

The AlaskaPoll



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# ALASKA SALMON QUALITY SURVEY IV

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## Alaska Seafood Marketing Institute



**Executive Summary ..... i - iii**

**I. Methodology ..... 1 - 2**

**II. Findings**

Fishermen ..... 3 - 34  
On-Shore Processors ..... 35 - 66  
Off-Shore Processors ..... 67 - 97

**III. Verbatim Comments**

Fishermen ..... 98 - 147  
On-Shore Processors ..... 148 - 149  
Off-Shore Processors ..... 150 - 153  
Non-Salmon Processors..... 154

**IV. Crosstabulations**

Fishermen ..... 155 - 223  
On-Shore Processors ..... 224 - 266  
Off-Shore Processors ..... 267 - 304



# Executive Summary



## Executive Summary

### FISHERMEN

- ◆ Overall, all indications are that major steps are being taken to improve quality. In fact, in nearly every case, the trend is toward more rapid delivery and improved fish handling.
- ◆ Although tenders still predominate (54%), the number of fishermen who deliver directly to the processing plant (34%) is increasing.
- ◆ Similarly, the number of fishermen who deliver promptly, within 6 hours, continues to increase (from 22% in 1991 to 32% currently).
- ◆ A majority of fishermen (59%) now report they chill all their fish, up from 34% in 1991.
- ◆ And among the few fishermen who use plastic totes with drainage holes, the same percentage (59%) report they insulate with ice, nearly double from 33% in 1991.
- ◆ Very few fishermen (4% or less) continue to allow their fish to be exposed to bilge water and other contaminants.
- ◆ And an increasing number of fishermen (72%) now remove their fish from the net by hand, up from 64% previously, and 80% also handle the fish by the head while loading and transferring their catch.
- ◆ In addition, the number of fishermen who now bleed their fish (49%) is up substantially from 27% in 2001.
- ◆ The use of brailers (62%) is increasing, and the average weight of a brailer load is decreasing (26% between 800-1200 pounds, down from 41%). Also, the use of knotless brailers is increasing (44%), up from 26% in 1991.
- ◆ There has also been a significant decrease in the depth in feet that fish are stored (38% three feet or more, down from 53% in 1991).
- ◆ And over three out of four (77%) report they clean their fish holds and totes after every delivery.
- ◆ As far as tenders are concerned, fishermen report that fairly few tenders check fish temperatures upon delivery (31%), while an additional 30% make “spot checks”.
- ◆ But over nine out of ten fishermen (92%) say their tenders take “good or excellent” care of their fish, and 80% of fishermen report they believe “market perceptions” of the quality of Alaskan salmon has changed for the better during the last 3-5 years, up from 51% in 2001.

## Executive Summary

### ON-SHORE PROCESSORS

- ◆ Similar to the results from Fishermen, the reports from On-Shore Processors indicate major steps to improve fish quality.
- ◆ On-shore processors report there has been a large increase in the numbers of gillnetters and seiners who chill their fish -- 57% of gillnetters, up from 16% in 1991; 100% of seiners, up from 59%.
- ◆ And by far, refrigerated sea water (RSW) is the chilling method of choice (90%), compared to ice (10%).
- ◆ On-shore processors also report requiring more frequent delivery by fishermen, 79% at least daily, up from 64%.
- ◆ Regarding types of gear, most on-shore processor respondents receive their fish from gillnetters (71% are currently gillnetters), up from 58% in 2001, while setnetters remain the same as in prior years (17%). The number of seiners (3%) and trollers (9%) have declined.
- ◆ On-shore processors report they provide instructions to fishermen regarding proper fish handling procedures (84%) and recommend chilling practices (84%), and nearly four out of five (79%) also provide ice for fishermen.
- ◆ On-shore processors also report they check fish history and reject fish if they suspect poor handling, or fish that are too old or haven't been kept cool enough.
- ◆ Fish quality when received is frequently evaluated (83% "all the time", 17% "most of the time"), and nearly all evaluators (94%) are considered to be experienced and familiar with regulatory requirements.

## Executive Summary

### OFF-SHORE PROCESSORS

- ◆ By far, most off-shore processor respondents are catcher-processors who catch most of their fish themselves.
- ◆ The reported usage of tenders has declined in every survey over the past 15 years (14% currently, down from 42% in 1991).
- ◆ Fish quality is improving -- all tenders (100%) are reported to chill their fish and to do it with RSW, and 80% of the off-shore processors require tenders to deliver their fish within one day or less.
- ◆ Most off-shore processors also provide information to tenders regarding proper fish handling and chilling, and tenders are required to reject fish that appear to be improperly handled.
- ◆ All off-shore processors (100%) gave “good” ratings to their tenders for the way they handle their fish, and the ratings are based on inspections of tender cleanliness and sanitation as well as observations of fish-handling practices.
- ◆ Regarding their own employees, nearly two out of three off-shore processors (63%) report they provide regular seafood quality education programs, and nearly all of the instruction (95-100%) includes how to handle fish properly and keep them cool and covered.
- ◆ Nearly nine out of ten processors (88%) “desire” their fish to be frozen the same day they are received, and four out of five (79%) report that one day is the maximum amount of time they will allow between receipt of fish and freezing them.
- ◆ Most of the fish are blast frozen (71% at least half), and kept very cold (94% at least -10° F or colder).
- ◆ However, similar to their on-shore counterparts, most off-shore processors don't monitor their fish after they have been turned over to the shipper and left the processing facility.