Rate 1 2 3 4 5 Remarks

IV.B. Special display techniques. Varying display heights designed to slow eye movement, resulting in greater attention to displayed items. Color combinations. Combine foodstuffs used in recipes/menus.	Rate 1 2 3 4 5 Remarks

IV.C. Use' Buy Fresh/Buy Local' signage.	Rate 1 2 3 4 5 Remarks

IV.D. Farmer Visibility. Name, location, photos, 'Take-one information' about the farm and producer displayed. Farmer could spend a little time at stores.	Rate 1 2 3 4 5 Remarks

IV.E. Event and holiday season participation. Pumpkins and farm visits at Halloween.	Rate 1 2 3 4 5 Remarks

IV.F. Serve environmentally conscious niche markets – food safety, organic, sustainability.	Rate 1 2 3 4 5 Remarks

IV.G. Cooperate in store promotions.	Remarks 1 2 3 4 5
IV.H. Place 'Louisiana-produce' ads in appropriate print media.	Rate 1 2 3 4 5
IV.I. 'Louisiana-produce' featured in mailed newsletters and promotions.	Rate 1 2 3 4 5
IV.J . Use publicity from government institutions (Dept. of Agriculture, etc.)	Rate 1 2 3 4 5
IV.K. Individual Web sites and government sponsored Web sites.	Rate 1 2 3 4 5

Rating some time honored promotional ideas

Print advertising: Free coverage by newspapers, local magazines.	Rate 1 2 3 4 5
Print advertising: Paid advertising by newspapers, local magazines.	Rate 1 2 3 4 5
Print advertising: Mailed newsletters and promotions.	Rate 1 2 3 4 5
Print advertising: Events.	Rate 1 2 3 4 5
Print advertising: Web sites.	Rate 1 2 3 4 5

Increasing Specialty Crop Competitiveness in Louisiana

Horticultural Stock Producers and Retailers of Nursery Stock

Strategies and Promotional Recommendations

Roger A. Hinson, Professor, Department of Agricultural Economics and Agribusiness
and
Joann H. White, CFP®

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Increasing Specialty Crop Competitiveness in Louisiana

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Strategies and Promotional Recommendations

January 2009

Louisiana State University Agricultural Center
William B. Richardson, Chancellor
Louisiana Agricultural Experiment Station
David Boethel, Vice-Chancellor and Director
Department of Agricultural Economics and Agribusiness
Gail Cramer, Professor and Head

Roger A. Hinson, Professor, Department of Agricultural Economics and Agribusiness
and
Joann H. White, CFP®

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The Louisiana Agricultural Experiment Station follows a non-discriminatory policy in programs and employment

Executive Summary - Promotion Strategy Recommendations for Nursery Stock Producers and Retailers

Results and recommendations in this report are from an extensive literature review, assessment of the opinions of industry stakeholders and industry experts through an internet based Delphi Method, and through focus groups. Overall, there also was a strong thread of common purpose based on interdependence along the supply chain to get the right products to consumers.

There are differing and sometimes conflicting goals within and among the industry's stakeholder groups, so marketing and promotion needs vary at the different levels of the industry. Growers seek to attract and hold the attention of retailers and landscapers, while the garden center retailer and the landscape industry generally promote to the consumer. Most promotion has been done by individual firms. Trade associations have contributed to promotional messages. Almost all these efforts have been conducted with budgets that limit professional support. On the other hand, other states have 'brands' that provide support and visibility, allowing producers and retailers to operate under an umbrella of common theme, brand and support. As examples, Mississippi has its *Mississippi Medallions* program, and Texas has its *Texas Superstars* plants and flowers.

Additionally, Louisiana's ornamentals industry can seek to maintain or increase market share by tying into consumer trends through branding and promotion. The breadth of industry stakeholders suggests a consumer-oriented system and brand-based approach. A coordinated promotion program would begin with market research to identify regional consumer preferences in Louisiana. Those results would drive positioning of Louisiana specialty crop products consistent with preferences and attributes of Louisiana products, branding, and promotion.

The recommendations provided below for ornamental crops program focus both on in-state sales and on the out-of-state markets that are important to many growers. The program includes:

1. An in-state market study of regional and niche market preferences, behaviors, attitudes, and demographics, and research using secondary data for important out-of-state markets,
2. Using market research as the basis for a branding and public relations/advertising campaign designed to create equity, generate loyalty and establish long-lasting relationships,
3. Supporting a basic strategy of differentiation or focus as we recognize the power of large retailers to set price expectations for consumers. The brand and image campaigns help individual garden centers to differentiate based on needs of local markets,
4. Demonstrating use of promotion ideas rated as most useful by the Delphi groups through extension programming,
5. Supporting
    a. linkages, perhaps emphasizing electronic alternatives, of producers with their markets and retailers with their customers
    b. options for customers to search for sources
    c. recognition of trends that enable differentiation, such as native plants, adapted plants, and an environmental focus, and
6. Highlighting product and economic benefits of Louisiana ornamental crop products.

These actions provide a framework that can increase efficiency of linkages along a system that ultimately is based on consumer preferences, and under which participants in the industry can get access to professionally developed materials with consistent theme (logo, branding, support) for use in their promotion efforts.

Contents

A. Introduction 6
B. Background 6
B.1. Economic Trends – short term 6
B.2. Consumer Trends 7
B.3. Business Trends 8
B.4. Environmental considerations 8
B.5. Trends in production 8
B.6. The demand for ornamental plants 9
C. Methodology 10
D. Nursery Stock Producers - Results and Discussion 12
D.1.Discussion of ratings from the Delphi questionnaire 12
D.2. Nursery stock focus group results 14
D.3. Conclusions for nursery stock producers 21
E. Nursery stock retailers (garden centers, landscape architects and contractors, and other retailers) – results and discussion 21
E.1. Discussion of ratings from the Delphi questionnaire 21
E.2. Industry-wide (Louisiana Nursery and Landscape Association Board) focus group results 24
E.3. Conclusions for Green Industry Retailers of Ornamental Plants 28
F. Recommendations for strategy, positioning and tactics: nursery stock producers, independent garden center retailers, landscape architects and contractors, and florists. 28
F.1. Research. 31
F.2. Branding. 32
F.3. Public Relations 322
F.4. Industry strategies addressing the consumer.. 35
F.5. Strategies for nursery stock growers 35
F.6. Strategies for independent garden centers and rewholesalers selling direct to consumers 38
F.7. Strategies for landscape architects and contractors 41
F.8. Strategies for florists 42
Appendix Tables 44

This document has two reports pertinent to the Louisiana Specialty Crop Competitiveness Program grant. The reports are:

1. Promotion Strategies and Tactics for Horticultural Stock Producers (producers)

2. Promotion Strategies and Tactics for Retailers of Nursery Stock (landscape architects and contractors, independent retail garden centers and florists)

These two components of the ornamental plants segment of Louisiana agriculture - producers and retailers of nursery stock - are grouped in this report because they comprise the producer-to-consumer supply chain for ornamental plants. These products have become increasingly important to Louisiana agriculture. Louisiana growers have demonstrated their competitiveness compared to other production areas by continuing to be viable business and growing sales steadily over time. These producers also are important 'exporters' of product to other states, bringing outside revenue to Louisiana's income stream. At the same time, sales within the state comprise a large share of total sales. In addition, production methods vary from production in open outdoor areas to heated greenhouse space. So the issues of promotion must be dealt with in a way that informs customers in Louisiana about the availability of unique local product while maintaining markets outside the state. Growers and retailers must have the knowledge to handle plants appropriately to maintain quality while plants are in inventory. For these reasons, a program that considers the entire supply chain seems logical.

Generally, growers' marketing activities are toward retailers, landscapers and to the re-wholesaler trade. Their selling tactics focus on trade shows, customer service, catalogs, price lists. Some are turning toward electronic distribution of this information through compact discs, email messages and attachments, and social networking pages. Garden centers and florists, on the other hand, interact directly with the end user. They must be aware of and use merchandising and relationship-building activities in addition to the image and action advertising. They use many tactics including media purchases to encourage the consumer to take some action at the local garden center. Analyzing and reporting these industry segments together provides for a more efficient and concise presentation of procedures, results and recommendations.

A. Introduction

The Louisiana Department of Agriculture and Forestry (LDAF) funded this research based on the importance of specialty crops to the state's agriculture. A statement from the grant proposal indicates the values of some of these crops.

> *Specialty crops have formed an important role in Louisiana agriculture since the founding of the territory. … Today specialty crop farmers in Louisiana produce a wide range of crops including nursery stock and foliage … These and other specialty crops have enabled the continuance, and even growth of the family farm*

Clearly, there have been successes in production and sales of specialty crops. Implementing strategy and promotion principles at the industry level can support efforts of individual farmers and groups of farmers. In conjunction with changes in consumer preferences, expansion of production and sales can be achieved.

Objectives

The stated goal of LDAF's state plan is to increase the competitiveness of Louisiana's specialty crops, and to provide benefits to Louisiana's specialty crop producers from proposed marketing programs through increased consumer and buyer awareness of locally grown products, increased sales for producers, and higher market value for Louisiana specialty crops. The stated goal of this grant was to support industry growth through both industry and farmer level promotion and industry-level generic promotion strategies in the four specialty crop areas specified.

B. Background

B.1. Economic Trends – short term

The effectiveness of overall marketing and promotional activities, and the effectiveness of individual actions, are at least partly dependent on overall economic activity and outlook. Important short-term economic impacts beginning in 2007 and continuing through 2009 and beyond, are mostly the result of financial industry issues and include:

- major economic weakness at the consumer level that has reduced discretionary spending, particularly for nonessentials
- loss of home equity as prices decline in the residential housing sector
- dramatic declines in home sales and construction
- reduced funding for commercial sector construction
- a government deficit that may affect public sector construction projects while stimulus efforts encourage public sector works
- increasing unemployment
- government spending to stimulate the economy

Oil and other energy sources also are related to the economic downturn in the US and abroad. While fuel costs have moderated since 2008's spike, economic growth in densely populated developing countries and recovery in developed countries will drive energy prices again as the economy recovers.

There are common features across the US economy, as well as regional differences. The Louisiana economy to date has seemed relatively insulated from the current economic downturn, but typically the state's economy lags national economic activity. There has been little 'bubble' in residential housing values, providing stability compared with much of the nation. But residential equity has provided a base for consumer spending and confidence. These and other factors that affect perceived threats and confidence lead to tightening of family budgets and can accelerate an economic slowdown.

Unemployment is another threat contributing to worries about a deeper and prolonged recession. Louisiana has not yet seen the large increases observed in some other states. But job losses in important markets would pose a problem.

The price of oil will continue to be an important driver of the state's income and will influence state spending patterns. Recent economic projections have led to reduced spending for 2008 and 2009. With longer-term economic recovery, trends in place before the recession would reassert themselves. In the meantime, businesses should expect consumers to become more conservative financially and to significantly reduce nonessential expenditures.

Ornamental plants are nonessentials, so sales could be significantly affected by any/all of these factors. These plants serve very definite roles in our lives and are valued for those contributions. It has been argued that the industry is recession-proof, but a more accurate statement probably would assert that it is recession-resistant. Growers and retailers' plans should take that into account.

B.2. Consumer Trends

Futurists provide a perspective about consumer behavior and business opportunities by discerning behaviors and translating those into statements of major trends. A few that seem particularly relevant for purchase decisions regarding specialty crop products follow:

- environmental awareness and action
- desire for higher quality of life, indulgence
- convenience - the demand for getting things done easier, faster
- parallel movements towards everyday luxury and anti-luxury, where consumers curb spending in one area to splurge in others
- consumers more rooted in home and family life; downshifting, cocooning; safety
- sensory orientation, actively seeking out intense experiences
- health - physical and mental well-being

B.3. Business Trends

In the same way, trends based on various incentives and development of opportunities drive business decisions. A few are noted here:

- fewer but large retailers in most sectors; they are powerful market forces
- business success increasingly is dependent on cooperation within a supply chain, and less on competition between firms in a chain
- generally, population demographics are changing; baby boomers still are a major consumer segment, but others such as Generation Xer's and Millennials receive much attention from marketing
- long term government and commercial spending priorities
- applications of computer technology
- there are many forms of concern about sustainability of systems
- support for local businesses

In this discussion, it is important to emphasize the point that most growers have limited contact with the final users of their product. Many growers sell a small portion of output to consumers. Most goes into the wholesale trade. Customers are independent garden centers, landscape architects and contractors, mass merchandisers (general merchandise and home centers) and middlemen called re-wholesalers. Typically, the grower has the task of 'marketing' to others in the trade, and must know the needs of those businesses and how to communicate with them. They also can build loyalty and subsequent customer stickiness in their markets by appropriate activity in the community with the objective of increasing visibility and presence. Retailers market to the customer/user. These businesses connect with their customers and to potential customers in different ways. The function of marketing is to understand the customer's wants and needs as they exist, and to know when they change.

B.4. Environmental considerations

In most states, environmental issues are an important consumer concern and play a very influential role in legislation and regulation. Sustainability – activities that protect the environment and enable firms at the various levels of the production, distribution and retail system to be viable – is an important concept. Even organic production of ornamental plants is emerging as a niche. However, the important impacts of environmental concerns are in customer reactions and potential regulatory regimes. As an example, crop protection chemicals and fertilizers enter the irrigation runoff as pollutants, so capture and reuse of this water may become mandatory. Proactive farmers who recognize these issues and respond appropriately may be able to carve out space in the market for plants positioned as environmentally friendly.

B.5. Trends in production

Nursery and Floriculture. Production volumes and values for some periods in the past are available in Outlook and Annual Reports publications from the US Department of Agriculture. These mostly are taken from Census of Agriculture, Census of Horticultural

Specialties, and situation and outlook reports prepared by USDA economists assigned to this agricultural segment. Another view is from Louisiana's Ag Summary report, an annual, non-statistically based compilation of estimates of volume and value of production.

As noted above, trends in production and value of output have been strong for a sustained period. Consumer preference trends suggest this will continue. From Appendix table 10, the values of production of 'Floriculture Crops' and 'Nursery Stock' crops were about the same at about $6.5 B, and the value of sod was about $1.5 B. From Appendix Table 9, Louisiana's distribution of production was different, with about 60% of an estimated $90 M in 2007 from nursery stock crops and about 40% from floriculture crops. Sod was a small part of the total at about 4%. We cannot estimate growth rate of dollar value of sales for Louisiana, since comparable numbers were not provided for from the 2002 interim work.

Louisiana's Ag Summary, however, does provide suggestions about growth rate and distribution of composition of the crop. From recent years, floriculture and bedding plants held steady from 2003 to 2007with an ending value of about $20 M. However, the woody ornamentals category, roughly equivalent to nursery stock in the USDA reports, was substantially higher in 2007, even after a weather-depressed value in 2005. Overall, these data indicate a steadily growing industry that increased in 2005 by about 2.5% and in 2007 by about 8% compared to the 2003 values. These numbers suggest a stable industry segment that, based on its ability to grow, is competitive with production from other producing areas.

B.6. Demand for ornamental plants

Growth and expansion of this industry result from environmental and aesthetic improvements to homes, communities and cities. As examples:

- a well-landscaped home may add a premium of 7 to 12 percent to the value of residential property
- these plants improve aesthetics of places, and gardening promotes health and wellness through physical activity and stress reduction
- Enjoyment is consistent with important consumer trends mentioned above. They *provide benefits consistent with environmental awareness and action*. They are *convenient and help satisfy the desire for a more indulgent life-style*, and since they generally are relatively inexpensive, consumers giving up luxuries may compensate themselves by splurging on other less costly ones. They provide a more fulfilling *lifestyle for consumers more rooted in home and family life*. And, they are a *very sensory experience.*

On the other hand, there are issues and concerns associated with production that affect consumer perception and demand:

- environmental issues - crop protection products and fertilizers may escape the farm and contribute to water pollution
- water use - overhead irrigation of container crops is a heavy use of water, but experts maintain it is the most economical delivery system

As with other products, many consumers are interested in and respond positively to the opportunity to purchase 'local'. This can may extend beyond the 'grower you can trust' to the benefits of patronizing locally owned garden centers as alternatives to box-store mass merchandisers. This is a strong motivation, and is being used by many kinds of products. In Baton Rouge, even car dealerships are using the theme 'you know us'. A tastefully done component of a promotion campaign could be very compelling to Louisiana consumers, and at the same time would avoid antagonizing out-of-state customers.

C. Methodology

We analyze promotion strategies and actions that take into consideration

- geographic growth potential, with a particular focus on sales to retail garden centers and florists within Louisiana,
- market channels including garden centers, landscapers and re-wholesalers, and
- strategies based on competitive forces that affect opportunities. Most Louisiana growers and retailers are relatively small, and are not likely to attain economies of scale and scope. With information and motivation, they may be able to *differentiate* themselves in terms of product perception and service to the customer. Other growers and retailers may *focus* on particular segment of a market because the firm has some competitive advantage in that segment.

The research was conducted in three steps:

Step 1. A literature review provided the initial basis for development of promotional strategies and implementation actions, revealing a set of factors that drive product choice and/or suggest strategy and promotional alternatives.

Step 2. Individuals with expertise, skills and experience in ornamentals marketing and sales were identified. Most were in the private sector, but we included research and extension personnel in the AgCenter and other segments of the public sector. These individuals were collaborators at different points in working toward the project objectives. Information from the literature and from the collaborators was used to develop a draft of strategy ideas.

To build on information in the literature and various other relevant sources, the Delphi method was chosen to develop discussion on usefulness of the strategy and promotion actions and ideas that had been identified. In the Delphi procedure, a moderator assembles issues and distributes them to the expert panel, then the expert panel members respond. The moderator assembles the responses into areas of agreement and disagreement, and a subsequent round is conducted in which information about results from the first round are disseminated. After consideration of these opinions, the group again responds and there is evaluation of whether the group has reached agreement. These refinements in sequential rounds are the essence of the method[1]. We used a shortened and electronic version to

[1] See "The Delphi Method for Graduate Research" by Skulmoski, Hartman and Krahn, Journal of Information Technology Education, Volume 6, 2007.

gather perceptions of the usefulness of the strategy and implementation actions from the group of experts.

