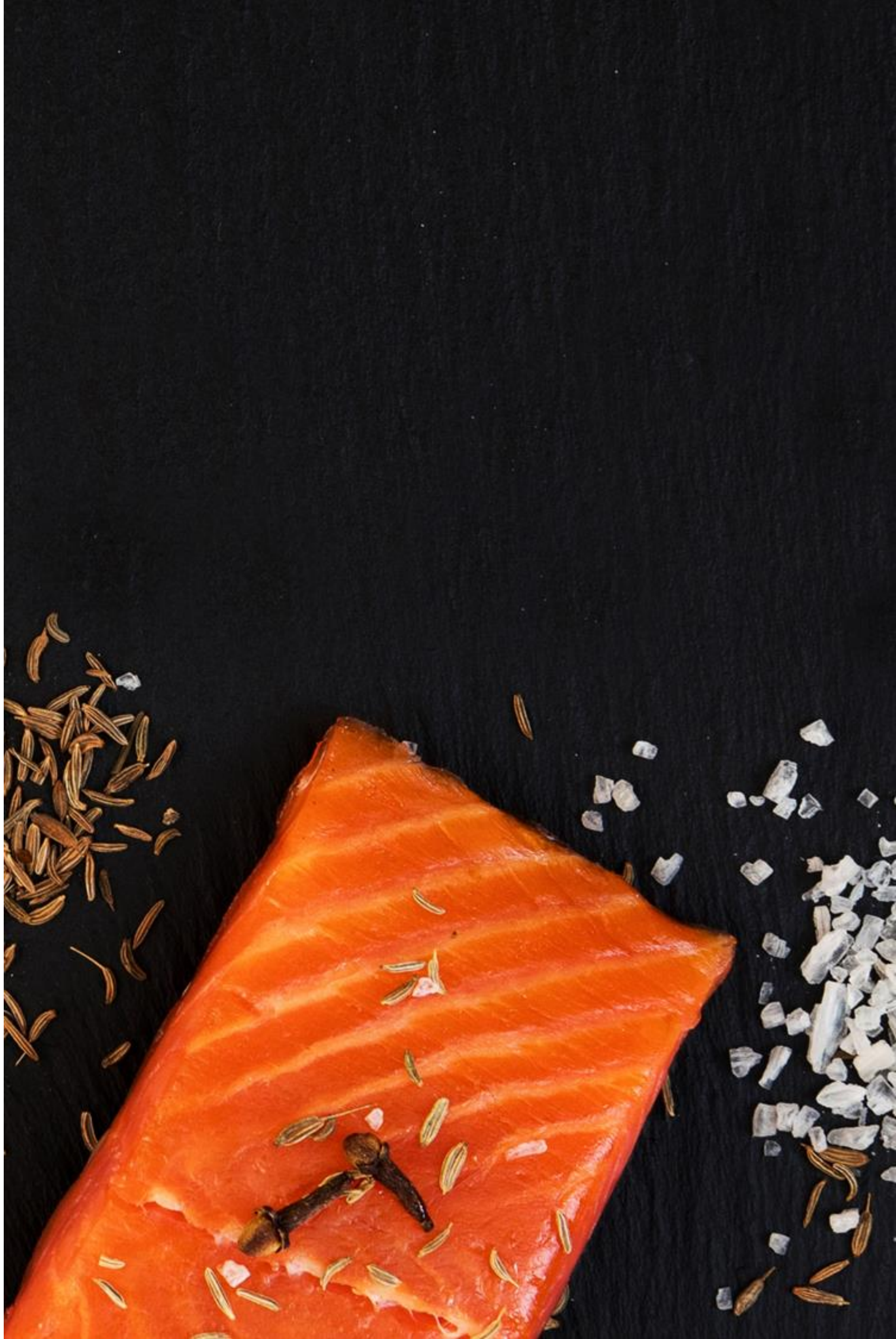
Seafood Consumer of the Future

Primary Research Findings and Segmentation

Prepared for

7/19/2018 #17581



Introduction

Alaska Seafood Marketing Institute (ASMI) retained Technomic to identify future trends in seafood consumption and how Alaska seafood can best position itself within this dynamic marketplace.

- Technomic, collaborating with ASMI, developed an online questionnaire based on the findings of secondary research conducted in September 2017.
- The primary research phase was designed to capture a psychographic segmentation of the seafood consumer.
- Other topics covered in the study included seafood eating practices, protein purchasing patterns, healthy eating and perception of Alaska seafood.

- In January 2018, Technomic fielded this questionnaire, tapping a nationally representative sample of 4,000 American seafood consumers (18+).
- Technomic presented these findings to ASMI and other stakeholders on March 1 in Seattle.

Program Overview

Phase One: Secondary Review
Deep dive into secondary sources to assess landscape and opportunity of future seafood consumer marketplace.

Phase Two: Primary Research
Assess Alaska seafood fit within the market to develop target consumer personas, and actionable brand strategy, anticipating strengths and challenges for the brand.

Key Findings and Implications

1

Demographic segments can vary wildly and do not represent a cohesive target consumer. Consumer segmentation, using a battery of psychographic and behavioral measures, reveals 5 distinct groups of seafood consumers.

2

There are advantages to targeting each group identified in the segmentation; however the greatest opportunity lies in two groups of Seafood Super Consumers, **Originators and Optimizers**, who collectively account for over half of annual consumer seafood spend. These same groups are poised for growth in category spend and purchasing power.

3

Alaska seafood is well positioned to align with current food trends around sustainability and health, the latter of which was the most common driver behind increased seafood usage. There is appetite among the general population and especially among Originators to find ways to incorporate seafood into everyday meals in lieu of other proteins (e.g. beef, chicken, etc.).

4

There is a lack of category knowledge among consumers, including Seafood Super Consumers. This may complicate messaging around species or specific origins as consumers are unlikely to have a point of reference.

Given the current, relatively low, level of seafood category usage in the domestic market overall, a simple category inclusive message may prove more fruitful.

5

Grocery ecommerce is poised for significant growth. While proteins and seafood in particular currently lag behind other categories, barriers to trial are minimal.

As grocery ecommerce continues to gain traction, expect shifts in consumer appetite for proteins from alternative and digital channels.

6

While similarities exist between Seafood Super Consumer groups, they prioritize different aspects of the Alaska seafood offering.

The Optimizer is value-driven, and messages around variety, convenience and value for price paid are key to reaching this group. While affordability is a factor for Optimizers, they also value the "premium" halo of Alaska products.

The Originator is less value oriented and is more concerned with the quality and the details around product and recipes.

Both groups are highly active in digital channels.

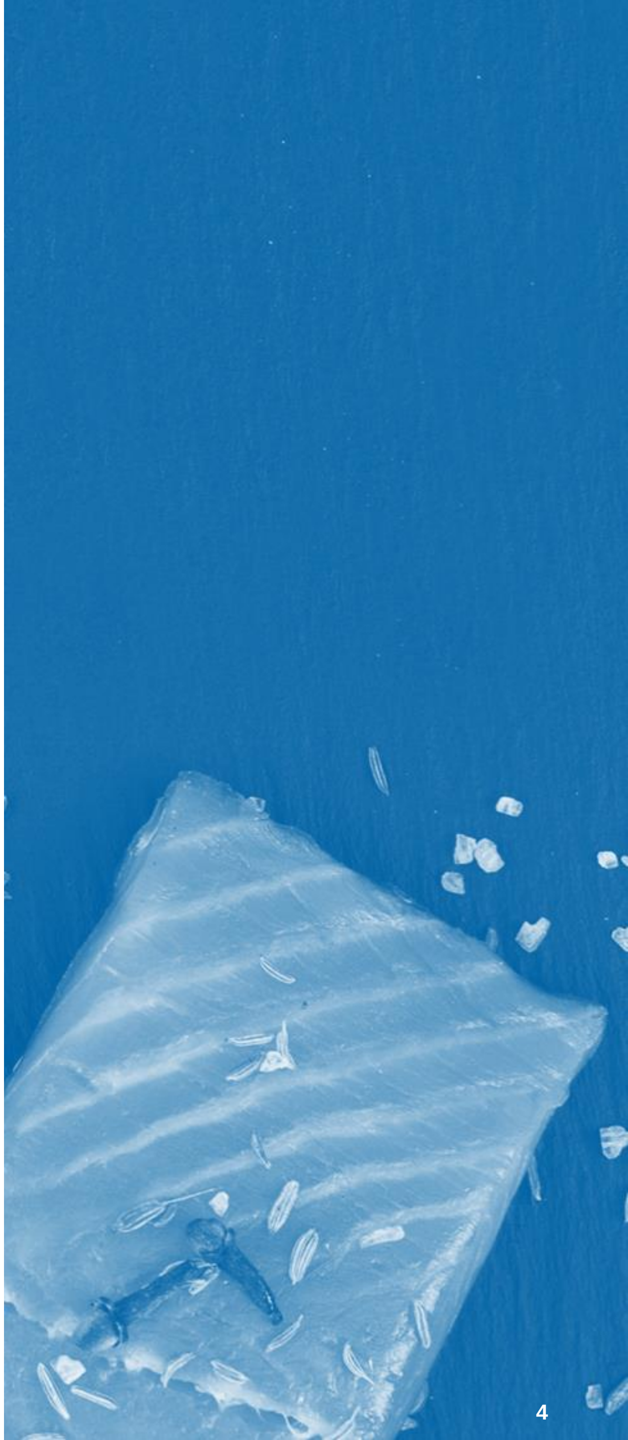
7

The Alaska brand equity has positive implications that radiate beyond the product itself. Consumers view establishments that offer Alaska seafood products as having a higher degree of pride in their offering as well as a higher esteem for the customer in both retail and foodservice contexts.

8

There is no direct correlation between number of years eating seafood and value as a seafood consumer. Optimizers, in general, have a comparatively short category history with seafood compared to the average consumer. Converting seafood non-eaters remains a viable strategy.

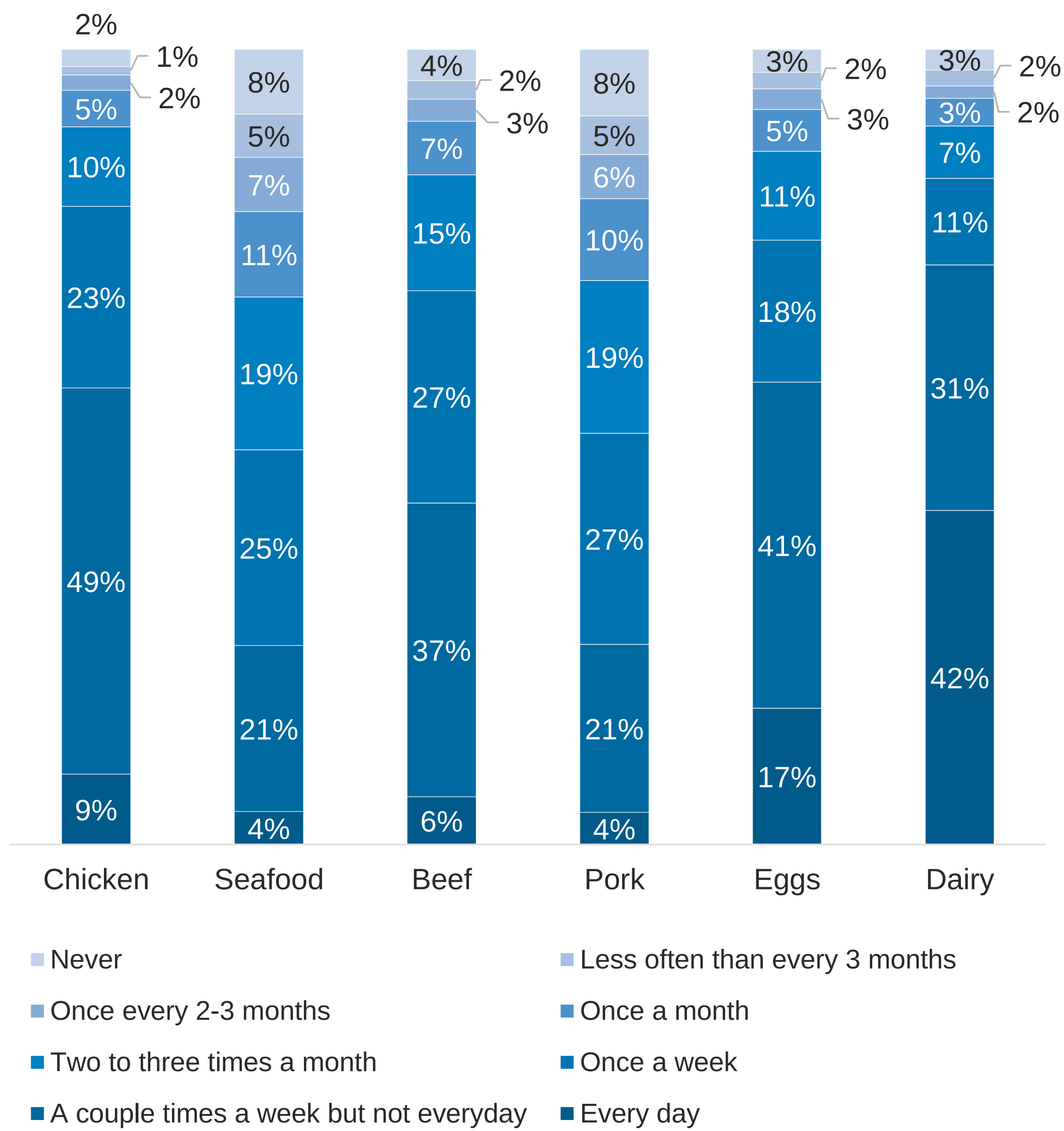
Macro Trend Update



At-home Protein Usage

Seafood tracks with pork in terms of overall frequency of category consumption, with 50% of US consumers eating seafood weekly or more frequently.

Frequency of Protein Consumption

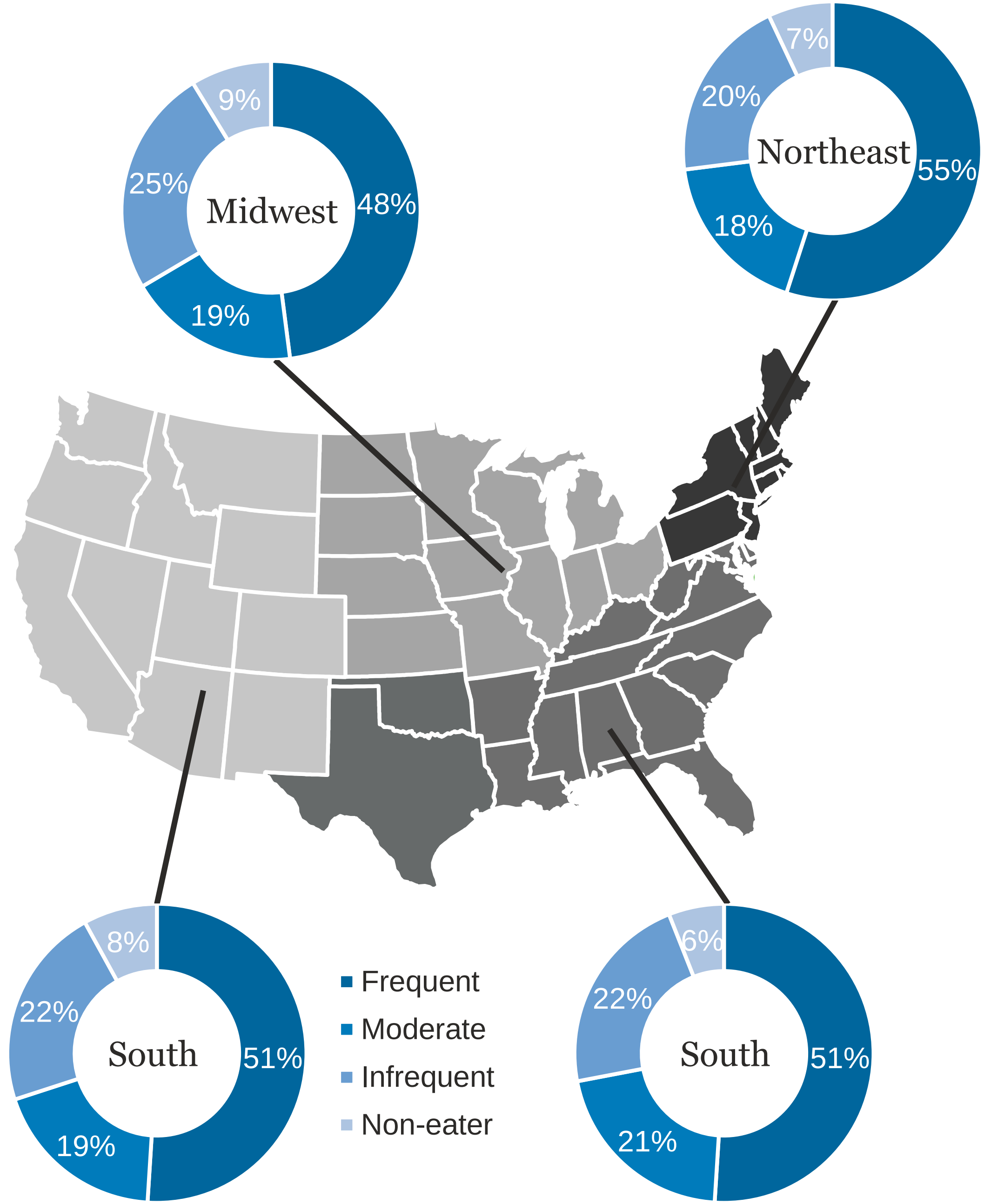


Please indicate how often you consume the following types of food at-home or at someone else's home.
Base; 5,154 (Includes terminates)

At-home Seafood Consumption by Region

Seafood eater group % in West, Midwest, South, Northeast regions

The Northeast and the South represent the US regions with the highest share of frequent and moderate seafood eaters.



Please indicate how often you consume the following types of food at-home or at someone else's home.
In which state do you live?
Base: 4,000

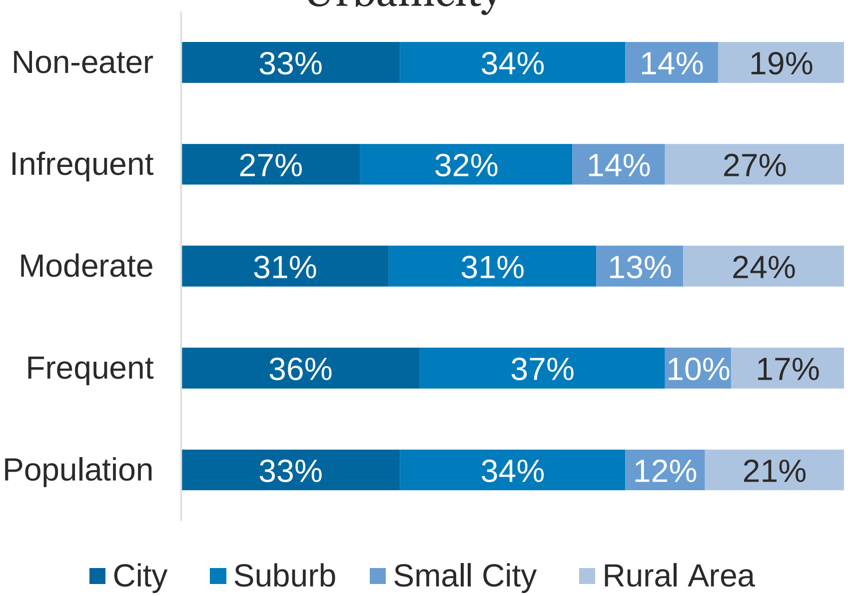
Seafood Eater Urbanicity

Away-from-home and at-home seafood eaters

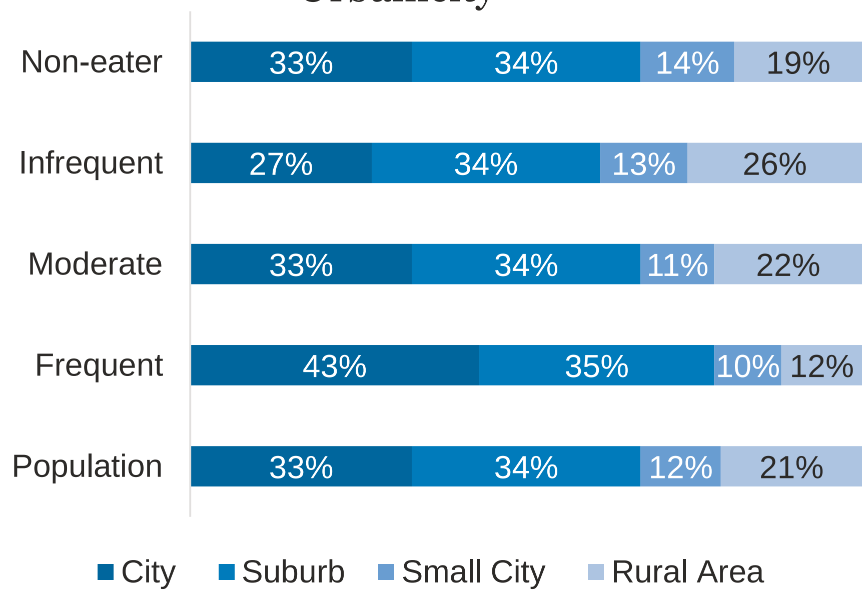
There is a positive correlation between those who live in more urban environments and frequency of seafood consumption. Less frequent eaters tend to skew towards rural and smaller cities, while more frequent eaters tend to live in suburban and urban environments.

Seafood non-eaters buck this trend and reflect the national average.

At-home Seafood Eater Urbanicity



Away-from-home Seafood Eater Urbanicity



Base: 3,579
Q: Do you live in…

Food Spending by Age Group

At-home and away-from-home consumption

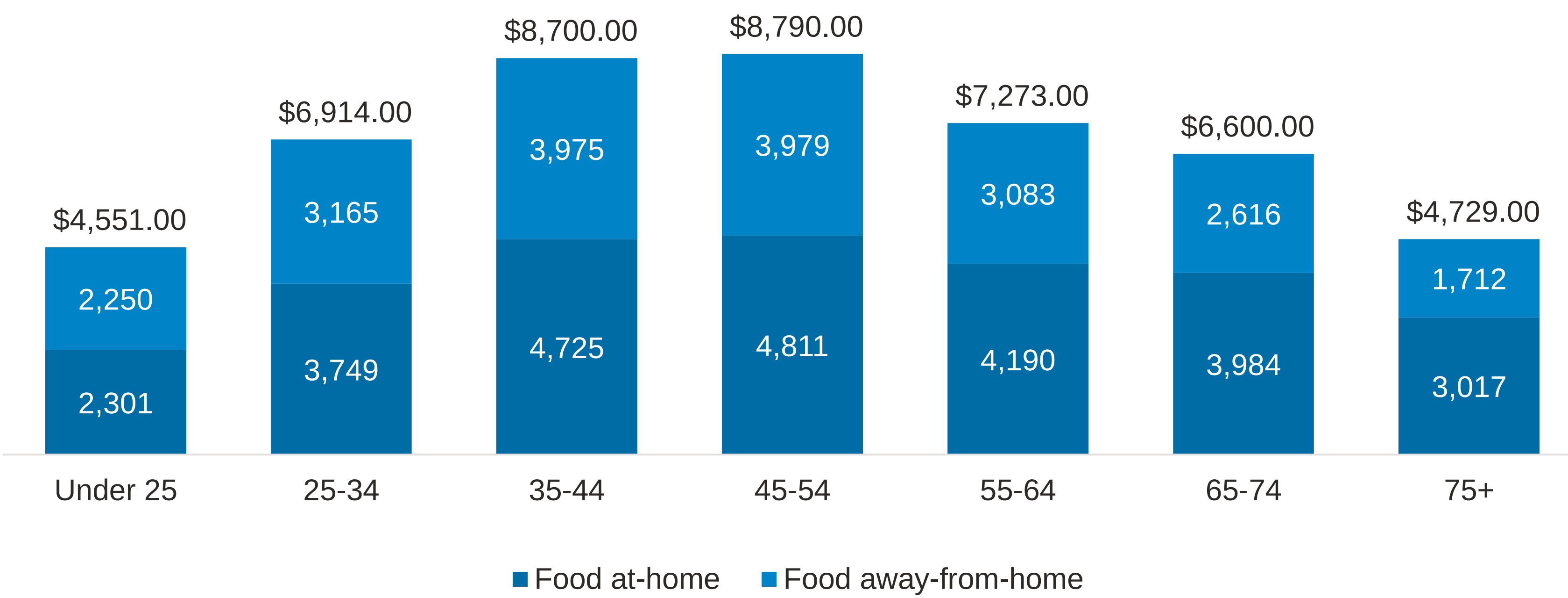
Overall food expenditure broken out by age range shows that consumers between the ages of 35 and 54 spend more on food than others. This apparent range of *peak spending years* correlates with the years that consumers are most likely to grow their family and reach their maximum earning potential.

Note, that while younger groups spend less, on average, than their older counterparts, a greater portion of their dollars is spent in the food category.

These younger consumers, on average, spend a greater share of food dollars at foodservice vs. retail than older consumer groups.

Those under the age of 25 spend 49% of food dollars at foodservice, whereas those in the 65-74 group spend 40% of food dollars at foodservice.

Mean Food Expenditure by Age, 2016

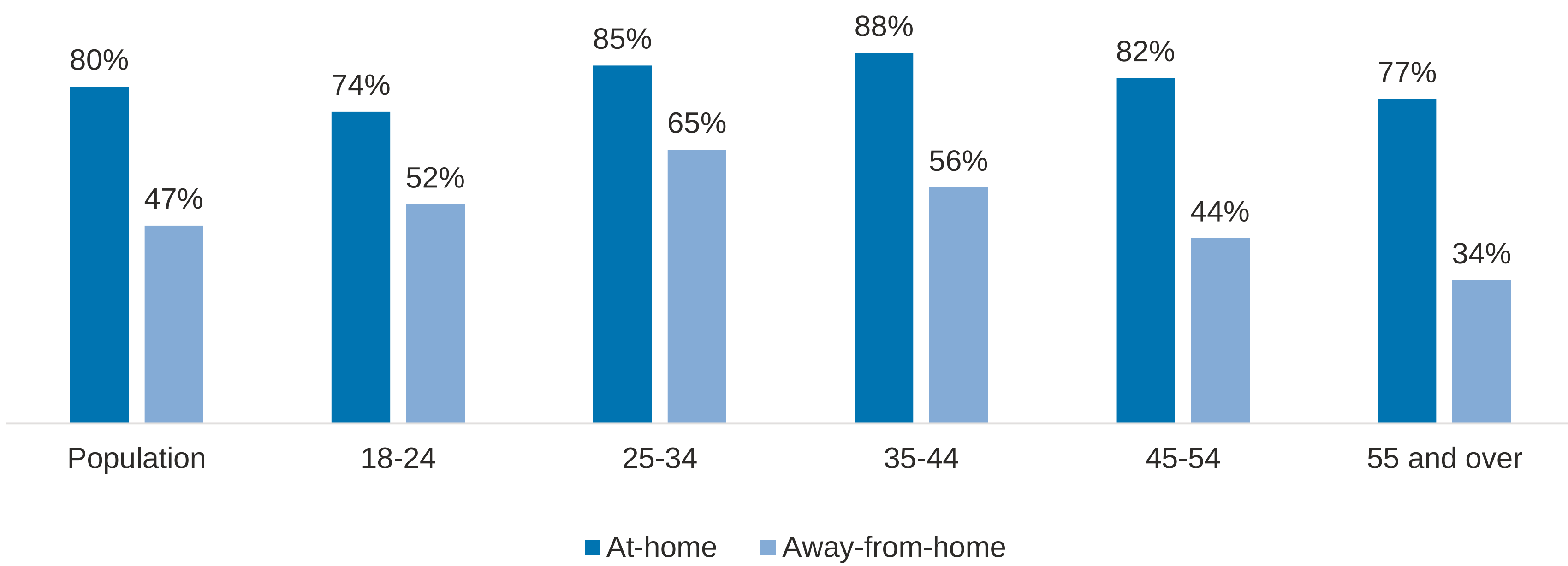


Source: Bureau of Labor Statistics (2016) "Consumer expenditures by age"

Weekly Food Spending by Age Group

% of consumers with weekly food spending over $50 at-home and $50 away-from-home

Technomic data supports the findings from 2016 that showed a range of peak spending years. In terms of food spending penetration (% of consumers spending over $50), the range of peak spending years becomes younger, with consumers ages 25-44 registering the greatest shares.

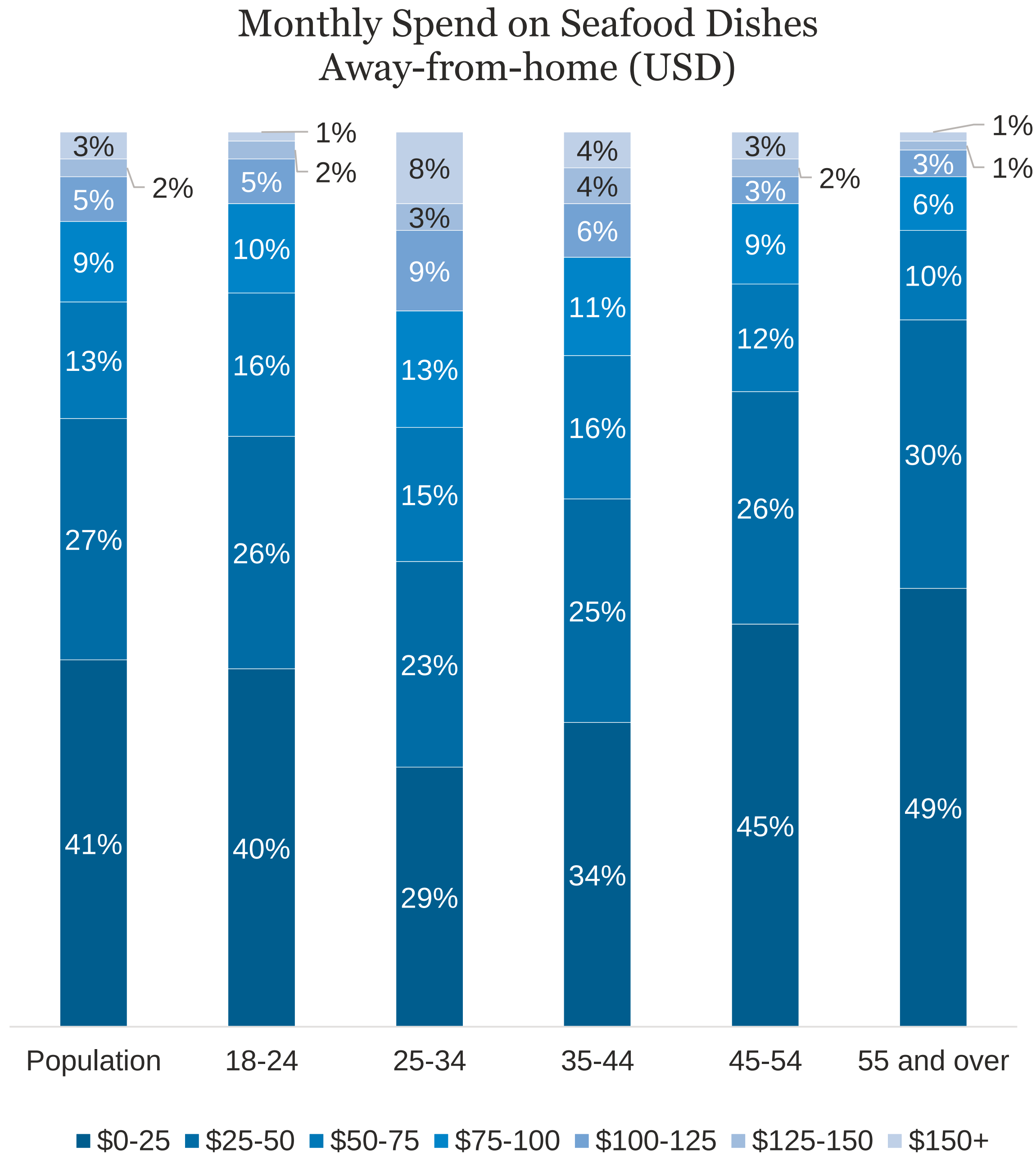


Base: 4,000
How much do you typically spend weekly on household groceries?
How much do you typically spend weekly on meals away-from-home?

