



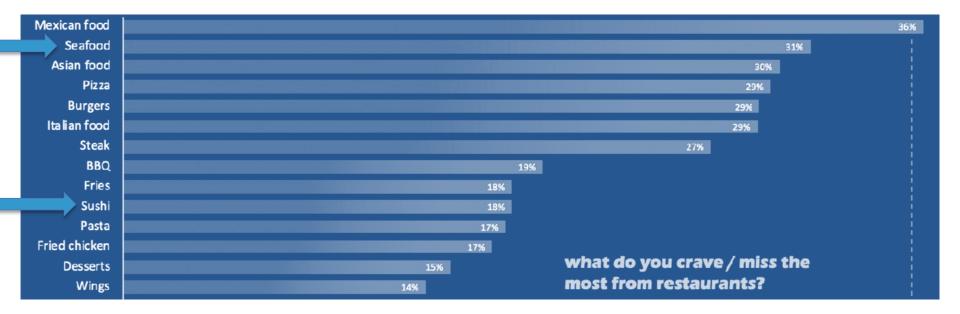
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State of The Science

September 17, 2020

AMERICANS MISS SEAFOOD!



Datassential in National Restaurant News 5/11/20



CONSUMER BEHAVIOR CHANGE

We have a once in a lifetime opportunity to help Americans embrace the vital benefits of sustainable seafood for our health, our planet's health, and for our economy's health.





SEAFOOD4HEALTH ACTION COALITION

(Multi-sector Collaboration)

- Alaska Seafood Marketing Institute
- Aquaculture Stewardship Council
- Aquarium of the Pacific, Seafood for the Future
- Bristol Bay Regional Seafood Development Association
- Chilean Salmon Marketing Council
- Coastal Culinary Academy
- Conservation Alliance for Seafood Solutions
- East Coast Shellfish Growers Association
- Environmental Defense Fund
- Fair Trade USA

SEAFOOD

- FishChoice
- FishWise Food Marketing Institute - Seafood Strategy Leadership Council

SEAFOODNITR

- Genuine Alaska Pollock Producers
- Global Aquaculture Alliance

- Global Salmon Initiative
- Gulf of Maine Research Institute
- Gulf of Mexico Reef Fish Shareholders' Alliance
- Gulf Seafood Foundation
- James Beard Foundation Smart Catch
- Maine Aquaculture Association
- Maine Coast Fishermen's Association
- Marine Stewardship Council
- Monterey Bay Aquarium Seafood Watch
- National Fisheries Institute
- National Marine Sanctuary Foundation
- NOAA Fisheries
- Northwest Aquaculture Alliance
- Oregon Dept. of Agriculture
- Oyster South
- Pacific Seafood Processors Association
- Pacific Coast Shellfish Growers Association

- Positively Groundfish
- Seafood Harvesters Of America
- Seafood Nutrition Partnership
- Sea Pact
- SeaShare
- The Nature Conservancy
- The Ocean Foundation
- The Walton Family Foundation

RETAIL PARTNERS

- Giant Eagle
- H-E-B
- HelloFresh
- Hy-Vee
- Meijer
- Publix
- ShopRite
- Stop & Shop





THE EAT SEAFOOD AMERICA! **CAMPAIGN** is a unifying consumerfacing campaign to encourage Americans to buy and eat sustainable seafood for health and to support the U.S. seafood community affected economically from COVID-19, with the rapid response phase from April to July 2020 and recovery phase through 2021.



MEET CONSUMERS WHERE THEY ARE

- Consumers are buying more seafood and we need to ensure they continue to have success making delicious meals at home so they continue to buy seafood into the future.
- Consumers are seeking to strengthen their health & immunity, reduce stress, get better sleep and a new movement toward self care.
- With quarantine fatigue and cooler weather approaching, consumers are seeking comfort foods and those fall flavors that warm the soul.
- Consumers want to help with social issues if they can.







Stay Strong with Family Meals

Help make fish dishes fun & affordable

CALL TO ACTION

WHILE THE GLOBAL PANDEMIC CREATED A SOCIALLY DISTANCED WORLD, FAMILY MEALS HAVE BEEN KEEPING US TOGETHER – IN PERSON AND VIRTUALLY WITH OUR EXTENDED FAMILIES.



FISHING FAMILIES AND CREWS, SHOW US HOW YOU #EATSEAFOODAMERICA

Our working waterfront communities have strong commitments to family values. Encourage your fishermen to share recipes, stories and photos using #EatSeafoodAmerica and #FamilyMeals.