A questionnaire was created to address opinions about usefulness of a variety of marketing, promotion and merchandising activities that have been common in promotion and selling of ornamental plants by growers and by retailers (garden centers and floral), and landscape architects and contractors. In addition, marketing strategies and promotions are conducted at several levels. The questionnaire included items relevant at the industry, organization and at the grower leveles. Full instructions provided to respondents and the complete text of the questions are in Appendix Tables 7 and 8. An abbreviated version of each question, used to facilitate efficient discussion, and the overall averages of ratings, are in Appendix Tables 2, 3 and 4 for the respective groups. The respondents had varying backgrounds. To have a more efficient process for collecting responses into a database, an online survey service was used (Zoomerang.com). The study's objectives and procedures were discussed with all respondents prior to distribution of the questionnaire, and all agreed to participate. A few respondents did not have computers or preferred regular mail, so they were accommodated.

Respondents rated the items in the questionnaire in terms of usefulness on a Likert scale of 1 (not useful at all) to 5 (very useful). They also were offered a space to provide comments. Then, we emailed each respondent a spreadsheet containing the original question, the number of responses for each unit on the scale, the respondent's rating of the question, and all comments. Respondents were asked if, based on information about how others had responded, they wished to change their rating. Results from the database were generated by sorting and averaging of the ratings. The qualitative comments were categorized and summarized.

Step 3. Results from the collaborators' efforts and the Delphi effort were the basis for further refinement at stakeholder focus groups. The first focus group activities was conducted as an independent event at an office of the LSU AgCenter, and the second was part of at regularly scheduled meeting of the La. Nursery and Landscape Association board. General Delphi results were presented as a series of questions. Outcomes from the focus groups were reported as responses to questions under headings that included respondents' recognition of consumer concerns, our opinions of strengths and weaknesses represented by the comments, and our suggestions for actions.

As noted above, the questionnaire was organized by industry segments or functions, and the analysis follows that format. In addition, we adopt the following terminology to refer to the different groups

- producers of nursery stock ('growers' in the text)
- independent garden center retailers and florist retailers ('retailers' in the text)
- landscape architects/contractors in the text
- university and agricultural association experts who are familiar with the industry ('industry experts' in the text)

D. Nursery Stock Producers - Results and Discussion

D.1.Discussion of ratings from the Delphi questionnaire

The work that forms the basis of this report was conducted during a period of significant economic contraction and uncertainty in the financial industry, based on unsustainable lending practices that have affected home values in many parts of the country. This instability has extended from those issues to other sectors of the economy and the country, and appears likely to affect decisions for several quarters.

The portion of nursery stock produced in Louisiana sold in and outside the state varies with market channel, as documented by survey results over a 20 year period[2]. The reports document the importance of garden centers and landscape architects/contractors to grower sales. These markets are predominantly in-state. The re-wholesaler trade also is a growing component of sales, but mostly is out-of-state. Based on these patterns, our focus is on promotion strategies and activities that support in-state sales, but we expect these activities to have benefits outside the state.

All those invited to participate in the Delphi method did not participate. However, from Appendix Table 1, respondents were well distributed across the nursery stock growers and experts groups. Overall averages of the usefulness ratings and averages by groups were calculated. Comments in individual items and general comments on sections of the questionnaire were collected. These were condensed and organized, and returned to respondents in a format that provided their original ratings scores, the distribution of ratings by others, and comments. Respondents were asked if they wanted to change their ratings based on scores and comments from others in the group. In the second round, there were changes in ratings by a few respondents. There were no large changes in ratings by any individual, and no additional comments were received.

General results are presented in this section. To maintain the context of the questionnaire in presentation of results, the items were analyzed by section. Within each function, items were grouped based on overall rating reported in Table 1 into those we called 'highly' rated and another group termed 'intermediate'. These designations were arbitrary and relative to the sector, so a numerical rating that might have garnered a high rating in one section might have been viewed as intermediate in another.

First, most individuals and groups of respondents rated these items at least average in usefulness based on the rating scale. Thus, all these actions and ideas were perceived to have potential benefits as strategies or in implementation of strategies. However, that was not the case for the questions about consumer concerns regarding environmental issues.

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[2] 'Trade Flows and Marketing Practices within the United States Nursery Industry: 2003'. http://www.cals.ncsu.edu/saaesd/scsb/list/SCBxyz.pdf

In the industry-wide actions section, conducting market research to understand the consumer was highest rated, and educating consumers to make appropriate choices with respect to plant materials also was high. In the next level, respondents thought it was important for the industry to find new markets, and to address other promotional items such as knowing the industry's positives and having point of purchase materials available for retailers. When we looked at differences between the groups in Appendix Table 2.1, the top-three rated items were the same, even though the numerical ratings were different. Opinions on the other items were mixed. As an example, growers gave higher ratings to better internet search options than did the industry experts group.

Table 1. Overview of Delphi questionnaire results for nursery growers, based on average ratings of items, Louisiana, 2008.

Section	High ratings	Intermediate ratings
Industry-wide activities	Conduct market research Educate about product choices	Identify new markets Identify La's positives, promote them Use point-of-purchase materials
Individual actions to support sales	Create/ enhance customer loyalty Improve services to LAs and contractors	Create and use value-adding supply chain activities New plants to markets Trade show participation Organize open houses Use internet to communicate with customers
Rating different kinds of promotions	Word-of-mouth/ referrals	Trade shows On-site visits/ events Email notifications of availabilities Direct mail/ newsletters Catalogs
Consumer issues	Home improvements Seek intense sensory experience Upgrade plant material choices	Want to support La producers Sustainable production

Among actions that individual firms could take to support sales, highly rated activities were customer loyalty and increased service to landscapers. The intermediate level generally was a set of services, including cooperation between growers and others in the chain, and Internet communication was included. Between the groups, developing customer loyalty was highest, but after that there was considerable divergence of opinion. The items rated by growers that had intermediate ratings received lowest ratings from the outside experts group. Growers gave higher ratings to value-adding supply chain activities, new plants, and better services to landscape architects/contractors, and placed more importance on Internet-based communication.

Specific kinds of promotional activity were evaluated. Word-of-mouth was highest rated, and the traditional relationship-building activities were in the intermediate group. Email notifications were rated higher than the traditional newsletters and catalogs. There are many areas of agreement between the groups, particularly at the top. One area of disagreement is the email notifications of availabilities, rated low by growers but the top item by the industry experts group. Growers' ratings also present an interesting contrast in that they seemed to recognize value in Internet and email communication in the previous section, but rated it lower here, perhaps indicating that their actual use level is low.

We asked respondent to rate a set of issues that, according to academic and popular press reports, are important to consumers. We know that expenditures on ornamental plants and related items are discretionary income expenditures, and we expect the responses to be in-line with overall consumer trends. The ratings substantiated that - sensory experiences through improving the home, and upgraded plant materials, were among the highest rated. Support for local producers was important as well. The environmental issues were perceived to have little influence on purchase behavior of most Louisiana customers. Within the respondent groups, growers had higher ratings for their top choices and lower ratings for their bottom choices. There was a very distinct drop in ratings values for the environmental issues by growers, indicating they are receiving little feedback from their customers that these are a concern. In the industry experts, environmental issues were rated much more similarly to the others, and concern about containers was close to the top of the items, with a rating of 2.71 compared to 1.73 by the growers.

In summary, there

- was strong support for research and for promotional effort along the lines of branding and labeling
- was moderate support for the Internet as a enabling tool
- were indications that promotion strategies and most of the activities we included in the rating were supported by growers.

In addition, respondents were invited to write in comments for each question, and to add ideas to the list, for each section. Those are available in Appendix Table 2.5. Generally, there was substantial diversity in comments received. Most issues that received comment were extensions of thoughts presented in the questionnaire. In most cases, the responses were positive.

The respondents felt that there is a consumer niche interested in sustainability and environmental awareness. As indicated in the additional comments section of the questionnaire, there was a voice or two regarding the potential of 'green' for positioning. But in general they sensed little influence on Louisiana consumers' choices. However, to serve consumers in large metropolitan markets where these concerns are more visible, it would be appropriate for growers to position themselves to serve that market. And finally, while the Internet is perceived to be an opportunity, growers perceive barriers to both direct marketing and commercial applications.

D.2. Nursery stock focus group results

As a qualitative means of gaining information, the value of focus groups is to provide more in-depth knowledge on the attitudes and opinions respondents hold about the strategies presented from the Delphi groups. As previously stated, more highly rated strategies from the Delphi groups were presented to focus group participants in the form of open-end questions. Although the sample is not appropriate for statistical analysis due to sample

size, information gained is useful in validating and extending responses to the questions originally posed to the Delphi groups. Sessions were recorded then transcribed for coding/categorizing responses. These activities resulted in the development of greater insight into why certain opinions are held. Using the collective perceptions of these groups helps uncover modifications needed to sustain or improve existing programs. Groups function like brainstorming sessions, allowing participants to build upon each other's thoughts and experiences. These in turn generate new ideas. It has been reported that individuals participating in focus groups often develop greater buy-in of subsequent plans.

Focus groups were conducted as described in the methodology and the description above. A $50 participation incentive was offered. We had a target of 10 to 12 participants in each group. The nursery stock growers group was coordinated by a retired Cooperative Extension employee. Letters of invitation were followed by telephone contact, and individuals confirmed that they would attend. The session was orally recorded. The final number of participants was seven, all of whom were wholesale growers. The questions list and a general 'transcription' are in Appendix Table 2.6.

The geographic area represented by these growers was small, mostly from Tangipahoa parish. Their responses appeared to be straightforward. The question and response session stopped after just more than an hour. A summary of the activity is included in Appendix Table 2.6.

These SELNA growers work together informally in many ways, such as assisting buyers to find the products they need from other growers in the area. When asked to describe themselves, they stated they are small family farms whose products beautify the environment. They saw new selling opportunities in producing plants for coastal restoration projects and for rain gardens. They acknowledged advantages of using the Internet to find new business and customers. On the other hand, it was noted that many Louisiana growers are only slowly adopting the internet, or are not adopting at all.

In terms of branding, these growers felt that the Louisiana Select program had been useful and that 'state brand' programs in other states have provided a level of support to their growers. Brand value was recognized, in terms bringing a promise of quality to the buyer or consumer. They were aware of environmental issues and that those issues can present opportunities. When asked about cooperation in the supply chain, where cooperation may capture more market share or expand the market by creating additional value, they noted as one example that there are opportunities for growing and promoting plants that are more appropriate to the storm-exposed Gulf Coast market. They also stated these opportunities aren't presented to customers, and there aren't enough producers of native plants.

These growers work together by assisting buyers to find the products they need in the area. Asked about working together at trade shows, more than one grower indicated awareness of a group of 'neighbor' nurseries in Georgia, with adjoining booths at the Southern Nursery Association trade show. This particular question was included because the coordinated activities of that particular group had been observed at the SNA trade

show by the authors. In essence, that group had created its own trade show 'neighborhood'. In informal conversation at the 2008 event, individual group members stated that the group has other informal cooperative business arrangements as well. Members of the focus group expressed the opinion that this kind of cooperation had potential advantages in terms of customer service, but that there are several barriers to cooperating in this manner.

In this focus group, there were statements of recognized opportunities as reported above. There also were many statements that explained why those opportunities might be difficult to accomplish or implement. For example, without a formal structure, these growers have great flexibility to cooperate for individual and mutual benefit. In particular, they noted constraints that are part of trade show rules and customs that would make it difficult to have adjoining booths at a trade show. They perceived and discussed new market opportunities. While there probably is validity in the growers' reasoning, opportunities could have been emphasized as well.

In discussion state brands, the Louisiana Select program was perceived to have been useful, but there appeared to have been little protest when it disappeared. When asked about Internet use, there appeared to be a perception of a steep learning curve for some growers. Respondents brought up the ideas of fees for cooperative advertising, and suggested that ads can be effective. One grower stated that he stopped advertising because it brought in more business than he was prepared to handle. There were excellent ideas from the group about environmental issues. These were mentioned in a follow-up sense in defining what others should know about the industry. But the environmental conversation was summarized in their statements that customers don't care about sustainability or even quality, if the price is right and as long as the product looks good.

An impression from the group's statements was that there is a level of awareness of the issues behind the questions that were asked, but day-to-day business activity allowed little time to follow up.

Observations on strengths and weaknesses

Based on our perception of the group's comments, we provide some comment on the focus group outcomes, organized based on specific comments and statements from the group. Our thoughts subsequently are presented in columns titled strengths, weaknesses and strategic actions/initiatives.

Concerns stated in the focus group covered several topics:

- Competition with mass merchandisers received comment, particularly in terms of low price strategies and extended guarantees. These motivate consumers to ignore quality.
- Environmental issues that affect the nursery were mentioned, including recycling of production materials. Environmental also was part of the consumer equation. The group mentioned use of plant materials and landscaping to help clean runoff water. Native plants that offer security to the consumer because they are better adapted to

the climatic range, including storms, were a part of the environmental issues. In combination, the group's focus had some emphasis on environment.

- There were information issues, like getting notification of state bid events, and learning about kinds of plants to be used in coastal restoration projects and when bids for those projects would be taken.
- Marketing issues were addressed often. Most comment indicated distrust of marketing, suggesting it is akin to manipulation. But they recognized that marketing activities can be effective. Funding for advertising and promotion was a topic.
- The power of the Internet was acknowledged. But most growers have inadequate knowledge of computers in general, or of use of the Internet for promotion and information.
- Cooperation with others in the industry is a form of promotion. Working with landscape architects to promote appropriate plants in various formats and scenarios, such as native and adapted trees, could reduce damage from storms.

Table 2. Summary of ornamental crops focus group responses, Florida parishes growers, 2008.				
Concerns/Comment	***Suggestions/Recommenda-tions by Participants***	***Strengths***	***Weaknesses***	***Strategic Actions/Initiatives***
	Products must have information tags	Opportunity to brand and educate		Design 'templates' are available (see *image ease*® on www.jhc.com). These could be part of a La. promotional campaign
Plant guarantees are expensive, and are used by box stores to get unfair advantage			This is a size disadvantage	Fact sheets might help to assure consumers that discretionary spending is wise and safe
Growers want to bid on public construction projects - keep tax dollars in state			No notification	Work thru LNLA and others to get notification; distribute over Internet and newsletter
			Little use of unique products to create competitive advantage	Programs and fact sheets on basic marketing strategy to emphasize the importance of differentiation and how to apply it
	LNLA needs to do research on grinding 'dump piles'	Aware of and willing to act on 'green' issues; recognize the industry can be positioned		A win/win opportunity; growers benefit from reusing; consumers made aware of actions to address environmental issues and how plants can help
	Expand markets through edible indoor/outdoor plants		Food safety issues	
Native plants - need more producers, more production	These plants could expand customer base	It's a segment with high current interest	Participants disagreed on definition of native plant	Define 'native plant' for *marketing* purposes; conduct market research to identify current and potential markets
	Grow and market trees and other materials adapted to our climate, ie smaller trees do less damage to structures	These products would address priority problems		Taking action and building awareness of efforts generates trust and confidence in Louisiana growers
	Need advertising campaigns to promote sales of Louisiana plants at garden centers	Awareness of the need	Ability and willingness to fund	Develop and implement a state level promotional campaign

Table 2. Summary of ornamental crops focus group responses, Florida parishes growers, 2008.				
Concerns/Comment	***Suggestions/Recommenda-tions by Participants***	***Strengths***	***Weaknesses***	***Strategic Actions/Initiatives***
	Grow plants for rain gardens in residential developments (application for native plants)	'Green' thinking; desire to create new markets		Weather events highlight problems, can make residents attentive to promotions featuring grower activities
	Grow plants used for coastal restoration projects	Identifies new markets		
Growers are not contacted by FSA about needs and upcoming projects				LNLA or other entity develop a fact sheet explaining process used by FSA in selecting growers
Use of Internet just beginning; having plant availabilities and photos there for all customers (LAs mentioned)	State develops easy to use platform	Recognize powerful selling tool	Concern for the amount of time it will take to keep up-to-date	Develop Web site to connect buyers and sellers such as www.nurseryman.com;
Form partnerships to meet volume requirement to sell to big box stores; that channel is "Achilles heel"		Recognize that differentiation cannot solve all problems	Sometimes have to match what the big box stores offer	Promote other attributes in other segments, such as shorter plant guarantees
Marketing is needed but must be genuine		Recognize that trust is essential	Feel that marketing is deceit; may create barriers to co-branded advertising efforts	Establish standards in the agreement to guide the advertising agency
	Resurrecting the 'Louisiana Select' program	Other states have similar programs	Commitment of time and money	Evaluate feasibility of re-establishing program
	Check-off or grower fee program for cooperative advertising, television	Growers and industry taking responsibility for their program		Less expensive media options include Cable TV gardening shows and sponsorships of PBS programs
Many garden centers buy on price and do not know how to recognize a quality plant			Managers buy what they think consumers want; perceive a price sensitive customer	Provide consumer education on value of high quality plants; search for retailers whose customers want quality
Unlike food products, consumers are less interested in *how*, but more interested in *where* a plant is grown			May be a marketing point	Develop PR to augment consumer concern for place of origin

Table 2. Summary of ornamental crops focus group responses, Florida parishes growers, 2008.				
Concerns/Comment	***Suggestions/Recommenda-tions by Participants***	***Strengths***	***Weaknesses***	***Strategic Actions/Initiatives***
Consumers are primarily interested in plant's appearance			Quality / environmental attributes enable differentiation and price premiums	Educate consumers on how to select and where to get quality plants
Footnote: the following items were common between this focus group and the LNLA Board focus group (reported in Section E) - Tags on products, plant guarantees, and support for the 'Louisiana Select' program; Plant guarantees by mass outlet stores are a serious problem; Sales to wholesalers and retailers are dependent on consumer opinions. Other considerations: Grow plants for rain gardens (water treatment and conservation) in new residential developments (could be a good application for native plants)				

D.3. Conclusions for nursery stock producers

The responses from the questionnaire and the focus groups suggest substantial knowledge of opportunities for Louisiana growers. All Louisiana's producers are small compared to the industry's largest producers, and almost all are small in absolute terms. Growers understand they can differentiate themselves based on size, excellent service, on ability to provide plants grown locally, and in terms of native plants. Their product characteristics fit well into the local market and other niche markets. A unified promotion program, including something like 'Louisiana Select' as a base, and other state supported brands, would be helpful. Discussion of sources of funds for promotion from private sources such as assessments is encouraging. Acknowledgment of deficiencies in terms of Internet promotion also indicates a need that should be addressed. Additionally, there are special issue areas that growers discussed as potential markets. That particularly would include environmental concerns that might affect image and selling opportunities. Awareness of these areas by growers and other industry segments did not appear to be a problem.

