SEAFOOD SUCCESS
Powered by
ALASKA
Retail Consumer Research
There’s so much to the story of seafood from Alaska. Wild-caught by generations of dedicated families amid majestic snow-capped mountains, rugged coastal shores, and pristine icy waters. Alaska is where the best quality seafood thrive and according to Circana, calling out “Alaska seafood” increases shoppers’ willingness to purchase. Read on to learn more about consumer seafood preferences and how Alaska is a call to action, empowering the retailers that promote it.

OF HOUSEHOLDS PURCHASE SEAFOOD

THE TOP 10% IS KEY

45% of all seafood is purchased by the top 10%

4X more purchases are made per year by the top 10%

2X as much is purchased by the top 10%
61% of consumers surveyed eat seafood at least once a week

<table>
<thead>
<tr>
<th>Frequency of Eating Seafood at Home</th>
</tr>
</thead>
<tbody>
<tr>
<td>Multiple times per week</td>
</tr>
<tr>
<td>Once per week</td>
</tr>
<tr>
<td>A few times per month</td>
</tr>
<tr>
<td>Once a month</td>
</tr>
<tr>
<td>Every 2-12 months</td>
</tr>
</tbody>
</table>

54% of consumers surveyed are eating more seafood compared to two years ago

- More: 54%
- About the same: 40%
- Less: 6%
TOTAL STORE SEAFOOD SALES
IN THE LAST 4 YEARS

+30.2%

- Refrigerated Finfish: 27%
- Frozen Finfish: 35.9%
- Sushi: 67.8%
- Refrigerated Shellfish: 10.2%
- Frozen Shellfish: 35.0%
- Shelf Stable Seafood: 14.3%
FREQUENCY OF SEAFOOD CONSUMPTION INCREASES WITH INCOME & PEAKS AMONG OLDER MILLENNIALS

CONSUMERS CITE HEALTH & ENJOYMENT AS THE TOP TWO FACTORS DRIVING INCREASED CONSUMPTION

- **60%** Healthier
- **9%** Cut back on red meat
- **6%** Price
- **29%** Enjoyment
- **8%** Preparation
- **2%** Sustainability concerns

AVERAGE TIMES SEAFOOD EATEN PER YEAR
Reasons Consumers Choose Seafood as Their Preferred Protein Choice

- Healthier overall
- Prefer the taste
- It has more protein

Seafood is preferred and poised for growth

<table>
<thead>
<tr>
<th>Protein Type</th>
<th>Eat Most Often</th>
<th>Desired Change in Consumption</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chicken</td>
<td>50%</td>
<td>Increase 46% No Change 46% Decrease 8%</td>
</tr>
<tr>
<td>Seafood</td>
<td>26%</td>
<td>Increase 62% No Change 33% Decrease 5%</td>
</tr>
<tr>
<td>Beef</td>
<td>15%</td>
<td>Increase 26% No Change 39% Decrease 36%</td>
</tr>
<tr>
<td>Pork</td>
<td>4%</td>
<td>Increase 21% No Change 47% Decrease 32%</td>
</tr>
<tr>
<td>Plant-based</td>
<td>5%</td>
<td>Increase 31% No Change 54% Decrease 15%</td>
</tr>
</tbody>
</table>

6 in 10 would like to eat more seafood

Top 3

- Healthier overall
- Prefer the taste
- It has more protein

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FREQUENCY OF SEAFOOD PURCHASE FROM STORE AREAS

Use of online retailers is almost twice as high among Gen Z/Millennials than Gen X or Boomers.

Use of online subscription services is 2-3 times higher among higher income and Gen Z/Millennials.

ONLINE RETAILER

ONLINE SUBSCRIPTION

31% 32% 46% 31% 18%

31% 32% 46% 57% 68%

<50K $50K-$90K $100K+

Gen Z/Young Millennial Older Millennial Gen X Boomer

57% 68%

57% 68%

<50K $50K-$90K $100K+

Gen Z/Young Millennial Older Millennial Gen X Boomer
### Frequency of Seafood Purchase