Photo from Barton Seaver



Seafood Is Simple

Many fish dishes cook in 15 minutes or less

RECIPE ROUNDUP (OPEN USE WITH CREDIT)



Foil-Packet Lemon & Herb White Fish from Seafood Nutrition Partnership



Sheet Pan Salmon with
Miso GlazeHo
MaNutrition PartnershipMa



How to Cook (& Eat) Maine Lobster Monique at @aragostamama



Sheet Pan Panko Crusted Cod from Seafood Nutrition Partnership



<u>Four-Ingredient</u> <u>Shrimp Pesto Pizza</u> from Seafood Nutrition Partnership



from Barton Seaver

@coastalculinaryacademy



Alaska Pollock Street Tacos use a freezer staple from Alaska Seafood Marketing Institute



State of the Science 2020

Live Healthier with Seafood

Seafood can lift you up during these trying times







Highlight the working waterfront communities

EAT SEAFOOD, AMERICA TO SUPPORT WORKING WATERFRONT COMMUNITIES AND LOCAL BUSINESSES THROUGH THESE UNPRECEDENTED TIMES.









RAPID-RESPONSE HAD NEARLY 300M IMPRESSIONS!

TOTAL REACH/IMPRESSIONS	TOTAL CAMPAIGN
#EATSEAFOODAMERICA TWITTER	11,973,310
#EATSEAFOODAMERICA FACEBOOK	10,549,569
@SEAFOOD4HEALTH OWNED CHANNELS	8,564,280
EARNED MEDIA	68,617,642
MAT RELEASE	189,953,135
RD BROADCAST SEGMENTS	8,132,000
MICROSITE PAGEVIEWS	51,486
TOTAL	297,129,181

(*INSTAGRAM NOT REPORTED; ALL CHANNELS INCLUDES EARNED MEDIA AND ADS)



ESA! Consumer Survey Highlights

(June & July 2020 n=1,097 confidence level = 95%)

- More than 14% of respondents recall seeing the ESA! campaign.
- People who remember seeing the ESA! campaign are:
 - 3x more likely to have increased their seafood consumption in the last 2 months as compared to those who didn't see messaging.
 - \circ 3x more likely to say they eat seafood >= 2x per week.
 - o 2x more likely to add seafood to their meals soon.



ESA! Consumer Survey Highlights (June & July 2020 Survey: n=1,097, confidence level = 95%)

- Of consumers surveyed approximately:
 - \circ 12% plan to add seafood to their meals soon
 - $\circ~$ 22% learning to cook seafood more at home
 - 23% eaten more seafood in last two months
- Consumers look for the following when buying sustainable seafood. Approximately:
 - \circ $\,$ 36% look for U.S. Seafood $\,$
 - 36% rely on grocery stores and/or restaurants for sourcing of sustainable seafood
 - $_{\odot}$ $\,$ 27% look for certification logos and programs



IRI CPG Demand Index

UBU

2020 Week Ending	04.19	04.26	05.03	05.10	05.17	05.24	05.31	06.07	06.14	06.21	06.28	07.05
Total CPG	101	119	116	117	114	113	111	110	111	114	109	109
Fresh Foods*	102	124	123	119	113	113	112	111	108	119	108	110
Deli Cheese 1	106	132	119	117	115	114	112	115	112	117	108	108
Deli Meat 1	102	118	108	107	105	105	106	107	109	112	106	110
Deli Prep ¹	59	65	66	69	69	74	74	75	77	81	77	81
Floral	55	76	104	103	92	109	103	98	98	114	103	105
Meat ²	118	151	153	143	127	122	120	120	116	132	116	118
Produce ²	103	123	118	118	116	115	113	113	109	115	106	109
Bakery ²	96	111	107	106	105	104	104	104	103	110	104	103
Seafood ²	96	140	140	151	148	151	146	143	124	164	143	132

Indices < 100 = Decline; > 100 = Growth

https://advantage.iriworldwide.com/Engineering/covid19/

Seafood continues to show the strongest demand of any category



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Eat Seafood America! Campaign Activation Timeline





Campaign Call To Action

HERE'S HOW YOU CAN HELP:

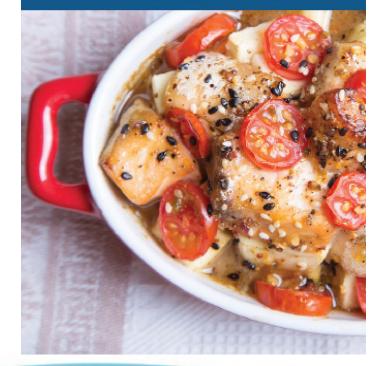
- 1. Eat seafood and buy seafood. It's as simple as that! Buy it online or order pick-up from purveyors, restaurants, mail-order, grocery stores.
- 2. Post a photo of your meal, tag it with #EatSeafoodAmerica.
- 3. Repeat. Keep supporting our nation's seafood community by eating seafood and buying seafood as often as you can.





Eat Seafood America!

September & October 2020 Communications Toolkit



OVERVIEW MESSAGE: EAT SEAFOOD AMERICA! TO MAKE YOUR LIFE HEALTHIER, TO MAKE MEALS SIMPLER, AND TO SUPPORT WORKING WATERFRONT COMMUNITIES.

Toolkit available at eatseafoodamerica.com



ESA! FUNDING SUPPORT

WALTON FAMILY FOUNDATION



National Marine Sanctuary Foundation

DISCOVER WONDER



Bluehouse Salmon[®]