See Section F for recommendations.

E. Nursery stock retailers (garden centers, landscape architects and contractors, and florists) – results and discussion

E.1. Discussion of ratings from the Delphi questionnaire

The retail environment is quite different from the situation faced by nursery stock producers. With proper care, plants remain salable over a reasonable period. Care is costly and even then losses occur. Sales are seasonal, with the larger share occurring in a three month window in the spring and with a smaller bump in sales in the fall season. Industry promotion efforts that encourage planting in other seasons have had some success.

The Delphi questionnaire, distributed as an electronic document, was described above. Individual garden center owners or managers, landscape architects, and florists were invited by telephone to participate (Appendix Table 1). This broadly targeted group of respondents to both the questionnaire and the focus group provided substantial stakeholder input. First and second rounds were conducted for the modified Delphi procedure. The first round responses were averaged, comments were organized by question and section, and those results were returned with the individual's original responses. Each respondent was requested to consider whether their opinion changed based on information from the other panel members. This round resulted in few changes in ratings by respondents. There were no large changes in ratings by any individual, and no additional comments were received.

The questionnaire was organized by industry segments or functions, and the analysis follows that format. Results for the grower components of the industry were presented in

the previous section. In this section, we present results from the groups (see full results in Appendix Tables 3 and 4). The abbreviations specified earlier – 'retailers', landscape architects/contractors, and 'industry experts' – continue to be used.

First, note that most groups of respondents rated these items at least average in usefulness. Many items were rated above 4 based on a scale where a rating of 1 was 'not useful at all' to a rating of 5 which was 'very useful'. Thus, almost all these actions and ideas were perceived to have potential benefits as strategies or in strategy implementation.

In the discussion that follows, we use information from Table 3 and Appendix Tables 3.x and 4.x. Grouping the rated items under high and intermediate labels followed the logic described in the grower section.

For *industry-wide efforts*, we can state that the high and intermediate rated items were fairly consistent across the groups (Table 3). Those items included a comprehensive research program and informing customers about plant and materials choices. Market research was highest rated by retailers. Landscape architects /contractors differed, putting best farm practices and cooperation in value-adding activities among their highest items. 'Certified La. product' was important for both the landscaper and the retailer groups, while the 'state brand program' was important among the industry experts. We also note that retailers had differentiation strategies among their higher rated items.

Regarding actions that *individual businesses* can take to attract and serve customers, or that plant material suppliers can take to improve service, all three groups placed promotion of branded plants at least in the intermediate group, and for retailers and industry experts it was second highest rated. Following that, the ratings were very diverse. The landscape architects/contractor group rated customer friendly internet site as its top item, followed by social gatherings, community involvement, and locator maps. Retailer interests differed, with a focus on customer databases, special attention to customers, and positioning as the primary information source for customers. After those items, retailers chose merchandising activities. For the industry experts, the top rated item was 'be the customer's primary information source', then create databases and target businesses as important areas had at least intermediate average ratings. These results reflect the different nature of these segments of the industry.

Table 3. Summary of Delphi method questionnaire results, landscape architect/contractor and garden center retailer industry groups, 2008.

Section	Landscape architects and contractors, overall		Garden center and florist retailers, overall		University/ag organizations	
	High ratings	Intermediate ratings	High ratings	Intermediate ratings	High ratings	Intermediate ratings
Industry level	Inform about product choices Promote 'best agricultural practices' Cooperate on added-value activities	'Certified La product' logo Comprehensive market research Promote new markets	Comprehensive market research	'Certified La Product' logo Inform about product choices Choose a differentiation strategy	Inform about product choices	Comprehensive market research State-level evaluate/ brand program Choose a differentiation strategy
Actions by individual businesses	Customer-friendly internet site Host outings for Landscape architects/contractors Broad evaluation of plant performance Community activities	Form co-ops Printed/online maps Promote branded plants Promote risk-reducing plant products	Create customer database Promote branded plants Customer special attention	Be primary source of information Community activities Create events/ programs Enhanced merchandising techniques Develop branding programs	Be primary source of information	Promote branded plants Create customer database Target businesses
Effective promotion activities	Word-of-mouth/ referrals Sales/ business development calls	Television Trade shows Direct mail newsletters/ promotions Own internet site	Word-of-mouth/ referrals Print advertising Direct mail newsletters/ promotions	Television Sign/display at entrance Cable Own internet site Radio	Television Word-of-mouth/ referrals	Print advertising Yellow pages Radio Cable Billboards Sign/display at entrance
Customer's concerns	Higher quality choices	Price of products/services Purchase La-grown plants	Higher quality choices	Price of garden center/ floral products Sustainably produced Reduce stress with plants	Higher quality choices	Purchase La-grown plants Price of garden center/ floral products

For the ratings of *effectiveness of promotion activities,* word-of-mouth and television were placed in the high to intermediate range of effectiveness by all groups. Other items important to retailers and landscape architects/contractors were direct mail and own internet site, but neither was as important to the industry experts group. A perception of declining effectiveness of trade shows as promotion attitude was reflected in these ratings. Only for landscape architects/contractors did trade shows appear as high as the intermediate category. For traditional promotion vehicles such as billboards, yellow pages and cable, only the industry experts rated these as strongly as the intermediate category.

The final section addressed respondents' perceptions of the *level of customer concern about specific current issues* related to demand. All the groups had the item 'higher quality choices' at a top item. On the other hand, the next item was concern about price. The item 'purchase Louisiana-grown plants' was in the intermediate category for landscapers and industry experts, and 'sustainably produced' was in the intermediate category for retailers. For all three groups, ratings of the environmentally oriented items received low ratings. There were comments from individuals regarding environmental attributes as important niche opportunities, but there was no perception of broad customer concern about these issues.

E.2. Industry-wide (Louisiana Nursery and Landscape Association Board) focus group results

This focus group was conducted as described in the methodology section. We arranged, through the association's Executive Secretary, to conduct the activity as a component of a regular Board meeting of the Louisiana Nursery and Landscape Association (LNLA). The number of actual participants was 12 (Appendix Table 1). These were approximately equally distributed among growers, retailers and landscapers. The session was recorded. The list of questions and a general transcription are in Appendix Table 4.5. Most of these individuals have extensive time in service on the Board. They were responsive and provided valuable information. The question and response session was stopped after just more than an hour.

A summary of the activity is included (Appendix Table 4.6). Participants understand they are in a mature market. In-state sales are very important to smaller growers, and in-state sources are important to independent retailers. At the same time, larger markets in metropolitan areas of Texas (to the west) and Atlanta and others (to the east) are crucial to the industry's health. Large retailers have gained market share and set pricing in the commodity portion of the market, while independent garden centers seek to attract customers that want special plant and allied materials, or the service(s) offered by smaller stores.

As leaders in the state's industry, members of the board were well informed with respect to issues. The dominant topics in the discussion follow:

- Value was a key word to these board members. 'Value at a good price' was a comment made early in the session, and value was mentioned in the context of cooperative effort among growers.
- The value of LSU's research and outreach was noted. Respondents were very complementary of LSU's reputation. This was reflected in comment about the Louisiana Select program, which one participant noted 'set records on the amount of material sold'.
- A rather negative comment on brands was made and was not challenged by other participants. The comment seemed related to proliferation of brands, noting that the industry was 'carried away with that whole branding thing'. An emphasis on the experience was valuable. 'Mental relaxation' from 'playing in the dirt' helps to attract new consumers, and the 'sensory experience' was mentioned as a primary motivation for consumers.
- The contribution of state-based promotional programs was important but testing must be 'real local'.
- The factors that affect consumer decisions are clear – plants must 'look great and live great'.
- Environmental factors may be important in other markets, but were perceived to have little influence on decision-making by buyers. Landscape contractors were particularly vocal regarding this issue.
- Some forms of cooperation to increase competitiveness were evident in the group's responses, but many reasons that ideas would not work were vocalized.
- Among the weaknesses that we perceived, differentiation approaches such as branding did not get solid support. Loss of the Louisiana Select program also encouraged competition on the basis of price.

Table 4. Summary of Louisiana Nursery and Landscape Association focus group – growers, landscape architects and contractors, and retailers, 2008.				
Concerns/Comment	***Suggestions/Recommenda-tions by Participants***	***Strengths***	***Weaknesses***	***Strategic Actions/Initiatives***
	Place tags on Louisiana-grown products		Opportunities lost to states with more active promotion	Develop a La. plant promotional campaign; design 'templates' for tags are available (see *image ease*® on www.jhc.com)
Promote La. products in other states; get information to buyers outside La.			La seems less active than competitors	LNLA representation at trade shows, promote in media
Image of Louisiana nursery industry		Value compared to competitors	Illustrates some understanding of differentiation concept	Fact sheets to emphasize importance of differentiation, and how use it as a strategy
	Develop quality standards	A brand requires consistent quality		Quality standards already exist
Branding is overused			Discussion of product guarantees; didn't support brand value	Fact sheets on how branding helps sales; branding assures that expenditures are wise and safe
	Inform consumers that adapted and locally produced plants require fewer pesticides			Promotional efforts emphasize the values of local/native plants
The 'Louisiana Select' program helped sales, but was discontinued		Recognized the value	Generic encourages price-based competition	Evaluate feasibility of re-establishing based on benefits to the industry
Whatever LSU Ag Center prints, customer takes as gospel	Provide education to consumers on how to grow plants; noted that educational seminars at garden centers attracted customers	Here is a trusted source of information		Provide garden centers with programs, materials and suggestions for promotions
	Encourage do-it-yourself; use garden shows to encourage gardening; encourage people to 'play in the dirt'	Expressed some interest in developing new markets	The new markets theme wasn't addressed	New markets are necessary for any industry to stay viable; conduct market research to identify prospective markets

Table 4. Summary of Louisiana Nursery and Landscape Association focus group – growers, landscape architects and contractors, and retailers, 2008.				
Concerns/Comment	***Suggestions/Recommenda-tions by Participants***	***Strengths***	***Weaknesses***	***Strategic Actions/Initiatives***
	Use digital photos; branded interactive Web sites; search engines to quickly identify places to secure product	Some used technology to promote, but modest evidence of wide-spread use		Use information technology; develop Web sites, use the Internet to communicate availabilities and develop sales opportunities
Customers ask for plants featured in *Southern Living* magazine		Free promotion through the magazine	Available from La. growers?	Wide audience for *Southern Living* in Louisiana – help them choose plants to feature
	Educate consumer that there is a perceived value			Leverage existing programs
	Landscapers and garden centers are saying "find it for me."	Provides an opportunity for great service		Differentiation at work. Neighbors make this happen, or can be cooperative effort
Growers who sell to big box stores encounter checkout scanning problems that affect which vender gets credit for the sale	Reduce business activity with these retailers	Awareness of these problems		
	Some growers cooperate in promoting at trade shows	Readiness among growers in the same area to cooperate in promotional efforts …	…however, growers are competitors and may be reluctant to cooperate with one another	Assess grower willingness to form statewide promotional association, or act thru LNLA
	Good landscape architects involve consumer and clientele in developing landscape		Recognized, but no follow-up in this discussion	Doing this is differentiating, builds loyalty
Few requests for organically grown/sustainably produced plants	First concern among customers is sensory experience. Landscape contractor statement – 'I have maybe only had two customers in the last 25 years express concern'.		Consumers in some markets want sustainability in plant production – this trend will come to Louisiana	In public relations, explain how growers care for the environment; monitor consumer demands for these plants

E.3. Conclusions for Green Industry Retailers of Ornamental Plants

The common bond among these segments of the industry is their focus on production and retailing of green industry products, but diversity probably is a better descriptor. Despite this diverseness, there were items that received high ratings across groups. Among producers, these included strong support for research and informing consumers about the offerings of the industry, along with promotional effort along the lines of branding and labeling. Using the Internet and other electronic technology as an enabling tool for promotion and other management support was important to growers. Finally, the promotion strategies and most of the activities included in the rating were supported by growers.

The issue of diversity is more evident among retailers. They were fairly consistent about industry-level actions such as market research to provide broad benefits. However the actions that seemed appropriate for garden center retailers differed from those appropriate for landscape businesses. But all the kinds of business appeared to recognize the impacts of business concentration at the retail level, as those affect Louisiana's growers and retailers. There is a need for differentiation in stores and product offers, to contrast to the standard plant/standard service offers of mass merchandiser retailers. Commonly, this differentiation would appear in terms of product mix, product quality, and service, and could occur along several product characteristic areas. We did note some apparent disagreement on the issue of the function of branding and branding's potential value, so education may be appropriate in that case. As a product characteristic example, growers selling into urban markets might sense more concern about these issues than is reflected in Delphi responses and in focus groups. Perhaps due to the composition of those groups, these issues were not a part of the group's interactions.

F. Recommendations for strategy, positioning and tactics: nursery stock producers, independent garden center retailers, landscape architects and contractors, and florists.

This work and subsequent strategy development are intended to benefit all those along the supply chain, so the overall strategy must also be very broad. The grant language stipulates a broad scope of those who should benefit from the discussion and development of strategies. Having a unique selling position for each and every specialty crop is impracticable and lessens the impact potential of cooperative promotional efforts. Therefore, a single unique selling position for certified, state-grown plant materials is advisable. Strategies can be developed through market research as described below.

The overall strategy to increase purchases of Louisiana nursery stock is to develop an integrated certification and marketing program to verify and sell Louisiana-grown plants to in-state customers and to important out-of-state markets. We propose a program to provide knowledge and assistance regarding end-user consumers' concerns in selecting and growing plants. Recommendations also suggest more education of Louisiana residents

concerning stewardship of Louisiana's ecosystem and the impacts of their plant material purchases. Therefore,

> *the communication strategy goal is to increase awareness of nursery crops grown in Louisiana and to develop or deepen the connection between consumers and growers as all being united in efforts to enhance economic growth and to enhance and protect Louisiana's ecosystem.*

In comparison to fruits and vegetables, there probably is less awareness among Louisiana consumers of the ornamental plant products grown in Louisiana, and probably less concern for 'local' production as a product attribute. Therefore, the communication strategy goal of increased awareness of nursery crops grown in Louisiana and developing/ deepening the connection between consumers and growers in a united effort to enhance economic growth and to enhance and protect the ecosystem is important. By targeting communications to end users, all parties within the supply chain have the potential to benefit. An implication of having a strategy focused on end users is to have a better understanding of what they value in plant materials, and how they make purchase decisions. Within the section covering market research, we suggest survey questions to help assess behaviors.

In our focus groups, a number of growers and retailers recalled that 'Louisiana Select' plants performed well and the program was popular with consumers. Such acceptance demonstrates the value consumers attribute to endorsements by unbiased authorities such as those offered through university trials at LSU. It also demonstrates the importance consumers place on increasing their odds of success.

Louisiana has fewer USDA plant hardiness zones than several states that have developed successful state branding campaigns. Our Texas neighbor has maintained a successful state plant selection program for 20 years. With eight USDA Plant Hardiness Zones, the Texas SuperStar plants are sold statewide and have made substantial financial contributions to their industry. Most gardeners felt that 'superstars' performed well and their gardening efforts were successful. According to Jerry Parsons, Professor and Horticulturist from the Texas Cooperative Extension Service in San Antonio, since the Texas SuperStar (CEMAP) program was introduced in 1989, 40 plants have been introduced. Developed and trademarked by Texas A & M University, these were plants that did not previously exist. In terms of financial impact, four of those plants were "million dollar sellers for the Texas nursery industry within four years of their introduction … Each one of the plants mentioned could produce at least a several hundred thousand-dollar boost to the nursery industry in one year of sales. To keep these profitable Texas SuperStars coming, an aggressive program of searching, propagation and testing must be maintained. This very conservative $15 million estimate takes into consideration number of items sold and the wholesale and retail sales price as derived from the major wholesale growers (Hines, ColorSpot and Greenleaf) in the state. This means that the value-added components are not included, nor is the production of smaller wholesale plant producers across the state."

Continuing the explanation of how and why the program has been so successful, Parsons stated, "What are the characteristics which make a plant a 'winner'? I have mentioned a

few such as (1) It must be attractive and useful to the gardening masses rather than a special few who devote themselves to one specific plant type; (2) It must consistently perform well for Texas consumers regardless of their plant growing expertise; (3) It must be able to be propagated and mass-produced in sufficient numbers to meet the increased consumer demand generated; (4) It must be unique and/or offer desirable and ornamental characteristics which are not usually available in commonly sold plants; (5) It must be as pest resistant as possible --- an added bonus is to be a deer non-preference plant; and, most importantly, (6) It must be attractive in the sales container -- so attractive that it sells itself to the consumer who has never heard of the many attributes of the plant." http://www.plantanswers.com/superstar_selection.htm.

Since inception, the program has generated millions of dollars in revenue to growers and retailers in Texas. State development and branding programs also are operating in many other states, including Mississippi, New Jersey and Pennsylvania, for a range of agricultural and non-agricultural products. So

> *success in other states suggests that a brand/logo program and restoration of the Louisiana Select program be considered*

Evidence suggests that growth in the demand for green-industry products is positively correlated to increasing disposable incomes. Economic downturns currently in effect mean fewer discretionary dollars for spending and more consumer emphasis on making wise purchases from trusted sources. Louisiana growers can become known as that trusted source. Once plant quality standards and identification requirements (container material, design, tags, etc.) are met, growers and others within the delivery channels will be able to market plant materials grown on Louisiana nurseries and farms.

Broadcast, print, and interactive mainstream media engage in 'self-promotion' by utilizing unsold 'inventory' for advertising space and commercial time. This maximizes opportunities to create awareness for the medium itself—for upcoming programs, events and so forth. Media self-promotion is also used to support image/ branding statements. So

> *the green industry could use point-of-sales materials, containers, plant tags, garden center aisle signage, invoices/customer receipts, etc. to promote how Louisiana's green industry directly and indirectly benefits the state and its residents.*

Use of such sales communication techniques can result in reducing reliance on paid advertising and mitigating the uncertainty of journalistic proponents in having press releases published.

Recommendations within this report are both general and specific, with examples given to help clarify or support some proposed tactics. Ideas suggested below may have been used previously. However, they are included as having merit or success in other states or with other products. Topics included in this section provide further insight into the purpose for consumer market research, areas of questioning, suggestions for a public relations campaign, promotional tactics and brief descriptions of some of the actions study respondents rated as useful.

