THE POWER OF SEAFOOD 2019
An In-depth Look at Seafood through the Shoppers' Eyes
FMI Antitrust Compliance

It is FMI’s policy to comply in all respects with antitrust laws.

All participants in FMI meetings and events are expected to comply with applicable antitrust and competition laws.

Avoid discussions of sensitive topics that can create antitrust concerns.

- Agreements to fix prices, allocate markets, engage in product boycotts and to refuse to deal with third parties are illegal.
- Discussions of prices (including elements of prices such as allowances and credit terms), quality ratings of suppliers, and discussions that may cause a competitor to cease purchasing from a particular supplier, or selling to a particular customer, should be avoided.
- No discussion that might be interpreted as a dividing up of territories.

It is important to avoid even the appearance of unlawful activity.

Questions or concerns? Please consult with FMI staff.
Meet Your Presenters

Rick Stein
Vice President, Fresh
Food Marketing Institute

Steve Markenson
Director, Research
Food Marketing Institute
FMI Seafood Strategy Committee

Guy Pizzuti - Publix (Chair)
David Wier - Meijer (Co-Chair)
Alex Corbishley - Target
Bethany Fitzgerald - Target
Josanna Busby - Food Lion
Jennifer Lambert - Loblaws
Winnie Choo - Loblaws
Rich Castle - Giant Eagle
Leigh Chase - Hannaford
Steve Disko - Schnucks
Thomas Domino - Wakefern
Jason Driskill - HEB
Anthony Snow - Albertsons
Buddy Jones - MDI
Suzanne Forbes - Wakefern
Joel Shaul - Harris Teeter

Dale Lubold – Weis Markets
Josh Platek – SE Groc
Jason Pride – Hy-Vee
Kendrick Repko - Ahold
Jason Resner - Price Chopper
John Rohrs – PDI/Hy-Vee
Kyle Stevens - HEB
Frank Thurlow - SE Groc.
Beth Grant – Ahold
Thomas Domino - Ahold
Tom Sargent - SuperValu
Jeremiah Clem – Kroger
Debra Paull – Walmart
Marife (Faye) Casem - Walmart
Jim Wallace – C&S Wholesalers
Mike Decory- Wegmans

Bryan Beck - Ahold
Lisa Guinther - Giant Landover
Bo Hawkins - AWG
John Laughead - Ahold
Samantha Pease - Ahold
Frank Malott Jr – Spartan Nash
Scott Negro - Weiss
Sean Breslin – Kroger
Brian Daflin - Sobeys
Tonya Pratt - Publix

Rick Stein – FMI Staff

*
FMI Seafood Strategy Leadership Council

Kristen Baumer – Paul Piazza
Laurel Bryant - NOAA.
Mike Kraft – Bumble Bee
Peter Larkins – Trace Register
Dave Melbourne- Bumble Bee
Andy Neely – Paul Piazza
Eric Bloom – Eastern Fish
Kari Valickis- Eastern Fish
Kevin Seeley- Eastern Fish
John Knorr – Phillips Seafood
Lou Shaheen- Trans-Ocean

Susan Marks- Alaska Seafood Marketing
Mark Jones Alaska Seafood Marketing
Chris Keller – GAA- BAP
Kathryn Novak - SFP
Dave Martin - SFP
Joe Bundrant – Trident
Adam Taylor – Trident
Stefani Moreland- Trident
Annette Chalmers- Clearwater
Aurora Alifano – FishWise

Ashley Greenley – FishWise
Jim Randazzo – AquaStar
Corey Peete- AquaStar
Dirk Leuenberger- AquaStar
Lisa Weddig – NFI
Judy Dashiell- NFI
Mark Bowen- NFI
Andrea Albersheim- SNP
Holly Koehler- ISSF
FMI Seafood Strategy Leadership Council

In-depth information, trends and insights to foster innovation, take advantage of new opportunities and help develop winning strategies

Share ideas, explore best practices and develop business relations

Understand what is going on in Washington and make your voice heard. Continue to advocate Sustainability
FMI SSC/SSLC Projects