#### Physical Store
- **Frozen Aisle**
  - Once a week or more: 35%
  - A few times a month: 24%
  - Once a month: 19%
  - Every few months: 11%
  - Once or twice a year: 3%
  - Less often/ Never: 9%
- **Seafood Counter**
  - Once a week or more: 40%
  - A few times a month: 25%
  - Once a month: 15%
  - Every few months: 9%
  - Once or twice a year: 4%
  - Less often/ Never: 8%
- **Canned/Shelf Stable**
  - Once a week or more: 32%
  - A few times a month: 22%
  - Once a month: 15%
  - Every few months: 11%
  - Once or twice a year: 5%
  - Less often/ Never: 17%
- **Deli Food Counter**
  - Once a week or more: 33%
  - A few times a month: 22%
  - Once a month: 11%
  - Every few months: 7%
  - Once or twice a year: 4%
  - Less often/ Never: 23%

#### Online Store
- **Online Retailer**
  - Once a week or more: 19%
  - A few times a month: 12%
  - Once a month: 6%
  - Every few months: 4%
  - Once or twice a year: 57%
- **Online Subscription**
  - Once a week or more: 14%
  - A few times a month: 7%
  - Once a month: 5%
  - Every few months: 3%
  - Once or twice a year: 69%
Promotions, Cravings and Recipes Drive Purchase

**Influences on Decision to Buy Seafood While Shopping**

- **In-store Influences (Net):**
  - Sales / Promotions: 45%
  - Display / Merchandising: 23%
  - Free Samples: 16%
  - Recommendations from store employee: 16%

- **Other Influences (Net):**
  - Had a craving: 54%
  - Saw a recipe: 36%
  - Recommendations from friend / family: 28%
  - Child / family member asked for it: 21%
  - Saw an advertisement for a fish / seafood dish: 17%

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# Keys for Encouraging More Purchase

## What Would Encourage Eating More Seafood

<table>
<thead>
<tr>
<th>Feature</th>
<th>% of Respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Availability (Net)</td>
<td>78%</td>
</tr>
<tr>
<td>Preparation (Net)</td>
<td>39%</td>
</tr>
<tr>
<td>Fish/seafood recipe ideas/suggestions</td>
<td>25%</td>
</tr>
<tr>
<td>Instructions on how to prepare fish/seafood</td>
<td>23%</td>
</tr>
<tr>
<td>Knowing it's wild-caught</td>
<td>35%</td>
</tr>
<tr>
<td>Knowing the catch date</td>
<td>24%</td>
</tr>
<tr>
<td>Knowing the fish/seafood's origin</td>
<td>23%</td>
</tr>
<tr>
<td>More knowledge of health benefits of species</td>
<td>21%</td>
</tr>
<tr>
<td>Carrying fish/seafood options that are sustainable</td>
<td>15%</td>
</tr>
<tr>
<td>Knowing it's farm-raised</td>
<td>11%</td>
</tr>
<tr>
<td>None of the above/Nothing</td>
<td>7%</td>
</tr>
</tbody>
</table>

Say greater selection would encourage them to eat seafood more often.

<table>
<thead>
<tr>
<th>Option</th>
<th>% of Respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fresh seafood options</td>
<td>46%</td>
</tr>
<tr>
<td>Frozen seafood options</td>
<td>36%</td>
</tr>
<tr>
<td>Seafood options at the deli/prepared food</td>
<td>22%</td>
</tr>
<tr>
<td>Raw fish/seafood options</td>
<td>21%</td>
</tr>
<tr>
<td>Pre-seasoned/marinated FULLY COOKED/READY-TO-EAT seafood</td>
<td>18%</td>
</tr>
<tr>
<td>Canned seafood options</td>
<td>15%</td>
</tr>
<tr>
<td>Organic seafood options</td>
<td>15%</td>
</tr>
<tr>
<td>Pre-seasoned/marinated RAW fish/seafood options</td>
<td>12%</td>
</tr>
</tbody>
</table>
### WHERE SHOPPERS TYPICALLY GET INFORMATION ABOUT SEAFOOD PURCHASED