In several sections, Web sites are included to further demonstrate potential services. Any references to companies or software solutions are made as examples only and are not endorsements of any product or service mentioned in this report.

F.1. Research.

Focusing on target market segments is the most suitable marketing strategy for specialty crops. Therefore, it is vital to collect primary data to increase knowledge of the consumer segments that currently purchase nursery stock, reasons for doing so, and to provide a gauge of future markets. (Recommendations for out-of-state market research are presented later within this report.) However, when resources are limited, well-informed decisions become crucial. Secondary data can be very useful, are less expensive, and often are available without cost. Periodicals, trade industry associations, university studies, and government agencies abound in data. Information gained through secondary sources can be used in devising an initial public relations campaign. For example, in regard to growing tips, an experienced gardener has very different service needs in comparison to a novice gardener. Also, the *National Gardening Survey* (2007) provides useful data for consideration in developing the survey tool for Louisiana research. However, findings are inappropriate for ascertaining specific attitudes of Louisiana consumers toward Louisiana growers, and their willingness to choose 'local products' over products grown in other states.

Delphi group respondents gave high ratings to conducting market research to understand and take understand and take advantage of shifts in consumer attitudes and buying behaviors. Primary research findings should be used to develop branding, product positioning, new market identification and communication strategies. Conducted statewide, consumer market research should identify niche markets and corresponding behaviors, attitudes and demographics. The scope of data required to develop a better understanding of consumer attitudes may require multiple studies. Unlike food products with local markets strategies, purchases of nursery and ornamental stock are infrequent. Many sources (such as mail houses and list brokers) can provide names and addresses of prospective respondents.

The goals of the research suggest study of the following consumer perspectives:

- Demographics, including rental or ownership of home, interest.
- Experience in gardening (highly experienced, experienced or novice), use of landscape services (architect and/or contractor), others
- Identification of opinion leaders to begin 'seeding word-of-mouth' messages in social networking circles.
- Purpose for plant purchases—gardening, landscaping or for indoor use.
- Who influences plant choices—landscape architect/contractor, word-of-mouth from family or friends, landscape/gardening experts featured in media, etc.
- Importance of plant attributes—quality, locally grown, suitability for growing conditions, plant assurances/guarantees, tagged with printed care instructions, price, etc.

- Supply channel preferences and corresponding attributes of same that appeal to consumers.
- Interest or trends in types of plants preferred. Identify plants that producers could consider growing to meet consumer demands.
- Sources of information on gardening.
- Anticipated future purchases and time of year.
- Awareness of potential benefits of planting native plants and trees.
- Willingness to purchase certified state-grown plants and motives for doing so (basis for differentiation).
- Appeal of state-branded (Louisiana Select) program.
- Image and awareness of Louisiana growers.
- Message content and best media channels and mix to promote products.

Providing research results to stakeholders benefits everyone along the supply chain. Regular repetition of the parts of the research will help stay ahead of consumer trends. This is especially applicable to growers who control product availabilities.

F.2. Branding.

A well-developed brand becomes the platform on which the consumer makes an emotional connection with a product. It is integral in securing a place in the consumer's mind. A brand is far more than a logo or an ad slogan—it is the sum of feelings consumers have towards a product. The brand should provide the foundation upon which an advertising campaign is built. An actively managed brand creates equity, generates loyalty and establishes long-lasting relationships. Furthermore, a well-perceived Louisiana brand should have little if any negative impact on growers supplying product to out-of-state buyers. Findings from the primary research study are the basis for development of the brand.

- Develop branding and product differentiation/positioning strategies from research findings. Development of a brand for a product includes differentiation. When products are essentially similar it becomes problematic for consumers to distinguish between them, thus making differentiation based on observable product features extremely difficult. Furthermore, lack of product differentiation can lead to intense price competition. The inability to make a distinction is particularly true of agricultural products as differentiation takes place in the consumer's mind. To a consumer, differences in appearance between Louisiana-grown plant materials and those from other states probably are not dramatic. This appeared to be a great concern to our focus group participants. Therefore, an origin-based differentiation strategy (meaning where the product was grown, not necessarily how) is best suited for Louisiana nursery specialty crops.
- Design unique logo incorporating the brand statement for state-grown plants. While there is little disagreement concerning the importance of having such a logo, the right design choice for a logo says volumes about a product. Use of a single logo as a distinctive image can help consumers immediately distinguish Louisiana products from others. The logo should be dissimilar from the existing 'certified' Louisiana logos. A simple graphic depicting a visual element of growth would be

most effective. The basic design component could be adapted to Louisiana-grown fruits and vegetables. For example, bamboo is an ornamental plant and some varieties have edible parts, and sweet potato vines in containers are popular.

- Enhance advertising. In a 1998 Trade Flow survey covering about 25 states, advertising expenditures as a share of sales were lowest for Louisiana growers. During recessions, it is common for businesses to cut marketing costs to reduce expenses, but such reductions may be ill-advised. As Harvard Business School professor of business administration John Quelch states, "It is well documented that brands that increase advertising during a recession, when competitors are cutting back, can improve market share and return on investment at lower cost than during good economic times." When purchasing media, larger 'buys' result in better negotiation of prices. Growers and retailers could form cooperatives to buy advertising and collaborate in promoting Louisiana-grown plants. While specific concept development is premature, some strategies can be recommended. Growers, landscapers and retailers should begin or step up efforts to incorporate the benefits of indigenous plants in gardens and landscapes into their existing advertising, point-of-sale and plant care materials, news releases and conversations with consumers.
- Creating desire for Louisiana nursery products well in advance of the season can impact consumer purchasing decisions early in the buying cycle. As was recommended in the report on fruits and vegetables, use of a calendar can create greater awareness of and eagerness for the materials. (More concerning this is mentioned in the next section of this report). There must be an ongoing commitment to maintain the campaign year after year, with media purchases designed to increase impressions just prior to and during prime buying seasons. A continuous source of funding to develop ads and evaluate and purchase media must be available.

F.3. Public Relations.

While brand development and advertising concepts for Louisiana nursery crops necessitates more consumer research, a public relations campaign can be initiated more quickly. As indicated in the report for fruits and vegetables, farmers' markets have helped develop and strengthen the ties between themselves and consumers in their communities. Frequent food purchases sustain that bond. Nursery stock purchases, however, are entirely different. While adding to the quality of life, ornamental plant materials are not essential. Consumers make purchases infrequently and may be only remotely aware of or connected to growers in their state or communities. (The supposition of connection will either be confirmed or rejected through research.) Also, consumers may be less altruistic with regard to buying nursery stock because it is done for aesthetic reasons. These facts and assumptions give rise to a different set of challenges in creating and managing a public relations campaign.

Given funding, the public relations campaign can begin now. Through a series of scheduled press releases, the campaign should target individuals and individual actions, helping them understand that each purchase or choice they make is indeed of some consequence. All

within Louisiana's green industry should participate in helping Louisianans understand how each entity along the supply chain specifically contributes to making our state a better place in which to live. Activities undertaken that result in wise use of or protection of Louisiana's ecosystem may each be noteworthy to the right audience.

Use of an attractive wall calendar may be one solution in addressing problems purchasing frequency. The *Lawn & Garden Calendar* produced by the LSU AgCenter Research and Extension offices is a high quality publication that may be an excellent tool for creating timely reminders of Louisiana nursery stock availabilities. In addition to the valuable advice given throughout the calendar, recommendations for using indigenous plant materials can be made.

As early as elementary school science classes, consumers become aware of how plants help the environment by creating oxygen and absorbing carbon dioxide. While consumers are generally aware of steps to improve the environment, many may believe the problem is so large they cannot to make a difference. Cause-related educational campaigns can further help Louisiana consumers understand how the purchase of a homegrown product helps them, their communities and state, the state's ecosystem, and the state economy. Climate changes and notation of events impacting the environment appear daily in the media. Louisiana's campaign can easily piggyback on the momentum of national messages.

The avenues available to inform the public are not limited to mass media or to the hope that a publisher will run a favorable story. Louisiana's green industry can and should perpetuate learning. For example, education can take place at retail outlets, or in plant care information provided to clients by landscape architects and contractors. Point-of-sale and other material can include information on how much carbon dioxide a fully grown tree will sequester over its expected lifetime, thus helping the consumer understand how her single purchase may help climate change; or how using indigenous plant materials has the potential to reduce use of plant protection products.

The demographic makeup of patrons of farmers' markets is likely similar to consumers keen on protecting the environment. Farmers' markets can be distribution points for literature. In fact, educational messages about Louisiana's green industry can be incorporated into any related sales outlet.

Growers, landscape architects/contractors and retailers can cooperate in developing a public relations campaign sponsoring the creation of urban forests. The *2002 Louisiana Urban Forestry Council* had as a goal in that same year to "continue to develop and implement a comprehensive public relations campaign…and educational programs" to make citizens aware of urban forest benefits and develop stable funding sources." A cooperative effort between private and public sectors may help Louisiana's green industry stakeholders gain public recognition and approval for their actions and enhance the awareness of the benefits of using indigenous plants. Promoting and supplying trees and other plant materials that are more effective in cleaning the air could be part of the campaign. Plants have been catalogued on this basis, and all plants do not sequester

carbon or do so efficiently. Sponsors of urban forests in metropolitan areas of Louisiana could be in position to gain recognition from consumer stakeholders.

Additional components of the public relations message should emphasize how green industry participants care for and contribute to Louisiana's ecosystem through both good agricultural practices and supplying greenery best suited for Louisiana. Landscape architects/contractors and ornamental retailers rated promoting 'best agricultural practices' at 4.75 and 4.18, respectively, in the Delphi rounds. These messages highlighting sustainable production and other environmental benefits improve consumer knowledge and understanding, and provide goodwill and awareness for the state's nursery industry.

Especially noteworthy in recessions, educating home owners in the process of selling their homes of the value of landscaping is another significant prong in the public relations campaign. Dr. Charlie Hall claims that well-done landscaping "may offset the devaluation of their home values to some degree." Some studies indicate increases to home values can be as large as 17%.

F.4. Overall industry strategies addressing the consumer.

As before, an on-going public relations/advertising campaign to the consumer should showcase the benefits of buying and planting indigenous nursery stock.

- Infrequent consumer purchasing behavior means personal contact needs to be initiated periodically by retailers. Communication in which consumers are provided with quality information on gardening and landscaping will help foster a relationship with the retailer and perhaps create loyalty to influence future buying decisions.
- Cultivate new markets and refine target markets.
    - Create programs and promotions to develop new markets, and cultivate younger customers. Baby Boomers spurred growth in the green industry. To get younger individuals enthusiastic about gardening, different approaches are needed. For example, opportunities were created out of the 2006 drought and subsequent water ban. Georgia Greenhouses developed a program run through sister operation Nectar and Company. 'Special event' container plant rental was discovered as an innovative way to get Gen X and Y demographic groups interested in gardening. Young home-owners developed an interest in gardening after they saw the impact the 'instant landscaping' had on the appearance of their homes.
    - Market to younger demographics through their children. This technique is used successfully in other industries (McDonald's is an example). Children love to watch things grow, so promote gardening activities that foster teaching opportunities and interaction with parents. As an example, several specialty item companies provide the capability to imprint logos on beans. As the plant grows, the imprinted logo appears on the seed leaves, serving as a daily reminder to parents of the sponsoring retailer.

    - Use results from market research study to identify and refine markets.
- Help consumers address their issues and problems with gardening and landscaping.
    - Provide assurances and guarantees. A significant complaint by focus group respondents concerned the competitive pressure from mass merchandisers in providing plant guarantees. While it is understood that matching the customary one-year guarantee provided by mass merchants and home centers may be imprudent, providing an alternative (perhaps much shorter), may be needed to compete.
    - Provide information and tools to aid consumers in being successful gardeners. Some market research studies suggest consumers are more likely to do business with companies that provide good gardening information.

F.5. Strategies for nursery stock growers.

Sales to re-wholesalers and landscape architects and contractors. To increase sales to their customers, growers should improve communications and relationships with landscape architects and contractors and themselves. They should also participate in public relations campaigns in advising citizens of good agricultural practices.

- As suppliers, growers determine what landscapers use and consumer demand can change quickly. The plant 'palette' landscape architects/contractors use is controlled by what is readily available, and what can be gotten quickly and within budget. Help landscape architects and contractors have a competitive edge by staying abreast of trends in consumer demands in plant materials.
- Consider employing trend watchers, or repeat market research frequently.
- Cooperate with or form partnerships with other growers to offer buying services for landscape architects and contractors.
- Communicate/sell using technology. Rated highest among proposed strategies by landscape architects and contractors was informing them of product choices. Application of Internet technology as a communication platform provides a very effective marketing tool and sends a message to landscape architects and contractors that growers respect time constraints under which they operate.
- Increase the use of technology. Develop Web sites containing plant availabilities, with digital photographs (photos enhance the communication); ability to order plant materials on the Web site; have common names available alongside scientific names; and virtual nursery site tours.
- Consider participation with Web sites designed to electronically link buyers and sellers with one another, such as www.nurseryman2.com.
- Incorporate Web site search engines so landscape architects and contractors can search availabilities using plant and other characteristics – criteria might include grouping of plants by color palette, growing conditions, native, Louisiana-grown, plant characteristics (compact, low growing, soil type such as dry, sandy, and so forth); link photographs of availabilities to ordering form.
- Use Internet search applications - purchase pay-per-click words such as popular plants, Louisiana landscaping, garden gardening, landscaping, and others.
- Use e-mail and text messages to further speed exchange of ideas.

- Develop branded line of plants. In a study performed by NQuery, branded plants outsold unbranded plants by 40% even though they were priced much higher. Recent business reports suggest branded product sales levels have been stronger during the current recession.
- Provide suggestions to landscape architects and contractors
    - what did well over winter
    - plants to use for adverse weather conditions such as droughts
    - positive feedback from other landscape architects and contractors.
- Education landscape architects and contractors about plant materials. As one landscape architect put it, "…we are designers, not scientists."
- Consumers often prefer unique cultivars. Help landscape architects and contractors be more competitive by having unique plants.
- Sponsor CEU sessions for landscape architects.
- Promote good agricultural practices to consumers.
- Integrated pest management practices, such as manually pulling weeds, was used by 84 % of Louisiana growers. Information about such activities may help consumers better identify with producers.
- If available, offer Louisiana certified plants and/or Louisiana Select plants.
- Provide care tags with complete first-year instructions.
- Use recyclable or biodegradable containers.
- Provide point-of-sale materials free of charge to re-wholesalers and retailers.
- Develop plants for specific markets and growing conditions such as:
    - Plants for first time gardeners.
    - Plants that can survive harsh growing conditions.
    - Plants that require little maintenance.
    - Plants that are compact when mature.
- Stay abreast of upcoming Natural Resources Conservation Service projects. Information presented here is quoted from Ralph Broome, Contract Specialist, USDA-NRCS Louisiana:

    > "All of our contracts with a value of over $25,000 are posted on the FedBizOpps website (www.fbo.gov). This includes contracts with vegetative planting requirements. Most of our contracts with planting requirements are for marsh restoration projects that include native Louisiana plant species. The prime contractor on these projects is typically a construction contractor and the vegetative supplier/planter is a subcontractor and/or supplier to the prime. We historically haven't let many contracts for strictly vegetative requirements. It is best to register on the FedBizOpps website and have electronic notices sent to you for all our construction and vegetative projects. Our office is under Department of Agriculture, Natural Resources Conservation Service, Louisiana State Office. Instructions for contractor registration are found on the website. Being registered will allow you not only to see our current requirements, but also be put on an interested vendor's list (IVL) which prime contractors can view and use as an aid in their search for vegetative planters/suppliers. FedBizOpps is the federal Government's central location for advertising all of its contracting actions. So you can also register for contract actions being advertised by offices other

than ours (i.e., other NRCS procurement offices or procurement offices for other federal agencies). To receive notices for our vegetative requirements under the $25,000 range (like the larger projects we have a few projects every few years or so) please send me your company information, to include contact info, type of work interested in, capabilities statement, work history, and similar info that would enable us to determine if you can provide and/or be interested in the work we require. If this is your first shot at federal contracts, then I would suggest you also take time to register on the Central Contractor Registration (CCR) and On-line Representations and Certifications Application (ORCA) websites. We can only award contracts to contractors who register on CCR and have completed the ORCA reps and *certification* process. It may also benefit you to include your company information on the Small Business Search engine available through SBA. We frequently use this search site to find capable small businesses to bid on our work."

- Maximize benefits of trade show participation. In the 2003 Trade Flows report, 44% of Louisiana growers' advertising expenses were for trade show participation. Historically trade shows were one of the dominant selling options, but participation is declining. However, when exhibitors at a nursery association trade show and focus group participants were asked why they chose to take part in the shows, many indicated they were afraid not to. As Steve Miller in his book *How to Get the Most Out of Trade Shows* says "…their absence would speak louder than their presence." There are many activities that lend themselves to more productive trade show participation. Comments are based on observations of exhibitors/booths at a recent association trade show, but the list below is not intended to be comprehensive
    - Provide training to staff on proper sales and display techniques.
    - Several weeks prior to show, send handwritten notes to current customers inviting them to visit booth.
    - Create a welcoming environment for attendees of show. Use tables for point-of-purchase materials. Sitting behind a table creates a barrier to conversation.
    - Make the result of your first contact with attendees/prospective buyers a brief handwritten thank you note. If possible, deliver the note to the prospect's hotel prior to the end of the show.
    - Mimic settings in which plants are to be used. For example, an outdoor living area might have a barbeque or fire pit, outdoor furniture, etc.
    - Increase the visibility of the sales booth by careful application of lights, displays, and plant materials. Because green is the predominant color at a trade show, increase the use of red (its complementary color) provided use does not clash with flowering plants. Incorporate red into graphics of banners and displays.
    - Develop 'landscaped' booths—plant samples should be arranged in a well designed construct.
    - Pricing sheets. Offer to mail or give password on Web site.
    - Qualify prospects by learning to recognize buying signals. Example: Prospect engaged in conversation, when exhibitor steps toward the prospect, prospect does not move back.
    - Follow up on sales leads promptly.

