

National Survey of Chef's Perceptions of Seafood Sustainability Preliminary Report

Global Outlook on
Aquaculture Leadership – Vancouver

Dr. James E. Griffin

global aquaculture
the alliance



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2015

RESEARCHER BACKGROUND

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[#satedepicure](#)



Dr. Jim Griffin is an Associate Professor at Johnson & Wales University, and a researcher and consultant serving institutions and organizations both domestically and internationally. From 2012 – 2014 he was President and CEO of the [Coolfish](#) division of Slade Gorton & Co, the \$42M value added division of the parent company. His association with Slade Gorton began in the early 1990's when he was retained as a consultant to help create the value-added line, develop product offerings, and serve as consulting corporate chef. He then served as a member of the Slade Gorton corporate advisory board prior to taking the role of President and CEO. His efforts led to successful execution of a corporate strategy to improve the divisions performance including expansion of sales from 16 to 20 of the top 30 retailers in the U.S., a 4-fold increase in new product development, and a refocused product mix and brand strategy that enabled entry into Europe and Asia. Coolfish was reintegrated into Slade Gorton in April, 2014.

Prior to joining Slade Gorton, Jim spent more than two decades with [Johnson & Wales University](#), where he served in several senior executive roles including Associate Provost of the University. Prior to serving as Associate Provost, Griffin served eight years as vice president and dean of academic affairs of Johnson & Wales' Denver campus. He was with JWU since 1989. Over the years Griffin, a serial entrepreneur, has served as a consultant, owner and manager of several food service related businesses and restaurants including co-owner for 12 years with noted food photographer Ron Manville of YUM! Inc., a culinary media and photography business. <http://yuminc.org/portfolio/>

Griffin earned a B.S. degree in Food Service Management and a M.S. degree in Hospitality Administration at JWU. He holds a Doctorate in Education (Ed.D.) from Boston University and is certified as an executive chef (C.E.C.) and culinary educator (C.C.E.) by the American Culinary Federation.

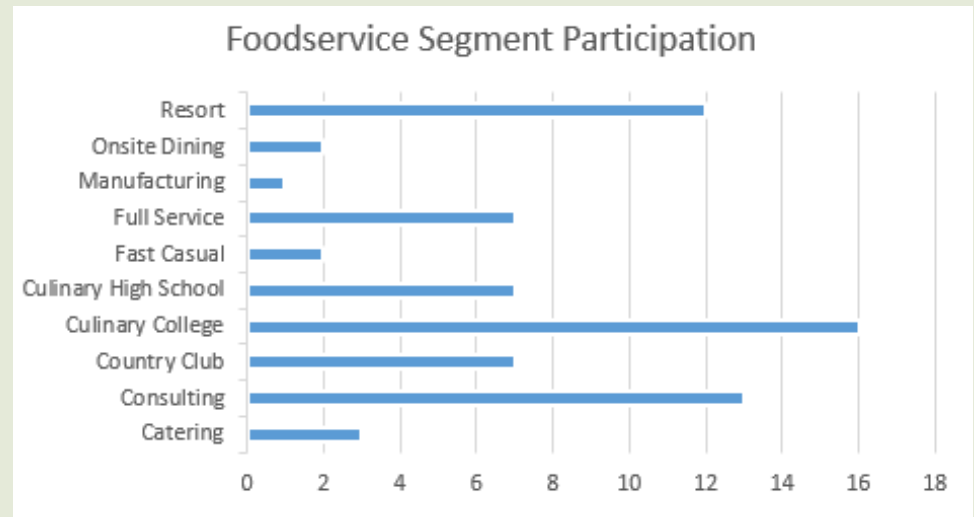
PRIMARY RESEARCH QUESTIONS

- To what extent are professional chefs and cooks aware of aquaculture certification logos?
- Do aquaculture certification logos influence seafood purchase decisions among professional cooks and chefs?
- Where do professional chefs and cooks go when seeking information about seafood sustainability?
- How do professional chefs and cooks define sustainability?