Regulatory and Legislative
- FSMA
- IUU
- Red Snapper
- NOAA Proposed

Research/Projects
- Mitigating Seafood Fraud Best Practices
- Annual Seafood Calendar
- Power of Seafood
- Standardization of Specifications
- Social Responsibility

Industry Updates
- Human Welfare
- Sustainability
- Emerging Issues
- Trade Association/NGO Collaboration
THE POWER OF SEAFOOD 2019
An In-depth Look at Seafood through the Shoppers’ Eyes
Introduction and Methodology

- Interviews with food retailers and industry experts
- Survey of 2,096 US grocery shoppers (44% non seafood)
- Representative of US population based on geography, age, gender, etc.
  - Regular seafood consumers: 56%, at least once a month
  - Frequent seafood consumers: 21%, two times/week or more (USDA recommendation)
  - Non-seafood consumers: 44%, less than once/month or never
- Seafood includes fresh, frozen, prepared and grocery (canned/pouched)*
- Real-life data overlays from Nielsen and IRI
- For the industry by the industry
- First Power of Seafood study

*Few consumers only purchase grocery seafood
Overview

- The market for seafood
- Where do shoppers shop for seafood?
- How do shoppers shop for seafood?
- Educating the consumer
- The seafood counter
- How to generate trial of seafood
- What is the role of nutrition, health, sustainability, certifications & standards?
the market for seafood
The Market for Seafood

Seafood consumers represent a small but lucrative demographic group.
The Market for Seafood

Americans annual per capita consumption (in pounds) of ...

- Vegetables: 385 lbs
- Fruits: 256 lbs
- Poultry: 109 lbs
- Meat: 108 lbs
- Seafood: 16 lbs

Source: USDA
The Market for Seafood

Only one in five adults (21%) can be classified as frequent seafood eaters. 44% eat seafood less than once a month or never.

<table>
<thead>
<tr>
<th></th>
<th>Non</th>
<th>Occasional</th>
<th>Frequent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Poultry</td>
<td>7%</td>
<td>19%</td>
<td>74%</td>
</tr>
<tr>
<td>Meat/Pork</td>
<td>12%</td>
<td>21%</td>
<td>67%</td>
</tr>
<tr>
<td>Seafood</td>
<td>44%</td>
<td>35%</td>
<td>21%</td>
</tr>
</tbody>
</table>

- **Non** – Less than once a month to never
- **Occasional** – Once a month to one time a week
- **Frequent** – Two or more times a week
The Market for Seafood

Consumption of seafood falls below USDA recommendations

Seafood Consumption
(2+ times per week)


Adult

Children

Source: National Center for Health Statistics
The Market for Seafood

Starting consumption early in life: A missed opportunity

Consuming seafood since...

- 56% All my life
- 44% Started later in life

Source: FMI’s Power of Seafood (Q11)
The Market for Seafood

The Seafood Department is relatively small but can generate a positive impact

<table>
<thead>
<tr>
<th>DEPARTMENT</th>
<th>$</th>
<th>$ Change</th>
<th>Unit Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>FRESH SEAFOOD (42%)</td>
<td>$5,144,324,203</td>
<td>+6.1%</td>
<td>+2.3%</td>
</tr>
<tr>
<td>FROZEN SEAFOOD (39%)</td>
<td>$4,647,363,168</td>
<td>+3.7%</td>
<td>+1.7%</td>
</tr>
<tr>
<td>GROCERY SEAFOOD (18%)</td>
<td>$2,104,323,097</td>
<td>+4.0%</td>
<td>-0.1%</td>
</tr>
<tr>
<td>TOTAL SEAFOOD</td>
<td>$11,896,010,469</td>
<td>+4.8%</td>
<td>+1.0%</td>
</tr>
</tbody>
</table>

Source: Nielsen (12 months ending 9/1/2018)
The Market for Seafood

Seafood permeates throughout food retail stores

Frequency of Purchasing…

- Frozen:
  - Rarely/Never: 23%
  - Sometimes: 44%
  - Often: 33%

- Fresh, self-serve:
  - Rarely/Never: 33%
  - Sometimes: 43%
  - Often: 24%

- Fresh from counter:
  - Rarely/Never: 35%
  - Sometimes: 37%
  - Often: 28%
The Market for Seafood

Seafood consumers represent valuable demographic segments of shoppers.