    - Carefully select specialty items (logoed merchandise) or dispense with them completely in lieu of refreshments.
    - Track sales and new customers to help determine participation in future shows.
    - Form alliances with other growers.
    - Form strategic partnerships with landscape architects and contractors, irrigation companies, sod companies, real estate developers, etc.
- Increase out-of-state sales to wholesalers and re-wholesalers. In focus groups, several growers mentioned concerns that the development and promotion of a Louisiana brand might negatively impact out-of-state sales. As mentioned previously, a highly respected quality brand, regardless of its state of origin, should sell well in other markets. One strategy for increasing out-of-state sales is to target buyers in larger metropolitan areas with comparable growing conditions.
    - Determine other states currently purchasing Louisiana products.
    - Conduct formal or informal market research studies among buyers to determine attitudes toward Louisiana products, desire for unique cultivars that may differentiate their stores, etc. List brokers could provide contact information on prospective survey respondents.
- Forego free Web site listings – some may harm the grower's image.

F.6. Strategies for independent garden centers, and rewholesalers selling direct to consumers.

Because store visits are infrequent for most consumers, retailers need to create ways to maintain contact with their customers. Supplying them with gardening and landscape information throughout the year is an excellent approach. Successful independent garden centers and rewholesalers will augment information by creating reasons to keep customers coming into their stores all during the year. Commonly, independent garden centers see mass retailers as the major source of competition and attempt to compete on price. It is neither advisable nor truly even possible for independent garden centers to compete for any length of time solely on price. Independent garden centers can best compete by focusing on their expertise and knowledgeable staff, stocking interesting inventories matched to the wants of their target markets, expert merchandising, and after-market servicing. Specific suggestions include:

- Knowledgeable, service-oriented staff. Mass merchandisers' customer service is minimal.
- Increase year round foot traffic by stocking and selling plant materials for spring, summer and fall. Train customers to expect product availabilities during all but the most dormant growing seasons.
- Increase fall season foot traffic by providing comprehensive assistance to consumers wishing to develop perennial flower beds
    - demonstrate that by focusing on perennials, they can reduce landscape maintenance costs (important to consumers in declining economic markets).
    - provide seminars on developing and designing perennial beds

    - unique cultivars suited to consumers' growing environment, water conservation, natural fertilization, pest and disease prevention, anticipated bloom schedules
    - use of ornamental plants that provide color without blooms, etc.
- Increase the amount of time consumers spend in the garden center by offering "education stations" within the facility. Example: a 'did you know' campaign in which information is given to customers—little known facts about plants such as growing tips, free services offered by center, etc. As with other retailers, greater visiting time normally translates into increased sales.
- Don't use 'sale prices' to attract new customers.
- At the end-of-the-season, clearance sales of low quality plants and sparse inventory may give consumers a poor image of a garden center. Instead, offer sale items first to regular customers via newsletters or e-mail.
- Maintain good plant selection inventory, including varieties, exotic and larger plants. Limit quantities of plants commonly sold by mass merchandisers, and, to the extent possible, display these further away from the store's entrance. Use the sale of special and exotic plants (that big box stores typically do not have) to draw customers.
- Maintain a database with customer names, street and e-mail addresses, and history of past purchases. Classify them according to buying habits (frequency of visits) or better yet, demographics if available.
- Provide practical advice to customers such as explaining differences between 'partial shade' and 'part sun'. This terminology can be confusing or meaningless.
- Increase the times that consumers are around plants. As local artists do, use lobby space (such as banks and medical offices) to showcase indoor plants.
- Expand opportunities to sell by sponsoring beds/landscaping at high profile businesses.
- Increase sales to repeat buyers by employing customer loyalty programs. Features of these programs can include:
    - Coupons that can be used on the next visit.
    - "Private viewing" at beginning of season for first pick opportunities.
    - Loyalty programs that reward customers for dollars spent. Allow points to be accumulated from one year to the next. Points might be for additional purchase discounts, home visits by garden experts, free rental of small garden equipment, etc.
    - E-mail or send hardcopy newsletters with gardening advice, discount coupons, news of anticipated plant arrivals, and invitations to seminars.
    - 'Double coupon' promotions on the slow sales days of the week.
- Be convenient. Offer early morning shopping during summer months to allow customers to be more comfortable.
- Assist customers by loading plants in vehicles and use protective materials to cover vehicle surfaces.
- Display of few or low quality products can harm the retail image. When selections dwindle, give away small plant items and annuals to customers.
- Sponsor activities where children have the opportunity to grow plants.
- Take advantage of the consumer trend toward outdoor living spaces.

- Hold seminars or clinics on plant care.
- Reduce price sensitivity by selling plant packages. Create plant packages by putting together a number of plants suggested for specific growing conditions. For example, plants that create rain gardens, plants that grow in harsh conditions, perennial shade or sun plants, pre-planned gardens, plants to attract hummingbirds and butterflies, 'container gardens'.
- Employ the use of specialty items. Specialty items or customized advertising promotional items, when well employed, can boost brand awareness and support public relations efforts. Items are most effective when their utility is closely connected to the concept being promoted. When the items are used by consumers it may validate their bond with the brand. Some specialty items are available as tools to aid gardeners in selecting the optimum places in their yards to grow a particular plant or help identify modifications needed to perk up existing plants. Plant sensors such as *EasyBLOOM* and *Sun and Soil* probes contain technology to measure moisture, light, humidity and soil data, by capturing and analyzing growing conditions that can be transferred to a computer via a USP port. For some devices, installing the flash drive automatically logs onto a Web site with information and algorithms to identify possible plant choices for an area or to analyze houseplant problems and provide solutions. The probes have sufficient space on one side for logo placement. When used by gardeners, the probe serves to keep them mindful of the sponsor. Logoed devices can be sold or used in 'loaner' programs .
- Merchandising. According to the *National Gardening Survey 2007*, "Twenty seven percent of all US households performed their own landscaping."
    - Cross-sell and up-sell plants by developing displays that replicate established gardens and landscapes.
    - Help consumers visualize by creating displays of plants requiring similar growing conditions that complement one another in color, texture, size, etc.
    - Help customers select flowers and plants that complement exterior home colors.
    - Develop store layouts so that hardscapes are interspersed with greenery.
    - Cross-sell other plants by noting on care cards other plants that may be complementary (example: ferns and impatiens.)
- Engage in after-market services such as helping diagnose plant pests and diseases and recommending appropriate products/actions.
- Market to do-it-yourselfers. Use or sell computer software to help consumers design their own landscapes. User-defined fields can be added to the plant database. (A similar feature can provide ability to add *Louisiana Select* plants if a decision is made in favor of pursuing these.) www.gardencomposer.com
- Market to parents through their children. Take notice of children and provide inexpensive mementoes like stickers to young guests.
- Feature customer gardens on Web site.
- Provide value-added services or 'success packages'. For example, a retailer might provide soil sampling kits and encourage the user to return the sample to the retailer, who would forward it for analysis. Results would be returned to the retailer, providing the opportunity to sell soil-amending products and to make

suggestions on plantings. An additional benefit may be in helping consumers reduce planting risks.
- Use popular, sometimes hard to find, hardscapes as loss leaders to draw customers into stores—ex: manufactured sugar kettles.
- Provide 90-day plant replacement warranty. (Customer must return plant and demonstrate proof of purchase.)
-

F.7. Strategies for landscape architects and contractors.

According to the *National Garden Survey 2007*, 30 percent of U.S. households purchased lawn care/landscape services. This is one area experiencing some growth, especially in landscape design and installation services. Specific suggestions include:

- Form strategic partnerships to generate referrals and provide after-market service.
    - Growers, horticulturists, arborists, irrigation companies.
    - Commercial and mortgage bankers, builders, realtors, real estate developers, pool designers, construction companies. Quality design and landscaping have the potential to increase property values. Property holders, especially commercial entities, may be willing to purchase landscaping services to hasten sales.
    - Outdoor furniture retailers.
- Educate home owners on the value of landscaping.
- Target new property owners.
- Offer discounts to property owners displaying advertising signage for landscape architects and contractors.
- Monitor new building permits and contact builders for sales opportunities.
- Buy mailing lists of names and addresses of new construction home buyers.
- Deliver 'welcome to the neighborhood' gifts of small plants to new home owners accompanied with printed literature/brochures describing services.
- Increase use of technology.
    - Employ software that helps clients better visualize the architect's or contractor's suggested landscape designs. Importing digital photographs of client houses into specialized software program and adding the landscape design may be superior to concept drawings in helping home owners assess design impact. *http://www.ideaspectrum.com/arch_overview.php*
    - Purchase popular pay-per-click key words on Internet search engines.
- Provide post-installation services. Participate with growers in addressing or preventing problems, providing further plant care information as necessary.
- Specialized design applications.
    - Drought resistant landscaping. As many as 36 states are projected to face water shortages in the next 60 months according to the Government Accountability Office. Among them is Louisiana with abnormally drier conditions to moderate drought expectations impacting most of the state.
    - Demonstrate stewardship of the Louisiana ecosystem by promoting designs featuring native and/or indigenous plants.
        - Adapted to local soil, rainfall, and temperatures.

        - Natural defenses against numerous diseases and insects.
        - Less need for watering (may even be designed as watersheds).
        - Reduced use of pesticides and fertilizers.
    - Gardens to attract wildlife.
    - Native plant gardens/landscaping.
    - Rain gardens.
    - Downsized lifestyles, such as condominiums and self-contained communities.
- Stay abreast of upcoming state landscaping and natural resource conservation contracts.
- Help clients better manage budgets by offering phase-in plans for projects.

F.8. Strategies for florists.

Stan Pohmer, executive director of the national Flower Promotion Organization states, "While the floral industry has previously thought of itself as recession-proof, a more realistic term these days would probably be recession-resistant." There are likely times in which consumers may reduce the number and size of arrangements, but tradition dictates that floral arrangements be a component of certain types of occasions.

- Increase use of technology.
    - Employ the use of a customized Web site, including secure online payment
    - Internet marketing.
        - Post photos online of floral arrangement specials.
        - Post testimonials relevant to the quality and on-time delivery of arrangements on Web site.
        - Maintain a database in which customers are segregated into target markets and purchase histories are stored.
        - Conduct after-purchase surveys to identify quality issues, on-time delivery, reasons for having selected florist.
        - Increase communication with buyers of floral gifts. Frequently, the customer who orders an arrangement doesn't see the quality, design, or flower size of arrangements. Use e-mail to show arrangement photos and time of delivery.
- Install quality control program.
        - Offer satisfaction and delivery guarantees.
        - Improve customer satisfaction and possibly reduce delivery costs by using GPS tracking and traffic monitors in delivery vehicles.
        - Maintain contact with delivery staff to assure arrangements are delivered within promised timeframe and in satisfactory condition.
- Offer discounts to customers ordering and paying for advance orders at busiest times like Valentine's and Mother's Day. The earlier the purchase, the greater the discount. May help prevent loss of sales to competitors as the holiday draws nearer. Helps manage inventories and workflows as well.
- Form cooperatives with out-of-market florists to improve supply chain by addressing availability, continuity and supply quality (collecting industry statistics will improve market signals of price, style, quality).

- Provide value added services. For example, if an arrangement is delivered an office, it probably will be taken home in a car. Solve the problem of driving home with the vase of cut flowers by offering inexpensive transport devices such as the Vase Valet® (www.vasevalet.com).
- Form partnerships with other event service providers and develop specially priced packages and joint advertising. Example: Tuxedo rental, limousine rental and flowers for proms, weddings, etc., caterers and photographers.
- Expand markets to include business clients.
    - Use stock near expiration date by preparing and delivering complementary arrangements to selected businesses.
    - All businesses experience customer service issues occasionally. Partner with businesses to provide small floral arrangements as atonement gifts to customers as an apology for failed service expectations.

Appendix Tables

Appendix Table 1. Number of invited and completed questionnaires for Delphi procedure, nursery growers, retailers, and industry experts, 2008.

Nursery growers		Landscape architects and contractors		Retail garden centers and florists	
invited	completed	invited	completed	invited	completed
25	19	13	9	21	16

Appendix Table 2.1. Ornamental growers results, by section, in descending order by overall rating. Section industry-wide strategies and promotional activities.

Growers		University/ag organizations		All respondents	
Question	Avg Rating	Question	Avg Rating	Question	Avg rating
Conduct market research	4.20	Conduct market research	5.00	Conduct market research	4.53
Educate consumers about product choices	4.09	Educate consumers about product choices	4.67	Educate consumers about product choices	4.29
Identify new markets	4.09	Identify La's positives, promote them	4.57	Identify new markets	4.12
Use point-of-purchase materials	3.90	Design/use Certified La Product Logo	4.43	Identify La's positives, promote them	4.11
Identify La's positives, promote them	3.82	Identify new markets	4.17	Use point-of-purchase materials	4.00
Emphasize La's environmental efforts	3.73	Develop 'La-grown' as a brand	4.14	La's environmental efforts	3.83
Better internet search options for customers	3.64	Use point-of-purchase materials	4.14	Design/use Certified La Product Logo	3.72
Design/use Certified La Product Logo	3.27	Emphasize La's environmental efforts	4.00	Better internet search options for customers	3.59
Develop 'La-grown' as a brand	3.09	Better internet search options for customers	3.50	Develop 'La-grown' as a brand	3.50

Appendix Table 2.2. Ornamental Growers results, by section, in descending order by overall rating. Section II, actions that individual nurserymen can take to attract garden center and landscaper customers.					
Growers		University/ag organizations		All respondents, overall	
Question	Avg Rating	Question	Avg Rating	Question	Avg Rating
Create/ enhance customer loyalty	4.55	Create/ enhance customer loyalty	4.83	Create/ enhance customer loyalty	4.65
Create and use value-adding supply chain activities	4.27	Improve services to LAs and contractors	4.71	Improve services to LAs and contractors	4.39
New plants to markets	4.18	Develop branding programs	4.43	Create and use value-adding supply chain activities	4.22
Improve services to LAs and contractors	4.18	Organize open houses	4.29	New plants to markets	4.17
Trade show participation	4.09	Create and use value-adding supply chain activities	4.14	Trade show participation	4.00
Use internet to communicate with customers	3.91	Alliances with plant societies	4.14	Organize open houses	4.00
Organize open houses	3.82	New plants to markets	4.14	Use internet to communicate with customers	3.88
Use terms of sale as incentives	3.73	Provide POS materials	4.00	Develop branding programs	3.78
Diversify approach to selling	3.73	Trade show participation	3.86	Use terms of sale as incentives	3.78
Create large/ small grower partnerships	3.64	Use terms of sale as incentives	3.86	Alliances with plant societies	3.72
Alliances with plant societies	3.45	Use internet to communicate with customers	3.83	Create large/ small grower partnerships	3.71
Develop branding programs	3.36	Create large/ small grower partnerships	3.83	Diversify approach to selling	3.63
Provide POS materials	3.36	Diversify approach to selling	3.40	Provide POS materials	3.61

Appendix Table 2.3. Ornamental Growers results, by section, in descending by overall rating. Section III, Kinds of promotions in terms of your perception of their effectiveness in wholesale sales of plant material to garden centers and the landscaper market.					
Growers		University/ag organizations			
Question	Avg rating	Question	Avg rating	Question	Overall avg rating
Word-of-mouth/ referrals	4.45	Email notifications of availabilities	4.71	Word-of-mouth/ referrals	4.50
Trade shows	4.18	Word-of-mouth/ referrals	4.57	Trade shows	4.28
On-site visits/ events	4.18	Trade shows	4.43	On-site visits/ events	4.28
Direct mail/ newsletters	4.00	On-site visits/ events	4.43	Email notifications of availabilities	4.22
Catalogs	3.91	Direct mail/ newsletters	4.14	Direct mail/ newsletters	4.06
Email notifications of availabilities	3.91	Web sites / internet / interactive media	4.00	Catalogs	3.94
Sales/ business development calls	3.91	Gardening/home and garden publications	4.00	Sales/ business development calls	3.72
Trade journals	3.40	Catalogs	4.00	Web sites / internet / interactive media	3.56
Web sites / internet / interactive media	3.27	Trade journals	3.57	Gardening/home and garden publications	3.56
Gardening/home and garden publications	3.27	Sales/ business development calls	3.43	Trade journals	3.47

Appendix Table 2.4. Ornamental Growers results, by section, in descending order by overall rating. Section IV Customer Concerns.					
Growers		University/ag organizations		All respondents, overall	
Question	Avg Rating	Question	Avg Rating	Question	Avg Rating
Making home improvements	3.00	Seek intense sensory experience	2.86	Making home improvements	2.94
Upgrade plant material choices	2.91	Making home improvements	2.86	Seek intense sensory experience	2.83
Seek intense sensory experience	2.82	Recyclable growing containers	2.71	Upgrade plant material choices	2.83
Want to support La producers	2.45	Biodegradable containers	2.71	Want to support La producers	2.53
Sustainable production	2.09	Upgrade plant material choices	2.71	Sustainable production	2.28
Purchase Louisiana-grown products	1.91	Want to support La producers	2.67	Biodegradable containers	2.11
Best management practices	1.73	Sustainable production	2.57	Recyclable growing containers	2.06
Biodegradable containers	1.73	Best management practices	2.29	La-grown products	2.00
Recyclable growing containers	1.64	Louisiana-grown products	2.17	Best management practices	1.94

Appendix Table 2.5. Ornamentals Growers Promotion Strategies summary from Delphi.

Section I. Strategies and Promotional activities to expand the industry.