METHODOLOGY

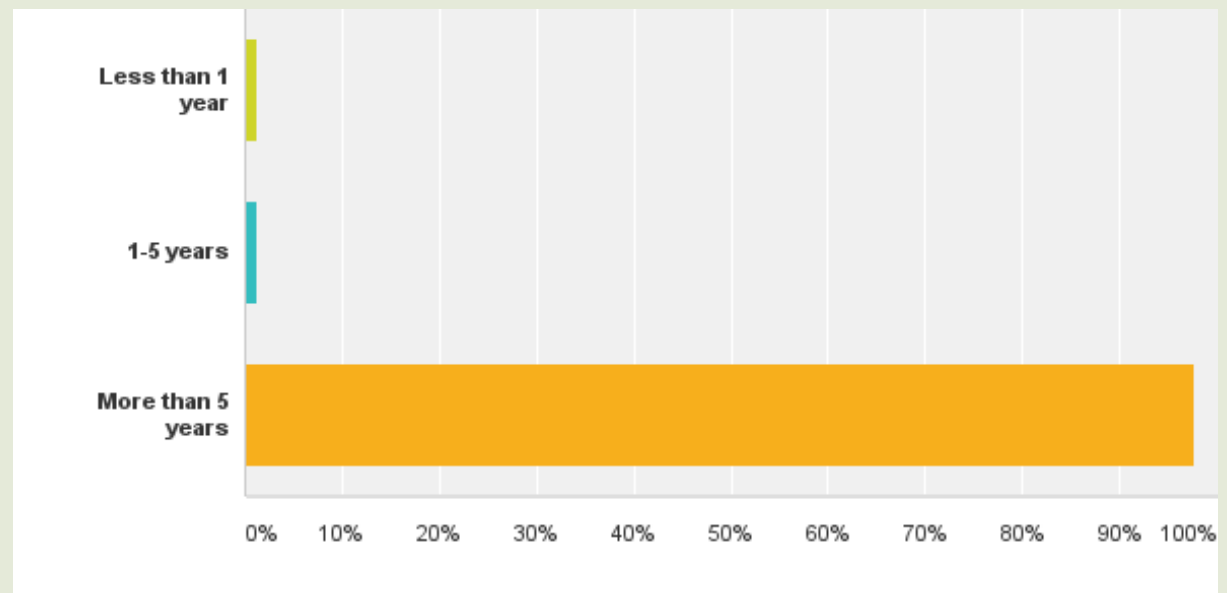
- **Survey target: working chefs in the USA**
- **Survey tool created** by consultant, piloted via SurveyMonkey, validated by GAA team, edited and approved, Friday, September 4, 2015
- Survey final pilot testing completed, Friday September 11, 2015.
- **SurveyMonkey Go-Live Date:** Tuesday, September 15, 2015
- **Marketing Channels:**
 - American Culinary Federation 1000+ members, RI, Boston, Washington DC – WOM, email
 - Center for Advancement of Culinary Education: National to 5,000+ chefs and educators, email, website, WOM
 - LinkedIn 750+ via email and website posting

- **Total Responses:** N = 127
 - **Qualified Responses:** n = 85
- (as of 10,23,2015)



98% OF PARTICIPANTS ARE CHEFS THAT BUY SEAFOOD WITH 5 OF MORE YEARS EXPERIENCE?