Compared to non-seafood consumers, seafood consumers…

- Have higher household income - $100k+ (16% seafood, 20% frequent vs. 8% non)
- More are Boomers (36% seafood vs. 28% non) and less are Millennials (27% seafood vs. 35% non)
- More likely to male (54% seafood, 58% frequent vs. 44% non)
- More likely to be college graduates (50% seafood vs. 35% non)
- More likely to live alone (24% seafood vs. 19% non) or have no children (65% seafood vs. 59% non)

- Seafood consumers – Once a month or more
- Frequent – Two or more times a week
- Non – Less than once a month to never
The Market for Seafood

Seafood consumers are lucrative segment of shoppers.

Compared to non-seafood consumers, seafood consumers:

- Spend more per week on groceries ($129/week seafood, $143/week frequent vs. $116/week non)
- Shop more frequently – 2/week (69% seafood, 76% frequent vs. 62% non)
- Shop for groceries online (34% seafood, 46% frequent vs. 22% non)
- Primary store – supermarket (55% seafood vs. 50% non), supercenter/club (33% seafood vs. 38% non)

Seafood consumers – Once a month or more
- Frequent – Two or more times a week
- Non – Less than once a month to never
the seafood shopping basket
The seafood shopping basket for seafood consumers is diverse

<table>
<thead>
<tr>
<th></th>
<th>Rarely/Ne ver</th>
<th>Sometimes</th>
<th>Often</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tuna*</td>
<td>19%</td>
<td>36%</td>
<td>45%</td>
</tr>
<tr>
<td>Raw shrimp</td>
<td>30%</td>
<td>40%</td>
<td>30%</td>
</tr>
<tr>
<td>Salmon</td>
<td>31%</td>
<td>40%</td>
<td>29%</td>
</tr>
<tr>
<td>Cooked shrimp</td>
<td>34%</td>
<td>41%</td>
<td>25%</td>
</tr>
<tr>
<td>Premium fin fish</td>
<td>38%</td>
<td>41%</td>
<td>21%</td>
</tr>
<tr>
<td>Other fin fish</td>
<td>45%</td>
<td>40%</td>
<td>15%</td>
</tr>
<tr>
<td>Crabs or lobster</td>
<td>56%</td>
<td>33%</td>
<td>11%</td>
</tr>
<tr>
<td>Mussels, clams, etc</td>
<td>62%</td>
<td>29%</td>
<td>9%</td>
</tr>
</tbody>
</table>

*primarily grocery tuna

Source: FMI’s Power of Seafood (Q13)
The Seafood Shopping Basket

The seafood shopping basket for seafood consumers is diverse.

<table>
<thead>
<tr>
<th>SPECIES</th>
<th>$</th>
<th>$ CHANGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>SHRIMP</td>
<td>$3,382,638,058</td>
<td>+7.6%</td>
</tr>
<tr>
<td>SALMON</td>
<td>$2,325,983,376</td>
<td>+5.9%</td>
</tr>
<tr>
<td>TUNA</td>
<td>$1,695,064,270</td>
<td>+4.4%</td>
</tr>
<tr>
<td>CRAB</td>
<td>$887,353,086</td>
<td>+2.9%</td>
</tr>
<tr>
<td>TILAPIA</td>
<td>$567,985,373</td>
<td>-14.1%</td>
</tr>
<tr>
<td>OTHER FIN FISH</td>
<td>$499,925,665</td>
<td>+4.4%</td>
</tr>
<tr>
<td>COD + SCROD</td>
<td>$346,503,851</td>
<td>+2.4%</td>
</tr>
<tr>
<td>CATFISH</td>
<td>$337,721,441</td>
<td>-0.9%</td>
</tr>
<tr>
<td>LOBSTER</td>
<td>$303,744,926</td>
<td>+1.0%</td>
</tr>
<tr>
<td>SCALLOPS</td>
<td>$200,091,260</td>
<td>+20.0%</td>
</tr>
<tr>
<td>ANCHOVY + SARDINE</td>
<td>$151,991,247</td>
<td>+7.1%</td>
</tr>
<tr>
<td>CLAMS</td>
<td>$117,722,061</td>
<td>+2.3%</td>
</tr>
<tr>
<td>OYSTERS</td>
<td>$103,390,455</td>
<td>+5.6%</td>
</tr>
<tr>
<td>TOTAL</td>
<td>$11,896,010,469</td>
<td>+4.8%</td>
</tr>
</tbody>
</table>