<table>
<thead>
<tr>
<th>Resource</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>In-Store</td>
<td>49%</td>
</tr>
<tr>
<td>40% Seafood person at store</td>
<td></td>
</tr>
<tr>
<td>18% Materials/brochures at seafood counter</td>
<td></td>
</tr>
<tr>
<td>Websites</td>
<td>41%</td>
</tr>
<tr>
<td>29% - Recipe/lifestyle website</td>
<td></td>
</tr>
<tr>
<td>20% - Online retailer website</td>
<td></td>
</tr>
<tr>
<td>Traditional Media</td>
<td>26%</td>
</tr>
<tr>
<td>16% - Television</td>
<td></td>
</tr>
<tr>
<td>12% - Magazines</td>
<td></td>
</tr>
<tr>
<td>7% - Newspapers</td>
<td></td>
</tr>
<tr>
<td>Social Media</td>
<td>32%</td>
</tr>
<tr>
<td>23% - Social media</td>
<td></td>
</tr>
<tr>
<td>16% - Food blog</td>
<td></td>
</tr>
<tr>
<td>Environmental Groups</td>
<td>11%</td>
</tr>
<tr>
<td>Friends &amp; Family</td>
<td>40%</td>
</tr>
<tr>
<td>#1 RESOURCE</td>
<td></td>
</tr>
<tr>
<td>44.8% of Gen Z/Young Millennials call out</td>
<td></td>
</tr>
<tr>
<td>50.7% of those with an income &gt;$100K callout</td>
<td></td>
</tr>
<tr>
<td>59.2% of Older Millennials callout websites</td>
<td></td>
</tr>
</tbody>
</table>
### Top 5 Most Important Attributes When Selecting Seafood to Eat at Home

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Important</th>
<th>Among Top 5 Most Important</th>
</tr>
</thead>
<tbody>
<tr>
<td>Taste/Flavor</td>
<td>41%</td>
<td>58%</td>
</tr>
<tr>
<td>Freshness/Fresh</td>
<td>44%</td>
<td>56%</td>
</tr>
<tr>
<td>Healthy to eat</td>
<td>34%</td>
<td>53%</td>
</tr>
<tr>
<td>Safe to eat</td>
<td>31%</td>
<td>50%</td>
</tr>
<tr>
<td>Affordability</td>
<td>32%</td>
<td>45%</td>
</tr>
</tbody>
</table>
Some also see frozen seafood as less expensive/more affordable and as good as fresh.

**REASONS FOR INTEREST LEVEL IN FROZEN SEAFOOD**

- **6%** Generally Prefer Frozen
- **22%** Product Attributes
- **12%** Availability
- **36%** Convenience
- **79%** Likely To Buy Frozen
- **7%** As Good As Fresh
- **9%** Less Expensive
Frozen seafood is widely accepted. 

8 in 10 are very or somewhat likely to purchase frozen seafood.

- **Very/Somewhat Likely**: 79%
- **Neutral**: 13%
- **Somewhat/Not at All Likely**: 8%
Attributes consumers associate with frozen fish:

- Convenient to store: 50%
- Affordably priced: 50%
- Widely available where I shop: 50%
- Tastes good: 50%
- Is easy to cook: 50%
- Reduces food waste: 25%
- Environmentally friendly: 25%
Greater Availability of Wild-Caught ENCOURAGES ONE-THIRD OF CONSUMERS to Purchase More Frozen Seafood

WILD IS PREFERRED 4:1 TO FARMED

TOP 3 REASONS CONSUMERS PREFER WILD-CAUGHT SEAFOOD:

TASTE

HEALTHIER

NATURAL

More Sustainable Seafood Options ENCOURAGES 1 IN 3 CONSUMERS to Purchase More Frozen Seafood
CONSUMERS PREFER ALASKA SEAFOOD BY A WIDE MARGIN

Labelling your seafood with ‘Wild’ and ‘Alaska’ together increase likelihood of purchase.
# Alaska Is Powerful and Drives Sales

Alaska sourced seafood drives larger basket sizes and is outpacing the category in terms of trip and unit growth.

## Basket Size with Seafood in the Basket

<table>
<thead>
<tr>
<th></th>
<th>RFG Seafood</th>
<th>RFG Alaska Seafood</th>
</tr>
</thead>
<tbody>
<tr>
<td>In Basket $ Per Trip</td>
<td>$100.84</td>
<td>$105.89</td>
</tr>
<tr>
<td>Out Basket $ Per Trip</td>
<td>$48.98</td>
<td>$43.73</td>
</tr>
</tbody>
</table>

## Trips, Units, Basket Size

<table>
<thead>
<tr>
<th></th>
<th>RFG Seafood</th>
<th>RFG Alaska Seafood</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trips per Buyer</td>
<td>7.8</td>
<td>3.0</td>
</tr>
<tr>
<td>Units per Trip</td>
<td>1.3</td>
<td>1.6</td>
</tr>
<tr>
<td>Annual Units per Buyer</td>
<td>10.4</td>
<td>4.7</td>
</tr>
</tbody>
</table>

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U.S. DOMINATES COUNTRY PREFERENCE

SEAFOOD FROM ALASKA IS PREFERRED 5:1 to Other Regions Outside of the U.S.