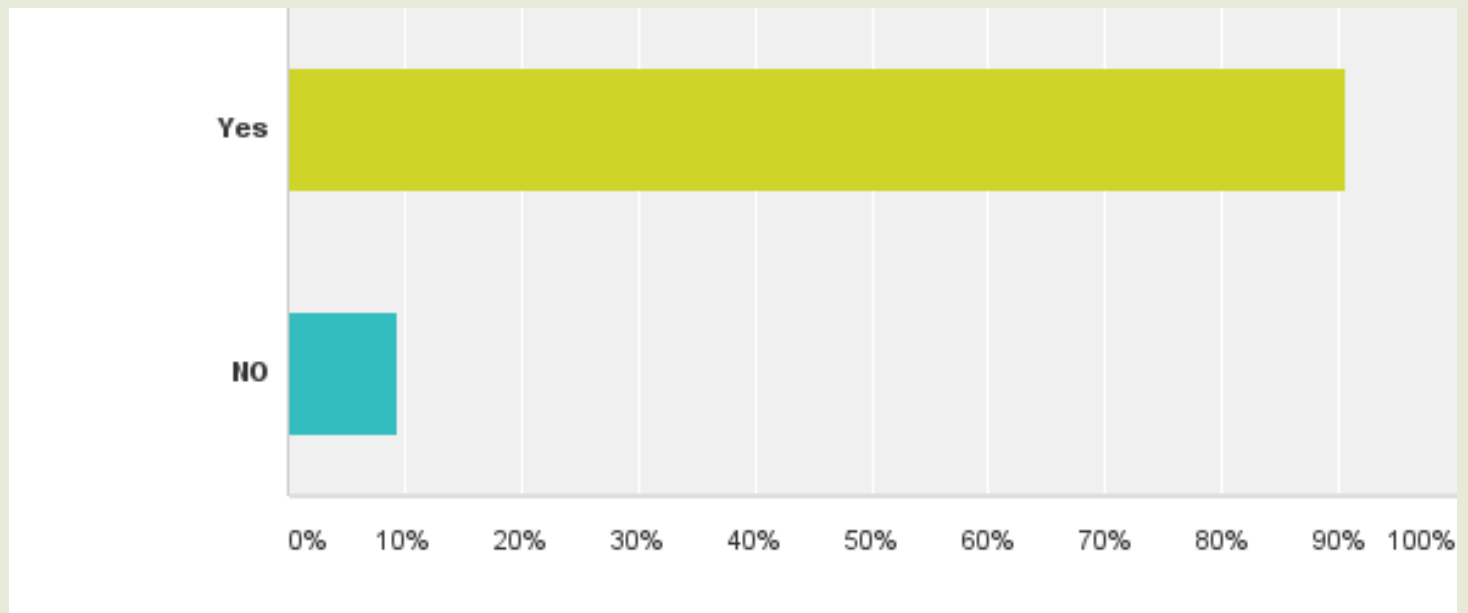
- Q3: How many years of foodservice industry experience do you have?
- n=85



Answer Choices	Responses	
Less than 1 year	1.18%	1
1-5 years	1.18%	1
More than 5 years	97.65%	83
Total		85

91% OF PARTICIPANT'S HAVE A COLLEGE DEGREE

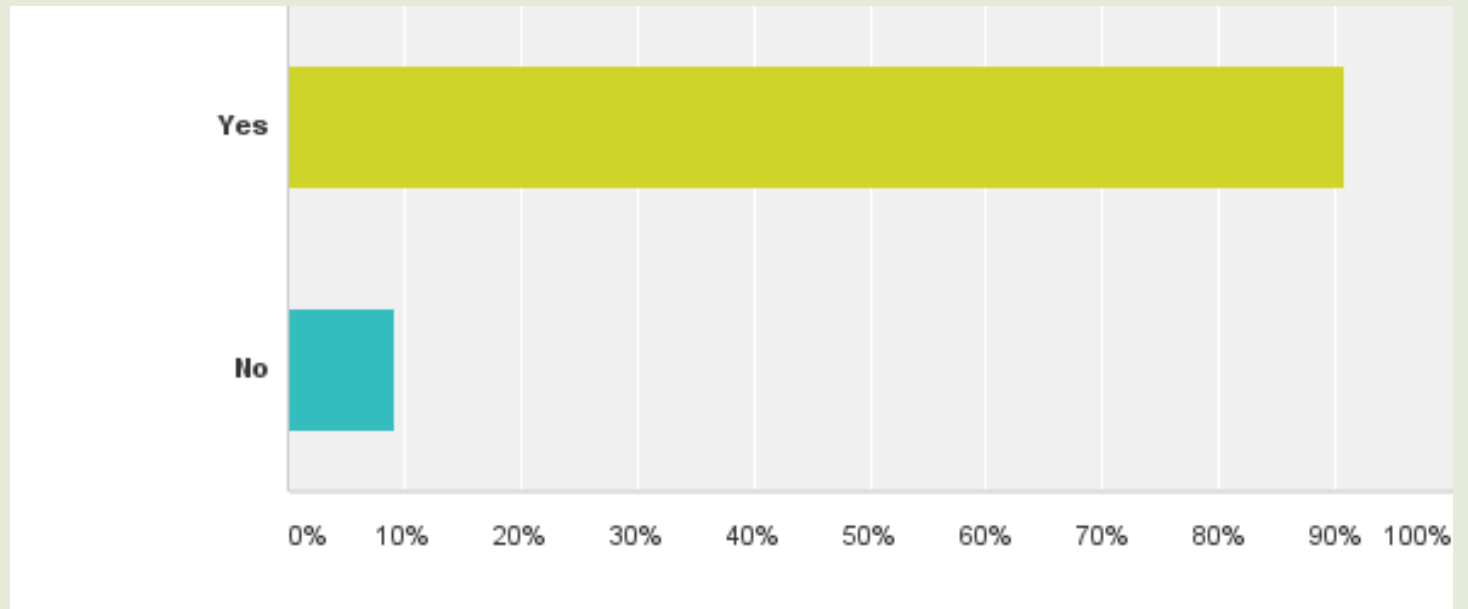
- Q4: Do you have a college degree (associate degree or higher)
- n=85