Q.1	Conduct comprehensive market research to understand and take advantage of shifts in consumer attitudes and buying behaviors. Examples: - regional differences in markets and customers - the changing role of trade shows - how customers perceive quality - identify plant materials and create products that fit consumer trends
	Need to see all choices at one time to rank them. This page by page survey doesn't allow that. Will have to answer 3 or 4 unless something grabs me.
	Ways to attract younger customers and develop interest with 30 & 40 year old consumers.
	This is how the new material is introduced to the wholesale and retail industry.
Q.2	Identify positive aspects of Louisiana's nursery industry, and promote them at the state and industry level. Evaluate our image in terms of product quality, service, native plants availability, unique or exotic offerings, environmental stewardship, etc
	Promote them to the general public with newspaper ads and radio time.
	Jump on the sustainability bandwagon.
Q.3	Develop 'Louisiana-grown' (or some other term) as a brand, like other states with brand programs based on product testing. Could Louisiana's industry benefit from "A brand … name, term, sign, symbol, or design, or a combination, intended to identify the goods and services of one seller or group of sellers and to differentiate them from the competition", that supports strongly held beliefs and attitudes?
	Remember, most Louisiana nursery products are exported to other states. Do not create a conflict with other states.
	This same idea has been implemented in the LDAF Marketing Div. by the use of a logo that is Louisiana Grown, etc.
Q.4	Design and adopt a Certified Louisiana Product logo specific to ornamental plant materials, and devise incentives to use it.
	This is a very good idea, however it will be hard to develop a quality standard for numerous ornamental plants produced in LA. Could be just for major cultivars.
	Needs to be based at the local Garden Center.
	I don't think it needs to be specific to ornamentals...maybe one logo that has a small change for each type in signature for each type of product.
	This will make the Louisiana Products stand out and tourist are a good market for this as well as the natives.
Q.5	Educate consumers about appropriate product choices, such as native and tested plants, that reduce product failure/ replacement risk. Examples: First-year care on tags, horticultural newsletters, locally tested products Additional Comment NA
Q.6	Leverage increasing concern for the environment (water use, crop protection product issues, waste disposal, etc.), then identify and emphasize Louisiana's efforts Examples: - sustainable production methods - best management practices - appropriate water use - recycling programs (for plastic pot the plant is grown in, for example) - biodegradable containers

	This has potential in La but we lag behind other tags in consumer adoption of these practices. Are seeing organic/sustainable trend and it is very present in some areas of the state. A few growers are illegal advertising their grown products as organic to appeal to customers.
	Regulatory rules are not in place for LA growers now, but the trend shows this is down the road.
	Selling Green should be a major focus for our market.
	We need to be more GREEN!!
Q.7	Identify new markets and opportunities for product sales, such as outdoor living spaces.
	And inform the public of it.
	Other examples could be new products for the busy young generation.
	Copy efforts of American in Bloom and other organizations.
	Work with "Get it Growing".
	Plants are known to clean the air in the home, etc.
Q.8	Display supportive point-of-purchase materials for Louisiana-grown ornamental plants at as many sales locations as possible.
	Especially for promotions of new ideas and new products
	A must
	The LDAF has a type of lists for potential buyers for wholesale that are permitted by the state.
Q.9	Implement Internet/computer-based search platforms that make the search for customers or product easier. MarketMaker (University of Illinois) is one example.
	And get growers and retailers to support it with timely accurate information.
	Kiosks at garden centers to identify pest or disease resistant cultivars and native plants will be a good example.
	Better not use the AgCenter CMS. They'll never find it!
	Every one is now computer oriented, even thru our phones that receive email from our computers.
Q.10	In the box below, please write in other industry-level strategy and promotion items that you feel should be included.
	Take the federal money that is specified for minor crop promotion and promote those crops to the general public and increase our competitiveness against other industries that go after "choice" consumer spending. This would be in opposition to previous uses.
	Promote benefits to environment, increase valve provided to home and everybody is talking about going green, we are the green industry.
	Conserve energy by eating local produce and planting la grown ornamentals
	Industry support for RESEARCH! Research that addresses problems encountered by local growers may not be able to get funding from out-of-state resource. Many states having horticulture as major agriculture commodity provide strong industry support to university research. Strategically, benefits to the industry can be both short or long term.
	Education to the wholesale grower of their true cost of production.

Your survey covered strategies and promotions that I have heard about. I have nothing to add from the wholesale nursery side of your questionnaire. We had to grow and develop plant materials and markets less competitive with other wholesale growers in our area.

Cottage industries that support Louisiana families.
Industries that are unique to our state.

TV, radio, and internet ads showing value of landscape to the environment and very importantly to the equity of the property. *(Before and After Pictures - And Before and after values.)

Section II. Actions that individual nurserymen can take to attract garden center and landscaper customers

Q.11 Develop branding programs or participate in existing brands in the market. Brands are used by groups such as Novalis (Plants That Work), by state level programs, and by other entities to increase sales and customer loyalty.

Once branding becomes the norm it loses it's distinctive appeal.

Not affordable for small nurseries

Use of product and the effect it has on the value of the property in our State.

Q.12 Be unique, differentiate, or develop other relationships that create/enhance customer loyalty. Examples: Develop native plants as a specialty. Be known for high quality or high service.

Should be a "natural"

This is what drives any business

YES! We need to promote native/sustainability.

Neatness in the workplace, ease of shopping, related items. Customer plant clinics.
Use nursery etc. as an outing that would take time to enjoy the area as well as the out of doors. An area to lunch as you shop, etc.
This should be "nursery - specific" Not necessarily Louisiana - Specific.

Q.13 Cooperate with growers, re-wholesalers, brokers and/or retailers to identify and implement value-adding activities in the supply chain. Examples: Good landscaping can increase home values, so landscape architects and contractors are a natural partnership for growers.

This is a very good point, however, many landscape architects do not know about new plants or availability of these plants, a communication platform is much needed.

Develop more interaction with the other growers, etc. Use your group size to order materials like a co-op. You have no competition if you take care of your customers, they will come back.

Develop programs and/or incentives to bring the various groups together.

Q.14 Use computer/Internet technology to communicate with customers about product and other needs, and appeal to existing and potential customers. Examples: - send e-mails with plant descriptions, availabilities and photographs to customers - free or low-cost listing services (plant locators) - banner advertising on related Web sites (‘AdWords’ on Google)

Go on line is very important to attract the young generation consumers but would be hard for growers who operate in the traditional way to add on on-line features.

Already available and being done.

Not sure how retail would respond to this here?

Develop the email to the individual by way of lists to fill out as to their interests related to the business. Send them incentives to shop.

Q.15 Partnership approaches to trade show participation, like working with neighboring growers. Examples: Heart of Georgia Group is a group of nurseries that cooperates informally. Growers in the area organize their trade show participation to reduce transportation costs and to include greater plant variety.
Need to do the educational work with growers before you can be successful with this effort.

Why not use the trade shows we already have...GSHE and the Midsouth Greenhouse Conference.

Unify and survive.

Q.16 Create large/ small grower partnerships to serve large customers. Larger growers often partner (usually on a contract basis) with smaller growers to handle the volumes required by large retail chains.

Not sure how this would work.

Maybe we need to market more to the landscape industry as this is the new market.

Work together on large projects to fill orders. Everyone gets a piece of the pie.

Necessitates some sort of liason or mediator - Person or agency to coordinate.

Q.17 Use alliances with plant societies to focus on consumer trends such as native plants.

Add to native plants tough drought resistant plants such as agaves, yuccas cacti, nolinas, manfredas, aloes, dasylirions, hesperaloes to name a few. Also cold hardy, tough palms such as sabals, windmill, saw palmetto, med fan Butia and others - some native plants are more fragile than many non-native plants. Good examples are dogwood, native azaleas, stewartia, fedder bush and others.
Hard to see how this can be profitable for the wholesale grower. Plant societies tend to require more service but produce less revenue.

YES!

Education is the key to any business. Read a lot on the subject. Never quit learning.

Correctly evaluating to identify the trend will be of utmost importance.

Q.18 Use terms of sale as incentive for customers to make larger purchases. Examples: Provide freight discounts for truck loads, perhaps in cooperation or alliance with nearby growers, or discounts for quantity and on-time payment
The more the customer is keeping in his pocket per item makes him or her think that it is worth buying more to save.

Nursery - Specific

Q.19 Organize open houses for customers, either as individual nurseries or groups. Invite garden center buyers, landscape architects on tours, and provide transportation, refreshments, etc.

Being done

We've tried this by can't get many to come...need better incentives. Got any idea?

This is being done by the Southeast Louisiana Nursery Association.

You have to educate your customers to keep them interested in your product.

Being done now through regional nursery associations. Could use help from the State. * Important to offer C.E.U.s to get architects there.

Q.20 Diversify the approach to selling - use several alternatives such as in-person, phone, computer based, outside salesmen hired by a group, etc.

Don't get too carried away by using out of house help. The customers still want the personal touch from the staff that has been familiar in the past. They do not appreciate strangers very much.

Must be organized and managed properly.

Q.21 Provide POS materials free to garden center and other customers.

Recipes, how tos, pictures of finished projects give the customer an idea of what of purchase, particularly if you have an excess you want to move.

Q.22 Bring new plants to market by cooperating with growers in other areas and regions for broader evaluation of plant performance.

Could be very useful

Be careful you use plants and material that you can continue to carry and is not scarce.

Q.23 Increase service level to landscape architects and contractors, actively providing information about availability and applications of plant materials through a diversity of kinds of contact, including traditional telephone and fax, and particularly through the Internet (emails, websites).

Yes. but once again we can't get the landscapers to come to anything!

Could be put in a format to make it easy to participate.

Q.24 Please write in other individual grower strategy/promotion items that you feel should be included here.

The one point: as earlier noted, promote Louisiana's horticultural products to the general public through common ads in general media.

Again stress the role plants play in our lives

Guaranteed sale during winter months and early spring

Numerous successful promotions are being used by different growers throughtout the state. The most successful are those who develope "niche" markets for a branded product and secure national attention.

End of the year buyer incentives/rebates for products purchased in Louisiana - Based on $ volume.

Section III. Please rate the following kinds of promotion in terms of your perception of their effectiveness in wholesale sales of plant material to garden centers and the landscaper market.

Q.25 Web sites / Internet / interactive media

Just getting started.

packaging quality is very important for internet sales.

For the wholesale market- primarily current photos of the product of interest.

Q.26 Gardening/home and garden publications

Once again the format of this survey should have included a Pane to view the entire survey at once. Results will be slurred by the choice of Zoomerang's format.

For plant branding.

Q.27 Catalogs

I love catalogs with good pictures and information.

Q.28 Trade Journals

Additional Comments NA

Q.29 Direct mail/ Newsletters

Additional Comments NA

Q.30 Trade Shows

When travel is not so expensive and the show is not too far to travel. Time is the essence in retail/wholesale

Q.31 On-site visits/ Events

Additional Comments NA

Q.32 Email Notifications of availabilities

Additional Comments NA

Q.33 Word-of-mouth/ Referrals

Additional Comments NA

Q.34 Sales/ Business development calls

Face to Face is still the best.

Q.35 Please write in other strategy/promotion items that you feel should have been included here.

Quality and service sells; having items other growers don't have gives a big advantage; means of timely delivery;

Free samples for home garden use by retail or landscape buyers

A combination of all the mentioned promotions. No one way will be successful going forward.

Section IV. Please rate the following items in terms of your customers' concerns. Please note the changed rating scale for this section!

Q.36 Environmental issue - whether plants are sustainably produced

Lack of consumer awareness, so it is not reflected in retail service and product suppliers expectations. See earlier comments about consumer awareness.

For most customers this is likely not much on their minds when purchasing plants.

Q.37 Environmental issue - whether best management practices are used

This concern is primarily manifested in customers as a desire for high quality, healthy, well grown plants. While the goal of BMPs is precisely this, customers are not all that concerned with the actual practices.

Q.38 Environmental issue - whether the growing container was or will be recycled

or it is a biocontainer...will decompose in soil

This may be a growing concern, but recycling opportunities for customers are limited at this time.

Q.39 Environmental issue - whether the container is made from biodegradable materials

I would say that this concern is not that common at this time, but may be growing.

Q.40 Customers want to support Louisiana producers

They are not really aware of Louisiana producers.

Q.41 Louisiana customers are concerned that plants they purchase are grown in Louisiana

Again, this whole section should be tagged with the proceeding comments.

Most customers are not that aware of or concerned about where plants come from at this time. There is more concern with cost and quality. But I think they could be moved in that direction.

Q.42 Customers actively seek more intense sensory experiences (visual, aromas, etc) in plant materials choices

Bright colors, fragrances are important to many gardeners.

Q.43 Customers want to upgrade their plant materials choices

Not sure what "upgrade" refers to. They generally don't want to pay more.

Q.44 Customers have an increased focus on home improvements relative to other discretionary expenditures

The absolute point.

Appendix Table 2.6. Focus group questions and general transcription for nursery stock producers, Southeast La. Nursery Association growers, Tangipahoa, December, 2008.
Question/notes
How can all of the stakeholders along the supply chain work together to improve the competitiveness of Louisiana specialty crops? Products must have tag on place of origin especially in 'big box' stores. California can ship to every state in the nation. Why can't we have something like that? Local growers want to have at least a chance at supplying plants for state construction projects. "If product marked 'Louisiana grown' people would be more apt to purchase them. Because our tax dollars pay for such [landscaping] Louisiana products should be used." Concern the plant guarantees offered by some big box stores gives them an unfair advantage. "There is no way to do it and stay in business." Plants that are returned to stores—they don't give credit (?) to the proper grower if given at all. "You can't guarantee products and stay in business, unless you are cheatin' somebody."
What forms of cooperation between growers could be used in trade show participation? "We do have a nursery association and they are the sponsors and the participants of the trade show—the only nursery trade show in the state of Louisiana at this time that I am aware of." Forest Hill used to do one. "We do have an association." "That's Southeast Louisiana Nursery Association." "I do know that In Atlanta, there is a group of [growers] in Athens that arrange all their booths together on the same aisle. It kind of creates a little community. I am not suggesting that that has even worked." "…would it do any good, to say group together for the Mobile show?" "I am not sure if it works or not, but it is an idea." "…It would require planning from the beginning because it always goes to seniority—whoever was there first. If you come in later on and want to join you have to take whatever booth is available." Good spaces are taken and growers would not want to give them up. "Web sites—some sort of Web site linkage?" Comments made about how well SELNA group gets along. Referrals to other growers in area mentioned as means of cooperation. Results in helping landscapers, etc.
If you were to be interviewed by the media and asked to comment on the positive aspects of Louisiana's nursery industry, what would you want to tell the state and the nation? (If responses are too general further probe using concepts below.) "We beautify everyone's environment." "…we are all family farms…" "There are only a few really big companies in the state. " Everyone offers something unique—"Louisiana gumbo."
Expressions of environmental protection are everywhere these days. How could the nursery industry apply this concern in marketing to consumers? "We all have been talking about recycling and stretching materials that we have further. We are talking about media. We all have 'dump' piles and we are looking at some possibilities of environmental grinding—taking the dump piles we have and grinding it into a media and stretching the bought media we buy." Everything we buy—it's the same stuff anyway. Everything that we are throwing away in the nursery can be reused…" Research needed by LNLA. Growers are not doing this for publicity purposes, but the public could be giving the information. "It would be a good system so that we don't have so much to throw away—so much waste." "The products themselves we produce, no matter how we produce them are 'greening.' That's what we do…we make plants that breathe in carbon dioxide and release oxygen. Comparisons were made to industries growers believe they are competing with such as recreational sports like water skiing. Other than commercial development, they feel they are competing for discretionary dollars. "We must let [consumers] know that we are for the environment. How we produce those products is like an add-on." "Edible landscaping would be a great thing to pick up on." "There are all types of tie-ins we could take advantage of—other parts of the country are doing this."
A marketing technique used in other industries is to uncover new markets or product sales opportunities. An example of a new market might be consumers interested in creating outdoor living spaces. What do you

think about identifying new markets as a method of growing sales? Again mentioned the edible landscaping. Mention was made of city dwellers using small amounts of land are interested in growing. "Promotional campaigns are needed to say we are here and we are at your garden center." Participating in farmers markets was mentioned as a way of getting more notice, but concern for the time and effort hinders participation. "Native plant production—that is a niche that is really, really becoming--, people aware of. We need more producers." Discussion ensued concerning what a native plant is. "Landscape architects need to spec more native plants. But we can't depend on native plants or we wouldn't be in business." "Growing smaller growing trees since the recent storms. Who wants to have large trees close to their houses?" "What about rain gardens?" This was mentioned as a popular item in developing residential markets. "Native plants are right there...that's what you want to use—irises." "The EPA is fixin' to make EBR Parish start not just recovering storm water, but treat it as well." "Swales and planting rain gardens are going to be a part of every development." "Not just a pond, but plantings that will treat the water before it gets to the pond." "That could be huge." Plants could be used for coastal restoration projects. Since Gustav, a hold has been placed on all this (Natural Resources?). But prior to this, plants were being purchased from out of state because of insufficient in-state supplies. "We need some large scale stuff for coastal restoration and we've got the capabilities to produce the plants that are needed for it." One participant mentioned that they are not contacted about the needs Natural Resources has. "They don't contact the local people about it."
The success of many firms is built on the use of information technology that contributes to service and cost control. How could the Internet or other information technology be used to improve communications between growers and buyers such as landscape architects and independent garden centers? Plants are listed, but it is not interactive. Some growers currently have a Web site. One mentioned that a landscape architect said it would be convenient if plant photos and descriptions could be 'selected' on the site and e-mailed to their client (without the price, of course.) "We haven't begun to use the Internet." There were expressions of concern for the amount of time and effort it would take to do this. "Must be simple enough for a farmer to figure out…" Plant sales on eBay were also mentioned.
To meet volume requirements from larger retail chains, how do you think partnerships between small and large growers might or might not work? "I don't think it would work at all." "Uniformity between growers would be tough—it would be an Achilles heel." Growers who sell to big box stores can be fined for mislabeling plants and must offer guarantees. Participants in this group were very opposed to providing guarantees—to the point of applauding one respondent who said "why should you ever replace it (container plants)." It was mentioned that the big box stores offer guarantees to get consumers back into store to make additional purchases.
You are probably familiar with Plants That Work® a brand developed by Novalis®. These plants have been performance-tested for specific conditions such as growing in shade. How could Louisiana's industry benefit similarly from a brand based on product testing? One grower expressed concern over proven winners—didn't understand how that could even work. "They realize that it is marketing, and marketing is something that some of us ole dirt farmers need—no question, but I really, really can't support that." "We find it hard to lie." "There has to be some integrity behind your brand." Louisiana Select was once again mentioned as a partnership between LNLA and the LSU Ag Center. "They promoted certain plants as being really good plants for Louisiana. Wording that would not imply any type of guarantee." "It worked." "Resurrecting this would be a good idea."
Increased competition requires doing things to stand out from your competition. Tell me about the positive experiences you have had in doing this? What were your disappointments? Question was not asked due to time limitations.
What cooperative efforts among growers, re-wholesales, brokers and/or garden centers could be undertaken to create value-adding activities in the supply chain? (Give example of good landscaping increasing home

values, if needed.) "I think there is a natural value added to plants when you landscape your yard particularly shade products which help with utility bills…" "…you've got hurricane alley here." "We've done some research here and this is what we have learned-- here are some trees that will give shade but not be a risk." A check-off program was mentioned in which growers would pay fees for cooperative advertising. Specifically television advertising was mentioned. "A common fee which would promote getting information to the public." One grower commented on success of advertising 'wearing him out.'
Earlier we discussed using information technology to assist with communication between growers and those in the landscape business. What could be the outcome of using e-mail or pay-per-click or ad-words on Web sites such as Google? There was some agreement that pay-per-click ads would be more cost effective than newspaper or yellow-page advertising. "What about social networking sites?" Participants in general agreed with concept if state platform could be developed for easy use by growers.
Think over the past year on how you provided service to landscape architects, contractors and garden centers. What things worked particularly well? Which could have been improved? Question not asked in consideration of time.
(Pass out additional handout.) I am going to read a list of consumer environmental concerns. These are on the handout we are passing now. Whether plants are sustainably produced, whether best management practices are used, whether the growing container was or will be recycled or whether the container is made from biodegradable materials. Which of these do you believe to be more important to consumers? Which are more important to you? "If the price is right, they don't notice anything else. They don't care about sustainability." "Every research question poll is asking questions from a presupposition." Discussion ensued that many garden centers do not know how to recognize a quality plant—"they buy on price." "Consumers have not exhibited concern for how things are grown." "People are grappling with the same issues." Participants agreed most will select plant based on visual aspects rather than on whether it was organically grown." "It is a matter of consumer education. Some of them think to ask about where it is coming from, but as long as it looks good, that is their concern." Would making consumers aware of sustainability practices employed in growing plants in Louisiana increase sales? Most consumers don't have the same concerns that they do with food products.
Again I am going to read a list of attributes Louisiana consumers may have: customers want to support Louisiana producers; Louisiana customers are concerned that the plants they purchase are grown in Louisiana; customers actively seek more intense sensory experiences in plant material; customers want to upgrade their materials choices; customers have an increased focus on home improvements relative to other discretionary expenditures. Which of these do you believe has more impact on sales? See responses above.
Of all the things we've talked about, what is most important to you? Question not asked due to time constraints.