Away-from-home Spend on Seafood

This range of peak spending occurring between ages 25-44 is repeated when looking at spend within the seafood category away-from-home.

48% of seafood eaters ages 25-34 and 41% of seafood eaters ages 35-44 spend over $50 monthly on seafood dishes at foodservice.

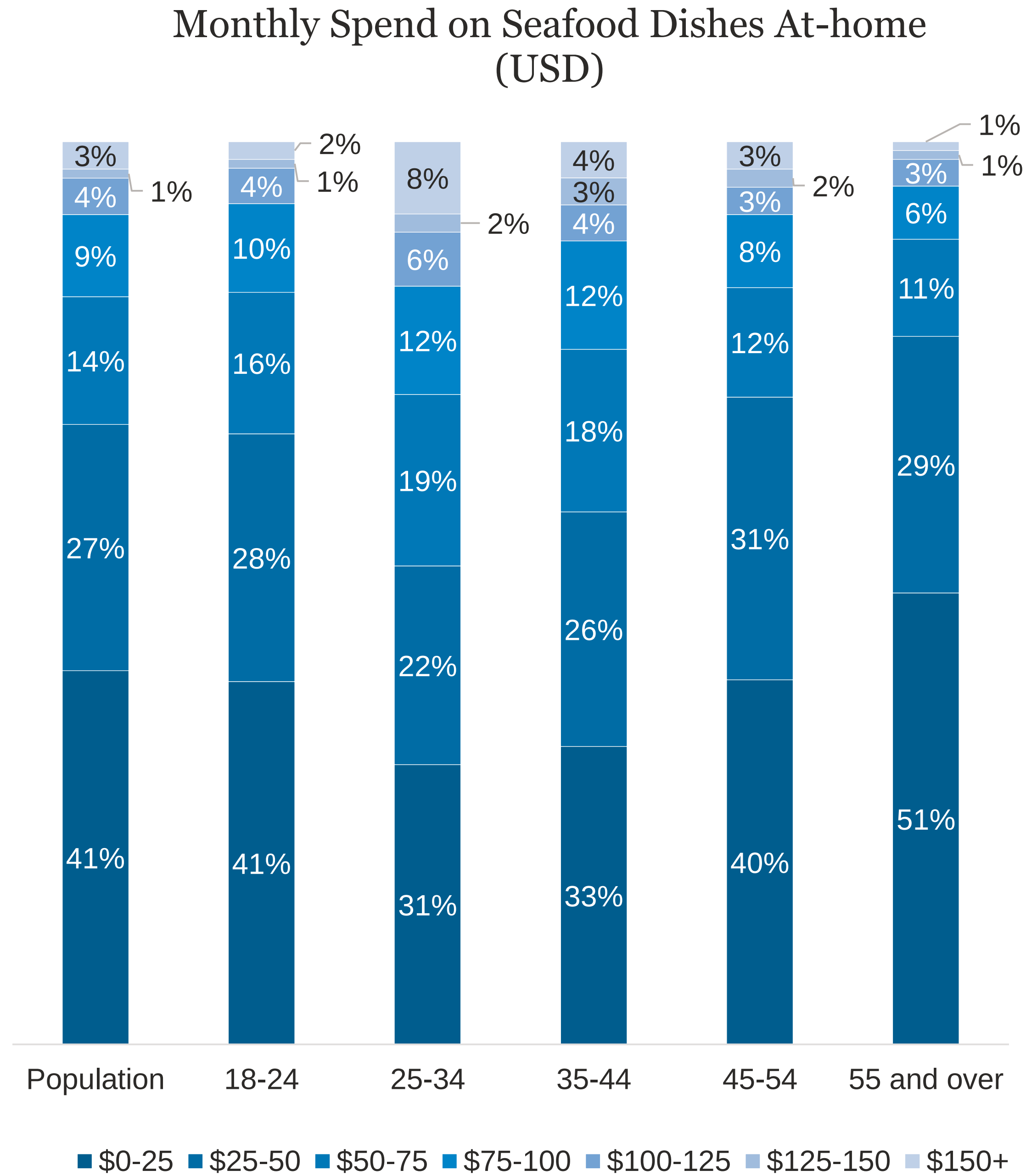


Base: 3,619
How much do you typically spend monthly on seafood dishes away-from-home?

At-home Spend on Seafood

Seafood eaters between the age of 25-44 spend more on seafood monthly for at-home consumption than other groups.

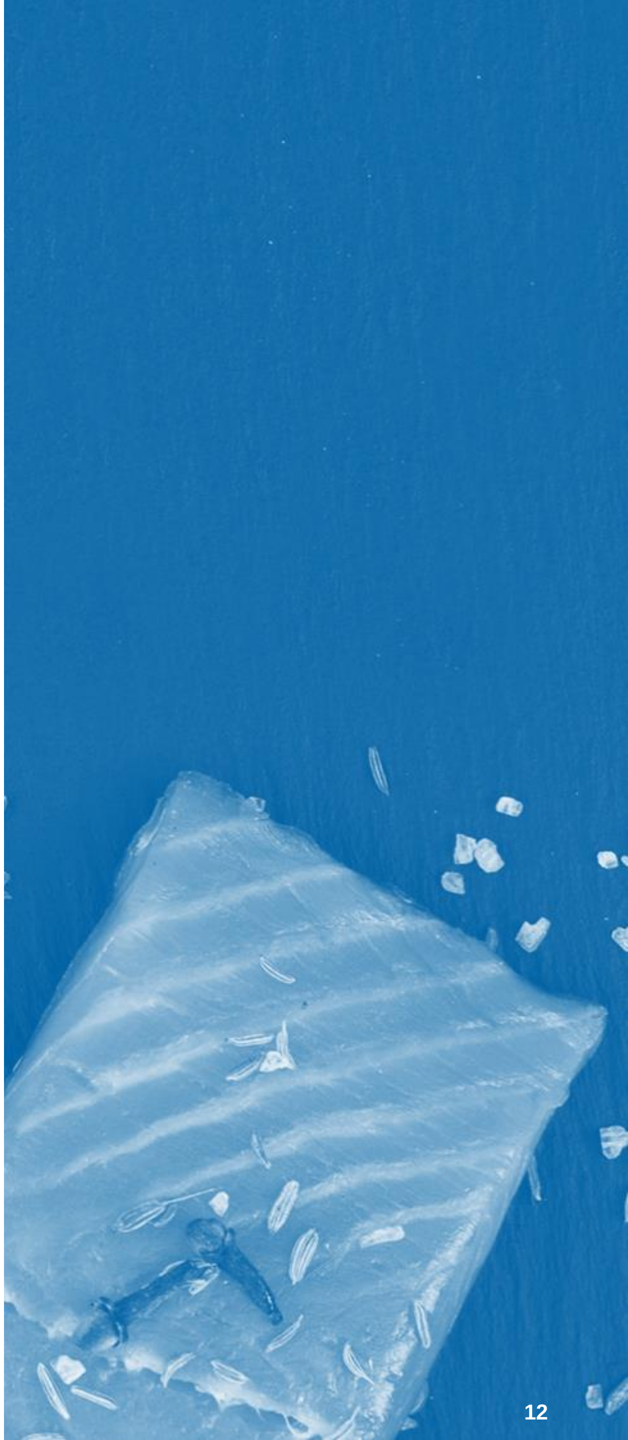
47% of seafood eaters ages 25-34 and 41% of seafood eaters ages 35-44 spend over $50 monthly on seafood for at-home consumption.



Base: 3,700
How much do you typically spend monthly on seafood for at-home consumption?

Psychographic Seafood Consumer Segments

Landscape and Opportunity



Psychographic Seafood Consumer Segments

The Pragmatist: Goes for the simplest and most affordable solution

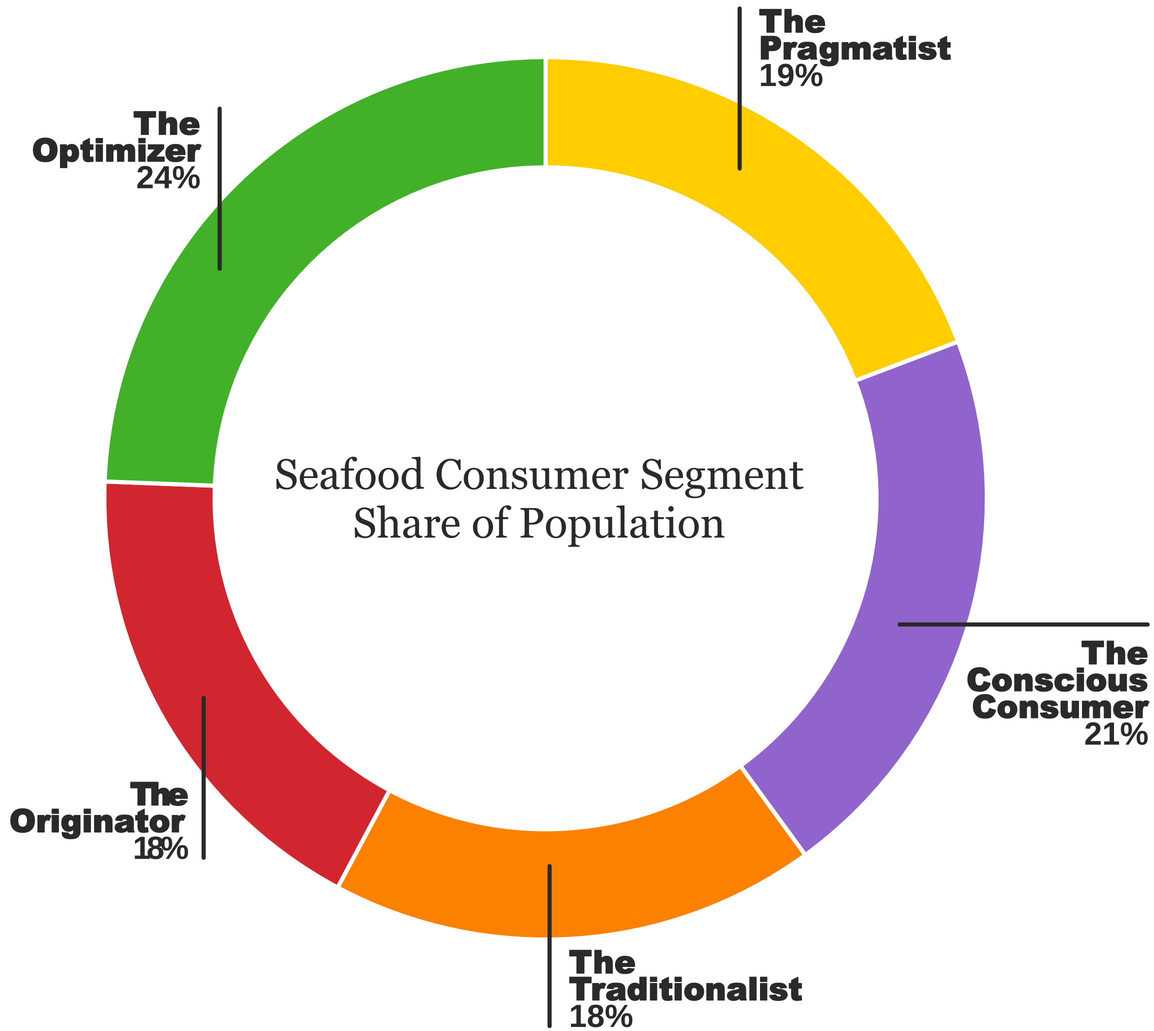
The Conscious Consumer: Careful to source goods that align with their worldview

The Traditionalist: Sticks to what they know and unlikely to change

The Optimizer: Uses technology to facilitate their busy lifestyle

The Originator: Always on-trend, always socializing

Metrics used in Segmentation Scheme
Price sensitivity
Retail/Foodservice need states
Fish and seafood attitudes
Role of food in lifestyle
Importance of wholesome/healthy ingredients
Technology usage
Attitudes on climate change
Among others…

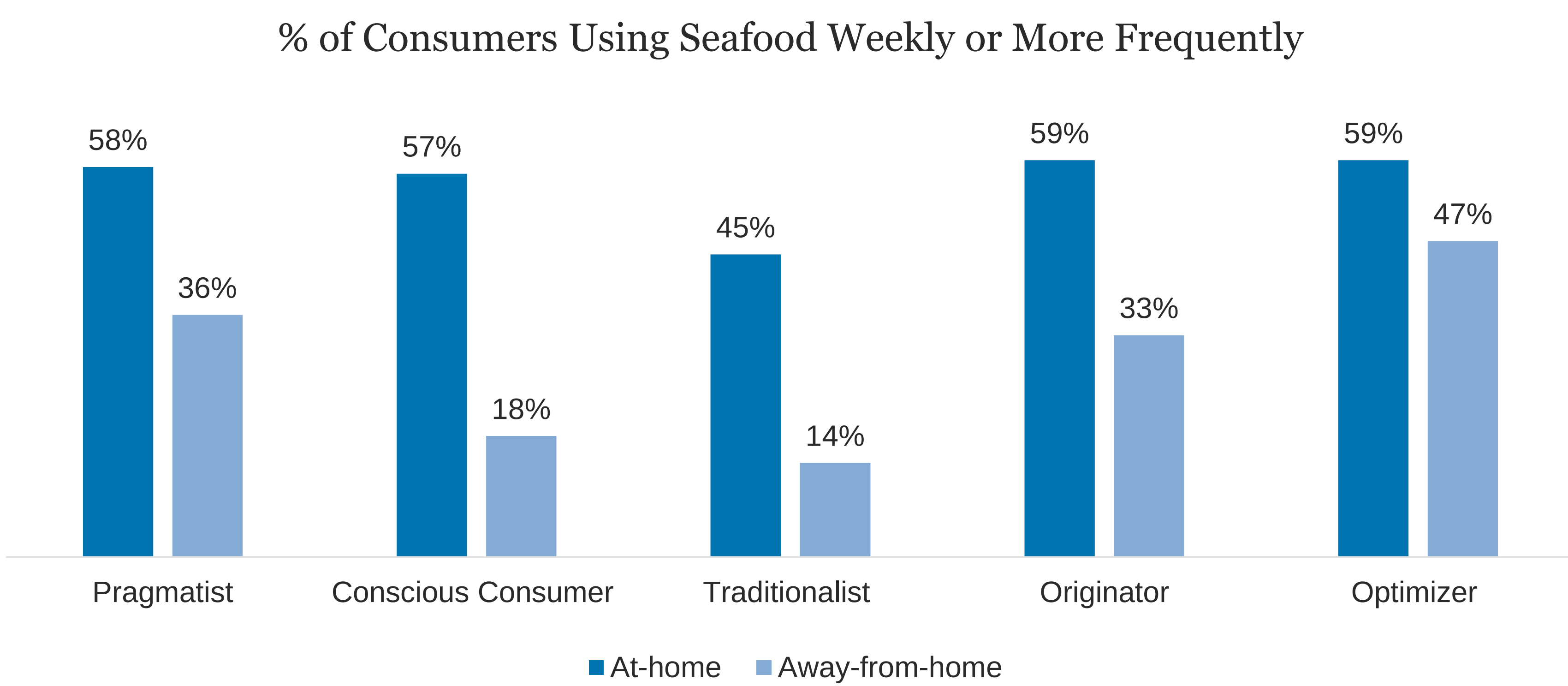


Weekly+ Seafood Consumption

By psychographic seafood consumer segment

Over half of all seafood consumer segments eat seafood at-home weekly or more frequently, with the exception of the Traditionalist segment.

Away-from-home consumption is stratified by group, with Optimizers being the most frequent away-from-home seafood eaters, followed by Pragmatists and Originators.



Please indicate how often you consume the following types of food at-home or at someone else's home/restaurants and other foodservice providers.
Base: 3,579

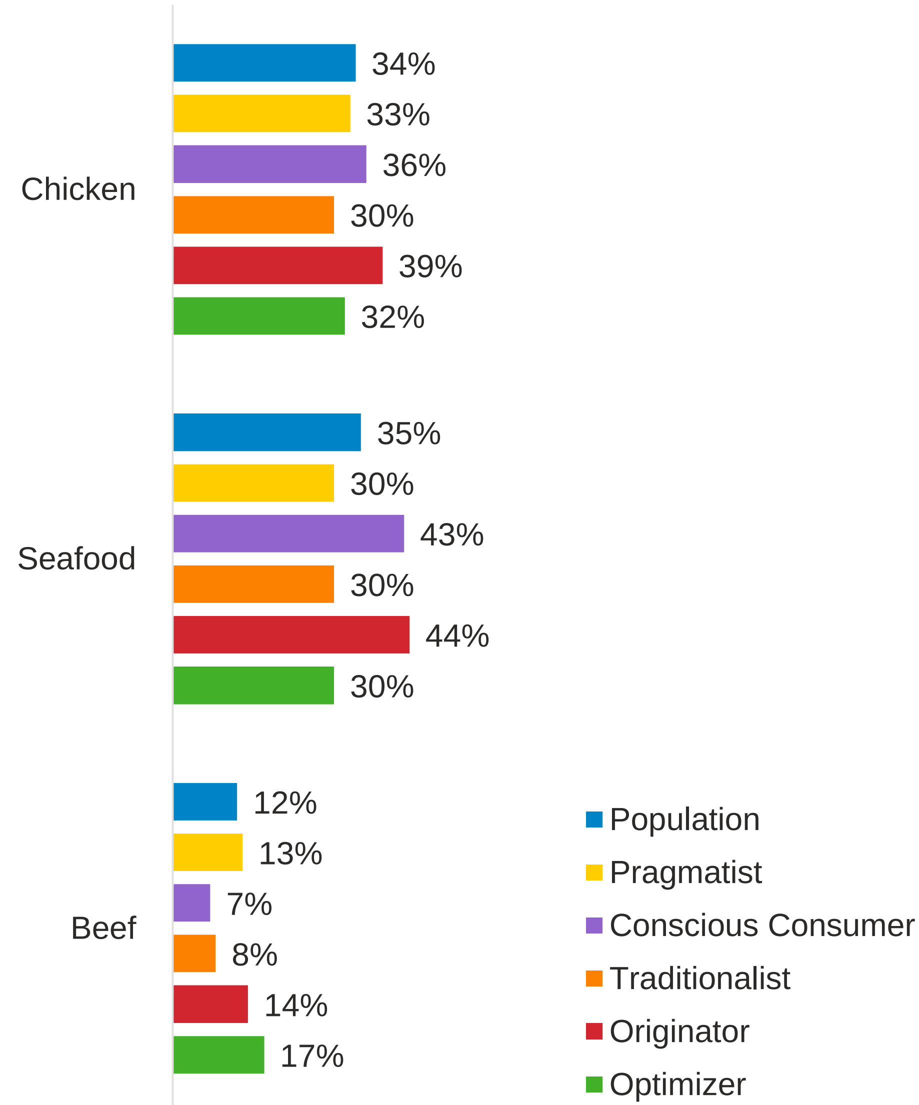
Changes in Protein Consumption

% eating more in past two years by protein category

Conscious Consumers and Originators register the greater share of seafood eaters who have increased their seafood consumption in the past two years.

Data suggest that for Conscious Consumers this trend is at the expense of usage of other protein categories like beef.

% of Seafood Consumer Segments Increasing Protein Consumption by Category

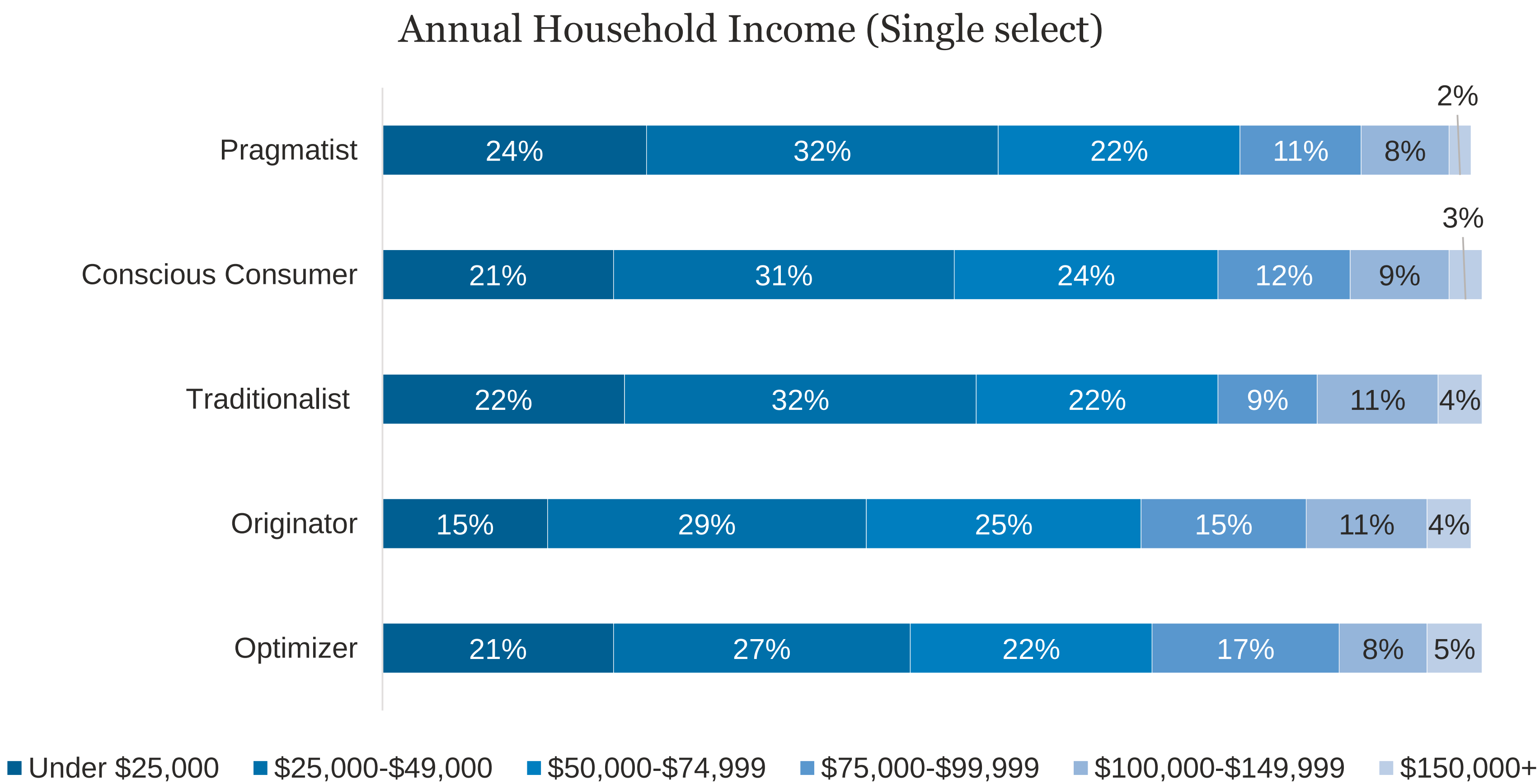


Are you eating more of or less of the following protein sources than you were two years ago?
Base: 3,579

Household Income

By seafood consumer segment

Originators and Optimizers boast the highest annual income among seafood consumer segments.



Which of the following categories includes your total annual household income?
Base: 3,579

Household Income Index

By seafood consumer segment

The household income index is designed to provide a high level view of a segment's average annual household income in an easy to compare format.

The index was built using distribution of household income Census data (2014) to generate a more granular look at household income within segment populations than initially captured in the primary research. Populations were broken out by region and urbanicity, weighted by share of segment and aggregated up to the total segment level.

Read the index as 100 representing the population average and 99 being one percent below that average.

Urbanicity	Region	Pragmatist		Conscious Consumer		Traditionalist		Originator		Optimizer	
		Index	Segment Share	Index	Segment Share	Index	Segment Share	Index	Segment Share	Index	Segment Share
Urban	Northeast	99	7%	80	6%	83	3%	108	9%	107	9%
	South	93	10%	83	8%	80	8%	96	16%	118	16%
	Midwest	106	7%	82	4%	109	4%	118	7%	84	7%
	West	80	10%	105	7%	94	5%	113	13%	103	13%
Suburban	Northeast	82	6%	98	9%	95	8%	114	7%	105	5%
	South	81	13%	109	15%	92	16%	103	16%	104	14%
	Midwest	88	8%	93	7%	101	9%	116	7%	98	6%
	West	94	5%	91	7%	111	6%	100	4%	101	5%
Small City	Northeast	100	1%	112	2%	97	2%	123	2%	76	2%
	South	108	5%	94	5%	97	5%	108	5%	89	4%
	Midwest	85	4%	86	3%	101	3%	142	1%	111	2%
	West	92	3%	114	3%	107	2%	131	1%	71	2%
Rural	Northeast	70	5%	94	5%	91	5%	133	4%	120	3%
	South	86	8%	88	10%	117	12%	98	9%	103	5%
	Midwest	106	5%	90	5%	111	9%	95	5%	85	4%
	West	104	2%	90	4%	117	3%	100	3%	87	2%
Total Segment		**89**		**96**		**98**		**108**		**103**	

Which of the following categories includes your total annual household income?
Base: 3,579

Weekly Food Spending Away-from-home

By seafood consumer segment

Originators and Optimizers register as the greatest spenders away-from-home with over a quarter of each group spending more than $100 on meals away-from-home on a weekly basis.

Spend (USD)	Pragmatist	Conscious Consumer	Traditionalist	Originator	Optimizer
$0-50	53%	63%	69%	37%	40%
$50-100	31%	27%	22%	36%	31%
$100-150	9%	7%	6%	15%	16%
$150-200	3%	2%	2%	6%	7%
$200-250	2%	1%	1%	3%	3%
$250+	1%	-	-	2%	2%
Over $50	**46%**	**37%**	**31%**	**62%**	**59%**
Over $100	**15%**	**10%**	**9%**	**26%**	**28%**

Base: 3,579
How much do you typically spend weekly on meals away-from-home?

Monthly Seafood Spend Away-from-home

By seafood consumer segment

Overall, Originator and Optimizer spending is supported by reported monthly away-from-home seafood spend.

43% of Optimizers and Originators each spend over $50 on seafood dishes away-from-home on a monthly basis.

Spend (USD)	Pragmatist	Conscious Consumer	Traditionalist	Originator	Optimizer
$0-25	42%	44%	58%	28%	34%
$25-50	28%	31%	24%	29%	23%
$50-75	14%	11%	9%	15%	15%
$75-100	8%	6%	6%	11%	13%
$100-125	3%	4%	2%	7%	8%
$125-150	2%	1%	-	4%	2%
$150+	2%	2%	1%	6%	5%
Over $50	**29%**	**24%**	**18%**	**43%**	**43%**
Over $100	**7%**	**7%**	**3%**	**17%**	**15%**

Base: 3,579
How much do you typically spend monthly on seafood dishes away-from-home?

Weekly Food Spending At-home

By seafood consumer segment

In terms of overall at-home spending, Originators and Optimizers also exceed the spend of other segments. 13% of Originators and 10% of Optimizers spend $200 or more on groceries vs. 7% of Pragmatists and 4% of Conscious Consumers.

Spend (USD)	Pragmatist	Conscious Consumer	Traditionalist	Originator	Optimizer
$0-50	19%	20%	26%	10%	18%
$50-100	39%	41%	41%	36%	31%
$100-150	24%	24%	23%	26%	26%
$150-200	11%	11%	8%	15%	14%
$200-250	4%	3%	2%	7%	5%
$250+	3%	1%	1%	6%	5%
Over $50	**81%**	**80%**	**75%**	**90%**	**81%**
Over $100	**42%**	**39%**	**34%**	**54%**	**50%**

Base: 3,579
How much do you typically spend weekly on household groceries?

Monthly Seafood Spend At-home

By seafood consumer segment

Looking at monthly seafood spend, again Originators and Optimizers are the spending leaders, with 14% spending over $100 monthly on seafood to prepare at-home.