Source: Nielsen
(12 months ending 9/1/2018)
## The Seafood Shopping Basket

Shrimp leads the way from the frozen food aisle

<table>
<thead>
<tr>
<th></th>
<th>$</th>
<th>$ Change</th>
<th>Unit Change</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>SHRIMP</strong></td>
<td>$3,382,638,058</td>
<td>+7.6%</td>
<td>+7.7%</td>
</tr>
<tr>
<td>FRESH SHRIMP</td>
<td>$875,781,332</td>
<td>+5.4%</td>
<td>+7.8%</td>
</tr>
<tr>
<td>FROZEN SHRIMP</td>
<td>$2,489,852,910</td>
<td>+8.4%</td>
<td>+7.8%</td>
</tr>
<tr>
<td>GROCERY SHRIMP</td>
<td>$17,003,816</td>
<td>-0.2%</td>
<td>-2.7%</td>
</tr>
</tbody>
</table>

Source: Nielsen (12 months ending 9/1/2018)
### The Seafood Shopping Basket

#### Salmon leads fresh seafood

<table>
<thead>
<tr>
<th></th>
<th>$</th>
<th>$ Change</th>
<th>Unit Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>SALMON</td>
<td>$2,325,983,376</td>
<td>+5.9%</td>
<td>+3.7%</td>
</tr>
<tr>
<td>FRESH SALMON</td>
<td>$1,686,479,178</td>
<td>+7.3%</td>
<td>+7.1%</td>
</tr>
<tr>
<td>FROZEN SALMON</td>
<td>$437,827,914</td>
<td>+1.7%</td>
<td>-1.0%</td>
</tr>
<tr>
<td>GROCERY SALMON</td>
<td>$201,676,285</td>
<td>+3.7%</td>
<td>-1.2%</td>
</tr>
</tbody>
</table>

Source: Nielsen (12 months ending 9/1/2018)
# The Seafood Shopping Basket

## Tuna leads from center store

<table>
<thead>
<tr>
<th></th>
<th>$</th>
<th>$ Change</th>
<th>Unit Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>TUNA</td>
<td>$1,695,064,270</td>
<td>4.4%</td>
<td>-0.6%</td>
</tr>
<tr>
<td>FRESH TUNA</td>
<td>$85,569,622</td>
<td>11.8%</td>
<td>-5.2%</td>
</tr>
<tr>
<td>FROZEN TUNA</td>
<td>$42,889,993</td>
<td>2.5%</td>
<td>4.6%</td>
</tr>
<tr>
<td>GROCERY (CANNED/POUCH)</td>
<td>$1,566,604,654</td>
<td>4.1%</td>
<td>-0.6%</td>
</tr>
</tbody>
</table>

Source: Nielsen (12 months ending 9/1/2018)
Where do shoppers shop for seafood?
Where do Shoppers Shop for Seafood?

Seafood consumers shop around, a lot, but not online.
Where do Shoppers Shop for Seafood?

Seafood consumers shop around for their seafood.

Primary Store for Seafood:
- Supermarket – 60%
- Supercenter – 20%
- Natural/organic/specialty store – 6%
- Club store – 5%
- Limited assortment – 3%
- Other – 5%

2018 Power of Meat - 78% Yes
Where do Shoppers Shop for Seafood?

Seafood consumers shop around for their seafood.

Aside from primary seafood store, where shop for seafood:

- Another supermarket – 28%
- Primary supermarket – 26%
- Supercenter – 23%
- Seafood store – 22%
- Club store – 17%
- Farmer’s market – 12%
- Seafood market/monger/stand – 11%
- Natural/organic store – 11%
- Limited assortment – 8%
- Specialty store – 5%
Seafood consumers have **not** gravitated to online, for seafood.

Only **4%** at least occasionally have purchased from an online only merchant.