Appendix Table 3.1. Landscape Architects and Contractors, results by section, in descending order by overall rating. Section 1: Industry level questions					
Landscape Architects		Landscape Contractors		Overall	
Question	Avg Rating	Question	Avg Rating	Question	Avg Rating
Inform consumers about product choices	4.83	Inform consumers about product choices	5.00	Inform consumers about product choices	4.88
Promote 'best agricultural practices'	4.67	Promote 'best agricultural practices'	5.00	Promote 'best agricultural practices'	4.75
Cooperate on added-value activities	4.50	Conduct comprehensive market research.	4.50	Cooperate on added-value activities	4.50
'Certified La product' logo	4.33	'Certified La product' logo	4.50	'Certified La product' logo	4.38
Conduct comprehensive market research	4.17	Promote new markets	4.50	Conduct comprehensive market research	4.25
Create point-of-purchase materials	4.17	Cooperate on added-value activities	4.50	Promote new markets	4.25
Promote new markets	4.17	State-level evaluation/ branding program	3.50	Create point-of-purchase materials	3.88
State-level evaluation/ branding program	3.83	Create point-of-purchase materials	3.00	State-level evaluation/ branding program	3.75

Appendix Table 3.2. Landscape Architects and Contractors, results by section, in descending order by overall rating. Section II: Actions that businesses can take to attract and serve customers, or that plant material suppliers can take to improve service.					
Landscape Architects		Landscape Contractors		Overall	
Question	Avg Rating	Question	Avg Rating	Question	Avg Rating
Customer-friendly Internet site	5.00	Customer-friendly Internet site	5.00	Customer-friendly Internet site	5.00
Community activities	4.60	Host outings for landscape architects/contractors	5.00	Host outings for landscape architects/contractors	4.63
Host outings for landscape architects/contractors	4.50	Broad evaluation of plant performance	5.00	Broad evaluation of plant performance	4.63
Broad evaluation of plant performance	4.50	Form co-ops	5.00	Community activities	4.57
Promote branded plants	4.17	Promote risk-reducing plant products	4.50	Form co-ops	4.25
Printed/ on-line maps	4.00	Printed/ on-line maps	4.50	Printed/ on-line maps	4.14
Form co-ops	4.00	Community activities	4.50	Promote branded plants	4.00
Target young customers	4.00	Develop branding programs	4.00	Promote risk-reducing plant products	4.00
Develop branding programs	3.83	Promote branded plants	3.50	Develop branding programs	3.88
Promote risk-reducing plant products	3.83	Target young customers	3.00	Target young customers	3.71

Appendix Table 3.3. Landscape Architects and Contractors, results by section, in descending order by overall rating. Section IV: Kinds of promotion activities in terms of effectiveness in generating sales.

Landscape Architects		Landscape Contractors		Overall	
Question	Avg Rating	Question	Avg Rating	Question	Avg Rating
Word-of-mouth/ referrals	4.67	Television	5.00	Word-of-mouth/ referrals	4.75
Sales/ business development calls	4.40	Word-of-mouth/ referrals	5.00	Sales/ business development calls	4.43
Trade shows	4.33	Sales/ business development calls	4.50	Television	4.29
Sign/ display at entrance	4.20	Print advertising	4.00	Trade shows	4.25
Television	4.17	Direct mail newsletters/ promotions	4.00	Direct mail newsletters/ promotions	4.00
Cable	4.17	Trade shows	4.00	Own internet site advertising	4.00
Own internet site advertising	4.17	Own internet site advertising	3.50	Cable	3.88
Direct mail newsletters/ promotions	4.00	Advertise on cooperative websites	3.50	Sign/ display at entrance	3.86
Radio	4.00	Cable	3.00	Advertise on cooperative websites	3.86
Advertise on cooperative websites	4.00	Sign/ display at entrance	3.00	Print advertising	3.75
Purchase ad space on search engines	4.00	Radio	2.50	Radio	3.63
Print advertising	3.67	Billboards	2.50	Purchase ad space on search engines	3.57
Billboards	3.50	Purchase ad space on search engines	2.50	Billboards	3.25
Yellow pages	3.33	Yellow pages	2.00	Yellow pages	3.00

Appendix Table 3.4. Landscape Architects and Contractors, results by section, in descending order by overall rating. Section IV: Customer's concerns.					
Landscape Architects		Landscape Contractors		Overall	
Question	Avg Rating	Question	Avg Rating	Question	Avg Rating
Higher quality plant choices	3.50	Higher quality plant choices	3.50	Higher quality plant choices	3.50
Price of products/services	3.17	Price of products/services	3.00	Price of products/services	3.13
Purchase La-grown plants	3.00	Native plants	2.50	Native plants	2.75
Native plants	2.83	Sustainably produced	2.00	Purchase La-grown plants	2.63
Sustainably produced	2.17	Biodegradable/ recycled materials	1.50	Sustainably produced	2.13
Biodegradable/ recycled materials	2.17	Purchase La-grown plants	1.50	Biodegradable/ recycled materials	2.00

Appendix Table 4.1. Ornamental Retailers results by section, in descending order by overall rating. Section I: Industry level issues.							
Garden Center Owner/ Managers		University/ag organizations		Florists		Overall	
Question	Avg Rating	Question	Avg Rating	Question	Avg Rating	Question	Avg Rating
Comprehensive market research	4.43	Inform about product choices	5.00	Comprehensive market research	5.00	Comprehensive market research	4.55
Certified La product' logo	4.43	Comprehensive market research	4.50	Inform about product choices	5.00	Certified La product' logo	4.36
Choose a differentiation strategy	4.29	State-level evaluate/ brand program	4.50	Certified La product' logo	4.50	Inform about product choices	4.36
Promote 'best agricultural practices'	4.14	Choose a differentiation strategy	4.50	Promote 'best agricultural practices'	4.50	Choose a differentiation strategy	4.36
State-level evaluate/ brand program	4.00	Certified La product' logo	4.00	Create POP materials	4.50	Promote 'best agricultural practices'	4.18
Inform about product choices	4.00	Promote 'best agricultural practices'	4.00	Promote new markets	4.50	State-level evaluate/ brand program	4.09
Create positive outcomes for all stakeholders	4.00	Promote new markets	4.00	Cooperate on added-value activities	4.50	Promote new markets	4.00
Promote new markets	3.86	Create POP materials	3.00	Choose a differentiation strategy	4.50	Cooperate on added-value activites	3.82
Cooperate on added-value activities	3.86	Cooperate on added-value activities	3.00	State-level evaluate/ brand program	4.00	Create positive outcomes for all stakeholders	3.82
Create POP materials	3.29	Create positive outcomes for all stakeholders	3.00	Create positive outcomes for all stakeholders	4.00	Create POP materials	3.45

POP = point of purchase

Appendix Table 4.2. Ornamental Retailers, results by section, in descending order by overall rating. Section II: Actions that individual garden center or florist businesses can take to attract customers.							
Garden Center Owner/ Manager		Government and Educators		Florists		Overall	
Question	Avg Rating	Question	Avg Rating	Question	Avg Rating	Question	Avg Rating
Create customer database	4.71	Be primary source of information	5.00	Promote branded plants	5.00	Create customer database	4.73
Customer special attention	4.57	Promote branded plants	4.50	Promote non-plant, hard good lines	5.00	Promote branded plants	4.60
Promote branded plants	4.50	Create customer database	4.50	Promote risk-reducing plant products	5.00	Customer special attention	4.55
Community activities	4.43	Target businesses	4.50	Support branded plant growers	5.00	Be primary source of information	4.45
Create events/ programs	4.43	Develop branding programs	4.00	Enhance 'brick/ mortar' with Internet	5.00	Community activities	4.45
Be primary source of information	4.29	Support branded plant growers	4.00	Create customer database	5.00	Create events/ programs	4.40
Enhanced merchandising techniques	4.29	Customer special attention	4.00	Customer special attention	5.00	Enhanced merchandising techniques	4.30
Develop branding programs	4.17	Community activities	4.00	Community activities	5.00	Develop branding programs	4.20
Support branded plant growers	4.00	Create events/ programs	4.00	Cross-sell	5.00	Support branded plant growers	4.10
Promote non-plant, hard good lines	3.86	Enhanced merchandising techniques	4.00	Create events/ programs	5.00	Promote non-plant, hard good lines	4.00
Cross-sell	3.71	Partnerships	4.00	Enhanced merchandising techniques	5.00	Target businesses	3.91
Enhance 'brick/ mortar' with Internet	3.57	Promote non-plant, hard good lines	3.50	Target businesses	5.00	Enhance 'brick/mortar' with Internet	3.82
Target businesses	3.43	Enhance 'brick/ mortar' with Internet	3.50	Partnerships	5.00	Cross-sell	3.70
Promote risk-reducing plant products	3.29	Target young customers	3.50	Develop branding programs	4.50	Promote risk-reducing plant products	3.30
Use 'sell-by' date on stock	2.71	Cross-sell	3.00	Be primary source of information	4.50	Partnerships	3.20
Partnerships	2.33	Use 'sell-by' date on stock	3.00	Use 'sell-by' date on stock	4.00	Use 'sell-by' date on stock	2.90
Target young	2.00	Promote risk-	2.50	Target young	4.00	Target young	2.70

customers		reducing plant products		customers		customers	

Appendix Table 4.3. Ornamental Retailers, results by section, in descending by overall rating. Section III: Kinds of promotion activities in terms of your perception of their effectiveness in generating sales.							
Garden Center Owner/ Manager		Government and Educators		Florist		Overall	
Question	Avg Rating	Question	Avg Rating	Question	Avg Rating	Question	Avg Rating
Word-of-mouth/ referrals	5.00	Television	5.00	Print advertising	5.00	Word-of-mouth/ referrals	5.00
Print advertising	4.29	Word-of-mouth/ referrals	5.00	Print advertising	5.00	Print advertising	4.36
Direct mail newsletters/ promotions	4.17	Print advertising	4.00	Trade Shows	5.00	Direct mail newsletters/ promotions	4.30
Cable	4.00	Direct mail newsletters/promotions	4.00	Word-of-mouth/ referrals	5.00	Television	4.18
Sign/ display at entrance	4.00	Yellow pages	4.00	Sales/ business development calls	5.00	Sign/ display at entrance	4.18
Television	3.86	Radio	4.00	Sign/ display at entrance	5.00	Cable	4.09
Own internet site advertising	3.86	Cable	4.00	Own internet site advertising	5.00	Own internet site advertising	3.91
Radio	3.57	Billboards	4.00	Advertise on cooperative websites	5.00	Radio	3.82
Trade shows	3.57	Sign/ display at entrance	4.00	Television	4.50	Trade shows	3.60
Advertise on cooperative websites	3.29	Sales/ business development calls	3.50	Radio	4.50	Yellow pages	3.40
Yellow pages	3.00	Trade shows	3.00	Cable	4.50	Billboards	3.27
Billboards	2.71	Own internet site advertising	3.00	Billboards	4.50	Advertise on cooperative websites	3.10
Sales/ business development calls	2.00	Purchase ad space on search engines	2.50	Purchase ad space on search engines	4.50	Sales/ business development calls	3.00
Purchase ad space on search engines	2.00	Advertise on cooperative websites	1.50	Yellow pages	4.00	Purchase ad space on search engines	2.55

Appendix Table 4.4. Ornamental Retailers, results by section, in descending order by overall rating. Section IV: Customer's concerns							
Garden Center Owner/ Manager		Government and Educators		Florist		Overall	
Question	Avg Rating	Question	Avg Rating	Question	Avg Rating	Question	Avg Rating
Higher quality choices	3.86	Higher quality choices	3.50	Price of garden center/ floral products	3.50	Higher quality choices	3.64
Reduce stress with plants	3.00	Purchase La-grown plants	3.00	Sustainably produced	3.00	Price of garden center/ floral products	3.09
Price of garden center/ floral products	3.00	Price of garden center/ floral products	3.00	Higher quality choices	3.00	Sustainably produced	2.82
Sustainably produce	2.86	Sustainably produced	2.50	Reduce stress with plants	3.00	Reduce stress with plants	2.82
Increased interest in home improvements	2.80	Native plants	2.50	Purchase La-grown plants	2.50	Increased interest in home	2.67
Biodegradable/ recycled materials	2.57	Biodegradable/ recycled materials	2.50	Increased interest in home improvements	2.50	Purchase La-grown plants	2.64
Purchase La-grown plants	2.57	Increased interest in home improvements	2.50	Native plants	2.00	Biodegradable/ recycled materials?	2.36
Native plants	1.86	Reduce stress with plants	2.00	Biodegradable/ recycled materials	1.50	Native plants	2.00

Appendix Table 4.5. Questionnaire for garden center retailers (welcome page was identical to that used for ornamental growers)

Section I. Industry level questions - Please rate these ideas about strategies, competitive advantage, and promotion in terms of their usefulness in expanding the industry.

Q.1	The industry should conduct comprehensive market research to understand and take advantage of shifts in consumer attitudes and buying behaviors. Examples: - environmental awareness - customer perception of quality
Q.1	The market is changing "quickly" and we need to know which way "to move" If the information does not reach us in a timely manner it may be too late to react. Trends and attitudes are changing. Would be helpful to know who to market what to
Q.2	The industry should create and implement a state-level evaluation/ branding program. Example: Brands make shopping easier and quicker, provide customers confidence in product quality. In garden centers, branding programs are supported by large nurseries (Monrovia), groups such as Novalis (Plants That Work), and state level programs.
Q.2	**Additional Comments** NA
Q.3	The industry should adopt and use a 'certified Louisiana product' logo specific to ornamental plant materials. Logos help certify origin and can be similar in function to brands.
Q.3	**Additional Comments NA**
Q.4	The industry should inform consumers about appropriate product choices, such as native and tested plants, that reduce the risk that plant materials will not survive. Examples: - POP materials - care tags - newsletters
Q.4	Sustainable plant materials! The problem is that consumers are more and more using non hardy items ie Tropicals for seasonal impact.
Q.5	As they are identified, the industry should promote environmentally friendly 'best agricultural practices' by Louisiana's growers. Examples - sustainably produced - appropriate water use - recycling programs (for plastic containers, for example) - using biodegradable containers
Q.5	**Additional Comments NA**
Q.6	The industry should create point-of-purchase materials emphasizing important consumer trends, such as convenience and health/wellness.
	This effort would be better suited toward promoting Louisiana grown plants.
Q.7	The industry should promote new markets and opportunities for product sales. Examples: - popularity of outdoor living spaces - develop and promote generic 'low maintenance' landscapes - develop new garden shows and support existing shows
Q.7	**Additional Comments NA**
Q.8	The industry should encourage cooperation between growers, re-wholesalers and retailers (garden centers, florists, landscapers) to identify and implement activities that add value for the customer. Example: - standard azaleas vs. Encore Azaleas® - cost savings from better coordination of activities from production to retail - Internet use by florists
Q.8	**Additional Comments** Louisiana growers do a very poor job of "marketing" their goods to retailers
Q.9	Would effort by independent garden centers and florists to create positive outcomes for all stakeholders (see the examples below) have a positive impact on industry growth? Examples: -Southwest Airlines creates loyalty by aligning with and serving the interests of 'Society, Partners, Investors, Customers, and Employees' (SPICE) - Jack Welch, former CEO of General Electric, stated "The three most important things you need to measure in business are customer satisfaction, employee satisfaction, and cash flow."
Q.9	Makes good sense to me

Q.10	Businesses can choose from many strategies. Should independent garden centers and/or florists choose a differentiation strategy, where the business becomes unique in one or more factors that are widely valued by customers, position itself appropriately, and charge a price that reflects this differentiation?
Q.10	This may be the absolutely to the future growth of our industry
Q.11	In the box below, please write in other industry-level strategy and promotion items that you feel should be included.
Q.11	Promoting and pushing pants and drygoods that are unique and only available through independent garden centers. (ex. fertilome, high yield)
	There still needs to be greater effort to standardize container sizes. In other words, a 3 gal. pot needs to be the same size for everyone.
	Any small town business should try to have community activities within their business, to promote and overall hometown feel.
	Buy Local from your independent garden center.
	Work with landscapers!
	Proper care and handling of all fresh flowers and plants.
	Fall Planting... Summer Gardening
Section II. Actions that individual garden center or florist businesses can take to attract customers	
Q.12	Develop branding programs or participate in existing brands in the market. Brands are used by groups such as Novalis (Plants That Work), by state level programs, and by other entities to increase sales and customer loyalty.
Q.12	Definitely for "louisiana". We cherry pick several different brands like simply beautiful, novalis, etc but most of those "brands" varieties do very well here.
	Has not proven to be as helpful as earlier thought due to inconsistent quality and availibility, confusion and non-factual claims.
Q.13	Strive to be the primary source of information, the customer's plant expert. Examples: - bring in seminar speakers covering topics like using indigenous plants - have employees present programs and seminars, etc.
Q.13	Working with LNLA and LSU.
	Today's busy consumers are difficult to capture their time and attention
Q.14	Be known for and promote branded plants, native plant selection, unique or exotic offerings, and other similar products.
Q.14	Another important key
Q.15	Be known for and promote non-plant, hard-goods lines.
Q.15	The future seems to point heavily life-style. ie. outdoor rooms, backyard paradise, container gardening, related
Q.16	Promote appropriate, risk-reducing plant and landscape products.
Q.16	un-sure
Q.17	Support marketing efforts by branded plant growers through outdoor banners, aisle markers, and area signs.
Q.17	need affordable ways to get this done
Q.18	Enhance 'brick and mortar' stores with a customer-friendly Internet site for selling, sales support, and communication with customers.
Q.18	depends the location
	Our retail stores need to enhance themselves...become a destination...not just a place to buy plants. Baucums in Minnesota
	Information yes products no
Q.19	Create a database with names, addresses, and purchase histories, and use the information for targeted promotion.