Answer Choices	Responses
Yes	90.59%
NO	9.41%
Total	85

OF THOSE WITH A DEGREE, 91% HOLD A DEGREE IN CULINARY ARTS, HOSPITALITY OF FOODSERVICE

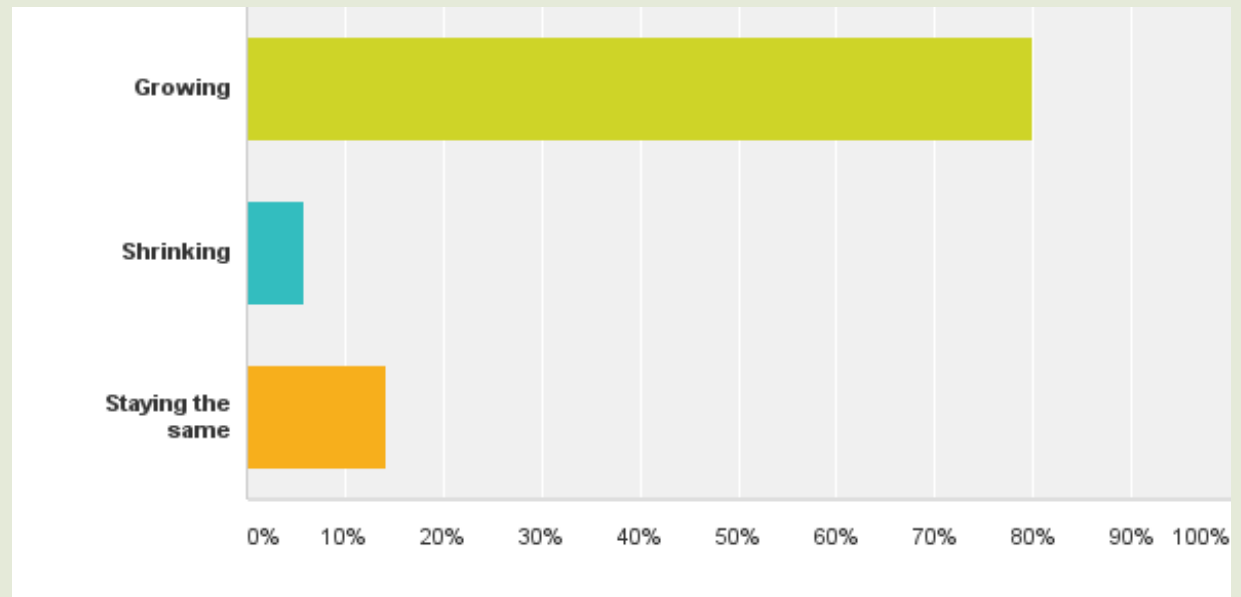
- Q5: Is your degree in culinary arts, hospitality, or foodservice?
- n=77