Spend (USD)	Pragmatist	Conscious Consumer	Traditionalist	Originator	Optimizer
$0-25	42%	45%	59%	27%	31%
$25-50	27%	29%	27%	31%	24%
$50-75	15%	14%	8%	17%	18%
$75-100	9%	8%	4%	11%	13%
$100-125	4%	2%	1%	5%	7%
$125-150	1%	1%	1%	4%	2%
$150+	3%	1%	1%	5%	5%
Over $50	**32%**	**26%**	**15%**	**42%**	**45%**
Over $100	**8%**	**4%**	**3%**	**14%**	**14%**

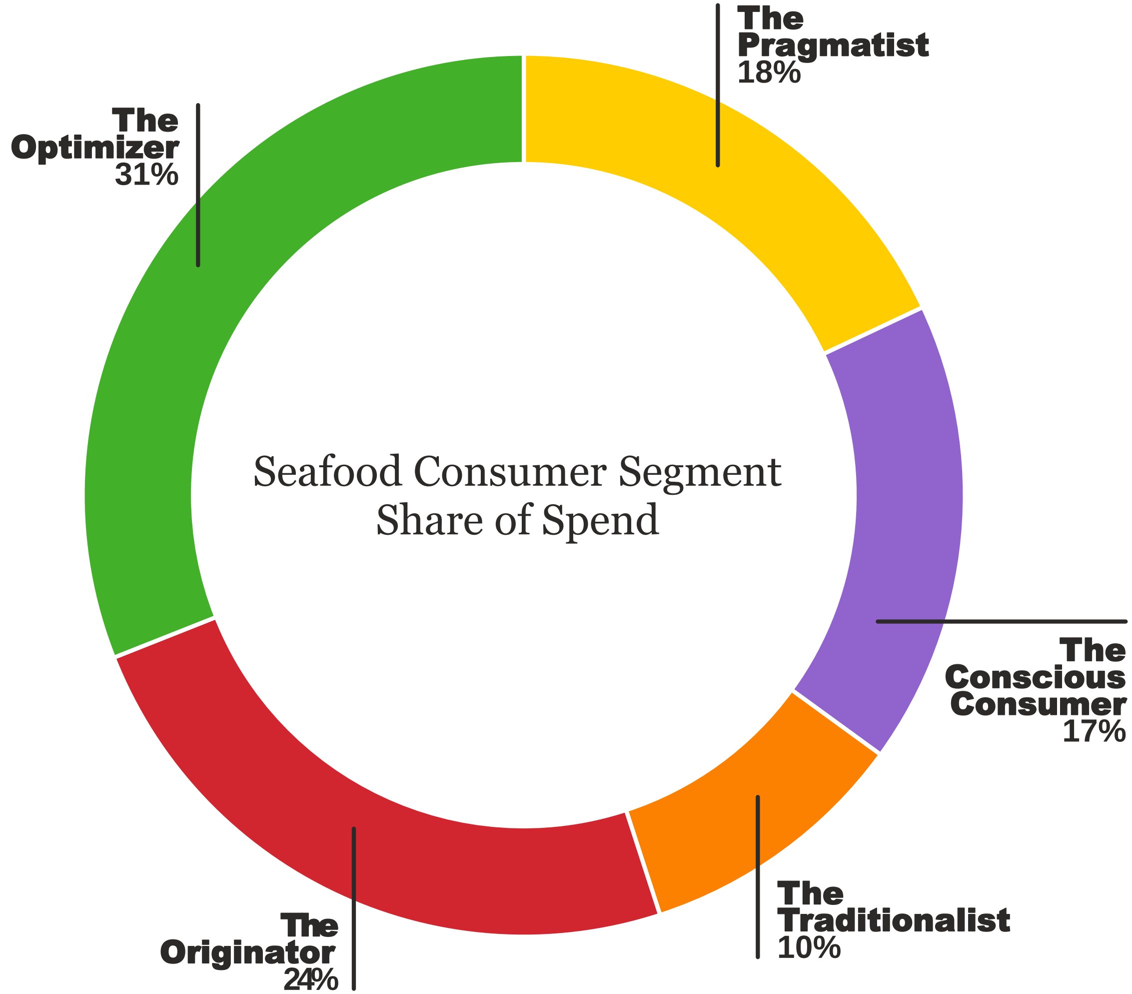
Base: 3,579
How much do you typically spend monthly on seafood for at-home consumption?

Share of Seafood Spend

Optimizers and Originators account for 55% of annual consumer seafood spending

Using consumer reported spending data in addition to population size, we are able to size the opportunity of each segment in terms of share of annual consumer seafood spend.

Top 2 Seafood Consumer Segments by Size of Segment Spend
Optimizer
Originator



Psychographic Profile and Alaska Brand Positioning

Seafood consumer segments were clustered based on responses to a wide variety of measures including but not limited to those on the right.

Using this grid to map where the segments fall behaviorally and psychographically, Conscious Consumers, Originators and Optimizers are most closely aligned with the current Alaska seafood brand positioning as a sustainable and high quality product. *Key alignment metrics are boxed in blue. Checks, X's and neutral circles indicate how each segment indexes against the mean per metric (i.e. Check = above the mean, X = below the mean).*

Psychographic Profile	The Pragmatist	The Conscious Consumer	The Traditionalist	The Originator	The Optimizer
Would trade chicken in for Alaskan white fish	X	✓	X	✓	⊖
Prioritizes wholesome/healthy ingredients	X	✓	X	✓	X
Prioritizes convenience/ quickness	✓	X	X	X	✓
Looks for unique flavors/recipes	✓	X	X	✓	X
Concerned about cost	✓	X	X	X	✓
Driven by cravings	✓	X	⊖	✓	X
Influenced by others in household/dining party	⊖	X	⊖	⊖	✓
Invested in issue of climate change	✓	✓	X	✓	✓
Uses social media	⊖	X	X	✓	✓
Won't make something until trying it at a restaurant	✓	X	X	X	✓

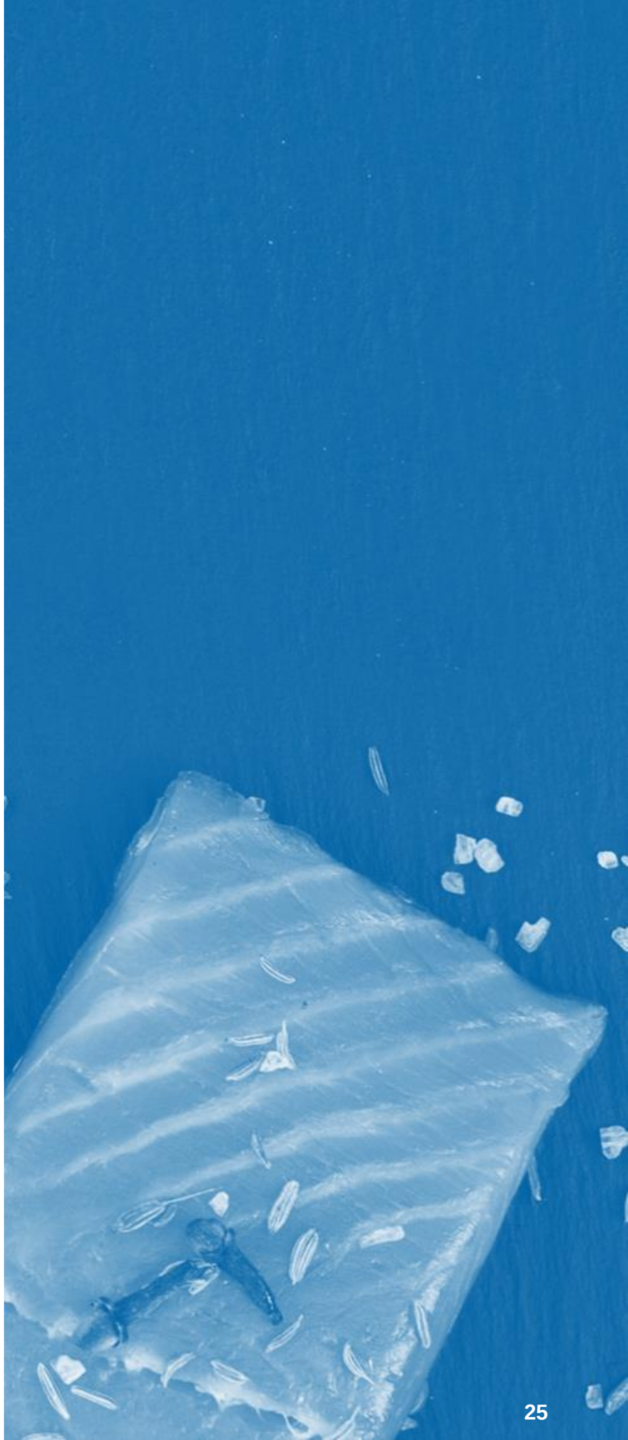
Opportunity Matrix

Using the following as measures of opportunity based on potential size of wallet & stomach, number of years of peak spending and alignment with the brand, Originators and Optimizers stand out from the rest.

Colored boxes indicate comparative opportunity advantage or disadvantage among consumer segments, with green representing an advantage and red representing a disadvantage.

Segments	Seafood Spend At-home ($50+ Monthly)	Food Spending At-home ($400+ Weekly)	Increased Seafood Usage in Past Two Years	High Annual Income (Greater than 75K)	Peak Spending Years (35-44)	Younger than Peak Spending Years (Younger than 35)	Alignment with Alaska Seafood Positioning (Qualitative)
Pragmatist	32%	42%	30%	21%	38%	35%	
Conscious Consumer	26%	39%	43%	24%	27%	13%	
Traditionalist	15%	34%	30%	24%	30%	9%	
Originator	42%	54%	44%	30%	40%	37%	
Optimizer	45%	50%	30%	30%	36%	51%	

Defining the Seafood Consumer Segments



The Pragmatist

Segment summary

The Pragmatist likes to keep things simple. This seafood eater uses food as fuel to get them through their day. This group prioritizes speed and convenience above all else. A meal doesn't have to delight as long as it is convenient and perceived as a good value.

Quick and easy meal solutions via limited service foodservice segments and frozen and prepared meals at retail are likely to resonate with this group.

Pragmatists know that in most cases an easy option for sourcing food is never too far away and may not plan out their meals ahead of time. As a result, this consumer group is more likely to be driven by impulses and cravings when making their dining decisions.

Demographic Skews

Gender

51%

Female

Age

18-24 **+5%**

35-44 **+3%**

55 and over **-9%**

Regional Population Share

22% in the South

20% in the Northeast

19% overall

Household Income Index

89

Keys to the Segment

- 18% of seafood spend
- 30% are eating more seafood than two years ago
- Convenience and quickness key to making dining decisions
- Impulse driven
- Value driven

Messaging Pairs

Optimizer

- Value
- Lifestyle driving dining decisions

Traditionalist

- Impulsive
- Simple meals to satisfy cravings

Gender distribution: Page 31
Age distribution: Page 32
Regional distribution: Page 35
Household Income Index balanced for region and urbanicity.
See Page 16, 17 for household income distribution
See Page 36 for urbanicity distribution

The Conscious Consumer

Segment summary

Conscious Consumers are invested in making food choices that align with their worldview. Sustainability and climate change are among Conscious Consumers' chief concerns as shoppers and diners, and they take the time to source food that is environmentally friendly.

In addition to sustainability, this group's dining decisions are driven by an effort to promote a healthy lifestyle. 52% of Conscious Consumers have purchased something in the past 30 days because it did not contain any additives or artificial coloring. 84% have made a purchase because they felt it was a healthy option.

A focus on healthy living and sustainability drives Conscious Consumers to research the food they eat and seek out better alternatives. 43% have increased their seafood consumption in the past two years, and 57% would replace chicken breast in their diet with sustainable Alaska white fish for a similar price.

Demographic Skews

Gender

54%

Female

Age

25-34 **-12%**

35-44 **-8%**

55 and over **+24%**

Regional Population Share

23% in the West

19% in the South

21% overall

Household Income Index

96

Keys to the Segment

- 17% of seafood spend
- 43% are eating more seafood than two years ago
- Buys domestic, sustainable and natural
- Seeks more sustainable sources of protein
- Environmentally motivated purchasing
- Spends time preparing food

Messaging Pairs

Originator

- Climate change
- Health
- Switching to seafood
- Likely to try something new

Traditionalist

- Supports domestic

Gender distribution: Page 31
Age distribution: Page 32
Regional distribution: Page 35
Household Income Index balanced for region and urbanicity.
See Page 16, 17 for household income distribution
See Page 36 for urbanicity distribution

The Traditionalist

Segment summary

Traditionalists prefer to stick to what they know. When dining at-home or away-from-home their primary concern is eating a simple meal that they know they will enjoy.

Traditionalists are less motivated than others to make food purchases that are environmentally sustainable, and are less likely to be concerned about global warming, factory farming and the relationship between the two.

This group is invested in promoting a sustainable domestic economy and prefers to spend their dollar with US businesses. 47% of Traditionalists prefer to buy domestic seafood in order to support the American Fishing Industry.

Demographic Skews

Gender

56% Male

Age

25-34 **-9%**

35-44 **-6%**

55 and over **+25%**

Regional Population Share

21% in the South

14% in the Northeast

18% overall

Household Income Index

98

Keys to the Segment

- 10% of seafood spend
- 30% are eating more seafood than two years ago
- Votes with dollar
- Prefers to support domestic seafood industry vs. buying imported
- More likely to be influenced by word of mouth and television than digital channels

Messaging Pairs

Conscious Consumer

- Supports domestic

Pragmatist

- Impulsive
- Simple meals to satisfy cravings

Gender distribution: Page 31
Age distribution: Page 32
Regional distribution: Page 35
Household Income Index balanced for region and urbanicity.
See Page 16, 17 for household income distribution
See Page 36 for urbanicity distribution

The Originator

Super Consumer Segment summary

The Originator is always talking to someone, in person or digitally. Originators are adventurous and are tuned into current trends. They are purposeful in their purchasing decisions and are the most likely to explore new products across consumer categories.

This group, responsible for 24% of all consumer seafood spend, is the first to try the new restaurant on the block and isn't nervous about trying to make the same dish at-home.

This group is interested in eating healthy, wholesome foods and views increased consumption of seafood as a way to continue to improve their diet.

Eating isn't just about the food itself, however. The social aspects of dining out and cooking for others at-home are equally important as the health content or taste & flavor.

Demographic Skews

Gender

59% Female

Age

25-34 **+8%**

35-44 **+6%**

55 and over **-13%**

Regional Population Share

19% in the West

19% in the Midwest

18% overall

Household Income Index

108

Keys to the Segment

- Accounts for 24% of seafood spend
- 44% are eating more seafood than two years ago
- Restaurants are entertainment best enjoyed with friends and family
- Enjoys cooking for others and puts thought into meals
- Experimental in the kitchen
- Concerned about climate change
- Talks about food online and in-person
- 62% have made a recent purchase just to try something new

Messaging Pairs

Conscious Consumer

- Climate change
- Health
- Switching to seafood
- Likely to try something new

Optimizer

- Digital channels
- Driven by cravings

Gender distribution: Page 31
Age distribution: Page 32
Regional distribution: Page 35
Household Income Index balanced for region and urbanicity.
See Page 16, 17 for household income distribution
See Page 36 for urbanicity distribution

The Optimizer

Super Consumer Segment summary

The Optimizer is on-the-run, using food as fuel to get them through their busy day. They need food solutions they can count on to be convenient and reliable. Optimizers depend on previous experiences and other inputs to minimize the risk something that will throw off the flow of their day.

Optimizers use a wider variety of foodservice locations than the average consumer for a wider variety of occasions. On the retail side, they are ecommerce pioneers, leveraging a number of retail channels to meet their needs.

Health and wholesome ingredients are less of a priority for this group than convenience and cost. They are brand sticky, relying on familiar labels to minimize time and effort in the purchasing decision.

Outside of sourcing, this group does not drive food trends, instead picking them up once they have already matured. This tends to result in a thinner understanding of where their food comes from and other food related topics.

Demographic Skews

Gender

60% Male

Age

18-24 **+10%**

25-34 **+11%**

55 and over **-23%**

Regional Population Share

27% in the Northeast

22% in the South

24% overall

Household Income Index

103

Keys to the Segment

- Accounts for 31% of seafood spend
- 30% are eating more seafood than two years ago
- Hectic lifestyle drives need for convenient meal solutions
- Active on social media and other digital channels
- Views food as a tool to get them through the day
- Less likely to experiment with new products for the sake of it

Messaging Pairs

Originator

- Digital channels

Pragmatist

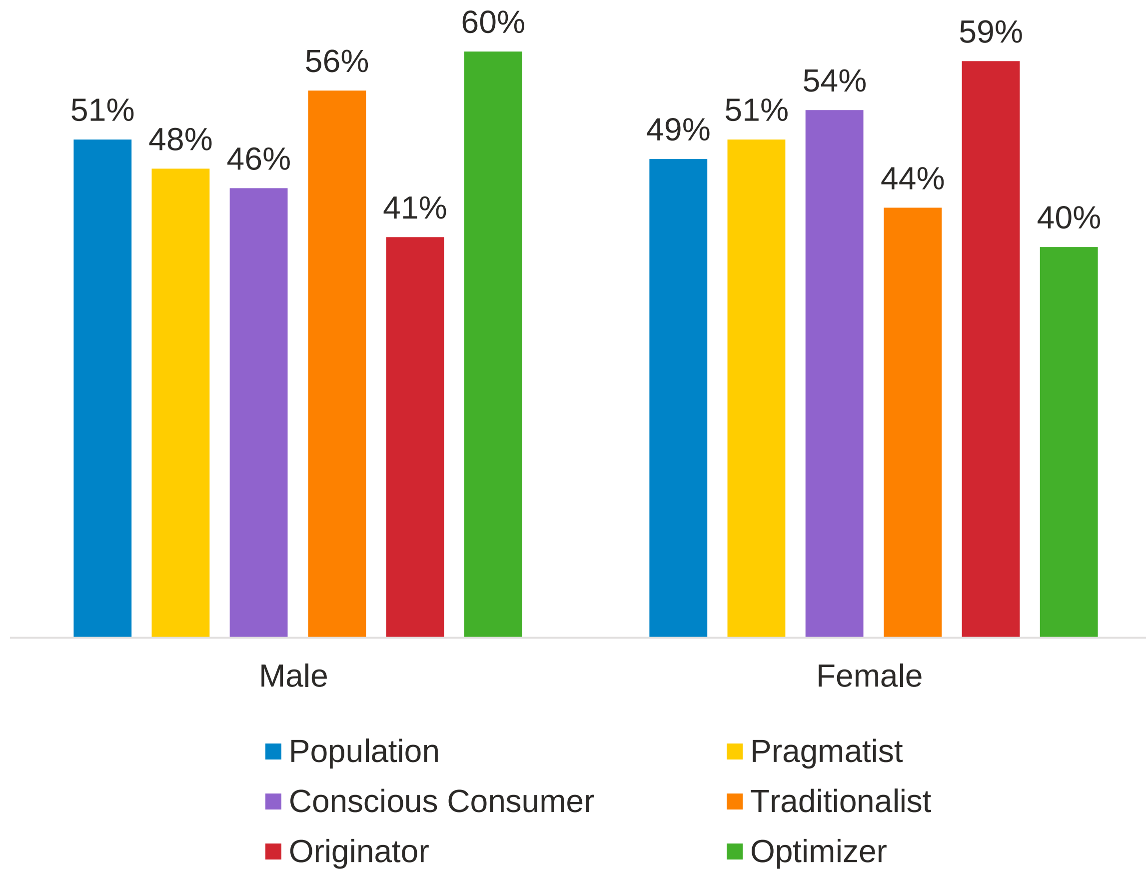
- Value
- Lifestyle driving dining decisions

Gender distribution: Page 31
Age distribution: Page 32
Regional distribution: Page 35
Household Income Index balanced for region and urbanicity.
See Page 16, 17 for household income distribution
See Page 36 for urbanicity distribution

Seafood Consumer Segments

Gender distribution

Originators skew female (59%) while Optimizers are equally skewed towards the male category (60%).



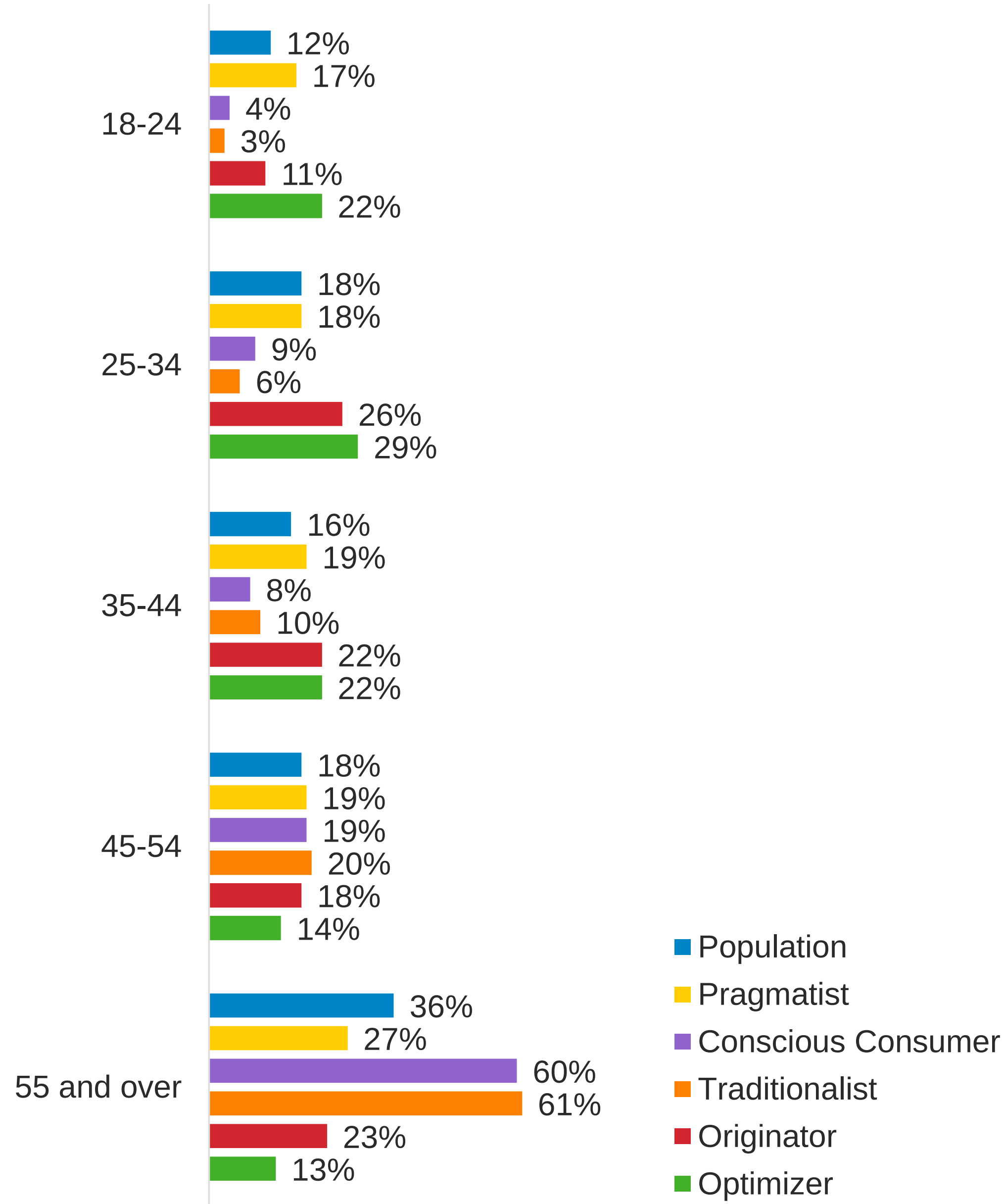
Please indicate your gender
Base: 3,579

Seafood Consumer Segments

Age distribution

Optimizers skew young with 51% under the age of 35. Originators also over-index in the 25-34 category.

Both Seafood Super Consumer groups under-index in the 55+ category.



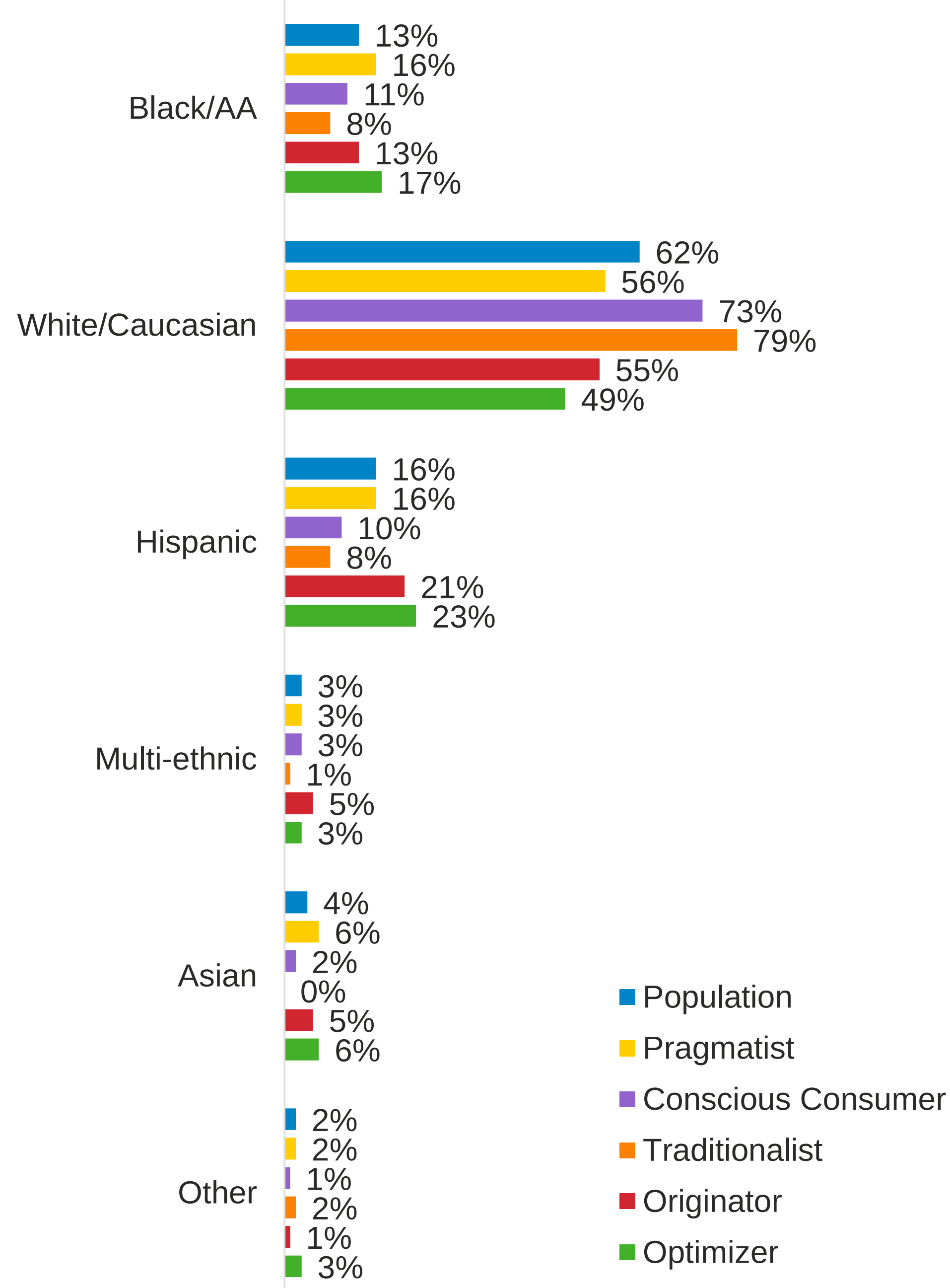
Please indicate your age
Base: 3,579

Seafood Consumer Segments

Ethnicity distribution

Both Seafood Super Consumer groups tend to be more ethnically diverse than the average consumer.

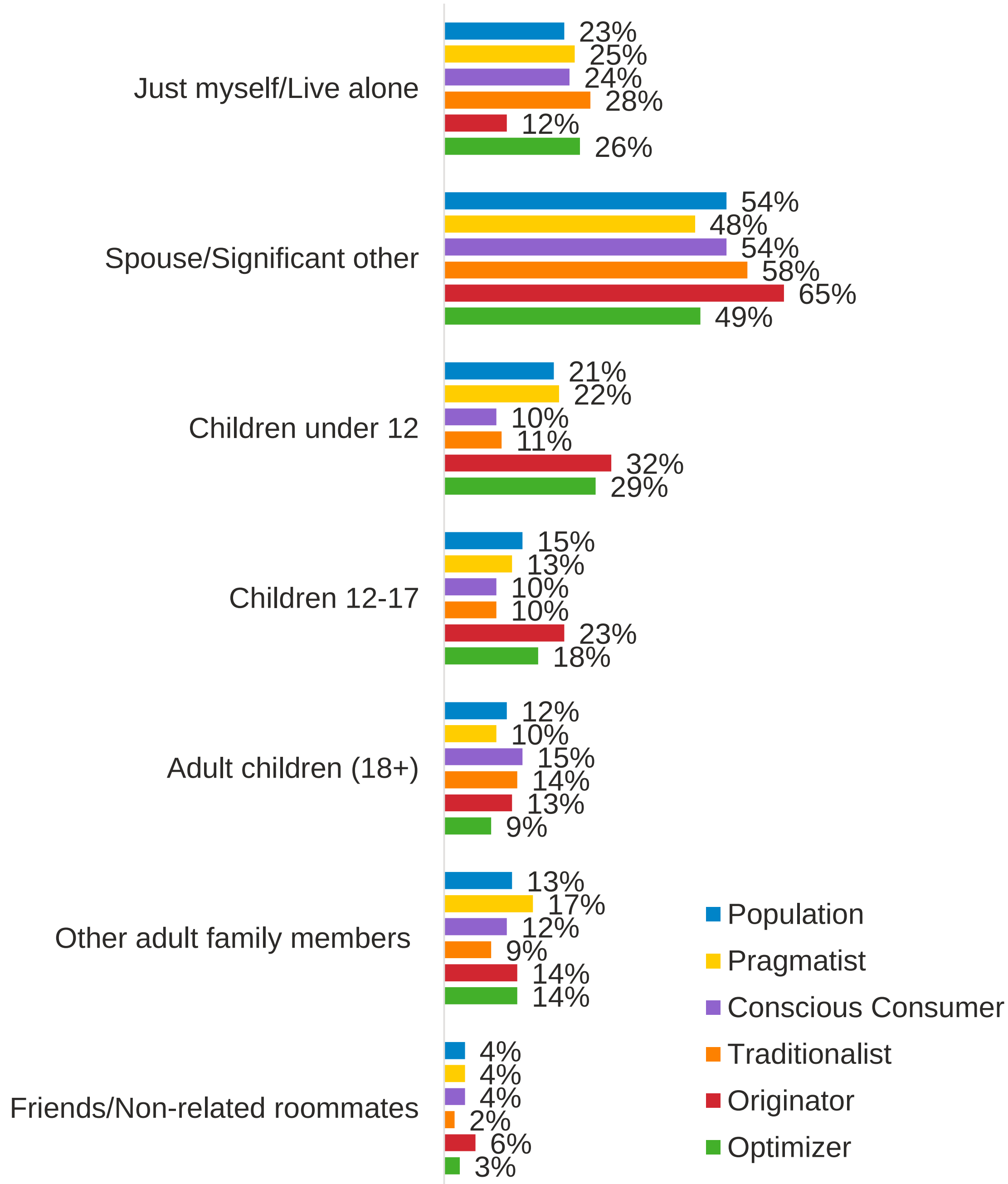
Optimizers are a minority majority segment, and Originators register larger shares of African American, Hispanic and Multi-ethnic consumers than the national average.



Which of the following best describes your ethnic background?
Base: 3,579

Seafood Super Consumer

Household composition



Originators are more likely to live with spouses/significant others while Optimizers under-index on this household composition category.

Both Seafood Super Consumer groups are more likely than the average consumer to be living with children under 12 in the household.