Q.19	we've been behind on this but are now beginning to build or database and use this type of marketing
	No. one
Q.20	Special attention to best customers to increase loyalty
Q.20	**Additional Comments NA**
Q.21	Conduct activities that link the garden center or florist shop to the community
Q.21	very important
Q.22	Cross-sell by 'sponsoring' products at local businesses.
Q.22	problem is coming up with ideas that benefit all equally
Q.23	Create events and programs.
Q.23	Yard of the Month is best. We support all that ask
Q.24	Expand and enhance merchandising techniques in stores.
	Great idea but hard to maintain. Poor demonstration much worse than no demonstration
Q.25	Create selling opportunities with creative uses of stock past its 'sell-by date'.
Q.25	Would love to come up with useful idea for un-saleable but useful plants (We probably throw away $250,000 per year.
Q.26	Target businesses as potential clients.
Q.26	We don't have garden centers that focus on landscape design and installation! they are missing the boat!
Q.27	Form partnerships with other service providers and develop specially priced packages promoted through joint advertising.
Q.27	**Additional Comments NA**
Q.28	Target younger customers through alternative promotional approaches, like plant rentals (a 'garden/flower experience' without the effort) with deal offers after the event.
Q.28	**Additional Comments NA**
Q.29	Please write in other individual grower strategy/promotion items that you feel should be included here.
Q.29	having local charities and groups fireman, police, etc. to come.
	Improve garden center appearance and what they offer. general knowledge for buying fresh and disease free products
	Louisiana Growers (especially the small to medium ones) should communicate better with Louisiana Retailers ...what they have to sell
Section III. Please rate the following kinds of promotion activities in terms of your perception of their effectiveness in generating sales.	
Q.30	Print advertising in newspapers and local magazines, etc.
	Best for selling items and reaching the over 50 crowd
Q.31	Direct mail newsletters and promotions
	Additional Comments NA
Q.32	Yellow pages
	barely necessary anymore
Q.33	Television
	Understanding how to target right demographics is key here
Q.34	Radio
	I don't like it but we use it. Hosting a call in show is good
Q.35	Cable
	TARGETING
Q.36	Billboards
	Can't afford to do everything
Q.37	Trade shows
	More important for growers. Vendors should work to make trade shows more buying/order writing events....incentives...sell something

Q.38	Word-of-mouth / referrals
	Most important for building and retaining loyal customers. Must be earned and sustained.
Q.39	Sales / business development calls
	Additional Comments NA
Q.40	Sign/display at business entrance
	Additional Comments NA
Q.41	Advertising on your own Internet site.
	Becoming more important
Q.42	Advertising on cooperative Internet sites such as Louisiana Nursery and Landscape Association
	Additional Comments
Q.43	Purchased ad space on search engines, i.e., Google or Yahoo!
	I'm 65 I could be wrong
Q.44	Please write in other strategy/promotion items that you feel should have been included here.
	Everything you have said is all very helpful, The internet is coming along way I think that will be the best way to go in the future
	offering any education seminars associated with the product
	Affiliation with peers is crucial
Section IV. Please rate the following in terms of your customers' level of concern about the item. Please note the changed rating scale for this section!	
Q.45	Is the customer concerned whether ornamental plants and flowers available for purchase are sustainably produced?
	Louisiana consumers are a decade behind
Q.46	Is the customer concerned whether native plants are available for purchase?
	Should be but need more education. Also louisiana growers should grow more of these items.
Q.47	For ornamental plants or flowers grown in a 'container', is the customer concerned whether that container is either (i) made from biodegradable materials, or (ii) will be recycled?
	Roger, I am working on biodegradable containers...i would like to know results on this one.
	Education...awareness....
Q.48	Louisiana customers want to purchase plants that are grown in Louisiana
	Opportunity for La. growers I think consumers would respond if they knew
Q.49	Customers want higher quality choices of plant/floral and other materials
	# 1 priority
Q.50	Customers are more interested in and focused on improving their home environment than on other discretionary expenditures
	good question..... We'll soon find out
Q.51	Customers seek to mitigate the stresses of life with the health/wellness benefits of plants, flowers and gardening.
	Seems to be losing it's appeal with younger consumers
Q.52	Price of garden center / floral products
	Is 3rd or 4th after quality/beauty, information and shopping experience

Appendix Table 4.6. Focus group questions and general transcription for La. Nursery and Landscape Association – combination of growers, landscapers and retailers, Lafayette, La., 2008
Question/ notes
How can all of the stakeholders along the supply chain work together to improve the competitiveness of Louisiana specialty crops? Emphasize fact that products are Louisiana grown, identity tags, provide standardization for quality product; marketing outside of the state, commission an ad agency to promote Louisiana products in other states.
If you were to be interviewed by the media and asked to comment on the positive aspects of Louisiana's nursery industry, what would you want to tell the state and the nation? (If responses are too general further probe using concepts below). "We take pride in what we produce". "Quality at a good price." Adaptability of Louisiana products to Louisiana. Let residents of state know how buying Louisiana supports our neighbors and the state.
You are probably familiar with Plants That Work® a brand developed by Novalis®. These plants have been performance-tested for specific conditions such as growing in shade. How could Louisiana's industry benefit similarly from a brand based on product testing? "First of all, I think we have gotten a little carried away with that whole branding thing." Indicated that 'plants that work' have not been tested throughout the state. Great differences in growing conditions throughout Louisiana. Testing must be 'real local.' Could not come up with a list of Louisiana plants that will work in all of the markets. Consumers may buy plants but not take proper care of them. (One retailer provides plant care information as customer checks out and gives phone number—encourages calls.) LSU Ag Extension developed a very successful program called Louisiana Select. Program was dropped. Products/plants LSU recommended as being 'tried and true' for our area. "Set records on the amount of plant material which was sold. For whatever reason, the consumer takes whatever LSU Ag Center prints as gospel." "So if we could put more emphasis back on that program--it would be of hugely beneficial." Some form of communication between the LSU Ag Center and grower in producing tested plants would benefit all. Consumers listen to what agricultural extension specialists and LSU say.
Expressions of environmental protection are everywhere these days. How could the nursery industry apply this concern in marketing to consumers? Not shipping from out-of-state; grown in Louisiana and therefore better suited for Louisiana climate, fewer pests, all of chemicals are monitored by the state so general public can feel secure; landscaping provides buffer from street noise, helps clean the air and prevent erosion, concrete barriers along Interstate in Baton Rouge has detracted from the appeal of the city "closed you off from the beauty of the city", landscaping there is not taken care of; quality of life issues landscape architects affect lives in a very real way—with Louisiana grown materials. Louisiana's green industry is a "people-pleasing business."
A marketing technique used in other industries is to uncover new markets or product sales opportunities. An example of a new market might be consumers interested in creating outdoor living spaces. What do you think about identifying new markets as a method of growing sales? Promote herb gardens, advertise in Southern Living. "Gets flooded with calls from customers wanting to have what they saw in Southern Living." Create vegetable gardens. "With the economy being what it is today no rosy future in the imminent future, do-it-yourselfers are a real market—I don't know how well they are being targeted, landscape contractors and landscape maintenance (companies) could provide themselves as consultants to those that want to do more of it themselves to save money--." Retail--they could cater to the do-it-yourselfers—individuals. Home Depot has capitalized on this strategy—provides expertise and guidance—as much as the individual wants. (A few participants disagreed with market). Branding mentioned—target homeowners with public service announcements—sponsored by LNLA, individuals and board members go to spring garden shows to promote and do demonstrations. "Since we do have these

garden shows, come together with LSU and LDAF and have demonstrations at these garden shows—how to plant your own garden—what does well." "Most people like to get out and play in the dirt." Need more "how to" demonstrations to show how to do gardening—articles and photos are not sufficient to educate. Recycling logos-Louisiana educators and green industries, reaping economic and health benefits. People garden because it is mental relaxation. "Intrinsic benefit/value that relaxes individuals—perfect opportunity." With economy the way it's going, perfect opportunity to invite people to enjoy their own garden. Emphasis on teaching and educating on horticulture to make people enthusiastic. If they are successful, they want to do more. To optimize investment, recommends hands-on training. Suggested spring garden shows provide opportunity to promote and give how-to's.
The success of many firms is built on the use of information technology that contributes to service and cost control. How could the Internet or other information technology be used to improve communications between growers and buyers such as landscape architects and independent garden centers? Suggested growers could send digital photos to communicate; have everyone's name and phone number in the yellow pages; identify professionals who would want to help with consulting. Branded interactive Web sites, such as Encore Azaleas generate sales leads. Use Internet search engines to quickly identify places to secure product. Using texting helps improve operational efficiencies. Customers will even text and ask about availabilities. Easy to text them back with answer; "not stopping with pleasantries on telephone—no small talk or chit chat." Use two-way radio/phone communication with growers; can get in touch with people quickly. Use e-mail to send invoices and bills of lading. Technology reduces stress of trying to communicate.
Increased competition requires doing things to stand out from your competition. Tell me about the positive experiences you have had in doing this? What were your disappointments? Out of time.
What cooperative efforts among growers, re-wholesales, brokers and/or garden centers could be undertaken to create value-adding activities in the supply chain? (Give example of good landscaping increasing home values, if needed.) Educate consumer that there is a perceived value (to buying Louisiana grown products)—"big boxes (retail stores) devalue our products." Loss leaders create a perception in the consumer's mind that independent garden centers are overpriced. "Education to consumer is the key to all of it." Everyone gets paid along supply chain. "Big box stores have put people out of business." "Having that label 'Louisiana grown' is going to be primary to keeping it (sales) in Louisiana." "Don't sell to box stores." "I think you would find that growers would be reluctant to abide with each other in that respect." Indicated that growers would not want other growers to know "their business." Growers can refer customers to other growers to meet materials needs when product is not available within their own operation. Some are already doing this—landscapers and garden centers are saying "find it for me." For the most part they do cooperate with one another. Helps both retailer and consumer when this is done.
Earlier we discussed using information technology to assist with communication between growers and those in the landscape business. What could be the outcome of using e-mail or pay-per-click or ad-words on Web sites such as Google? Out of time.
What forms of cooperation between growers could be used in trade show participation? Success of trade show depends upon economy and time of year. Trade shows are geared toward growers/green industry. Several praised GSHE show because of convenience to Louisiana growers. Some trade shows are too big in that they have booths with non-relevant products. Have shows in spring. "Landscapers enjoy the opportunity to speak with growers" but want to look at "total outdoor spaces—not just plants." Price-bundling can overcome some of the concerns about freight costs. "I am not sure that the consumer even knows what we are talking about when we talk about the green industry." Educate them with

billboards and photos to show them what the green industry does.
To meet volume requirements from larger retail chains, how do you think partnerships between small and large growers might or might not work? Out of time.
Think over the past year on how you provided service to landscape architects, contractors and garden centers. What things worked particularly well? Which could have been improved? Communicating with retailers using e-mail and photos. Providing consistency in quality. Use 'Louisiana grown' as a selling point. Good landscape architects involve consumer and clientele in developing landscape (plans)—communicate with client about what is being recommended and why; involve consumer in decisions.
(Pass out additional handout.) I am going to read a list of consumer environmental concerns. These are on the handout we are passing now. Whether plants are sustainably produced, whether best management practices are used, whether the growing container was or will be recycled or whether the container is made from biodegradable materials. Which of these do you believe to be more important to consumers? Which are more important to you? First concern among customers is sensory experience. Some want to return plastic containers (mentioned twice and heads nodding in agreement). "Vast majority of customers I deal with don't really care" whether or not something is recycled or not. They want it to "look great and live great." "Customers have feel good notion because they are 'greening the world' with what they have purchased already." "Looks good, smells good" all that matters. "We do a lot of spraying and fertilizing and everything. I have maybe only had two customers in the last 25 years" express concern. "They want their plants to look good." One grower has about six customers that expressed concern and mentioned impact on pets.
Again I am going to read a list of attributes Louisiana consumers may have: customers want to support Louisiana producers; Louisiana customers are concerned that the plants they purchase are grown in Louisiana; customers actively seek more intense sensory experiences in plant material; customers want to upgrade their materials choices; customers have an increased focus on home improvements relative to other discretionary expenditures. Which of these do you believe has more impact on sales? Out of time.
Of all the things we've talked about, what is most important to you?

Appendix Table 5. Welcome page for ornamentals growers questionnaire.

Department of Agricultural Economics and Agribusiness
101 Agricultural Administration Building
Louisiana State University
Baton Rouge, LA 70803-5604
Phone: (225) 578-2753
FAX: (225) 578-2716
E-Mail: rhinson@agctr.lsu.edu

Promotion Strategies to Increase La. Specialty Crop Competitiveness - Nursery and Greenhouse Growers questionnaire

We have been asked by Louisiana's Department of Agriculture and Forestry to suggest efficient and effective promotion strategies for Louisiana's nursery and greenhouse growers. As a person who grows, sells or has other significant knowledge of these products, your opinions about the ideas and activities below are very important in helping evaluate strategies that might be used to enhance competitiveness. Our work is based on the importance of serving customer needs with quality products. Then, promotions are effective when they are aligned with consumer preferences. And finally, cooperative and collaborative actions between industry and public institutions can make a positive difference in the effectiveness of promotions.

We use the term 'promotions' broadly, to include paid advertising in traditional and electronic media, activities by individuals and businesses to attract interest and customers, and some items of industry organization. It also includes activities by trade organizations and support from the public sector. The ideas we present are not new. They have been used in various parts of the US and generally have been effective in promoting sales of nursery stock through a variety of outlets.

This document is organized into the following sections:

I. Rating promotional activities intended to expand the industry
II. Rating activities businesses can undertake to attract garden center and landscaper customers
III. Rating the usefulness of alternative kinds of *promotion*
IV. Rating consumer concerns

Instructions: Each promotional item is described in a brief statement, and in some cases is clarified with an example. We ask you to rate each item based on your experience of having used, seen used, or having an informed opinion about the activity. Your rating is based on whether you think the activity has been or could be useful in attracting customers and increasing sales. Please respond to as many of the activities as you can, but if you don't have experience with an item, use the N/A response.

The rating scale is

1 = not useful at all	**3 = somewhat useful**	**5 = very useful**
2 = not very useful	**4 = moderately useful**	**N/A = no basis to rate the item/activity**

This document looks big, but really isn't. We believe that you can complete it in 15 minutes or so, depending on how much 'writing in' you do. Circle your rating, write in your comments (if any), and return the material in the enclosed, postage-paid envelope. After everyone has responded, we will calculate averages and record the comments. The results will be returned to you, asking whether your opinion is changed based on information from the group.
Please respond by November 14, 2008. I will send reminders of that date.
Thanks in advance for your time. Roger Hinson, John Westra and Joann White

Appendix Table 6. NURSERY CROPS: categories and value, 2007, 2005 and 2003, from Louisiana Ag Summary.		
Category	Number	Value ($)
Fruit and Nut Trees (Total)	49	$3,260,000
Floriculture & Bedding (Total)	169	$20,163,750
Woody Ornamentals (Total)	458	$85,907,500
Foliage Plants	96	$6,267,500
2007 Total		$115,598,750
Fruit and Nut Trees (Total)	39	$2,560,000
Floriculture & Bedding (Total)	169	$35,409,875
Woody Ornamentals (Total)	464	$65,174,250
Foliage Plants	128	$6,528,250
2005 Total		109,672,375
Fruit and Nut Trees (Total)	54	3,420,000
Floriculture & Bedding (Total)	166	$22,707,50
Woody Ornamentals (Total)	411	$72,044,000
Foliage Plants	142	$8,802,000
Total		$106,973,500

Appendix Table 10. Nursery and Floriculture production area and sales, 2007 and 2002.

Crops		Under glass or other protection		In the open		All farms	
		Farms	Sq feet	Farms	Acres	Farms	Dollars
Cuttings, seedlings, liners, and plugs	:						
(see text)	2007	1,066	29,975,544	612	4,089	1,447	440,932,591
	2002	(NA)	(NA)	(NA)	(NA)	(NA)	(NA)
Floriculture crops - bedding/garden plants, cut flowers and cut florist greens, foliage plants, potted flowering plants, and other floriculture and bedding crops, total	2007	18,670	819,940,649	13,154	54,196	26,137	6,466,885,753
	2002	21,728	973,658,415	14,579	68,214	(NA)	(NA)
Nursery stock	2007	4,590	221,813,698	20,906	446,496	22,130	6,568,562,723
	2002	4,956	187,765,579	23,272	463,631	(NA)	(NA)
Other nursery crops	2007	228	1,431,170	543	3,628	693	48,475,835
	2002	(NA)	(NA)	(NA)	(NA)	(NA)	(NA)
Sod harvested	2007	(X)	(X)	1,881	409,440	1,878	1,353,422,529
	2002	(X)	(X)	2,124	386,504	(NA)	(NA)
2007- farms by area:							
0 to 99.9 acres .....:		(X)	(X)	1011	31,959	1008	104,783,217
250.0 to 399.9 acres .....:		(X)	(X)	185	56,689	185	183,182,984
400.0 to 749.9 acres .....:		(X)	(X)	168	86,102	168	305,368,450
750 acres or more .....:		(X)	(X)	115	171,556	115	532,269,758