Answer Choices	Responses
Yes	90.91% 70
No	9.09% 7
Total	77

80% OF PARTICIPANTS THINK SALE OF FARMED SEAFOOD IS GROWING

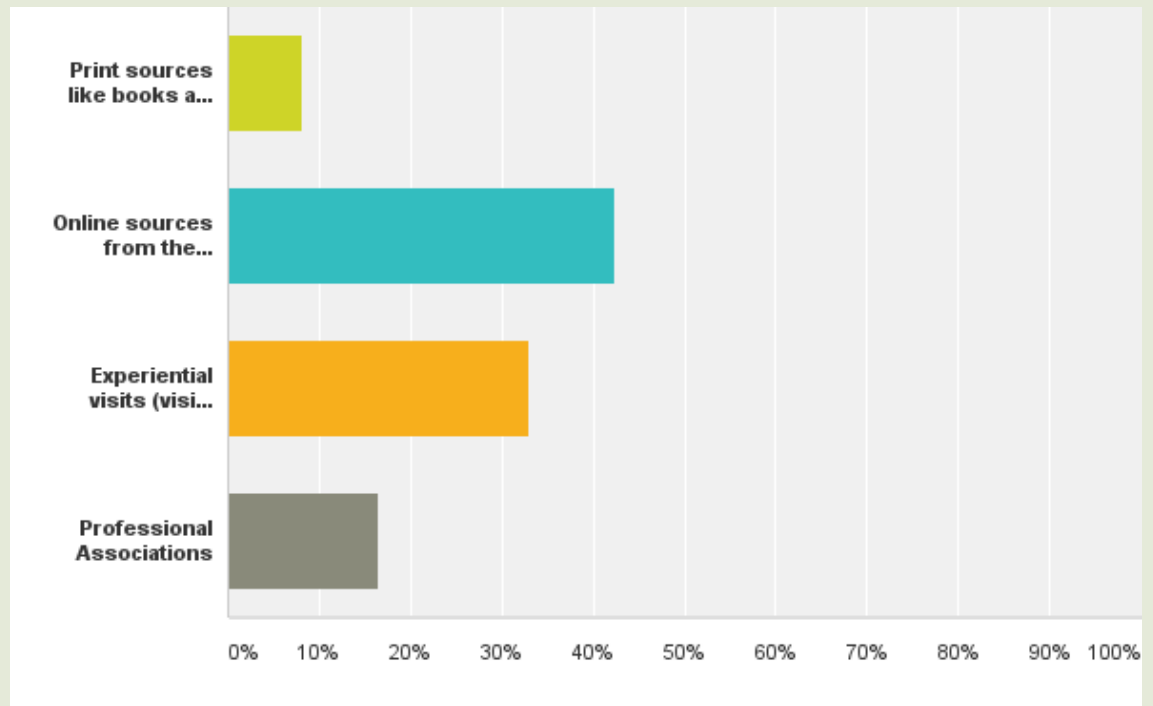
- Q6: Do you believe sale of farmed seafood in commercial restaurants is:
- n=85



Answer Choices	Responses
Growing	80.00% (80)
Shrinking	5.88% (5)
Staying the same	14.12% (12)
Total	85

WHEN SEEKING INFORMATION PARTICIPANTS PREFER ONLINE SOURCES (43%) FOLLOWED BY VISITS TO SOURCES, SUPPLIERS, AND VENDORS (33%)

- Q7: Which of the following is your first choice (the one you would most likely use) for finding information about farmed seafood?
- n=85