ALASKA DOMINATES U.S. PREFERENCE

AREA OF ORIGIN

USA 66%

No Pref. 23%
Norway 4%
Iceland 4%
Other 5%

SEAFood SUCCESS - Powered By ALASKA
Alaska Salmon Beats All The Salmon

58% of consumers say Alaska Salmon tastes better than Atlantic salmon.

Of those who have a preference, nearly two-thirds prefer Alaska salmon.

<table>
<thead>
<tr>
<th>Type of Salmon</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alaska Salmon</td>
<td>50%</td>
</tr>
<tr>
<td>Atlantic Salmon</td>
<td>32%</td>
</tr>
<tr>
<td>Pacific Salmon</td>
<td>26%</td>
</tr>
<tr>
<td>Norwegian Salmon</td>
<td>14%</td>
</tr>
<tr>
<td>Farmed Salmon</td>
<td>12%</td>
</tr>
<tr>
<td>Responsible Fisheries Management Certified Salmon</td>
<td>9%</td>
</tr>
<tr>
<td>Chilean Salmon</td>
<td>7%</td>
</tr>
<tr>
<td>Marine Stewardship Council Certified Salmon</td>
<td>7%</td>
</tr>
<tr>
<td>Loch Duart Salmon</td>
<td>5%</td>
</tr>
<tr>
<td>No Preference</td>
<td>22%</td>
</tr>
</tbody>
</table>
UNAIDED Consumer Descriptors of Seafood from Alaska:

- Fresh/Fresher
- Great Taste
- High Quality

AIDED Descriptors Consumers Agree Describe Seafood from Alaska:

- Product of USA
- Fresh
- Wild-Caught
- Safe to Eat
- Delicious Taste/Flavor
Alaska Seafood Logo Drives Purchase Interest

**Percent Who Would Be “A Lot More” or “Somewhat More” Likely to Buy Alaska Seafood**

- **“Alaska” Labelling**
  - GenZ/Young Millennials: 85%
  - Older Millennials: 87.5%
- **Alaska Seafood Logo Displayed**
  - GenZ/Young Millennials: 86%
  - Older Millennials: 87%

**Impact of “Alaska” Labelling & Alaska Seafood Logo on Likelihood to Buy Alaska Seafood**

- A Lot More Likely
  - Seeing “Alaska”: 44%
  - Seeing Alaska Seafood logo: 38%
- Somewhat More Likely
  - Seeing “Alaska”: 43%
  - Seeing Alaska Seafood logo: 38%
- Unaffected
  - Seeing “Alaska”: 18%
  - Seeing Alaska Seafood logo: 17%
- Less Likely
  - Seeing “Alaska”: 1%
  - Seeing Alaska Seafood logo: 1%
78% of Consumers Would Pay More for Seafood Displaying the Alaska Seafood logo

- 22% Would not pay more
- 24% Significantly more
- 54% Slightly more

PERCEPTIONS OF STORE THAT DISPLAYS ALASKA SEAFOOD LOGO

- Has high quality fish/seafood: 52%
- Cares about the quality of the fish/seafood it sells: 48%
- Recommends Alaska fish/seafood: 41%
- Supports sustainable fisheries: 41%
- Would recommend buying fish/seafood at this store: 35%
Available Resources:
The Alaska Seafood Marketing Institute (ASMI) has the tools and resources to make it easy for you to build successful promotions.

- Educational materials
- Recipes
- Consumer trends data
- Training in the selection, handling and uses of all varieties of wild Alaska seafood
- Promotional support
- Photographs, videos and artwork to customize your needs
- Ready access to seafood marketing consultants
- Directory of Alaska seafood suppliers
- Social media support

For More Information:
Please contact us at 800-478-2903
alaskaseafood.org/retail

Research Methodology:
Conducted by Circana at the end of 2023, this online study was conducted in the U.S. among 1,221 consumers across the U.S. All consumers were required to have purchased salmon to eat at home at least one time in a three-month time period.