***46%** of frequent seafood consumers have purchased groceries online in the past 30 days.

- 2018 Power of Meat – 19% purchase meat online
how do shoppers shop for seafood?
How do Shoppers Shop for Seafood?

Product quality, freshness, taste and flavor have the biggest impact on seafood shopping. But a sale/good price or just being “in the mood” can drive impulse purchases.
How do Shoppers Shop for Seafood?

Seafood shoppers tend to stay with familiar seafood options, but some are adventurous.

Seafood Variety When Shopping…

- 18% Same Type
- 47% Few Different
- 33% Variety

Source: FMI’s Power of Seafood (Q22)

Q22: Which best describes your selection habits when shopping for seafood to prepare at home? Do you buy the same types of seafood every time, just a few different types of seafood or a variety of types of seafood?
Restaurants bring out the adventure in seafood consumers

Source: FMI’s Power of Seafood (Q24)

Q24: Which best describes your habits when ordering seafood at a restaurant? Do you order the same types of seafood every time, order just a few different types of seafood and don’t try anything new and different, or like to try new and different types of seafood?
How do Shoppers Shop for Seafood?

Impulse purchases common for seafood

Purchase of Seafood Typically is…

62% Planned  38% Impulse/Depends

**Being in the mood and good sale price are top influencers for impulse purchases of seafood**
How do Shoppers Shop for Seafood?

The price vs. quality trade-off for seafood.

Seafood Shopping Habits…

- 26% Buy Only on Sale
- 43% Compare Prices
- 31% Buy on Quality
How do Shoppers Shop for Seafood?

Product quality and taste/flavor are most important factors when shopping for seafood.

<table>
<thead>
<tr>
<th>Factor</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product Quality</td>
<td>58%</td>
</tr>
<tr>
<td>Taste or Flavor</td>
<td>42%</td>
</tr>
<tr>
<td>Type or Species</td>
<td>35%</td>
</tr>
<tr>
<td>Price per Pound</td>
<td>35%</td>
</tr>
<tr>
<td>Total Price</td>
<td>42%</td>
</tr>
<tr>
<td>Nutritional Benefits</td>
<td>20%</td>
</tr>
<tr>
<td>Product Appearance</td>
<td>24%</td>
</tr>
<tr>
<td>Sustainability</td>
<td>15%</td>
</tr>
<tr>
<td>Knowledge How to Prepare</td>
<td>17%</td>
</tr>
<tr>
<td>Preparation Time/Ease</td>
<td>12%</td>
</tr>
</tbody>
</table>

2018 Power of Meat – price per pound most important
How do Shoppers Shop for Seafood?

Freshness and taste/flavor have a major impacts on seafood consumption.

- Freshness: 85%
- Taste or Flavor: 84%
- Smell or Odor: 68%
- Family Will Like: 64%
- Mercury Content: 62%
- All Natural: 53%
- Heart Healthy: 51%

› Top 7 mentions of 26 factors
educating
the consumer
Seafood consumers do not feel very knowledgeable about seafood and, in fact, most want to become more knowledgeable. Many believe there is a lack of information about seafood.
Few seafood consumers consider themselves knowledgeable about seafood.

Very knowledgeable about…

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>How to buy</td>
<td>29%</td>
</tr>
<tr>
<td>How to cook, prepare or flavor</td>
<td>28%</td>
</tr>
<tr>
<td>Nutritional benefits</td>
<td>27%</td>
</tr>
<tr>
<td>How to know freshness/quality</td>
<td>26%</td>
</tr>
<tr>
<td>Different types/species</td>
<td>26%</td>
</tr>
<tr>
<td>Different ways/methods to cook/prepare</td>
<td>24%</td>
</tr>
</tbody>
</table>
Most seafood consumers want to become more knowledgeable about seafood.

Want more knowledge about…

<table>
<thead>
<tr>
<th>Topic</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Different ways/methods to cook/prepare</td>
<td>84%</td>
</tr>
<tr>
<td>How to cook, prepare or flavor</td>
<td>83%</td>
</tr>
<tr>
<td>How to know freshness/quality</td>
<td>83%</td>
</tr>
<tr>
<td>Different types/species</td>
<td>75%</td>
</tr>
<tr>
<td>How to buy</td>
<td>74%</td>
</tr>
<tr>
<td>Nutritional benefits</td>
<td>72%</td>
</tr>
</tbody>
</table>
Even **non-seafood** consumers want to be more knowledgeable about seafood.