Who do you currently live with in your household? (Select all that apply)
Base: 3,579

Seafood Consumer Segments

Regional distribution

Optimizers and Conscious Consumers make up over 50% of seafood consumers in western states.

The West and the Midwest register the highest percentages of Originators.

The Midwest contains a fairly balanced mix of seafood consumers.

The South is composed of a greater share of Pragmatists and Traditionalists than other regions.

The Northeast is composed of the greatest share of Optimizers.

Consumer Segment	Population	West	Midwest	South	Northeast
Pragmatist	19%	18%	18%	22%	20%
Conscious Consumer	21%	23%	20%	19%	22%
Traditionalist	18%	16%	19%	21%	14%
Originator	18%	19%	19%	17%	16%
Optimizer	24%	25%	24%	22%	27%

Base: 3,579
In which state do you live?

Seafood Consumer Segments

Urbanicity distribution

Originators and Optimizers tend to live in more urban environments than other seafood consumer segments.

38% of Traditionalists live in suburban areas. This group also registers a higher share of rural consumers.

Consumer Segment	Pragmatist	Conscious Consumer	Traditionalist	Originator	Optimizer
A city – with a population over 100,000	33%	34%	21%	36%	44%
A suburb – within 1 hour from a major city or one of many suburbs in a large metropolitan area	34%	31%	38%	34%	31%
A small city – with a population 50,000 – 100,000 and no larger cities within 15 minutes, not part of a large metropolitan area	12%	14%	12%	9%	11%
A rural area - in a town with fewer than 50,000 people, not part of a large metropolitan area	21%	20%	29%	21%	14%

Base: 3,579
Do you currently live in…

Segmentation Psychographic Summary

Psychographic Attribute Agreement Summary (Top 2 box, agree & agree completely)

Psychographic Attributes	Population	Pragmatist	Conscious Consumer	Traditionalist	Originator	Optimizer
Base Size	**3,579**	**688**	**743**	**638**	**637**	**873**
Cooking meals at home is a good way to live	81%	79%	88%	86%	87%	69%
Enjoys the social aspects of dining out at restaurants	72%	71%	75%	66%	85%	64%
Restaurants are entertainment	70%	68%	76%	65%	85%	60%
Eats out with friends	66%	65%	68%	60%	80%	60%
Pays close attention to menu prices	66%	69%	70%	67%	67%	60%
Enjoys cooking for others	64%	59%	67%	59%	78%	58%
Always compares prices	57%	60%	61%	57%	55%	54%
Puts thought into meals	55%	53%	61%	45%	66%	53%
Seeks nutritious food	48%	46%	62%	32%	55%	45%
Health-conscious	45%	41%	55%	31%	51%	47%
Picks restaurants with lowest prices	44%	51%	40%	46%	35%	48%
Name-brand typically tastes better	42%	46%	34%	36%	47%	45%
Buys same brands regardless of price	41%	43%	37%	38%	39%	45%
Looks for healthy options	33%	32%	27%	47%	28%	32%
Eats out to meet obligations	29%	32%	22%	16%	33%	41%
Eat meals on the run	29%	38%	19%	18%	32%	38%
Price is a lower priority	25%	21%	24%	25%	22%	29%
Too busy to enjoy meals	13%	15%	5%	8%	9%	26%

Please indicate how much you agree or disagree with the following statements
Base: 3,579

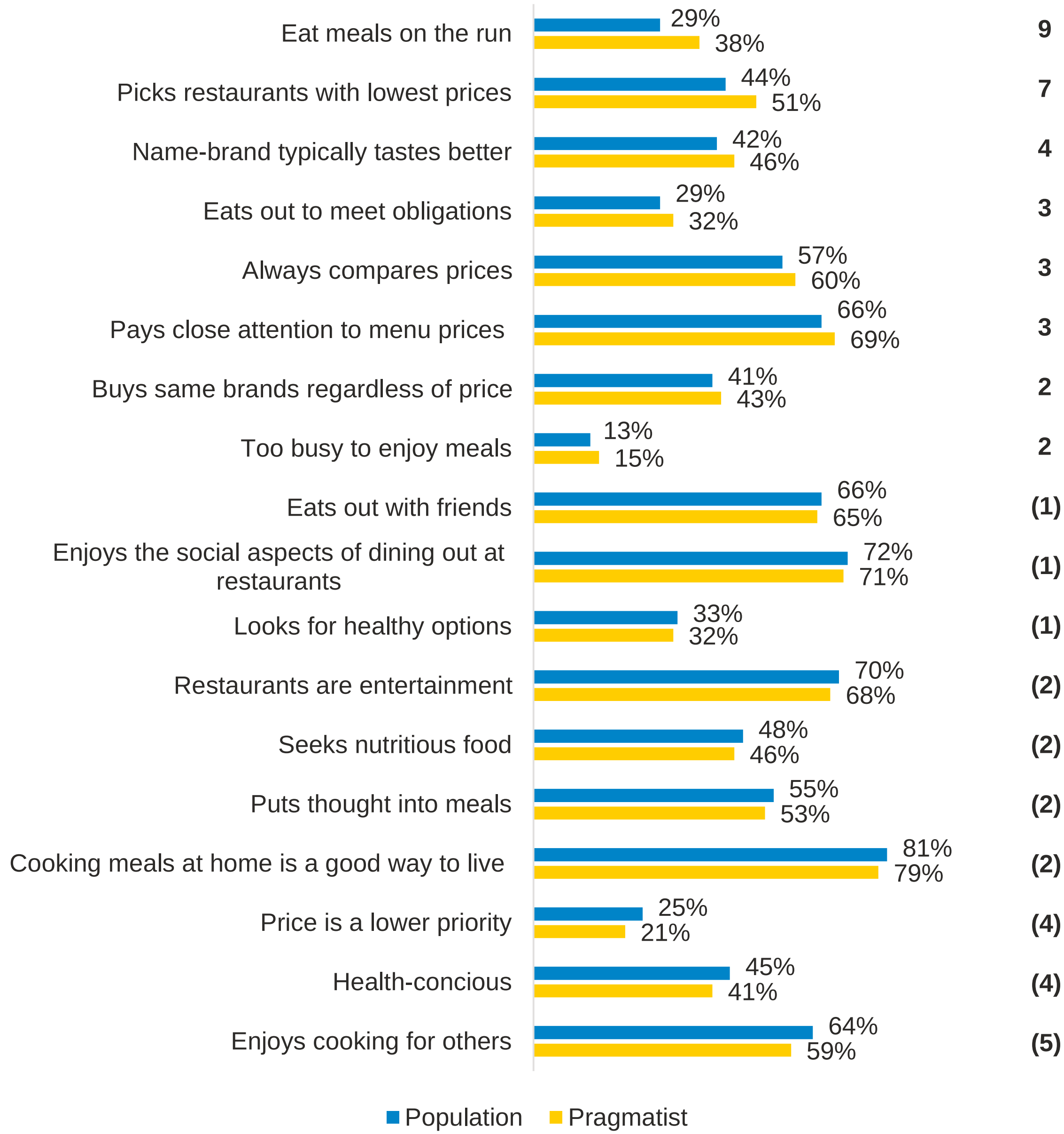
Pragmatist Psychographic Gap Analysis

The psychographic gap analysis is conducted to show the most unique psychographic qualities of a consumer segment. Positive numbered elements at the top of the chart reflect where the segment scores above the average consumer, negative numbers (indicated by parentheses) indicate where the segment scored below the mean.

The psychographic gap analysis demonstrates a higher emphasis placed on affordable options that allow Pragmatists to continue with their daily tasks.

This consumer segment is less likely to consider cooking at-home an enjoyable activity or a part of a healthy lifestyle.

Psychographic Agreement Statement Gap Analysis (Gap and top 2 box)



Please indicate how much you agree or disagree with the following statements
Base: 3,579

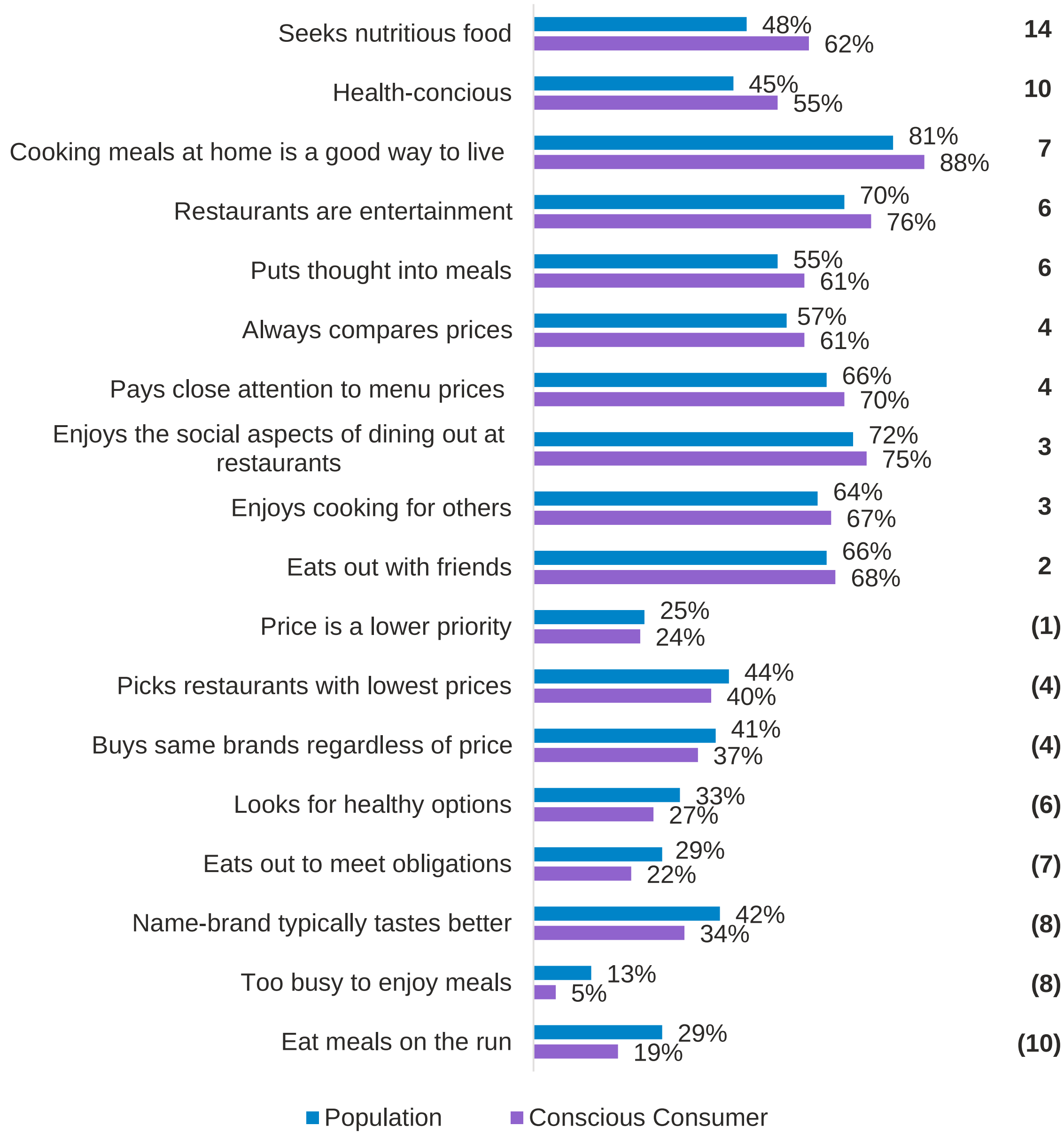
Conscious Consumer Psychographic Gap Analysis

The psychographic gap analysis is conducted to show the most unique psychographic qualities of a consumer segment. Positive numbered elements at the top of the chart reflect where the segment scores above the average consumer, negative numbers (indicated by parentheses) indicate where the segment scored below the mean.

The psychographic gap analysis reveals the Conscious Consumer to be a one that is highly focused on healthy eating as a means to achieving a healthy lifestyle.

This is a cerebral consumer who puts thought into their dining decisions.

Psychographic Agreement Statement Gap Analysis
(Gap and top 2 box)



Please indicate how much you agree or disagree with the following statements
Base: 3,579

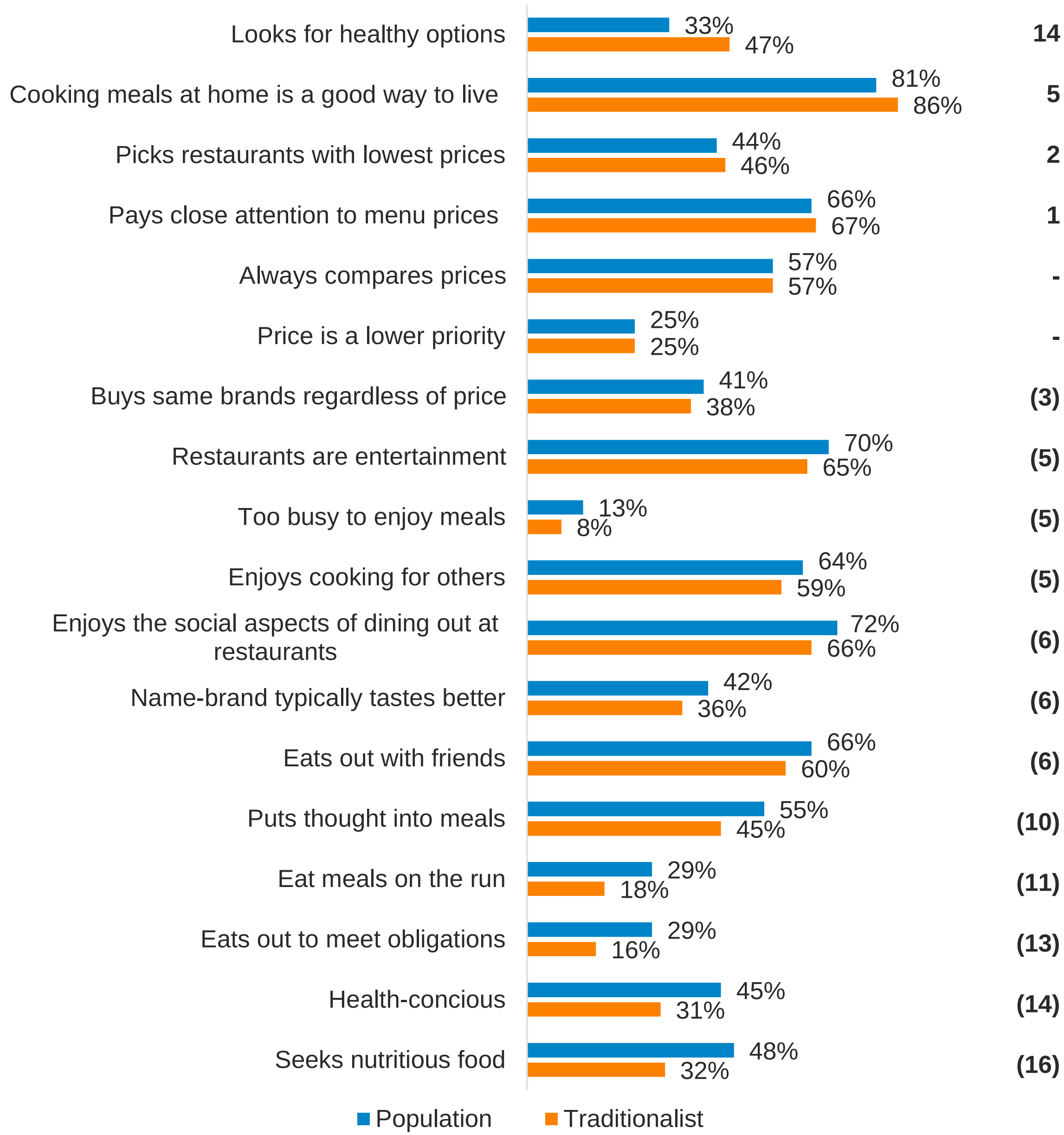
Traditionalist Psychographic Gap Analysis

The psychographic gap analysis is conducted to show the most unique psychographic qualities of a consumer segment. Positive numbered elements at the top of the chart reflect where the segment scores above the average consumer, negative numbers (indicated by parentheses) indicate where the segment scored below the mean.

For the traditionalist, the meal is a more individualistic activity. This group scores lower than the average consumer on measures involving lifestyle drivers and social activity.

Where the Traditionalist does score above the mean are in psychographics where the consumer is in control, comparing their options before making a selection.

Psychographic Agreement Statement Gap Analysis
(Gap and top 2 box)



Please indicate how much you agree or disagree with the following statements
Base: 3,579

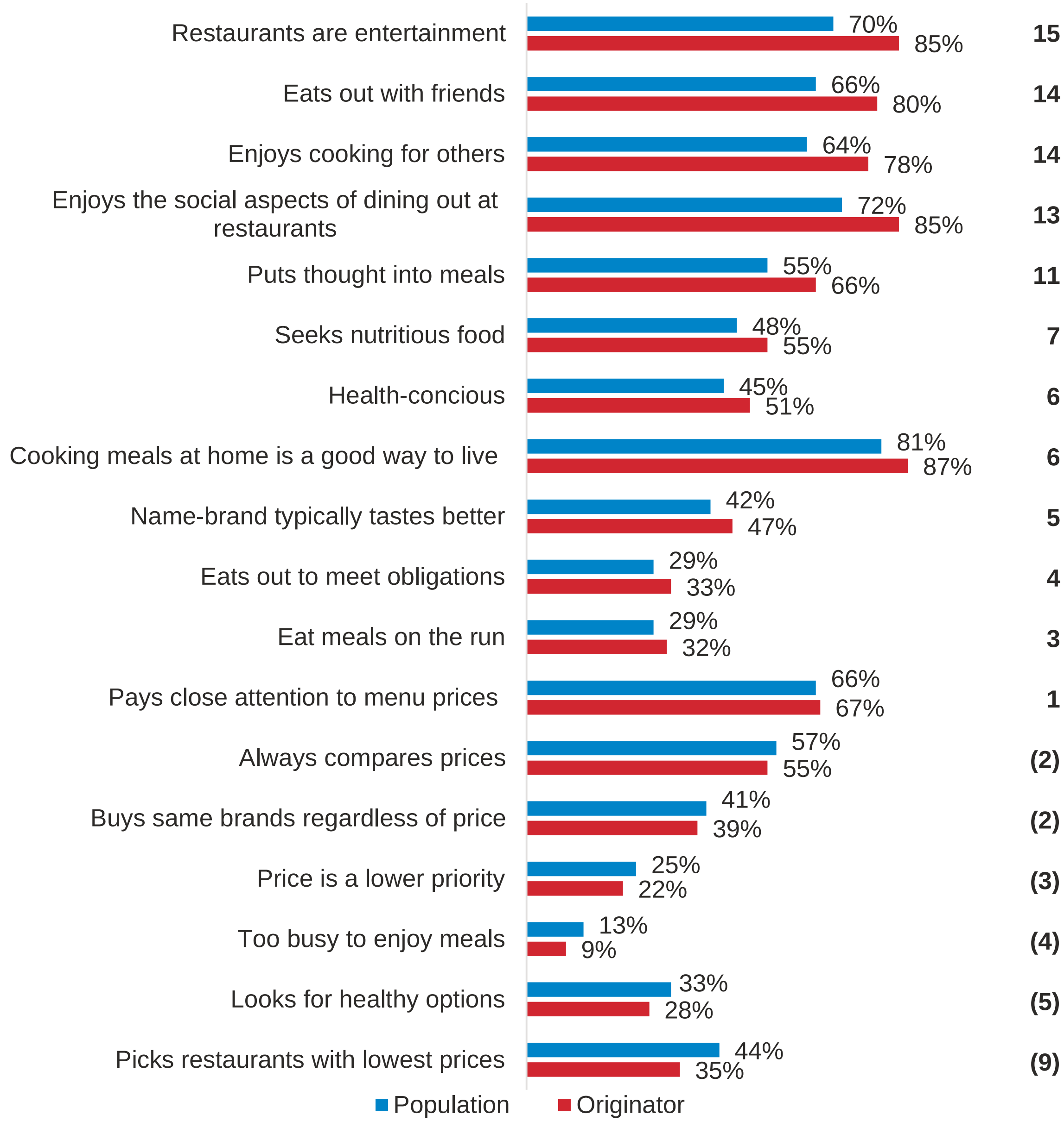
Originator Psychographic Gap Analysis

The psychographic gap analysis is conducted to show the most unique psychographic qualities of a consumer segment. Positive numbered elements at the top of the chart reflect where the segment scores above the average consumer, negative numbers (indicated by parentheses) indicate where the segment scored below the mean.

The Originator is defined by its social behavior. Visiting restaurants with friends, using foodservice as entertainment and social at-home dining occasions are key to this group,.

They are less price-driven than other groups, and are more likely to find time in their day to think through meals.

Psychographic Agreement Statement Gap Analysis
(Gap and top 2 box)



Please indicate how much you agree or disagree with the following statements
Base: 3,579

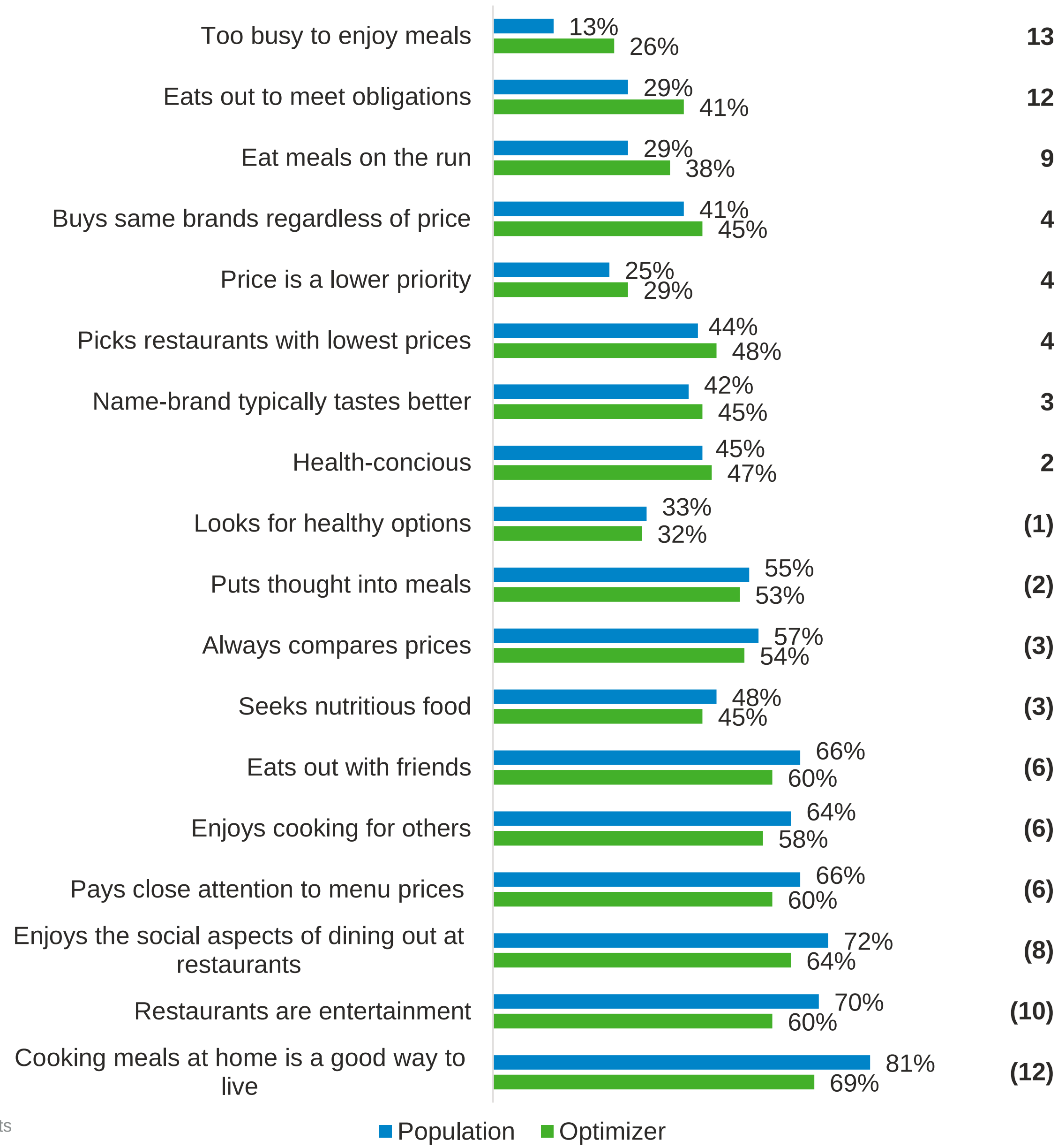
Optimizer Psychographic Gap Analysis

The psychographic gap analysis is conducted to show the most unique psychographic qualities of a consumer segment. Positive numbered elements at the top of the chart reflect where the segment scores above the average consumer, negative numbers (indicated by parentheses) indicate where the segment scored below the mean.

The Optimizer is defined by their lifestyle. This group is unlikely to have time to put thought into their meals, and seeks out value and convenience as a result in both retail and foodservice contexts.

They are less likely to see the inherent social value of dining out or cooking for others, viewing these occasion more as means to an end.

Psychographic Agreement Statement Gap Analysis
(Gap and top 2 box)



Please indicate how much you agree or disagree with the following statements
Base: 3,579

Segmentation Behavioral Summary

Behavioral Attribute Agreement Summary (Top 2 box, agree & agree completely)

Behavioral Attributes		Population	Pragmatist	Conscious Consumer	Traditionalist	Originator	Optimizer
	Base Size	**3,579**	**688**	**743**	**638**	**637**	**873**
	Try new restaurants	69%	62%	73%	69%	87%	56%
	Talk about food in person	57%	46%	60%	44%	85%	53%
	If I like something at a restaurant I will try to make it at home	54%	47%	54%	47%	70%	53%
	More likely to try restaurant with seafood	50%	43%	53%	41%	62%	51%
	Defer to others when choosing restaurant	41%	36%	36%	39%	42%	49%
	I vote with my dollar	41%	28%	40%	45%	38%	50%
	Defer to others when choosing groceries	34%	33%	25%	19%	37%	49%
	Talk about food on social media	33%	26%	8%	7%	72%	49%
	My meal choices affect the environment	33%	25%	40%	5%	39%	48%
	The US meat industry contributes to global warming	31%	21%	38%	7%	34%	47%
	I am not worried about climate change	29%	10%	5%	66%	15%	49%
	Post pictures of food on social media	27%	19%	1%	2%	62%	50%
	If I haven’t tried it in a restaurant, I won’t try to make it at home	19%	16%	9%	7%	10%	46%

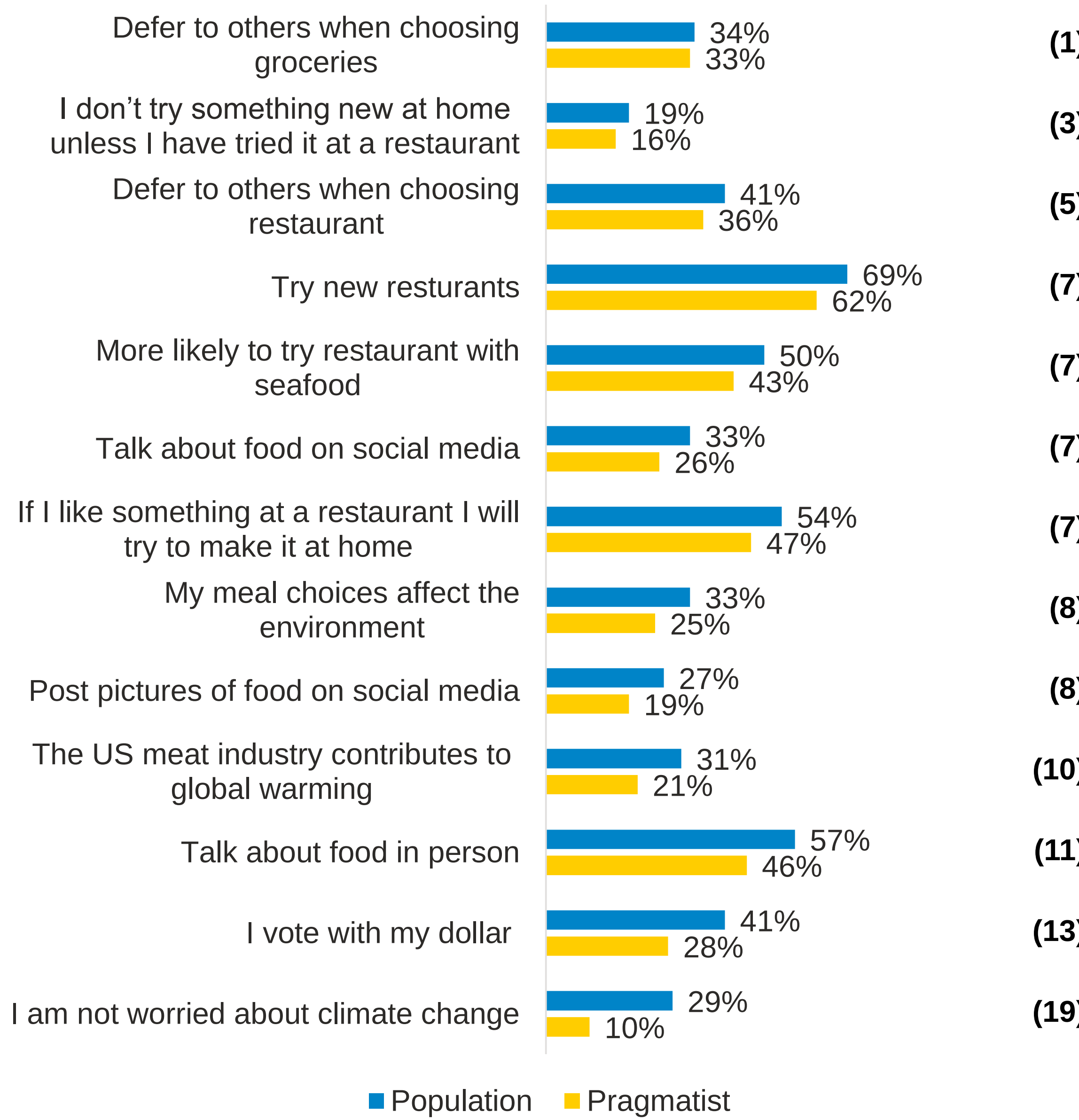
Please indicate how much you agree or disagree with the following statements
Base: 3,579

Pragmatist Behavioral Gap Analysis

The behavioral gap analysis is conducted to show the most unique behavioral qualities of a consumer segment. Positive numbered elements at the top of the chart reflect where the segment scores above the average consumer, negative numbers (indicated by parentheses) indicate where the segment scored below the mean.