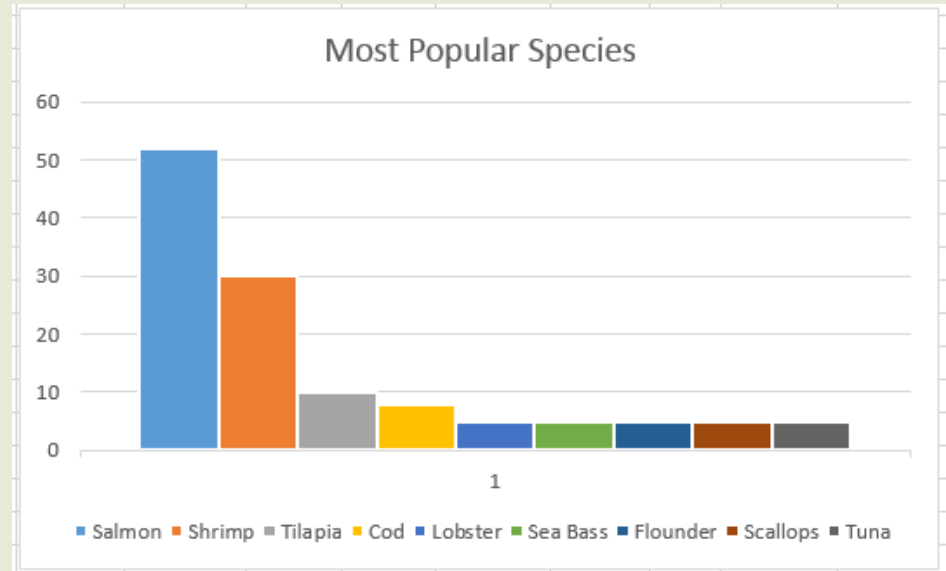


Answer Choices	Responses
Print sources like books and magazines	8.24% 7
Online sources from the internet	42.35% 36
Experiential visits (visits to actual sources, suppliers, vendors)	32.94% 28
Professional Associations	16.47% 14
Total	85

THE TOP SPECIES ON THE MENU ARE (NO SURPRISE), SALMON, SHRIMP, AND TILAPIA WITH 31 SPECIES REPORTED

- Q8: What are the top two seafood species (types of fish or seafood) that you menu on a regular (weekly) basis?
- n=85

Salmon	Shrimp	Tilapia	Cod	Lobster	Sea Bass	Flounder	Scallops
52	30	10	8	5	5	5	5
31%	18%	6%	5%	3%	3%	3%	3%
Tuna	Red Sapper	Grouper	Rock Fish	Crab	Haddock	Sole	Mahi
5	4	4	4	3	3	3	3
3%	2%	2%	2%	2%	2%	2%	2%
Oyster	Trout	Perch	Squid	Halibut	Char	Pollok	Mussels
2	2	2	2	2	1	1	1
1%	1%	1%	1%	1%	1%	1%	1%
Walleye	Clams	Bluefish	Red Fish	Sword Fish	Monkfish	Sea Urchin	
1	1	1	1	1	1	1	
1%	1%	1%	1%	1%	1%	1%	