**Want more knowledge about…**

- Different ways/methods to…: 50%
- How to cook, prepare or flavor: 48%
- How to know freshness/quality: 48%
- Different types/species: 42%
- Nutritional benefits: 41%
- How to buy: 36%
Consumers report a lack of information being available about seafood.

48% of seafood consumers say there is not enough information about seafood.

50% of non-seafood consumers say there is not enough information about nutrition/healthiness of seafood.
## Educating the Consumer

Consumers’ information sources about seafood.

<table>
<thead>
<tr>
<th>Source</th>
<th>Seafood Consumers</th>
<th>Non-Seafood Consumers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recipe Website or App</td>
<td>60%/20%</td>
<td></td>
</tr>
<tr>
<td>Cookbook or Recipe</td>
<td>53%/17%</td>
<td></td>
</tr>
<tr>
<td>On Package Info or Recipe</td>
<td>37%/16%</td>
<td></td>
</tr>
<tr>
<td>TV/Cooking Channel</td>
<td>31%/10%</td>
<td></td>
</tr>
<tr>
<td>Seafood Department</td>
<td>28%/7%</td>
<td></td>
</tr>
<tr>
<td>Social Media</td>
<td>28%/11%</td>
<td></td>
</tr>
<tr>
<td>Family or Friends</td>
<td>48%/16%</td>
<td></td>
</tr>
</tbody>
</table>

*Data for seafood consumers/non-seafood consumers*

*Source: FMI’s Power of Seafood (Q41)*
Educating the Consumer

Awareness of USDA recommendations limited.

USDA recommends all Americans eat at least two servings of seafood per week.

- Only **59%** of **seafood consumers** are aware.
  - But, when told **80%** believe this to be true.

- Only **37%** of **non-seafood consumers** are aware
  - But, when told **54%** believe this to be true.

› **Seafood consumers** – Once a month or more, 56% of respondents
› **Non** – Less than once a month to never, 44% of respondents
Educating the Consumer

Awareness of many recommendations about seafood consumption is far from universal.

Awareness of...

USDA recommends all Americans eat at least two servings of seafood per week

- Seafood: 59%
- Non-Seafood: 37%

FDA advises seafood is good for children’s growth and development

- Seafood: 54%
- Non-Seafood: 36%

FDA/EPA advises seafood contributes to healthy diet before/during pregnancy/while breastfeeding

- Seafood: 51%
- Non-Seafood: 35%
the seafood counter
The Seafood Counter

Use of and opinions about the grocery store seafood counter are mixed, but shoppers do want one. Their expectations for information from the seafood counter are broad and varied.
Seafood consumers use of and experience with their primary store’s seafood counter has been mixed.

- **Primary Store…**
  - Has Counter 70%
  - Does Not 30%

- **Frequency of Using Seafood Counter**
  - Never: 8%
  - Occasionally: 31%
  - Often: 39%
  - Every Time: 21%

*Source: FMI’s Power of Seafood (Q33-37)*
The Seafood Counter

Seafood consumers use of and experience with their primary store’s seafood counter has been mixed.

- **Primary Store…**
  - Has Counter: 70%
  - Does Not: 30%

- **Knowledge of Seafood Counter Staff**
  - Very: 45%
  - Somewhat: 45%
  - Not: 6%
  - Not Sure: 4%

*Source: FMI’s Power of Seafood (Q33-37)*
A seafood counter could convert some non-seafood consumers

47% of non-seafood consumers who do not have a seafood counter would like their primary store to have one (22% of all).

39% of non-seafood consumers who have a seafood counter at their primary store have ever used it (20% of all).

Source: FMI’s Power of Seafood (Q51-54)
Expectations are high for the information and assistance that can be provided by seafood counter staff.