The Pragmatist is worried about climate change, though they are less likely than the average consumer to believe that their dining choices impact the environment.

Behavioral Agreement Statement Gap Analysis (Gap and top 2 box)



Please indicate how much you agree or disagree with the following statements
Base: 3,579

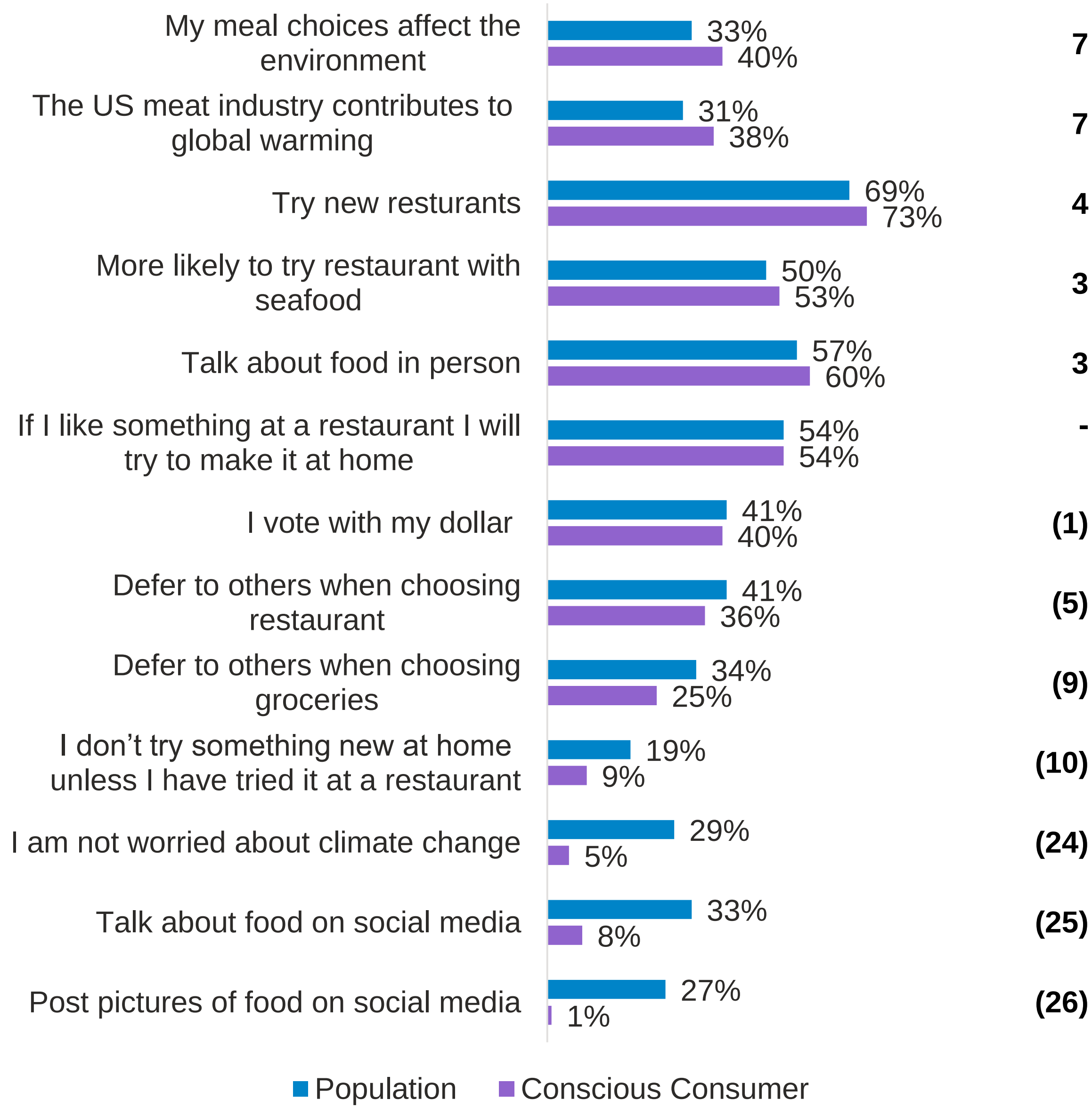
Conscious Consumer Behavioral Gap Analysis

The behavioral gap analysis is conducted to show the most unique behavioral qualities of a consumer segment. Positive numbered elements at the top of the chart reflect where the segment scores above the average consumer, negative numbers (indicated by parentheses) indicate where the segment scored below the mean.

The Conscious Consumer's behavioral attributes demonstrate their engagement with climate change in their consumption habits.

They are far less likely than the average consumer to be active on social media.

Behavioral Agreement Statement Gap Analysis
Gap and top 2 box



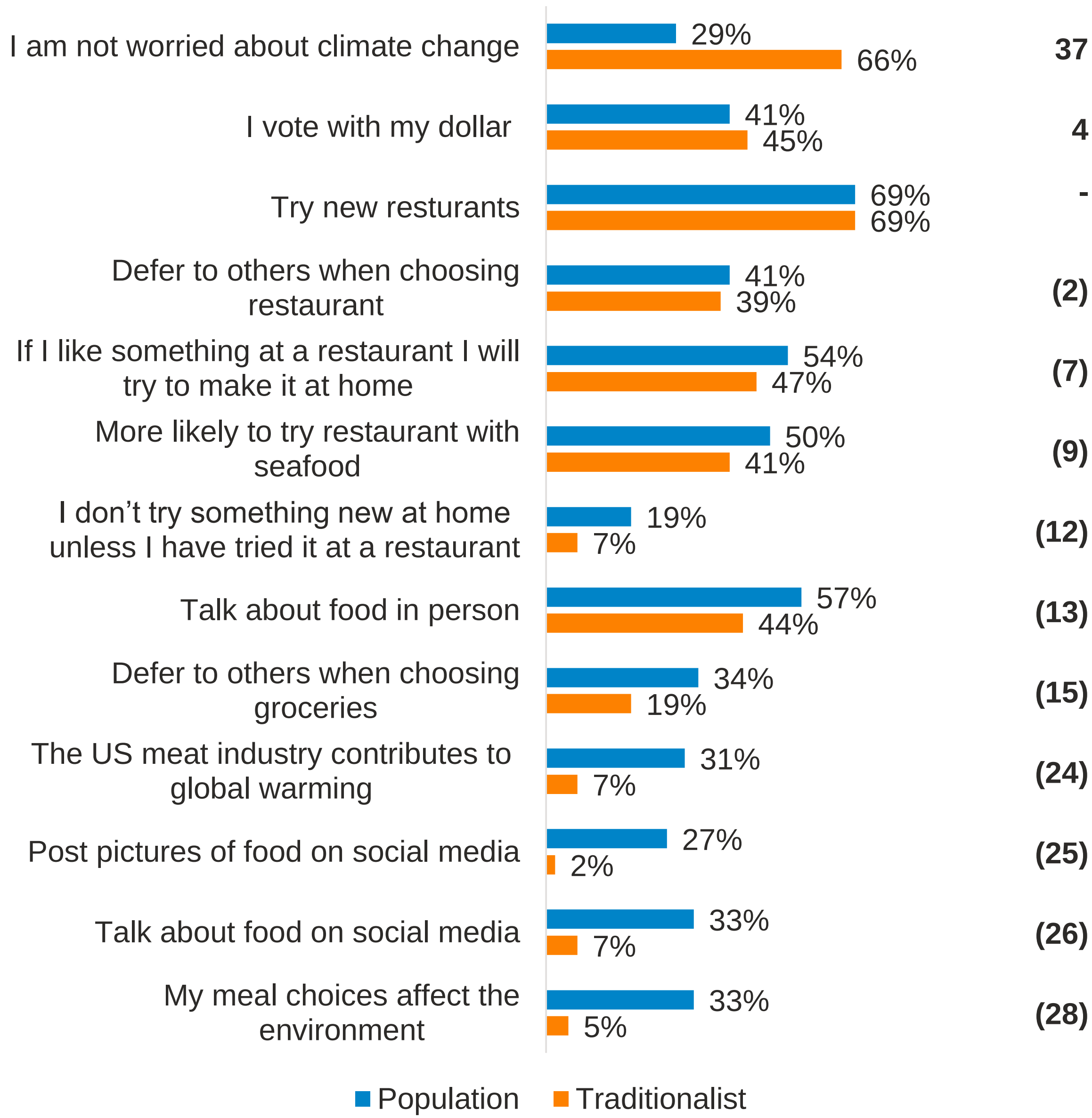
Please indicate how much you agree or disagree with the following statements
Base: 3,579

Traditionalist Behavioral Gap Analysis

The behavioral gap analysis is conducted to show the most unique behavioral qualities of a consumer segment. Positive numbered elements at the top of the chart reflect where the segment scores above the average consumer, negative numbers (indicated by parentheses) indicate where the segment scored below the mean.

The Traditionalist is not worried about climate change and uses their consumer spending to vote for products and businesses they support.

Behavioral Agreement Statement Gap Analysis
Gap and top 2 box



Please indicate how much you agree or disagree with the following statements
Base: 3,579

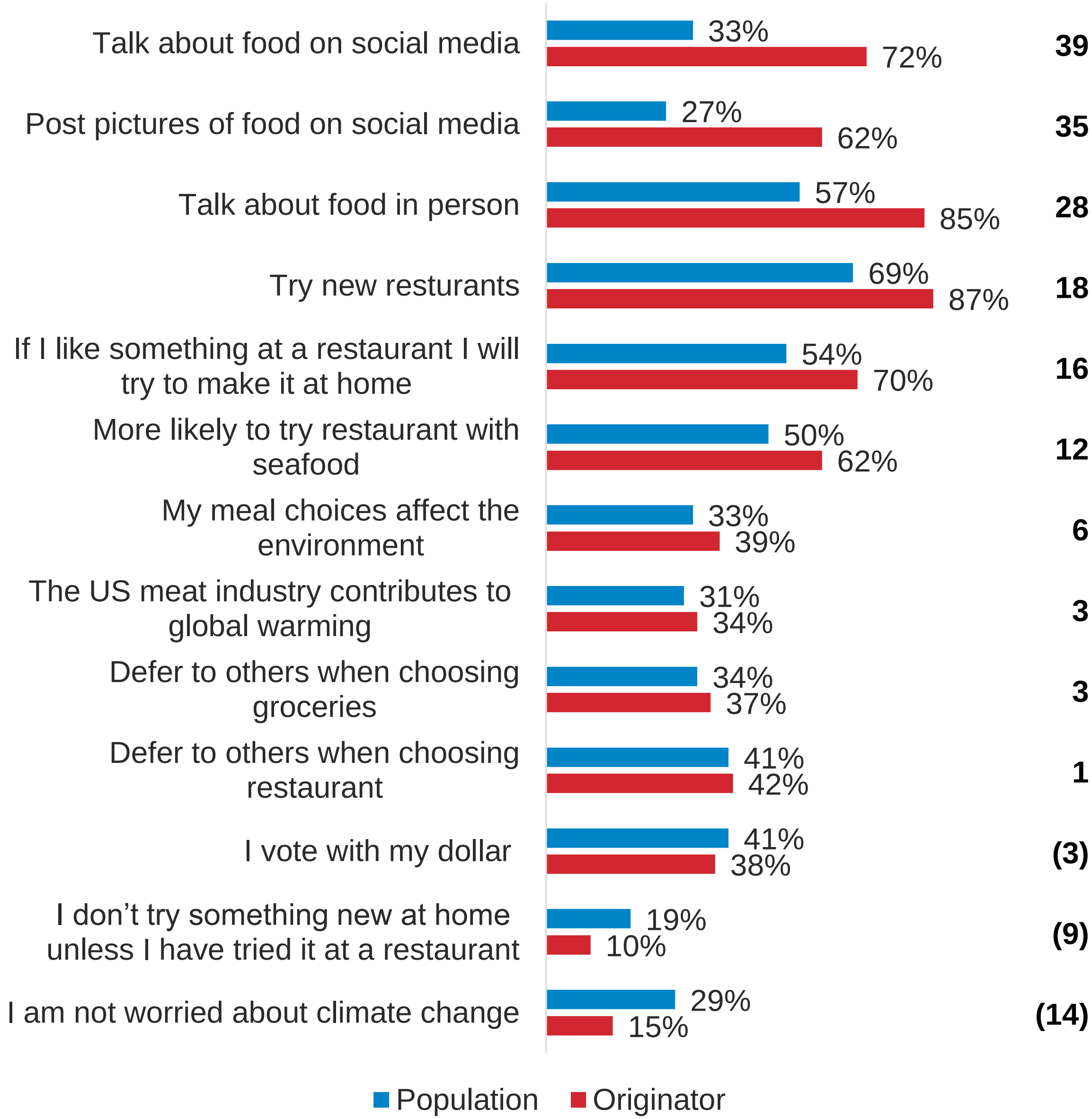
Originator Behavioral Gap Analysis

The behavioral gap analysis is conducted to show the most unique behavioral qualities of a consumer segment. Positive numbered elements at the top of the chart reflect where the segment scores above the average consumer, negative numbers (indicated by parentheses) indicate where the segment scored below the mean.

The Originator engages with food in numerous ways throughout their daily life. They are highly likely to discuss food on social media, in-person, and post pictures of food on social media.

They are more likely than others to experiment with recipes at-home, even if they have never tried it before.

Behavioral Agreement Statement Gap Analysis
Gap and top 2 box



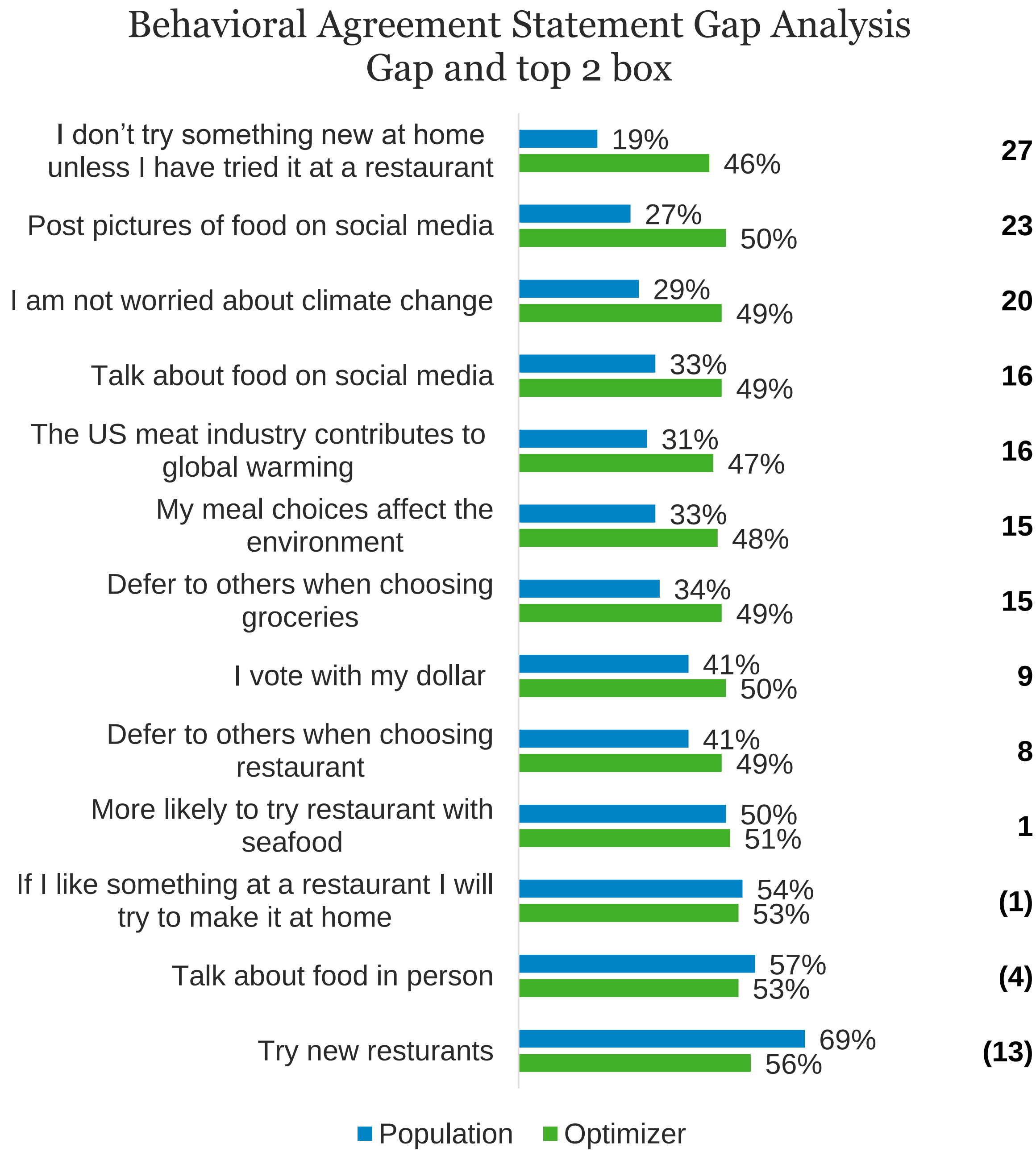
Please indicate how much you agree or disagree with the following statements
Base: 3,579

Optimizer Behavioral Gap Analysis

The behavioral gap analysis is conducted to show the most unique behavioral qualities of a consumer segment. Positive numbered elements at the top of the chart reflect where the segment scores above the average consumer, negative numbers (indicated by parentheses) indicate where the segment scored below the mean.

The optimizer relies on data in order to act. They are unlikely to try a dish at-home unless they have had it elsewhere, making foodservice an important discovery path for this group.

At the same time they are less likely than others to try new restaurants unless there is a compelling reason to do so.



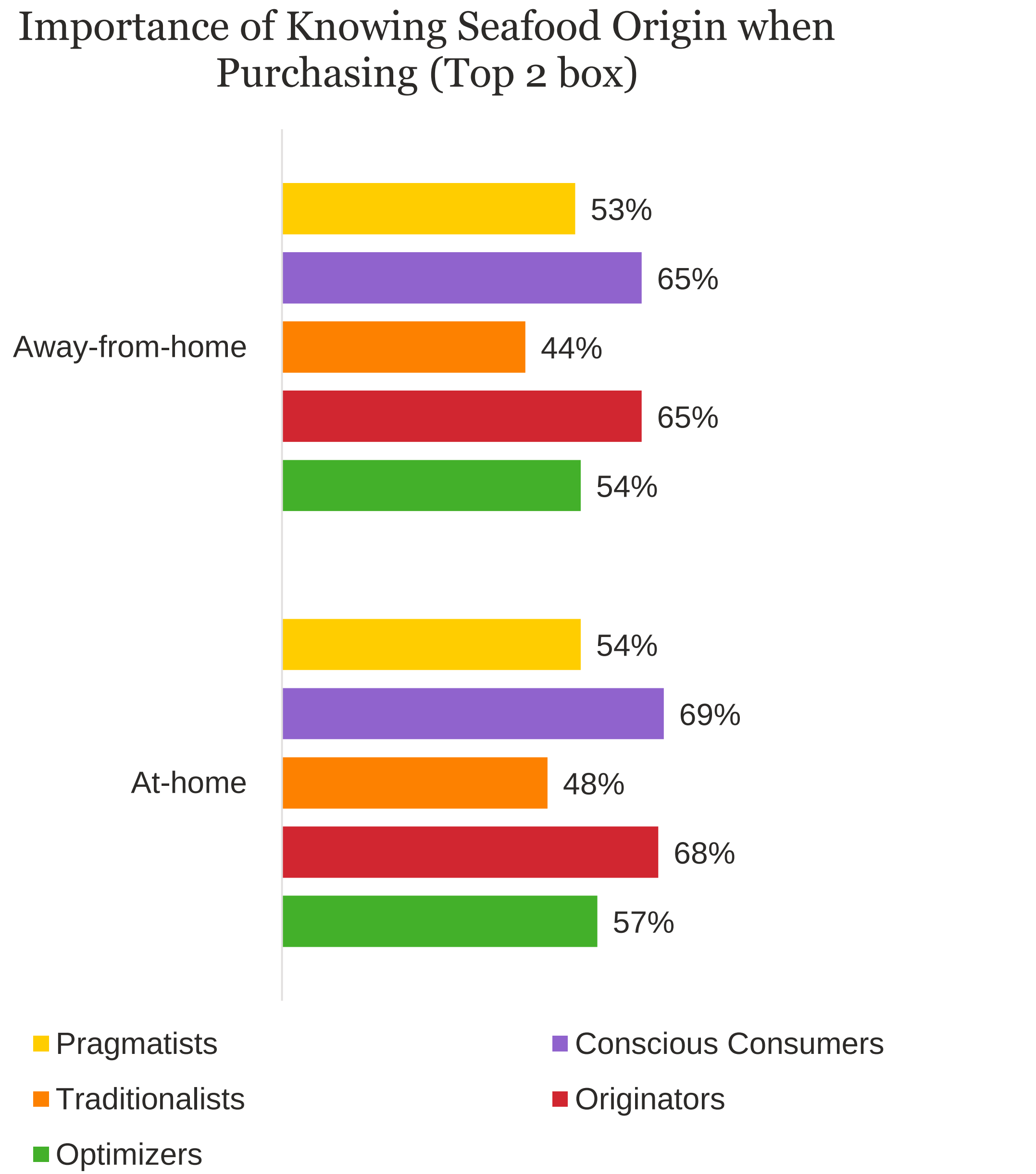
Please indicate how much you agree or disagree with the following statements
Base: 3,579

Importance of Seafood Sourcing

By segment, top 2 box

For both at-home and away-from-home, knowing the source/origin of seafood is most important to Conscious Consumers, Originators and Optimizers.

Interestingly there is little variation between retail and foodservice contexts when it comes to the importance of sourcing.



How important is it that you know where your fish/seafood came from when dining at-home and away-from-home (i.e. where it was caught, raised, etc.)?
Base: 3,579

Seafood Super Consumer Foodservice Profile

The Foodservice Profile details the most important attributes, most common need states and most impactful drivers for increased usage of seafood in a foodservice context. Boxes indicate ranking differences among Seafood Super Consumers.

(e.g.) Originators prioritize attaining confidence in taste and freshness as a driver while Optimizers prioritize variety and value.

Importance (Top 5 out of 17)		Need States (Top 5 out of 13)		Drivers to increase usage (5 out of 8)	
Originator	**Optimizer**	**Originator**	**Optimizer**	**Originator**	**Optimizer**
Clean	Clean	Satisfy a craving	Satisfy a craving	Increased confidence in freshness of seafood	Better variety of seafood
Fresh	Fresh	Real/wholesome ingredients	Simple meal	Increased confidence in taste and flavor	Better value for price paid
Visually appealing	Good value	New flavors, menu, dining experience	Real/wholesome ingredients	Better variety of seafood	Increased confidence in freshness of seafood
Menu description	Visually appealing	Simple meal	New flavors, menu items, dining experience	Increased confidence that what you buy is what you get	Increased confidence in taste and flavor
Good value	Affordable	Healthy meal/snack	Healthy meal/snack	Better value for price paid	Increased confidence that what you buy is what you get

Seafood Super Consumer Retail Profile

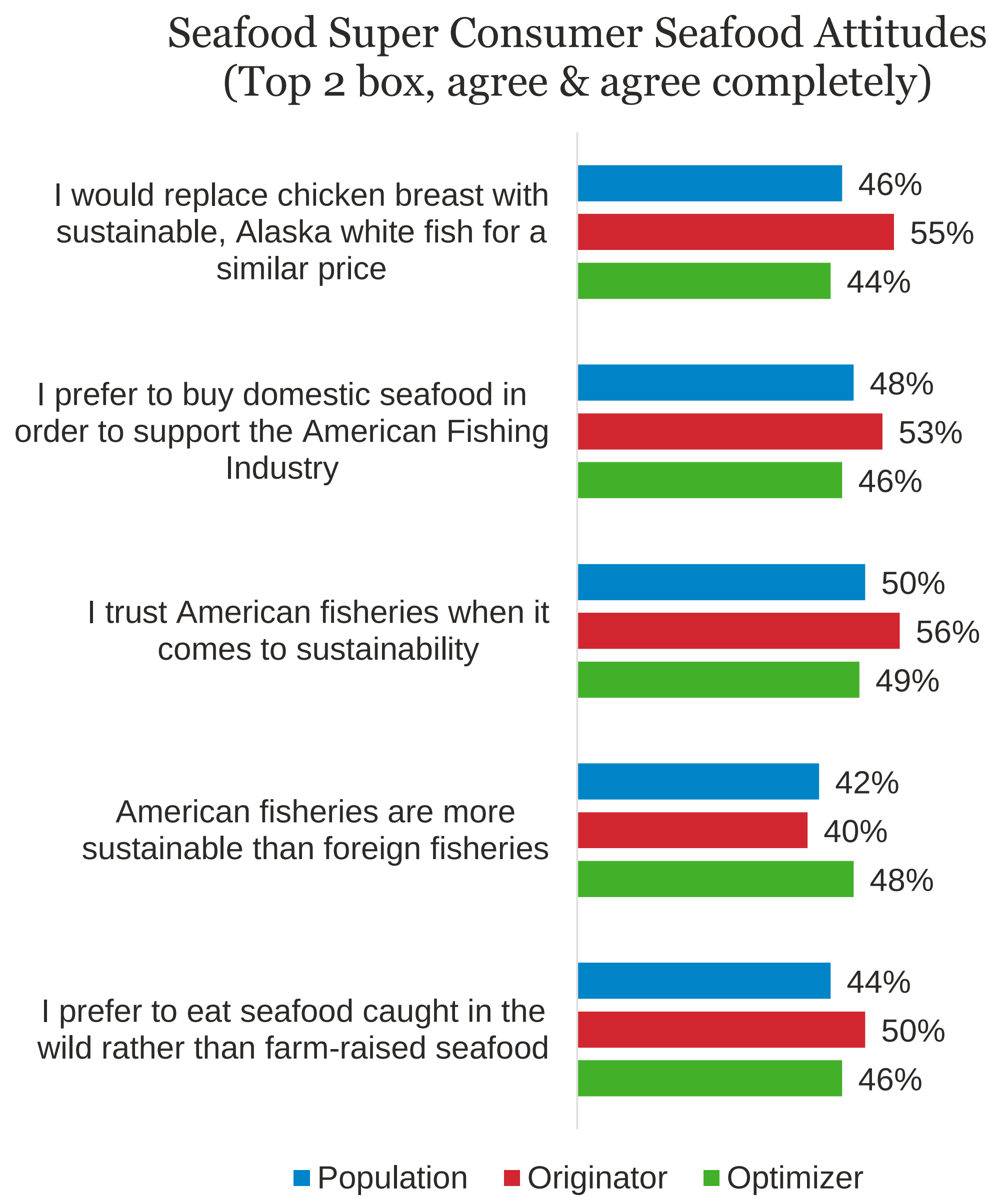
The Retail Profile details the most important attributes, most common need states and most impactful drivers for increased usage of seafood in a retail context. Boxes indicate ranking differences among Seafood Super Consumers.

(e.g.) Originators find visual appeal to rank higher in importance at retail vs. Optimizers who prioritize affordability.

Importance (Top 5 out of 11)		Need States (Top 5 out of 12)		Drivers to increase usage (Top 5 out of 18)	
Originator	**Optimizer**	**Originator**	**Optimizer**	**Originator**	**Optimizer**
Clean	Clean	Satisfy a craving	Satisfy a craving	Increased confidence in freshness of seafood	Better value for price paid
Visually appealing	Affordable	Real/wholesome ingredients	Simple meal	More affordable options	More affordable options
Fresh	Good value	Healthy meal/snack	Real/wholesome ingredients	Better value for price paid	Increased confidence in taste and flavor
Good value	Fresh	Simple meal	Healthy meal/snack	Increased confidence in taste and flavor	Better variety of seafood options
Affordable	Visually appealing	Sustainable ingredients	Connect/socialize	Better variety of seafood options	A better knowledge of how to prepare seafood

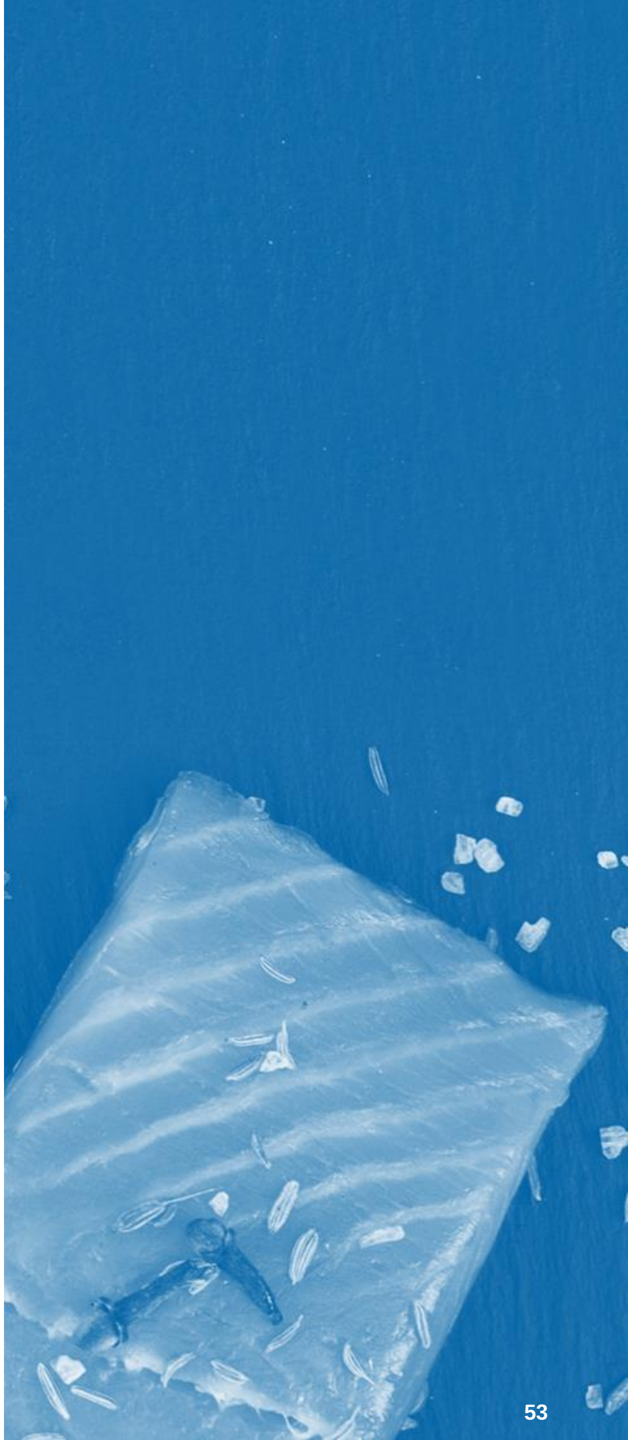
Seafood Super Consumer Seafood Attitudes

46% of seafood eaters would replace chicken with Alaska white fish for a similar price. This is more true for Originators (55%).



Please indicate how much you agree or disagree with the following statements
Base: 3,579

Seafood Super Consumer Sourcing Practices



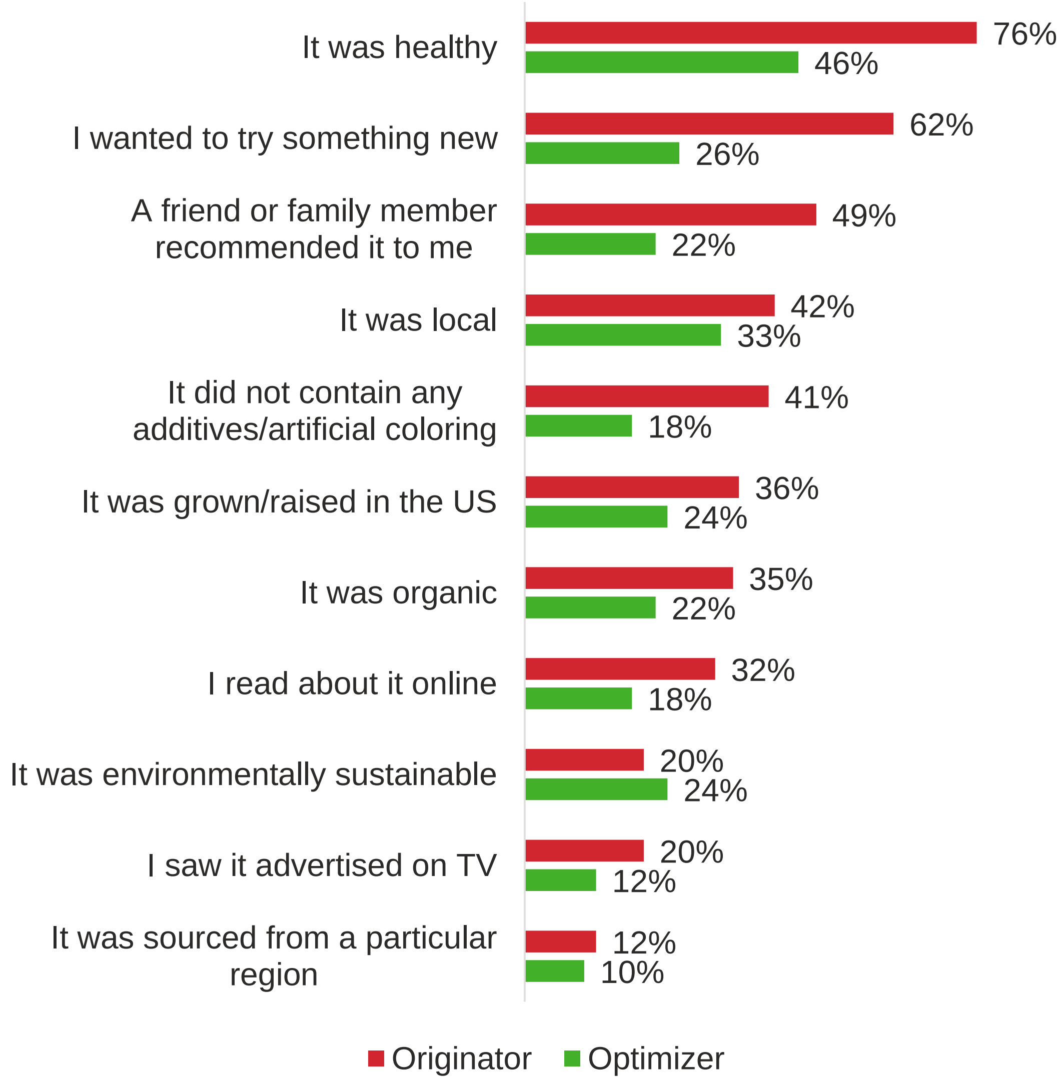
Drivers of Seafood Super Consumer Shopping Pattern

Health, novelty, word of mouth, and local are the greatest drivers of Seafood Super Consumer shopping patterns.

Health, novelty and word of mouth are particularly salient for the Originator group.

Data show that local maintains a strong foothold in the consumer value equation with 42% of Originators and 33% of Optimizers purchasing food because of its local origin in the past 30 days.

Drivers of Food Purchases in the Past 30 Days (Multiple select)

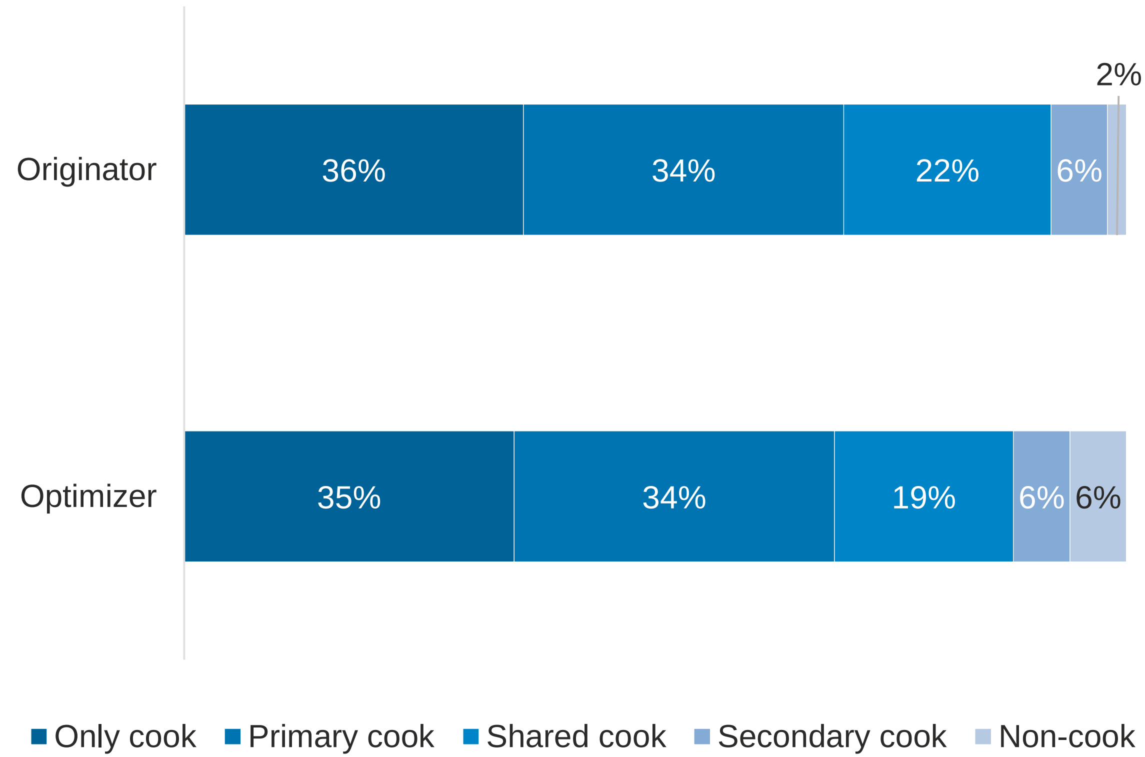


In the past 30 days, I have purchased food because…
Base: 3,579

Household Cooking

70% of Originators and 71% of Optimizers identify as the only or primary cook for their household.

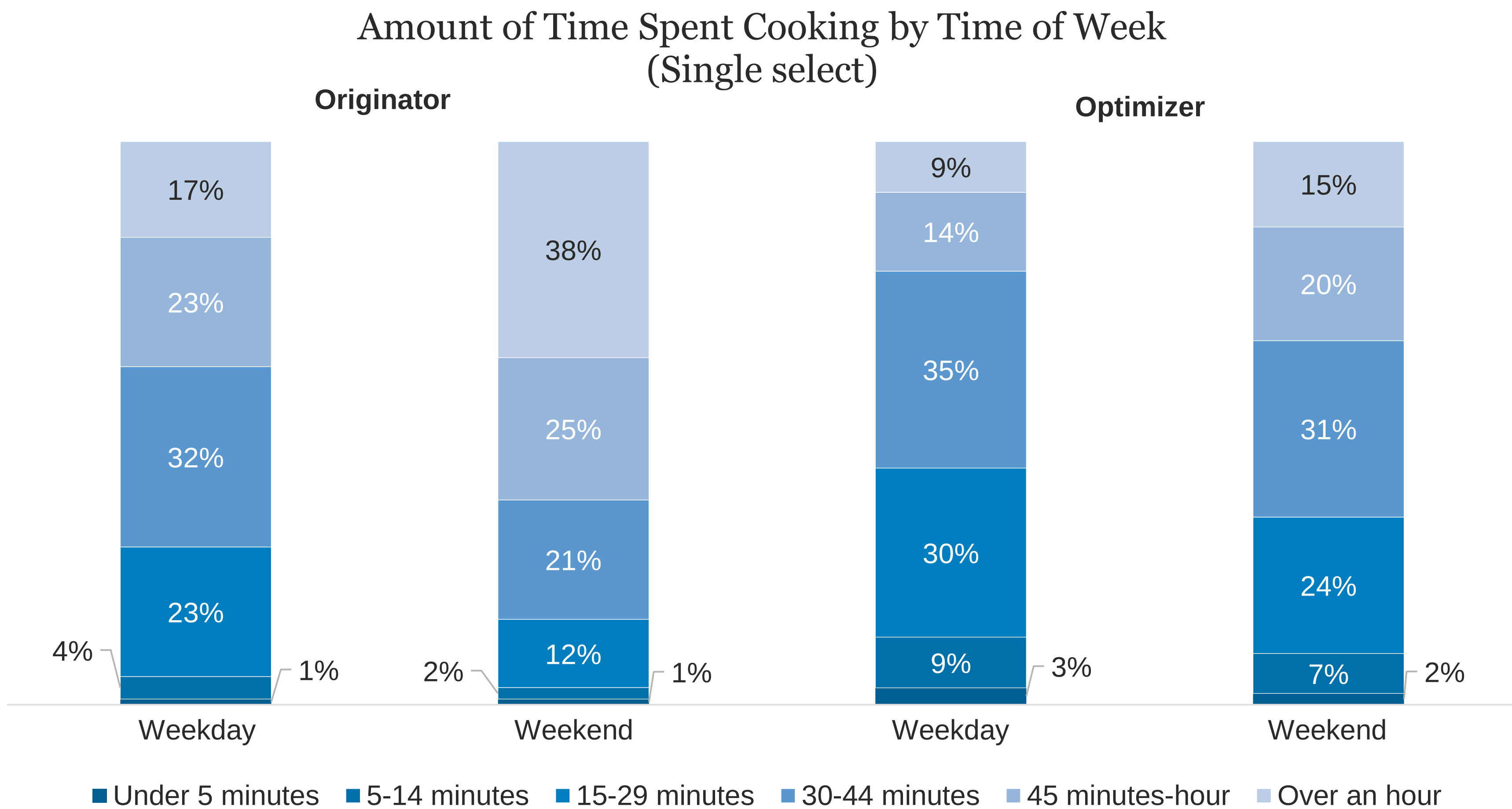
Seafood Super Consumer Level of Responsibility in Household Cooking



How would you describe your level of responsibility for the household meal preparation?
Base: 3,579

Time Spent Cooking

Originators are willing and able to spend considerably more time in the kitchen than their Optimizer counterparts. Originators, on average, spend more time cooking on weekdays than Optimizers do on the weekends.

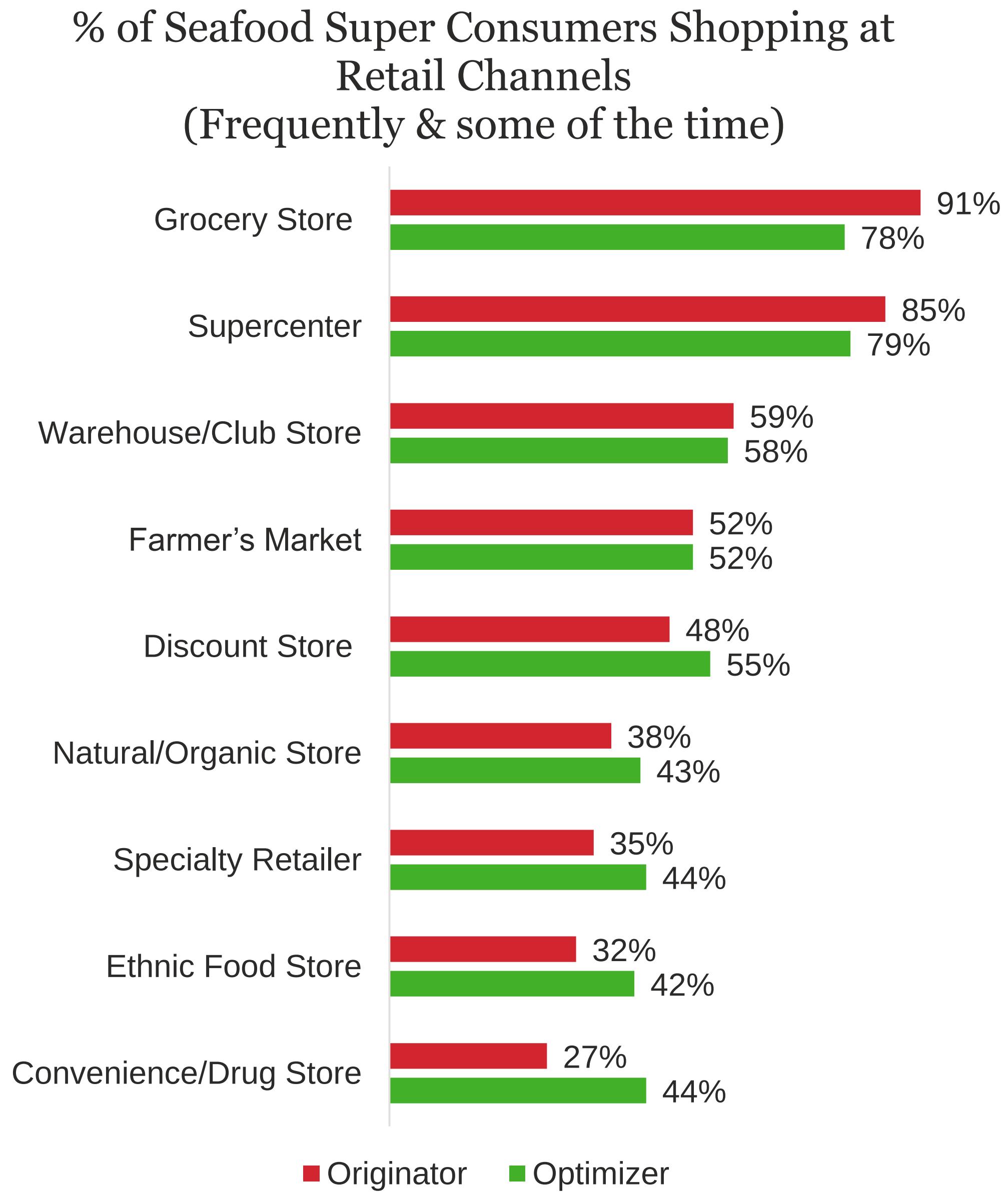


In general, how much time are you willing to spend preparing food for the dinner daypart on weekdays and weekends?
Base: 3579

Brick and Mortar Retail

Traditional grocery stores and supercenters are the most common retail sources for the Seafood Super Consumers.

Smaller retail channels, however, capture some share of wallet for these consumer groups with over half (52%) shopping at Farmer's Markets on a regular basis. Usage of Natural/Organic and Specialty Retail is also common among these groups.



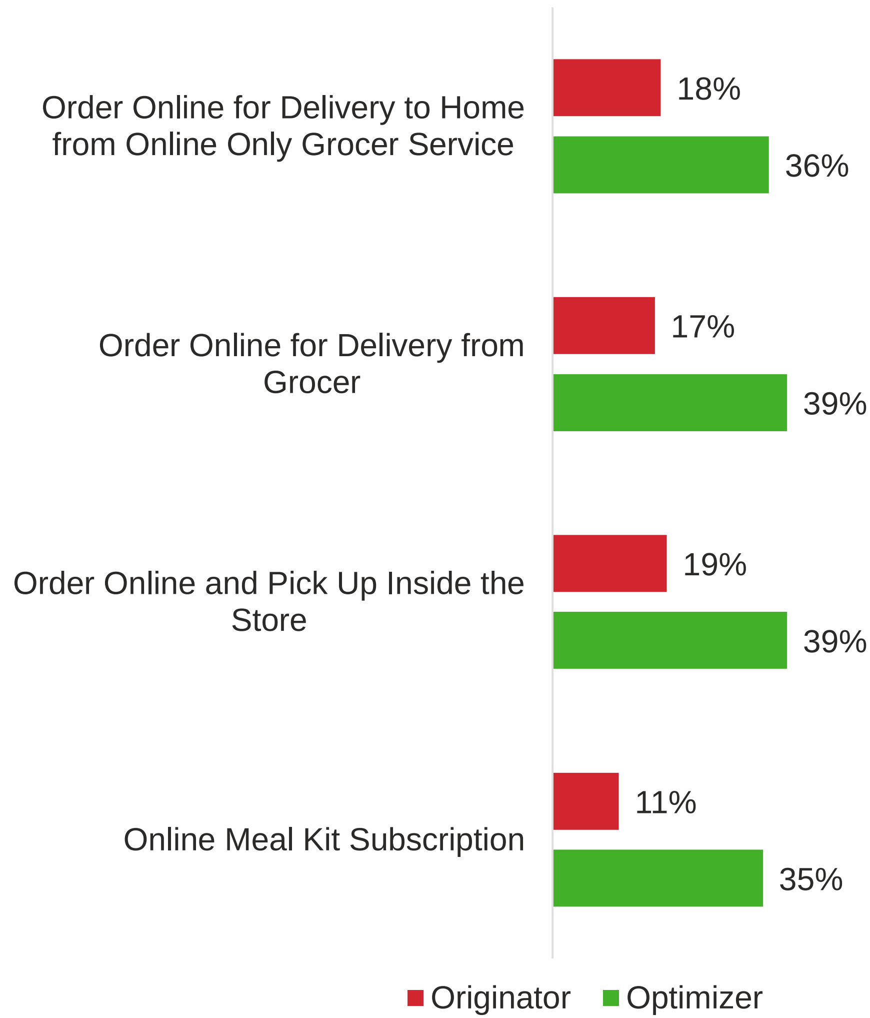
How often do you buy your household groceries from the following types of retailers?
Base: 3,579

Ecommerce Retail

Optimizers are bullish on ecommerce, with over one-third of Optimizers already leveraging ecommerce channels to source groceries.

This trend is consistent with the Optimizer mentality, which drives them to seek out new tools to more easily facilitate everyday activities.

% of Seafood Super Consumers Currently Utilizing Ecommerce to Source Groceries (Frequently & some of the time)

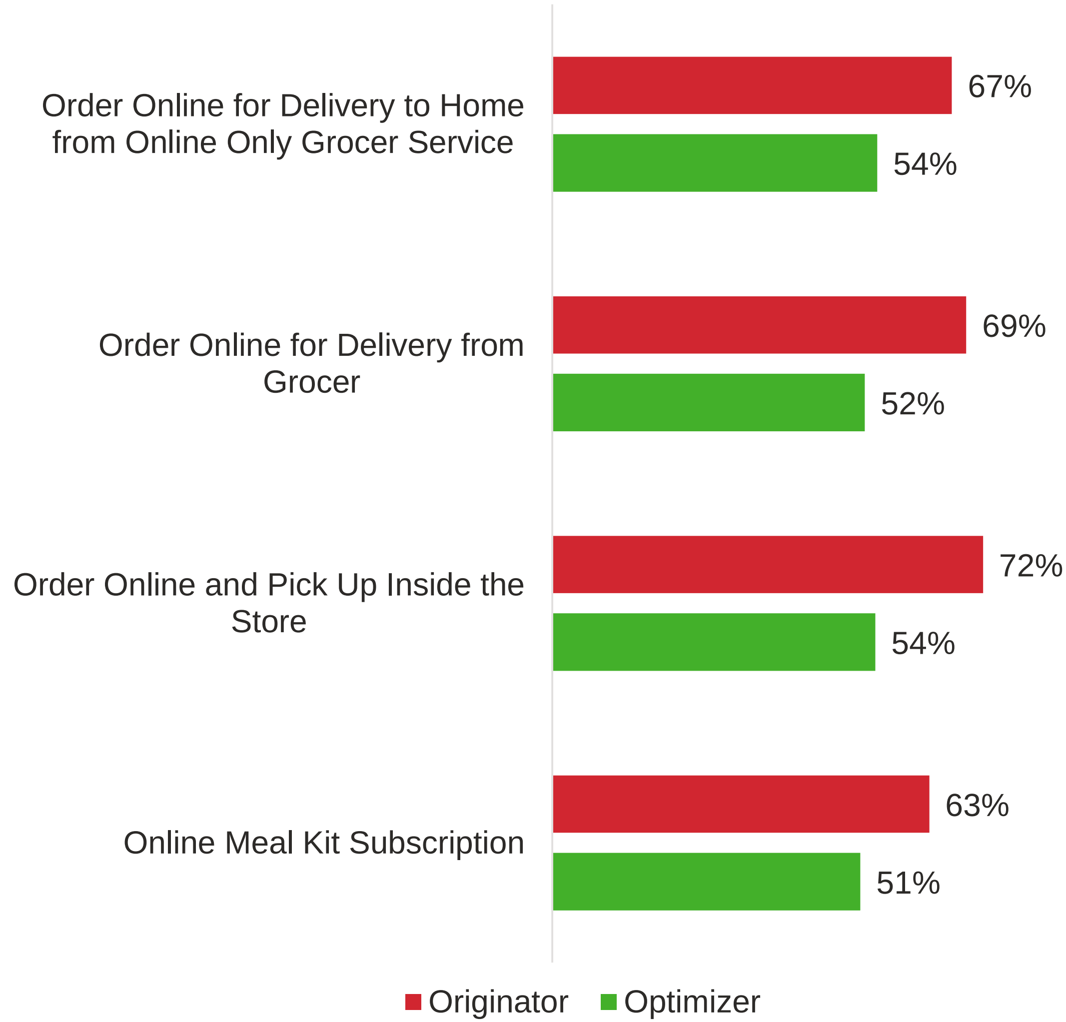


How often do you buy your household groceries from the following types of retailers?
Base: 3,579

Ecommerce Non-users

Of those Seafood Super Consumers not currently leveraging ecommerce solutions to source their groceries, the majority are willing to do so in the future.

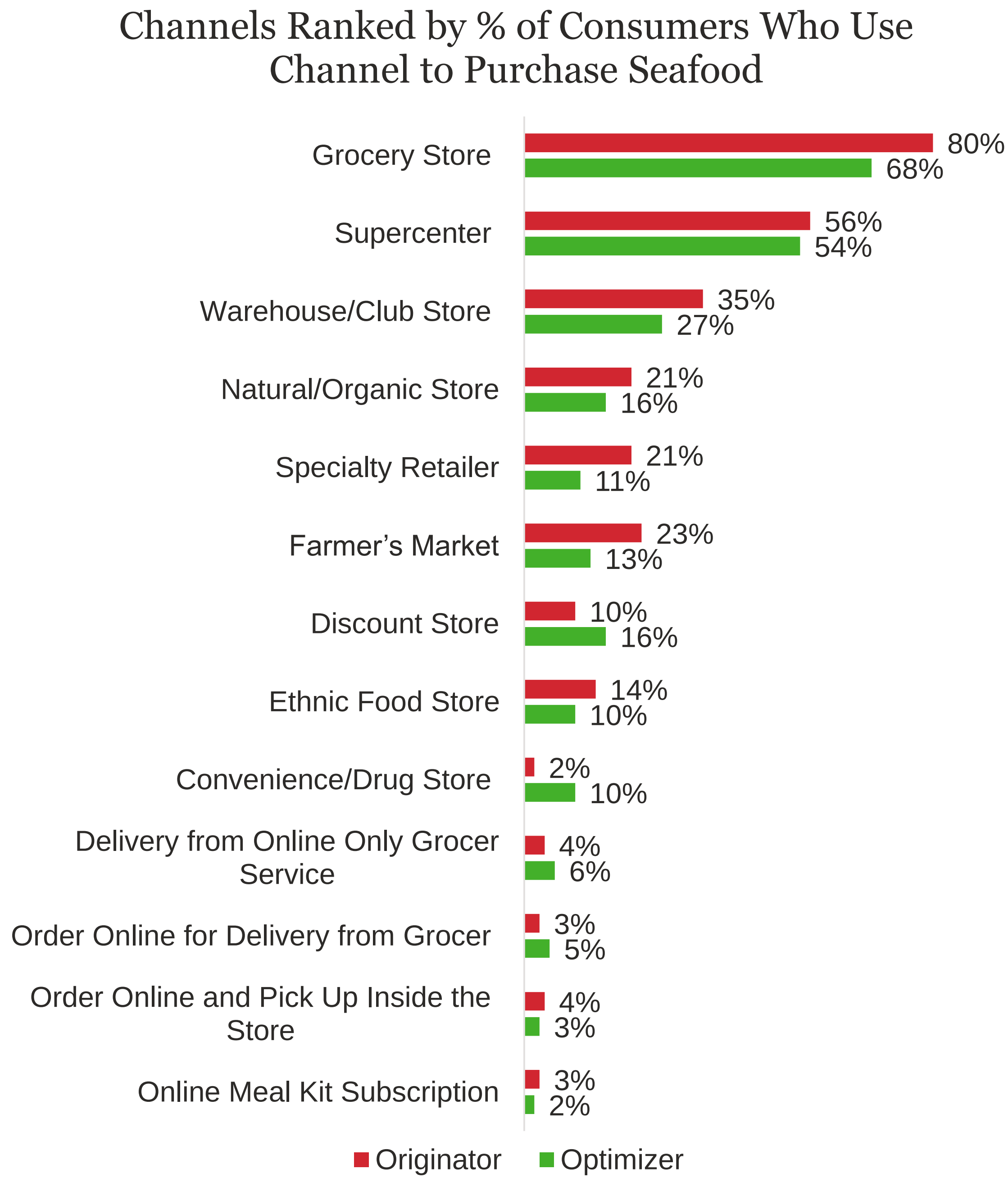
% of Seafood Super Consumers not Currently Using Ecommerce Grocery Channels but Willing to Use in the Future



How often do you buy your household groceries from the following types of retailers?
Bases vary by channel

Channel Usage for Seafood

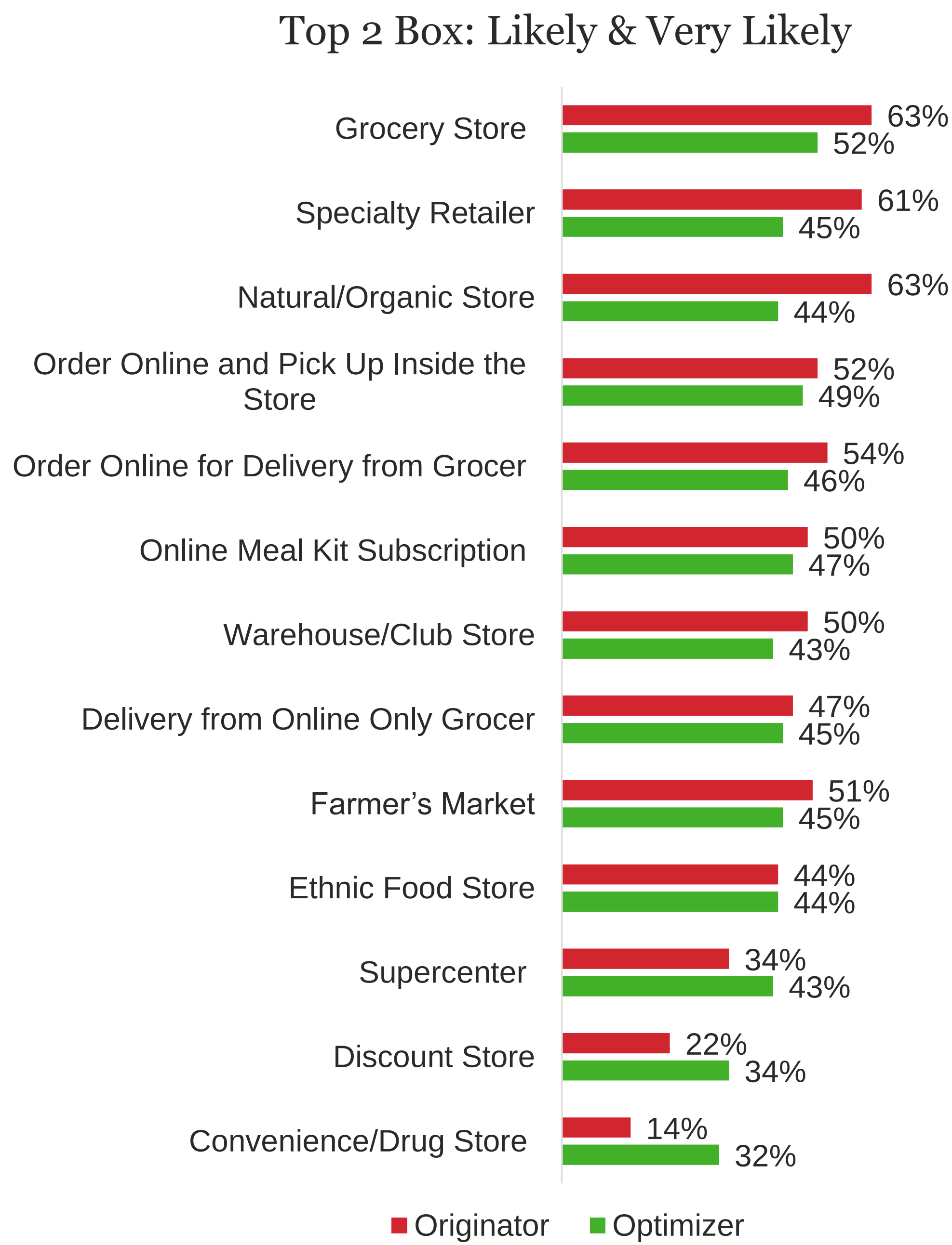
Grocery stores and supercenters currently represent the dominant source for seafood, even among Seafood Super Consumer populations.



Bases vary by channel
You mentioned that you purchase groceries at the following types of retailers. Where do you purchase ________? Please select all that apply.