Source: FMI's Power of Seafood (Q38/56)
how to generate trial of seafood
How to Generate Trial

Approaches to generate trial abound

- Good/Sale price: 83% Seafood, 66% Non-Seafood
- Sampling: 83% Seafood, 64% Non-Seafood
- Rec from friend/family: 81% Seafood, 60% Non-Seafood
- Recipes other than seafood: 71% Seafood, 47% Non-Seafood
- In-store cooking demo: 71% Seafood, 50% Non-Seafood
- In-store recipes: 69% Seafood, 49% Non-Seafood
- TV/online/social media: 66% Seafood, 50% Non-Seafood
- Money back guarantee: 61% Seafood, 41% Non-Seafood
How to Generate Trial

Seafood counter staff a resource for seafood consumers

Willingness to… based on recommendation from store’s seafood department

- Make a new recipe with a familiar item: 91% willing, 49% somewhat willing, 42% very willing
- Buy a new type/species of seafood not purchased before: 84% willing, 47% somewhat willing, 37% very willing
How to Generate Trial

Non-seafood consumers willing to take recommendations from seafood counter staff

Willingness to… based on recommendation from store’s seafood department

- Make a new recipe with a familiar item
  - Somewhat Willing: 41%
  - Very Willing: 27%

- Buy a new type/species of seafood not purchased before
  - Somewhat Willing: 37%
  - Very Willing: 17%
Barriers for non-seafood consumers are varied but surmountable

<table>
<thead>
<tr>
<th></th>
<th>Major impact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Preference for other foods</td>
<td>45%</td>
</tr>
<tr>
<td>Cost/Expense</td>
<td>43%</td>
</tr>
<tr>
<td>Taste/Flavor</td>
<td>39%</td>
</tr>
<tr>
<td>Cost compared to other protein</td>
<td>33%</td>
</tr>
<tr>
<td>Freshness</td>
<td>33%</td>
</tr>
<tr>
<td>Smell/Odor</td>
<td>32%</td>
</tr>
<tr>
<td>Seafood is not top of mind</td>
<td>29%</td>
</tr>
<tr>
<td>Family will not like</td>
<td>26%</td>
</tr>
</tbody>
</table>

NOTE: Top mentions among 24 factors
Source: FMI’s Power of Seafood (Q49)
what is the role of nutrition, health, sustainability, certifications & standards?
Role of Nutrition and Health

Nutrition and health are important in seafood choices, along with general food choices.
Seafood consumers are focused on nutritious and healthy options in general and when eating seafood.

87% of seafood consumers do put at least some if not a lot of effort into selecting nutritious and healthy seafood options.

77% of non-seafood consumers do put at least some if not a lot of effort into selecting nutritious and healthy food options.

Source: FMI’s Power of Seafood (Q42/43/61)
Role of Sustainability

Sustainability important to some consumers.

Effort put into selecting sustainable food options.

- **Seafood**
  - Some: 67%
  - A Lot: 25%
  - 67% of seafood consumers do put at least some if not a lot of effort into selecting sustainable seafood options.

- **Non-Seafood**
  - Some: 64%
  - A Lot: 20%
  - 64% of seafood consumers do put at least some if not a lot of effort into selecting sustainable seafood options.

Source: FMI's Power of Seafood (Q44/45/63)
The Power of Seafood 2019

1. Seafood consumers represent a small but lucrative demographic group.

2. Seafood consumers shop around, a lot, but not online.

3. Product quality, freshness, taste and flavor have the biggest impact on seafood shopping. But a sale/good price or just being in the mood can drive impulse purchases.

4. Seafood consumers do not feel very knowledgeable about seafood and, in fact, most want to become more knowledgeable. Many believe there is a lack of information about seafood.

5. Awareness of USDA, FDA and EPA recommendations and guidelines for seafood is less than universal.

6. Use of and opinions about the grocery store seafood counter are mixed, but shoppers do want one. Their expectations for information from the seafood counter are broad and varied.

7. Nutrition and health are important in general food choices and in seafood choices.
The Power of Seafood 2019
An in-depth look at seafood through the shopper’s eyes

Q&A
The Power of Seafood 2019
An in-depth look at seafood through the shopper’s eyes

- Full Report available at www.FMI.org/freshfoods
- Questions?

Rick Stein, Vice President
Rstein@fmi.org
202-202-0700

Steve Markenson, Director
Smarkenson@fmi.org
202-202-0702