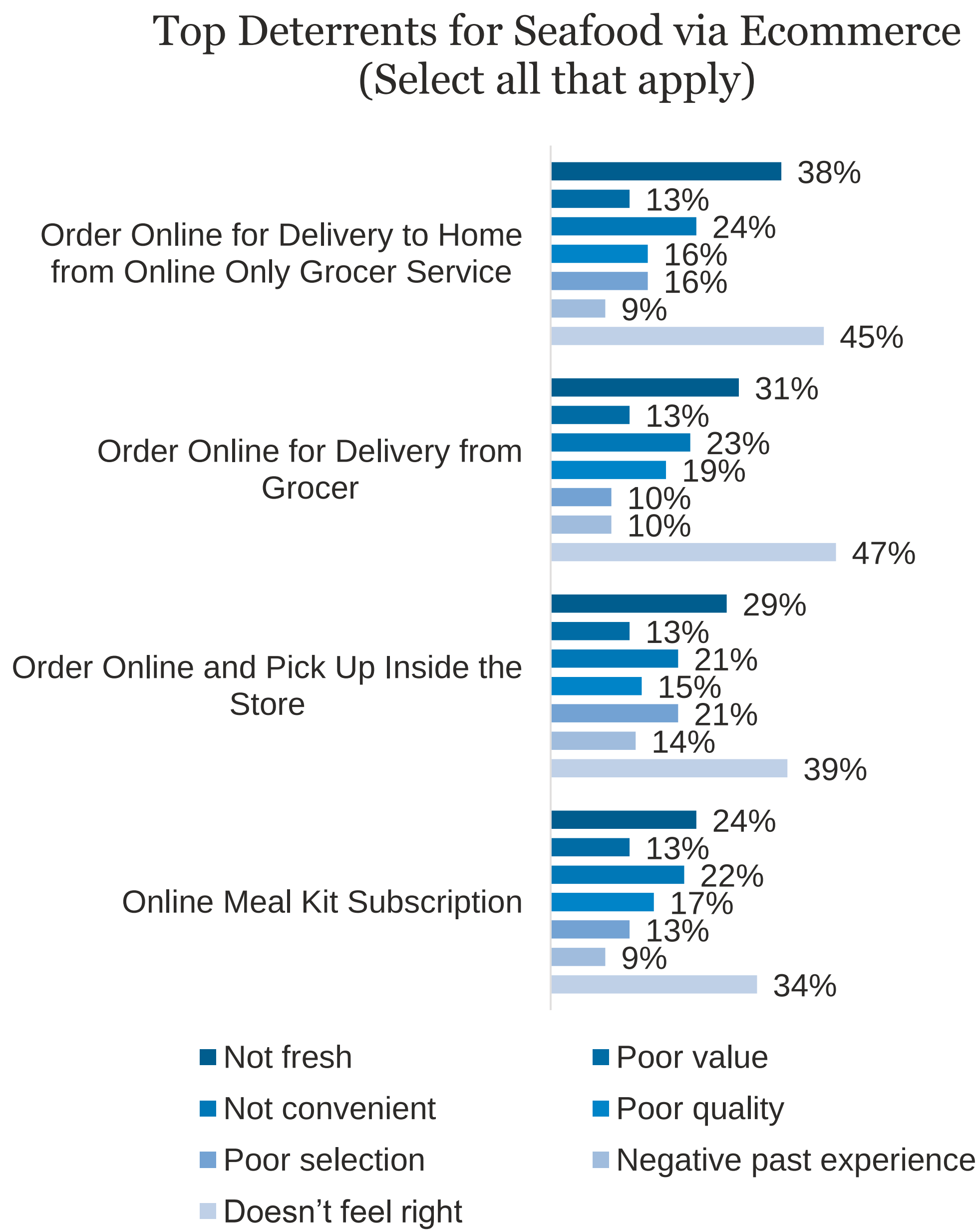
Likelihood to Use Channels for Seafood

While current seafood sourcing remains limited in terms of channel variety, there is an appetite among Seafood Super Consumers to make seafood purchases in a far wider array of locations and establishments.



Base: 3,579
You mention that you do not source fish/seafood from the following types of retailers. On a scale of 1-5 how likely would you be to sourcing fish/seafood from these types of retailers in the future? .

Top Deterrents



For those who would not consider ordering seafood via ecommerce channels, the primary blocker across these channels is that it just "doesn't feel right."

The other common blockers to ordering seafood online are concerns around freshness and convenience.

As ecommerce becomes more engrained as the primary consumer-facing marketplace, issues around convenience and a general "doesn't feel right" mentality are likely to fade.

Base: >174 per channel
You mention that it is unlikely that you would source seafood from __________. What are the primary deterrents? Select all that apply

Alaska Impact on Consumer Sentiment

The brand equity gained by displaying the Alaska seafood logo extends beyond perceptions of freshness and quality. Foodservice and retail establishments that offer Alaska seafood reap the benefits of the brand. Consumers are more likely feel positively towards establishments offering Alaska seafood (e.g. Consumers are more likely to feel that these establishments are proud of their offering and care about providing the best product possible to their customers).

Foodservice		**Retail**	
Trust the restaurant is proud to serve Alaska fish/seafood	66%	Trust the retailer is proud to offer Alaska fish/seafood	65%
Trust the restaurant wants to make a good impression on its customers	63%	Trust the retailer wants to make a good impression on its customers	63%
Trust the restaurant cares about the quality of the food it serves	62%	Trust the retailer cares about the quality of the food it serves	61%
Trust the restaurant is a good place to get fish/seafood	62%	Trust the retailer is a good place to get fish/seafood	61%
Trust the restaurant has high quality food	58%	Trust the retailer has high quality food	59%
Trust the restaurant cares about the environment	45%	Trust the retailer cares about the environment	45%
Order a fish/seafood dish	63%	Purchase fish/seafood from this retailer	59%
Return to the restaurant in the near future	54%	Return to this retailer in near the future	53%
Be willing to pay more for Alaska fish/seafood from this restaurant	40%	Be willing to pay more for Alaska fish/seafood from this retailer	40%
Recommend the restaurant to family and friends	48%	Recommend the retailer to family and friends	49%
Be willing to pay more for fish/seafood from this restaurant	39%	Be willing to pay more for fish/seafood from this retailer	40%

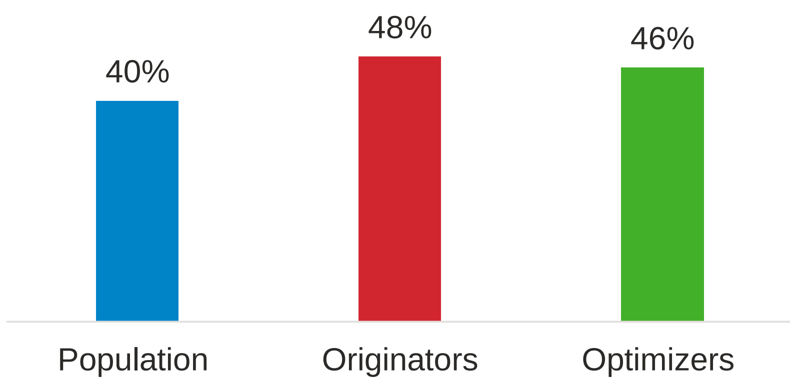
Base: 3,579
If a retailer/restaurant uses ‘the ASMI logo’ to describe the fish/seafood offering, would you be more likely to… (please answer on a scale of 1-5 where 1 = Disagree completely and 5 = Agree completely

Willingness to Pay More for Alaska

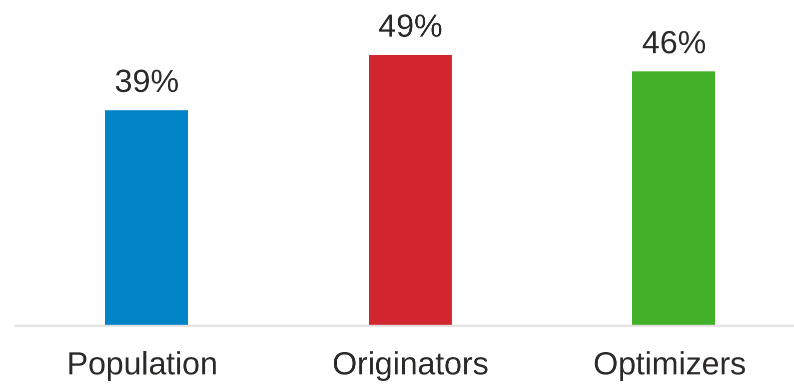
When labeled with the Alaska seafood logo, 40% of seafood eaters report they are willing to pay more for Alaska seafood at foodservice. 39% are willing to pay more in retail contexts. This willingness to spend more is heightened among Seafood Super Consumer groups.

In foodservice and retail contexts, 46% of Optimizers are willing to pay more for Alaska while roughly half of Originators are willing to pay more.

% Willing to Pay More for Alaska Seafood at Foodservice (Top 2 box: agree & agree completely)



% Willing to Pay More for Alaska Seafood at Retail (Top 2 box: agree & agree completely)

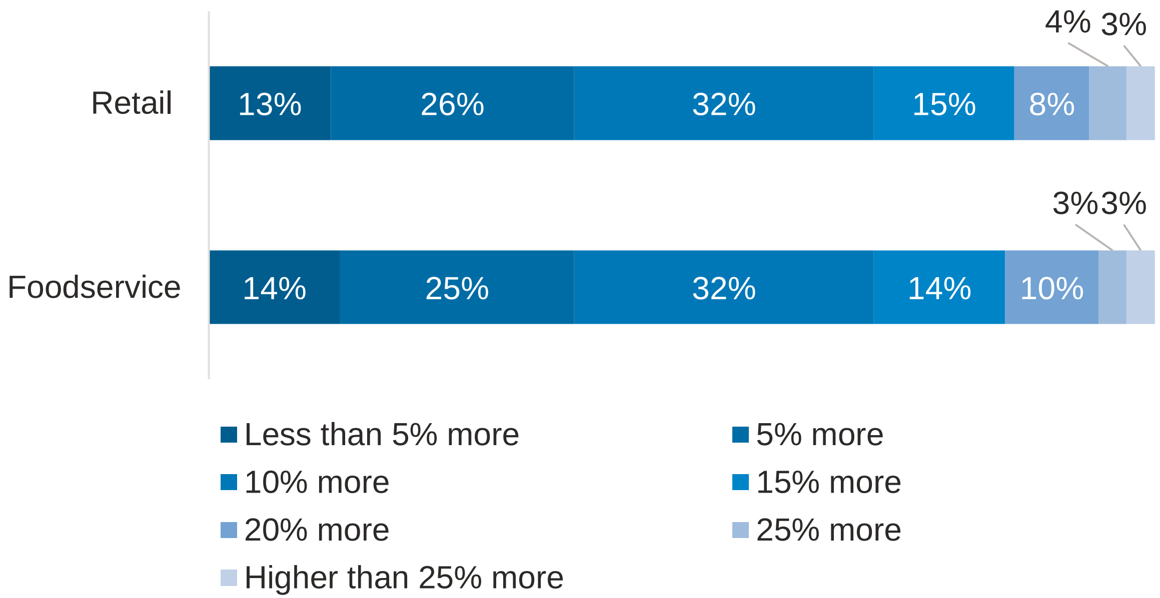


If a restaurant uses 'the ASMI logo' to describe the fish/seafood on its menu, would you be more likely to be willing to pay more for Alaska fish/seafood from this restaurant?
If a retailer uses 'the ASMI logo to describe the fish/seafood offering, would you be more likely to likely to be willing to pay more for Alaska fish/seafood from this retailer?
Base: 3,579

Willingness to Pay More for Alaska

Of those seafood eaters who are willing to pay extra for Alaska seafood, 61% are willing to pay at least 10% more at foodservice and retail. This price threshold stretches further for Seafood Super Consumer groups.

How Much More Consumers Are Willing to Pay for Alaska

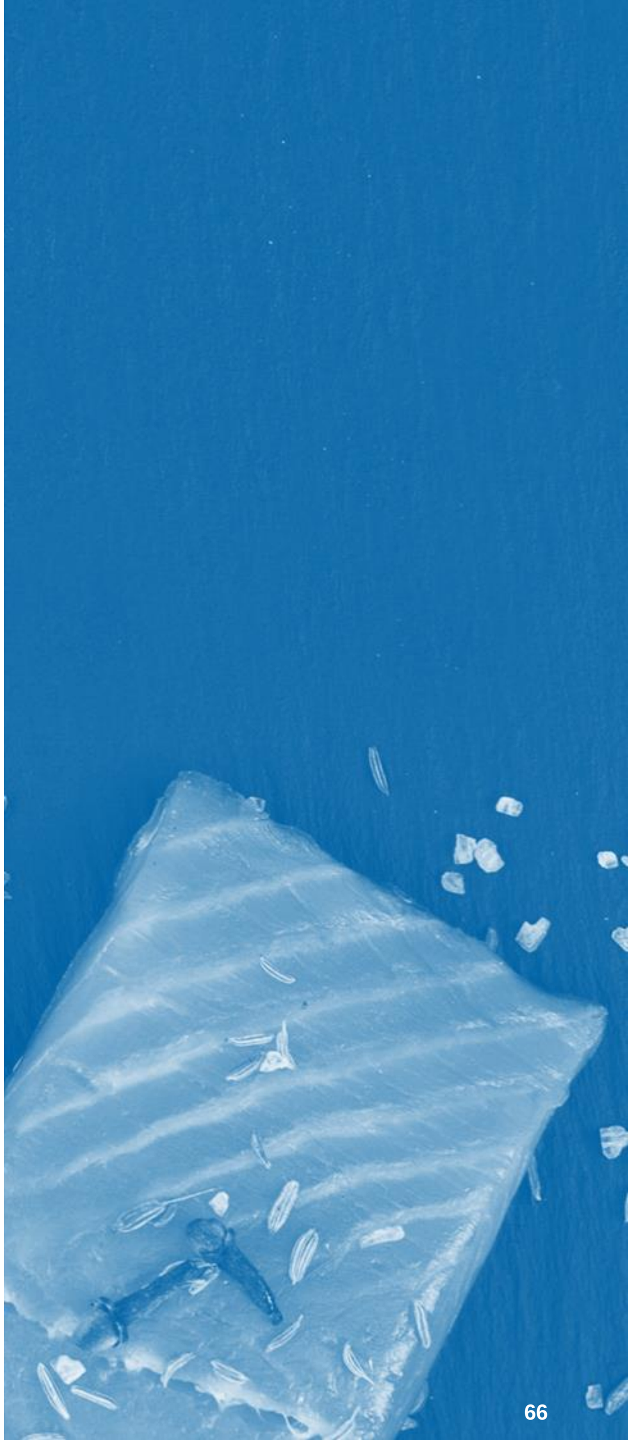


% of Those Willing to Pay 10% or More for Alaska

	Retail	Foodservice
Population	61%	61%
Originators	66%	65%
Optimizers	68%	69%

You mention you would me more willing to pay more for Alaska fish/seafood at a restaurant. How much more would you be willing to pay?
Base: 1481

Accessing the Target Consumer

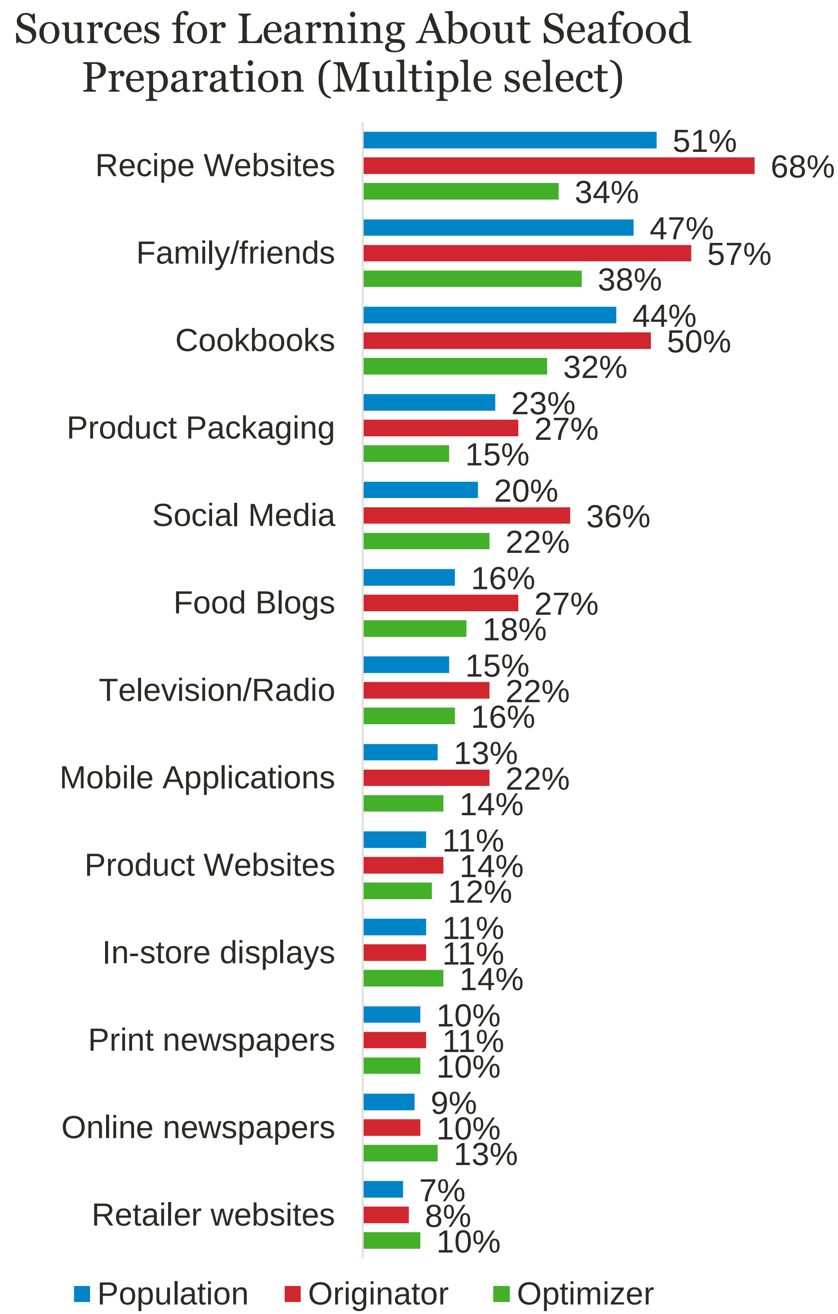


Learning About Seafood Preparation

Recipe websites, word of mouth and cookbooks are among the highest impact channels for consumer education about seafood preparation.

These channels are particularly salient with Originators, who have an eye on new and innovative ways to incorporate seafood into their at-home meals.

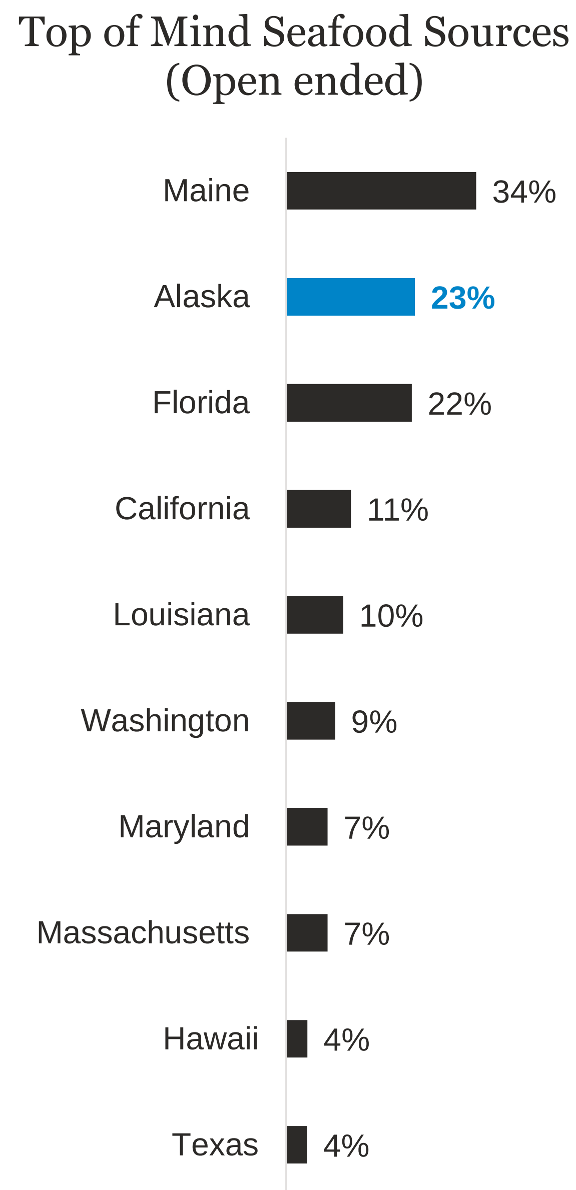
Notably, 36% of Originators identify social media as an impactful source of knowledge about seafood preparation.



How do you get information about how to cook fish/seafood?
Base: 3,579

Top of Mind Seafood Sources

Alaska has a strong top of awareness in the seafood category, ranking 2nd behind Maine and ahead of Florida and California.



Now, thinking specifically about fish/seafood, Which US states or other countries come to mind when you think of sources of great seafood?
Base: 3,579

Knowledge of Origin

In general, there is a lack of category knowledge among the consumer base. When asked to match species to their appropriate origins, even Seafood Super Consumers struggled to make appropriate matches.

Many simply indicated that they weren't sure about a species source. 52% of Originators and 47% of Optimizers were not sure where pollock is harvested.

61% of Originators identified Alaska as a source for salmon, while only 38% of Optimizers were able to correctly make this match.

This suggests marketing certain lesser known species and their sourcing are targeting an audience without a reference point.

Top 10 Species Identified as from Alaska

Originator		
Species	**Alaska**	**Not sure**
Salmon	61%	14%
Crab	51%	17%
Cod	32%	26%
Halibut	28%	40%
Lobster	24%	17%
Tuna	23%	25%
Shrimp/Prawns	21%	22%
Pollock	19%	52%
Sablefish/Black Cod	18%	60%
Haddock	17%	51%

Optimizer		
Species	**Alaska**	**Not sure**
Salmon	38%	27%
Crab	33%	31%
Cod	24%	35%
Halibut	22%	44%
Lobster	21%	31%
Tuna	20%	33%
Shrimp/Prawns	19%	34%
Pollock	19%	47%
Sablefish/Black Cod	19%	47%
Scallops	19%	41%

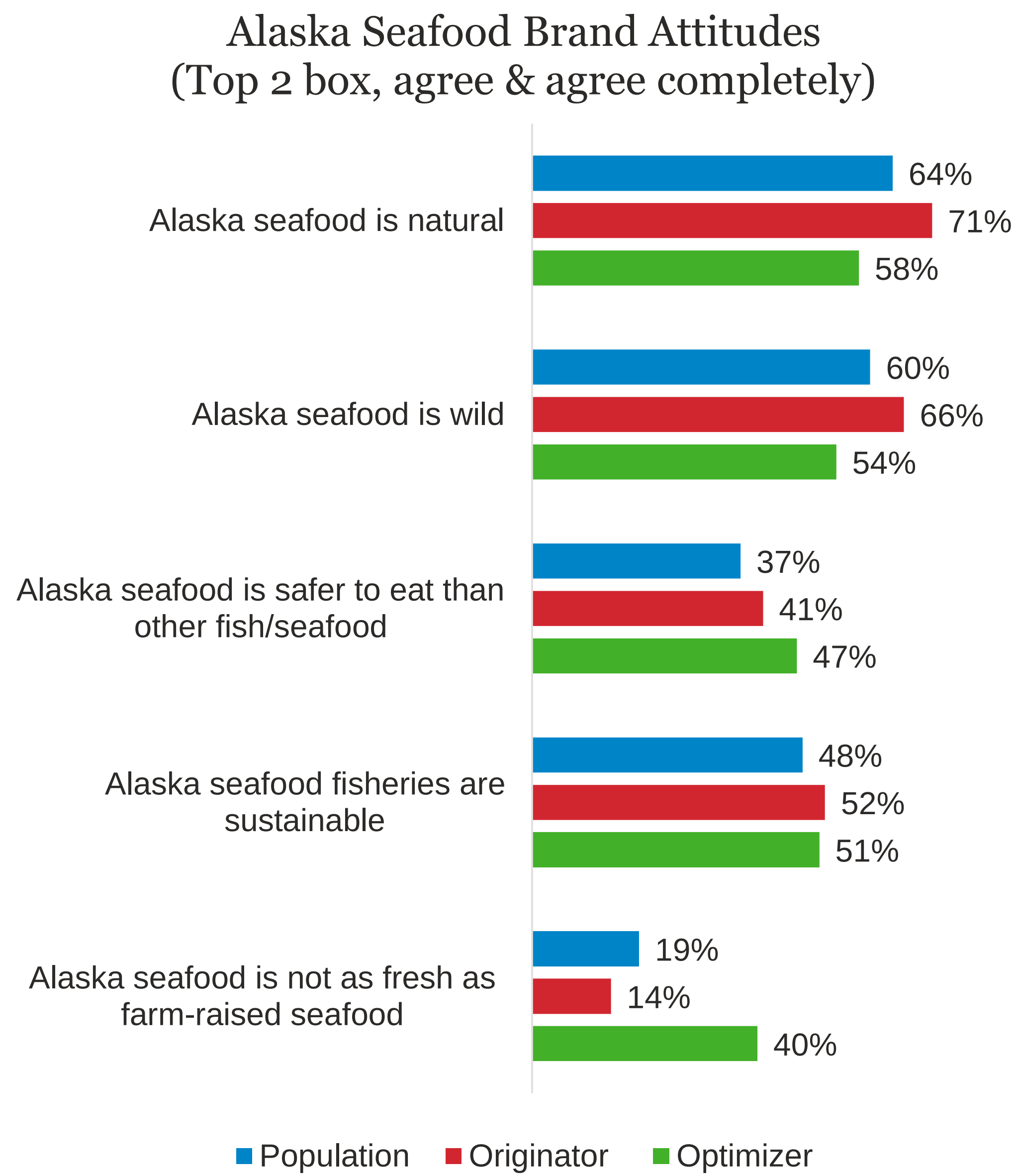
To the best of your knowledge please select the appropriate sources for each of the following types of fish/seafood.
Base: 3,740

"Alaska Seafood" Perceptions

Natural and wild as descriptors of Alaska seafood gain the most consensus among seafood consumers.

Natural, more than any other descriptor stands out, indicating that products from Alaska have a "natural" halo tied to their origin. In a retail and foodservice environment that places a premium on natural, Alaska seafood has an edge.

48% of consumers agreed that Alaska seafood is sustainable, suggesting that some consumers may need a reminder about the meaning of the Alaska seafood label.



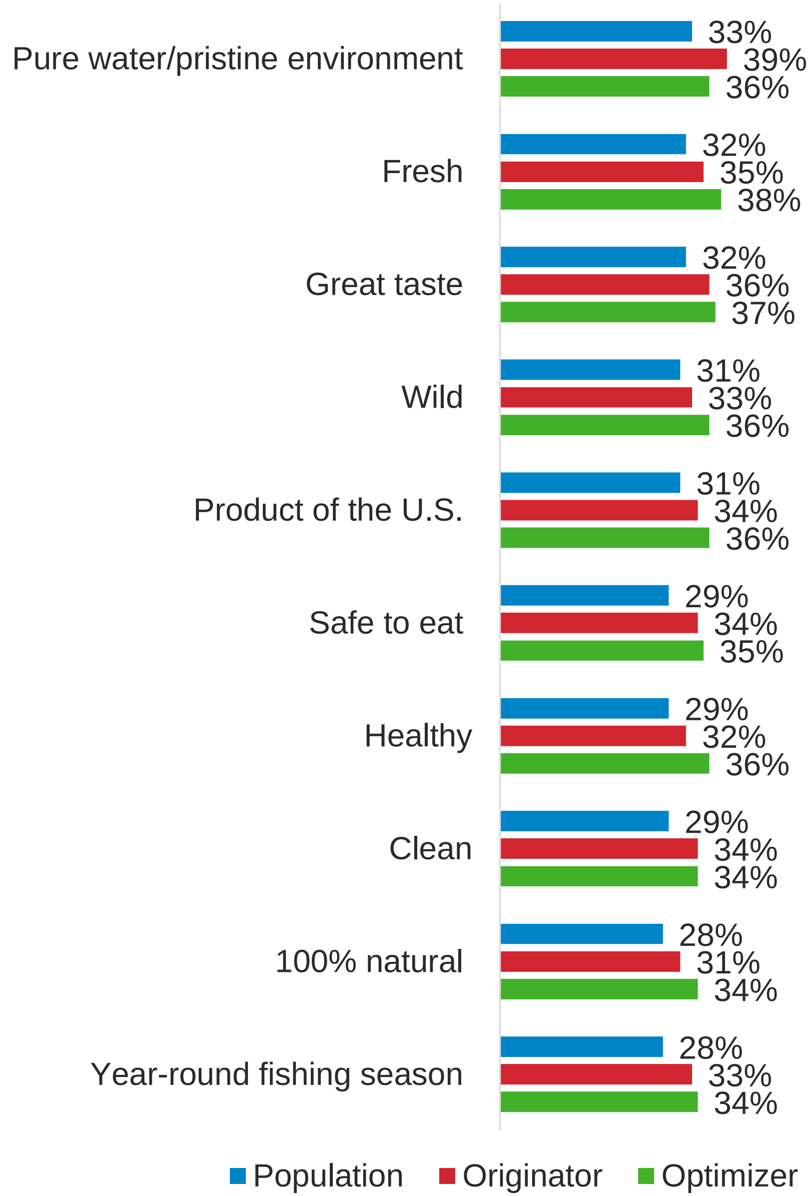
Please indicate how much you agree or disagree with each statement about Alaska seafood
Base: 3,740

Alaska Seafood Differentiation

Alaska's perception as a pure and pristine natural environment is the greatest differentiator for the region.

Fresh, great taste, wild and product of the U.S. also rank highly as Alaska differentiators.

Top 10 Attributes "True and Unique to Alaska"



Using the list below, we'd like you to rate the degree to which fish/seafood from Alaska fits each element.
Base: 3,740

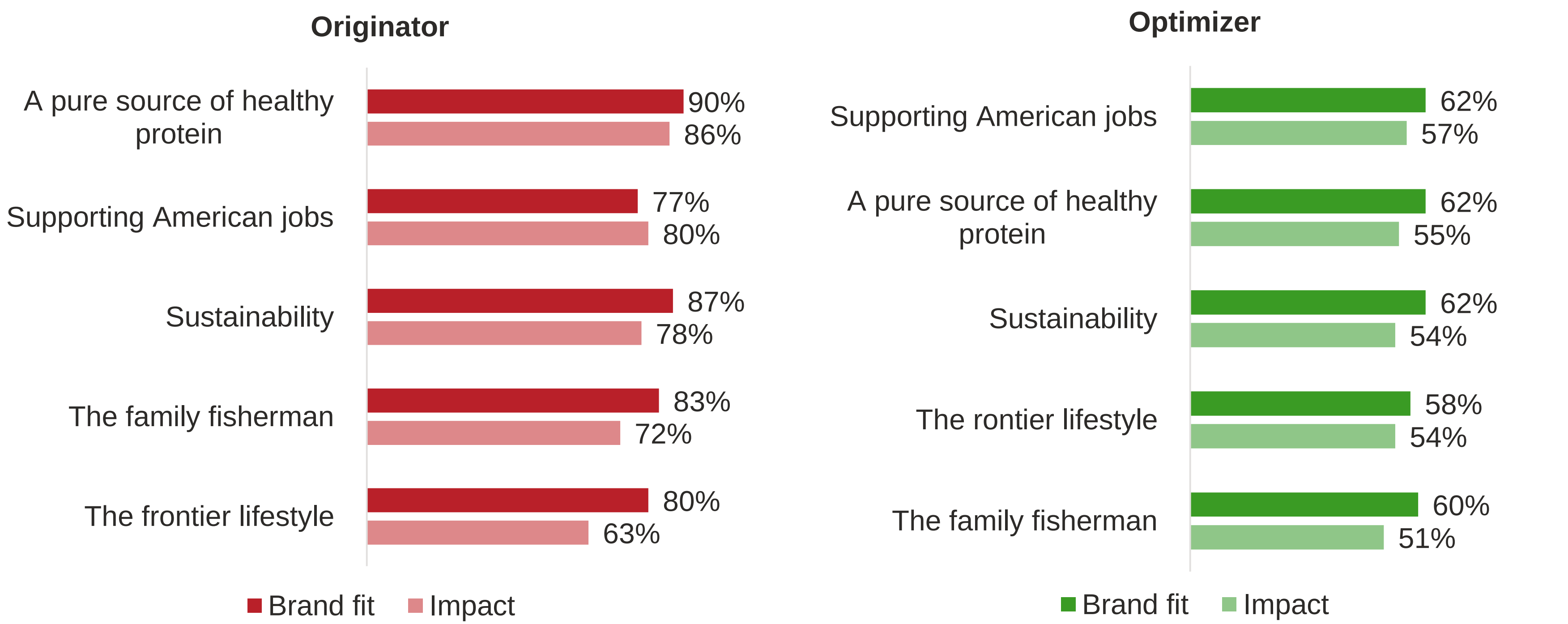
Alaska Messaging

In order to maximize messaging, pursuing directions that both align with consumer perception of Alaska seafood and have impact will put the brand in the best position for sales growth.

A pure source of healthy protein, supporting American jobs and sustainability ranked highest for both Seafood Super Consumer groups in terms of brand alignment and impact.

Pure source of healthy protein resonated highest with Originators while supporting American jobs ranked highest for Optimizers.

Messaging Impact and Brand Fit (Top 2 box)



Now knowing what you do about Alaska Seafood, how strongly do the following messages fit with the Alaska Seafood Brand?
Now imagine you are sourcing fish/seafood for at-home or away-from-home consumption. Please indicate how impactful these messages are. Please respond on a scale 1-5 where 1 = not impactful at all and 5 = very impactful.
Base: 3,740

Sustainability Centric Messaging

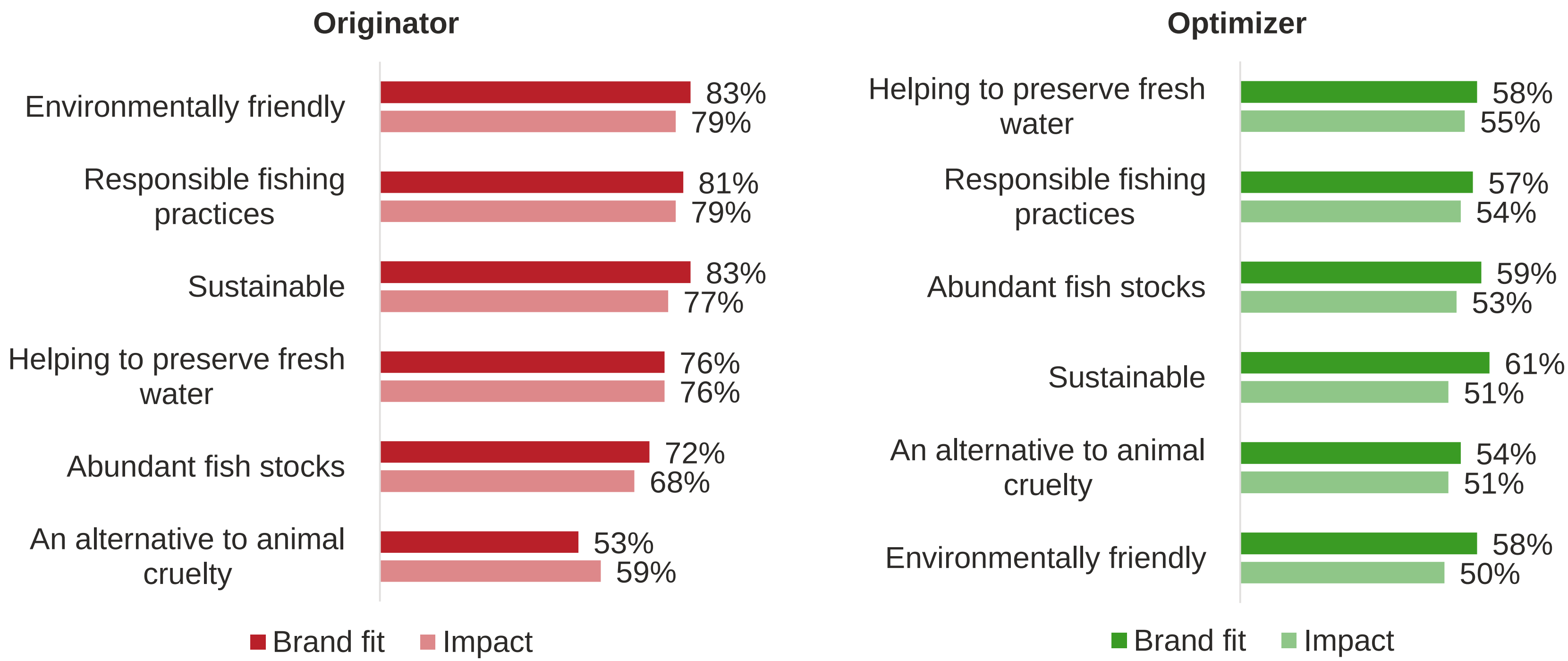
Seafood Super Consumers differed somewhat when considering specific messages around sustainability.

Originators found messaging around being environmentally friendly and sustainable to be more impactful that their Optimizer counterparts.

For Optimizers, messaging around preserving fresh water and fishing from abundant fish stock is more impactful.

For both groups, messaging highlighting responsible fishing practices was both impactful and a good fit with the Alaska seafood brand.

Messaging Impact and Brand Fit (Top 2 box)



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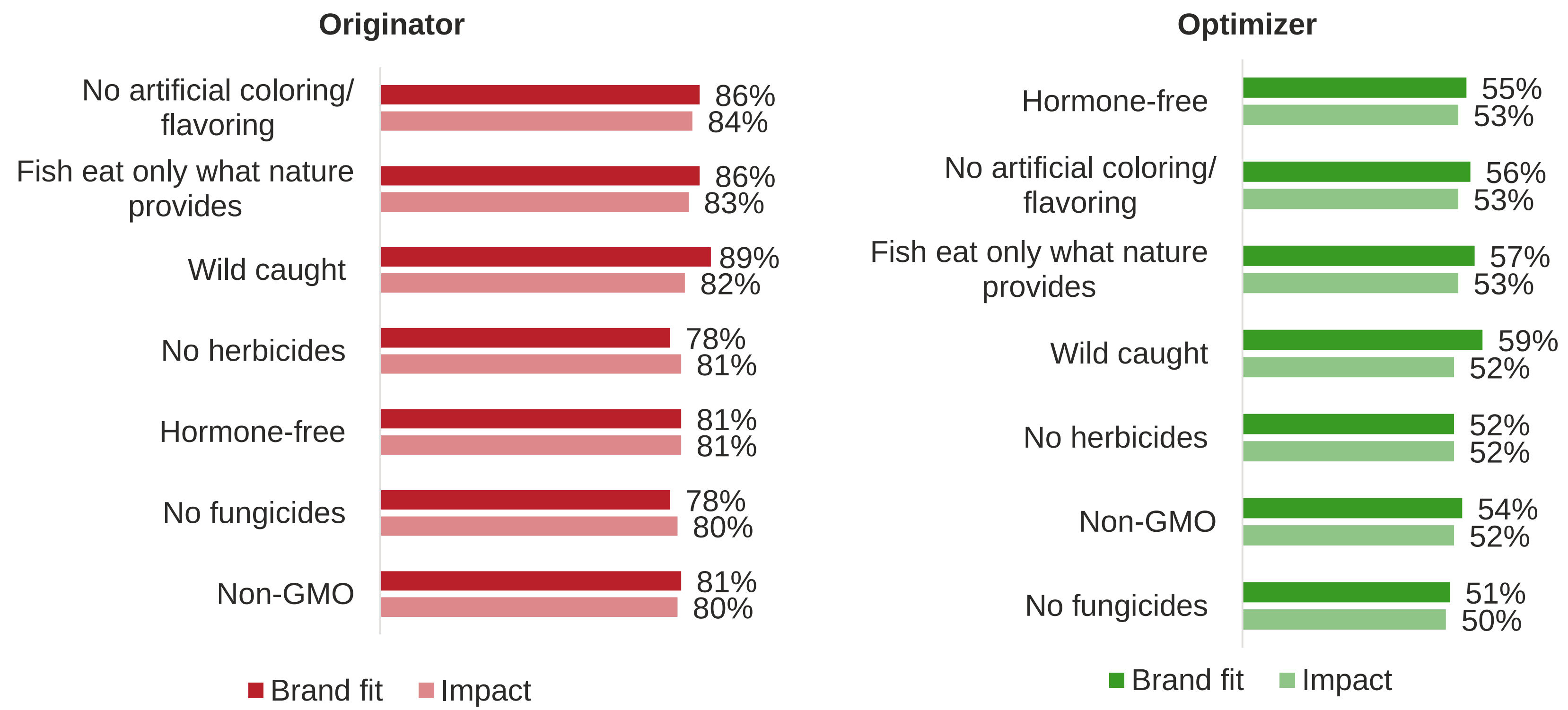
Base: 3,740

Clean Label Messaging

No artificial flavoring and natural fish feed resonated well among Seafood Super Consumers. Messaging around hormone-free ranked higher among Optimizers, while wild caught was more of a priority for Originators.

Messaging Impact and Brand Fit (Top 2 box)



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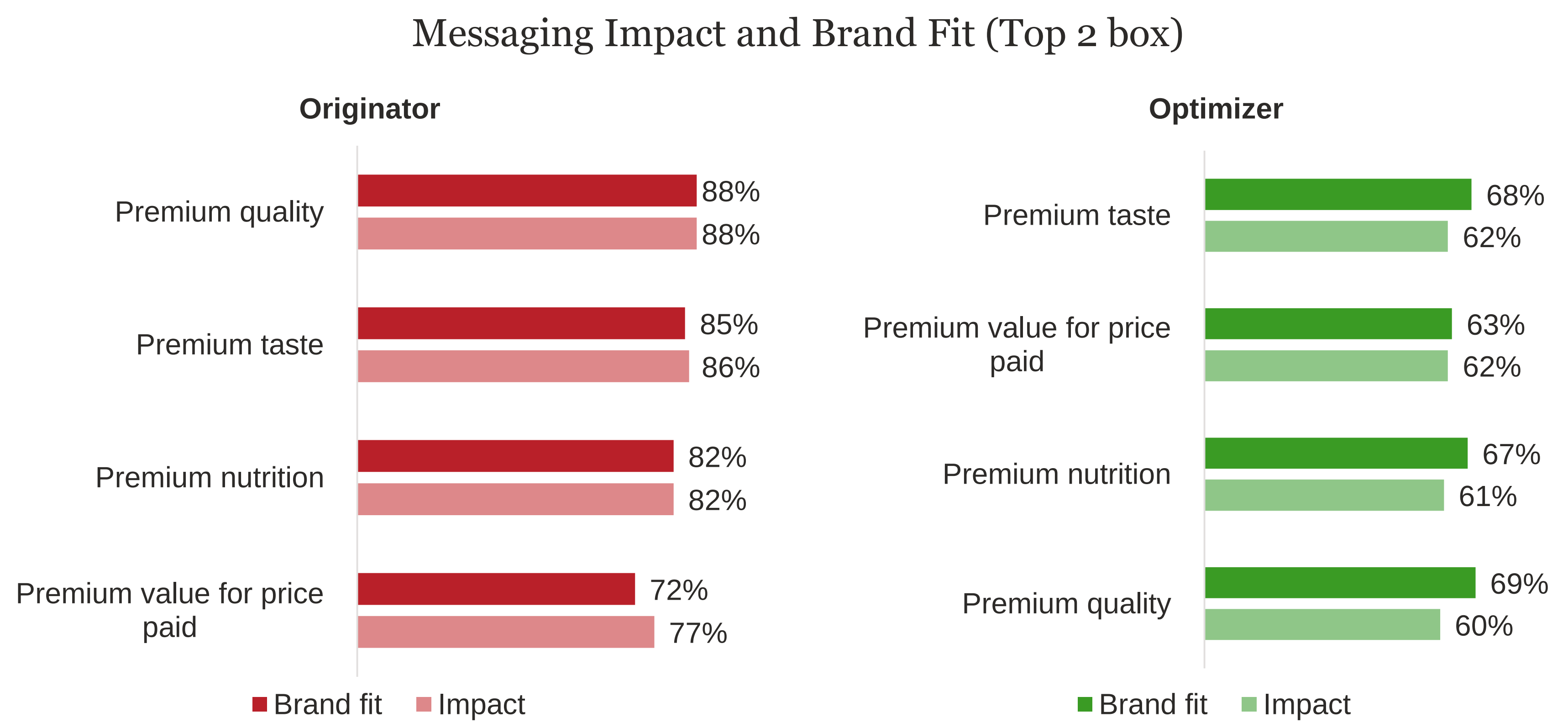
Base: 3,740

"Premium" Messaging

Premium messages resonate for Optimizers and Originators alike. For Originators highlighting premium taste and quality rank highest. For Optimizers, premium taste and value were the most important factors.



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Now imagine you are sourcing fish/seafood for at-home or away-from-home consumption. Please indicate how impactful these messages are. Please respond on a scale 1-5 where 1 = not impactful at all and 5 = very impactful.
Base: 3,740

Messaging Summary

Below is a ranked summary of the messages tested for brand alignment and impact.

For Originators, a pure source of healthy protein, wild caught and premium quality were most closely associated with Alaska seafood. Two-thirds of those messages, namely pure source and premium quality, also registered as being most impactful.

For Optimizers, messages around premium win out in terms of brand fit and impact. premium quality, premium taste and premium nutrition ranked highest in terms of brand fit while premium taste, premium value and premium nutrition were identified as most impactful.

Originator

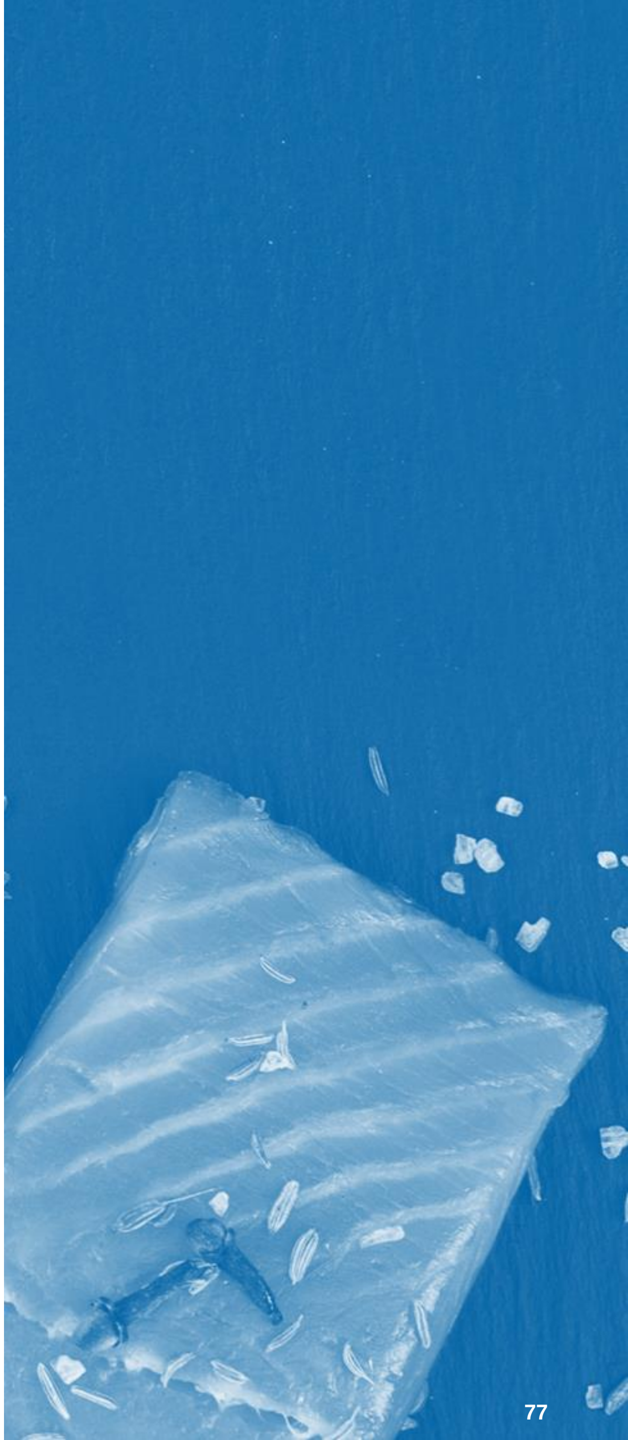
Top Fit	Top Impact
A pure source of healthy protein	Premium quality
Wild caught	A pure source of healthy protein
Premium quality	Premium taste
Sustainability	No artificial coloring/flavoring/additives
No artificial coloring/flavoring/additives	Fish that eat only what mother nature provides
Fish that eat only what mother nature provides	Wild caught
Premium taste	Premium nutrition
The family fisherman	Hormone-free
Environmentally friendly	No herbicides
Sustainable	Non-GMO

Optimizer

Top Fit	Top Impact
Premium quality	Premium taste
Premium taste	Premium value for price paid
Premium nutrition	Premium nutrition
Premium value for price paid	Premium quality
Supporting American jobs	Supporting American jobs
A pure source of healthy protein	A pure source of healthy protein
Sustainability	Helping to preserve fresh water
Sustainable	Sustainability
The family fisherman	The frontier lifestyle
Abundant fish stocks	Responsible fishing practices

Now knowing what you do about Alaska Seafood, how strongly do the following messages fit with the Alaska Seafood Brand?
Now imagine you are sourcing fish/seafood for at-home or away-from-home consumption. Please indicate how impactful these messages are. Please respond on a scale 1-5 where 1 = not impactful at all and 5 = very impactful.
Base: 3,740

Non-eaters



History with Seafood

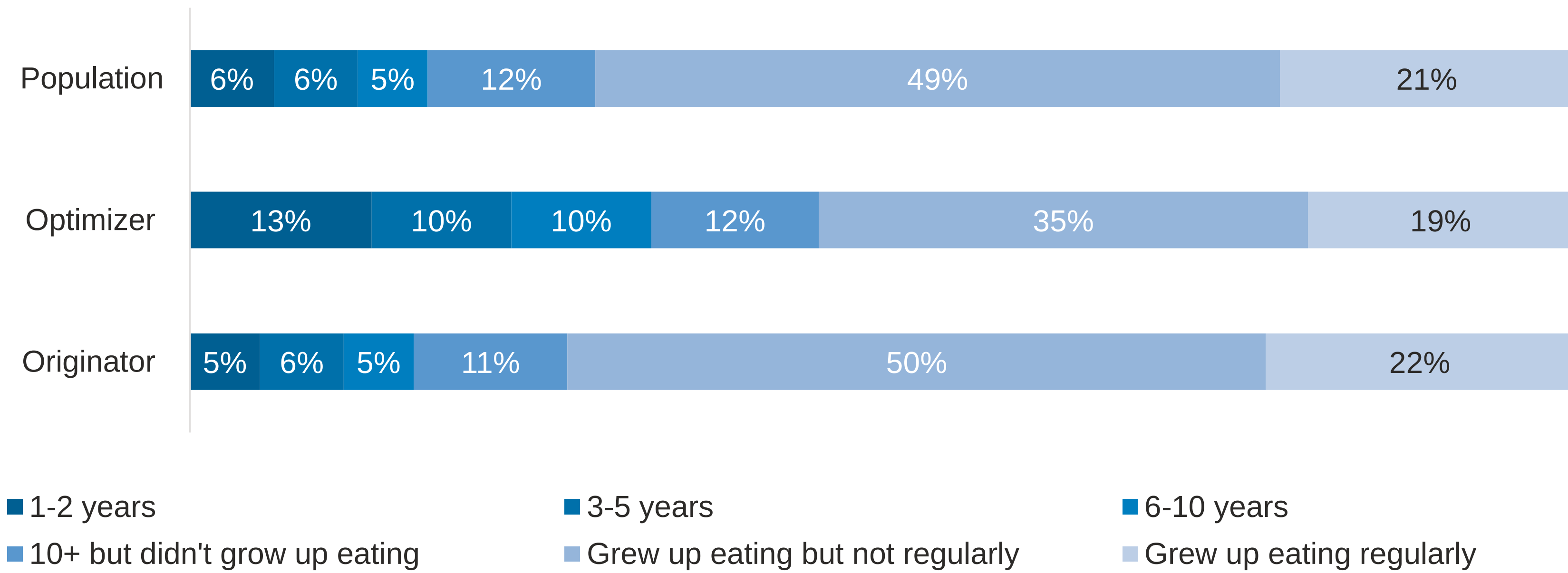
70% of seafood eaters grew up eating seafood. However only 21% grew up with seafood as a staple part of their diet.

Originators largely track with the overall population trends.

Optimizers, on average, are newer to the seafood category than the general population, with 13% of Optimizers indicating that they began eating seafood within the past 1-2 years.

This suggests that a long history with the category is not required to fall into a Seafood Super Consumer categories, bolstering the potential value of converting current non-eaters.

When Did You Begin Eating Fish/Seafood?



When did you start eating fish/seafood?
Base: 3,579 (All seafood consumer segments)

At-home Non-Seafood Eater Diet

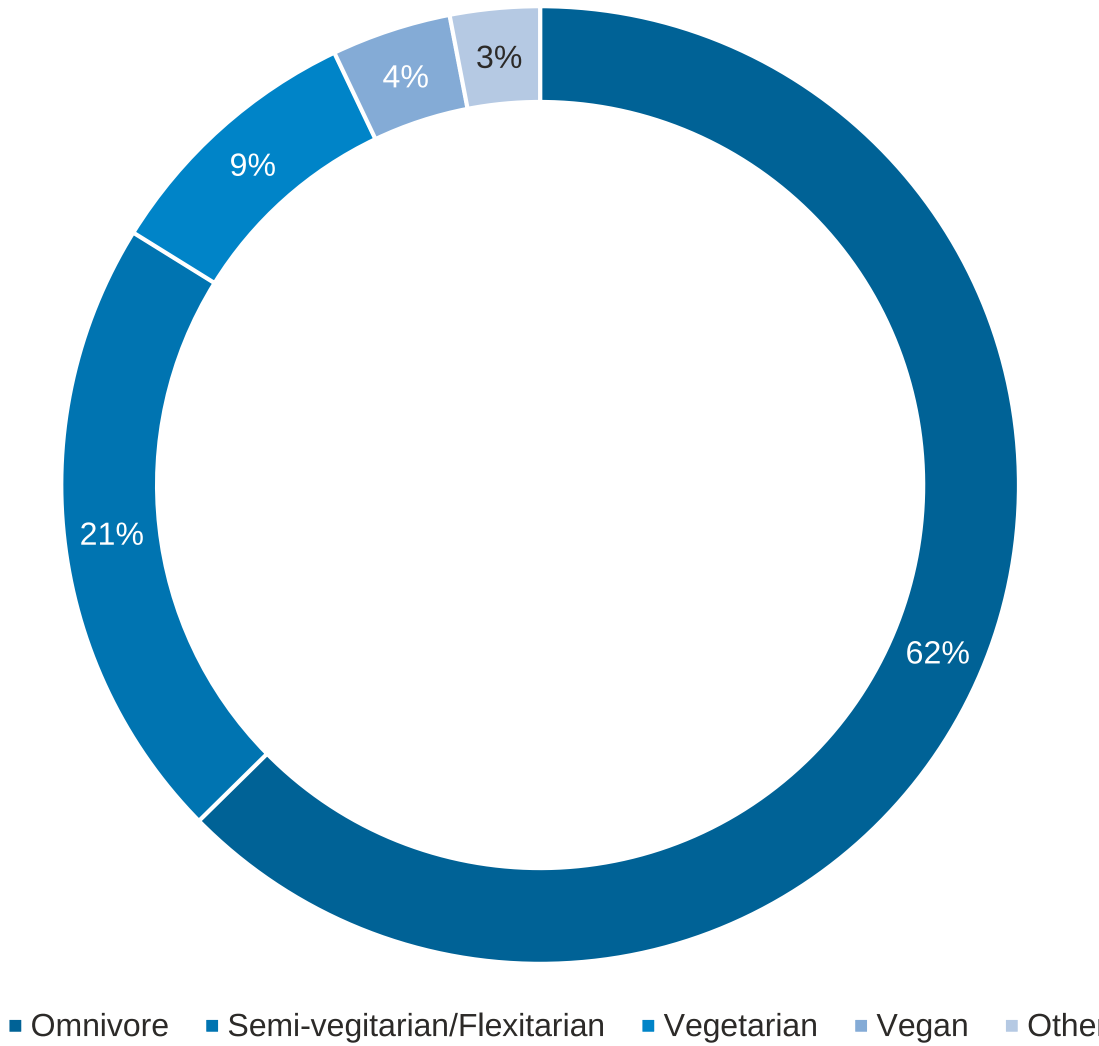
The majority of consumers who do not eat seafood at-home are omnivores.

Vegetarians and vegans account for 13% of those who do not eat seafood at-home.

There is a meaningful number of non-eaters in the flexitarian category.

In relation to protein consumption, how would you describe your diet?
Base: 381 (Consumers who do not eat seafood at-home)

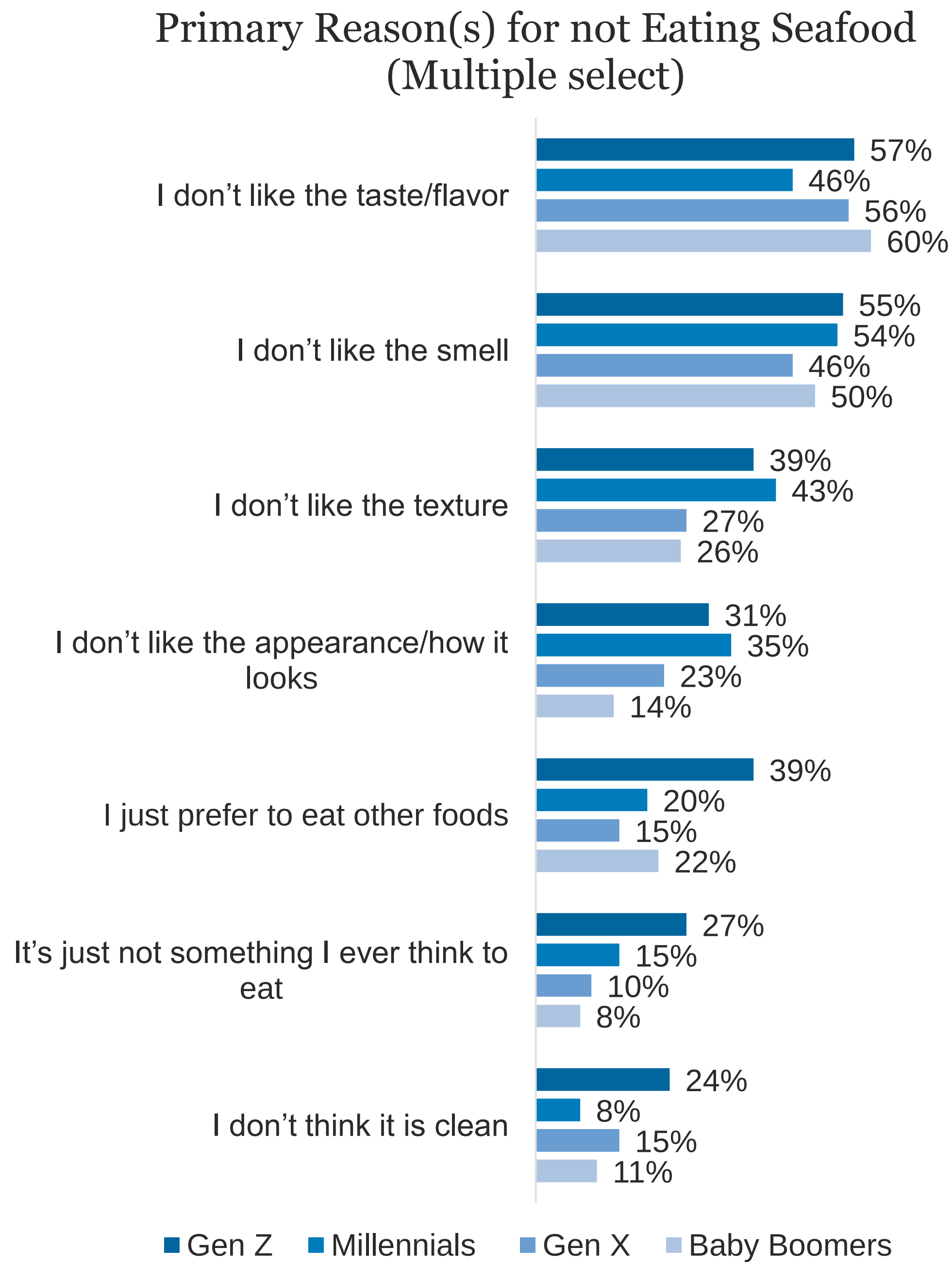
Overall Diet of Consumers Who Do Not Eat Seafood At-home (Multiple Select)



Seafood Deterrents

Most frequently cited deterrents to seafood consumption include perceived aversion to taste/flavor, smell and texture.

For some younger non-eater consumers, there is not a strong aversion based on qualities of the protein but rather a lack of top of mind awareness or preference for other foods available.



Base: 260
You mention that you don’t eat fish/seafood. What are your primary reasons for not eating seafood? Please select all that apply

Questions?

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