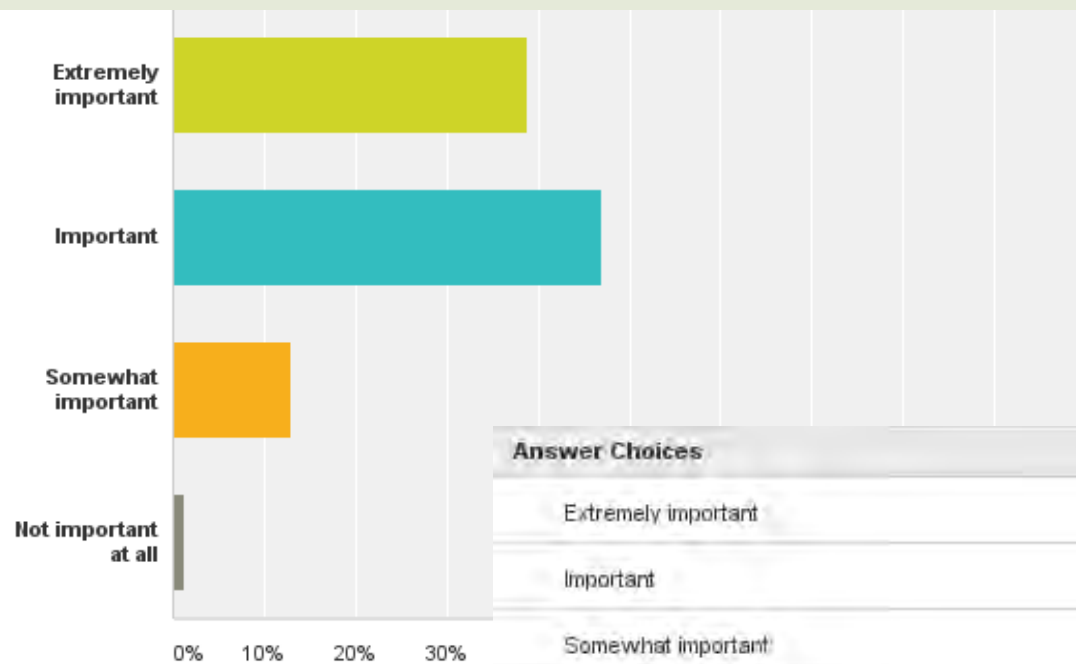
SUSTAINABILITY = ENVIRONMENTAL/ ECOLOGICAL RESPONSIBILITY AND TRACEABILITY

- Q9: What terms do you associate with “sustainability” when purchasing seafood? Select all that apply.
- n=84

	DO associate with sustainability	DO NOT associate with sustainability	Total	Weighted Average
Environmental/Ecological responsibility	98.81% 83	1.19% 1	84	1.01
Social responsibility (employee welfare)	68.75% 55	31.25% 25	80	1.31
Animal welfare	70.75% 58	21.25% 17	80	1.21
Food Safety	77.11% 64	22.89% 19	83	1.23
Trace-ability (Ability to determine country of origin)	87.80% 72	12.20% 10	82	1.12
Product Availability (resource management)	88.10% 74	11.90% 10	84	1.12

SUSTAINABILITY IS DEEMED IMPORTANT (47%) OR EXTREMELY IMPORTANT (39%) -

- Q10: How important is sustainability of the seafood when making your purchase decision?
- n=85

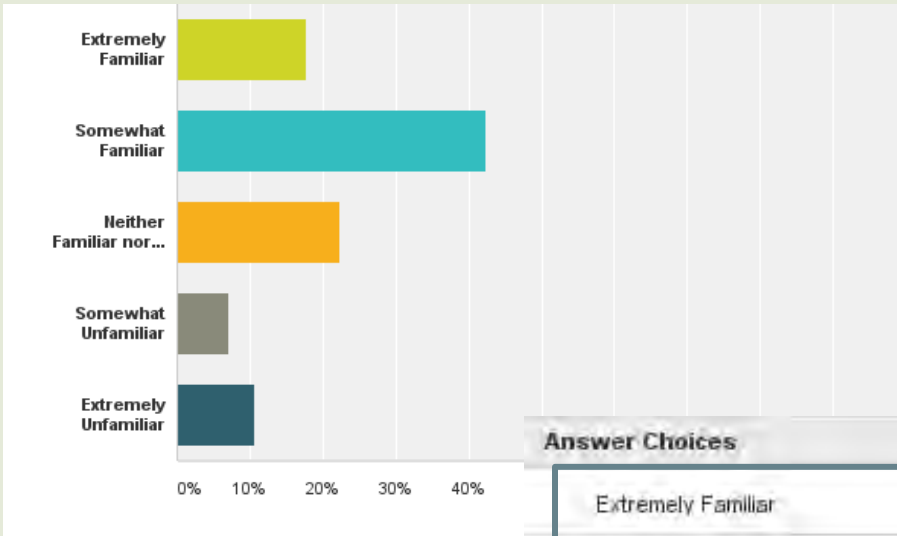


Answer Choices	Responses
Extremely important	38.82% 33
Important	47.06% 40
Somewhat important	12.94% 11
Not important at all	1.18% 1
Total	85

60% OF RESPONDENTS ARE FAMILIAR WITH THE BAP LOGO

■ Q11: How familiar are you with this logo

■ n = 85



Answer Choices	Responses	
Extremely Familiar	17.65%	15
Somewhat Familiar	42.35%	36
Neither Familiar nor Unfamiliar	22.35%	19
Somewhat Unfamiliar	7.06%	6
Extremely Unfamiliar	10.59%	9
Total		85

BUT THE BAP LOGO ONLY MARGINALLY INFLUENCES PURCHASE DECISIONS – (41%)

- Q12: To what extent does seeing this logo on fish packaging influence your purchase decision?
- n: 84



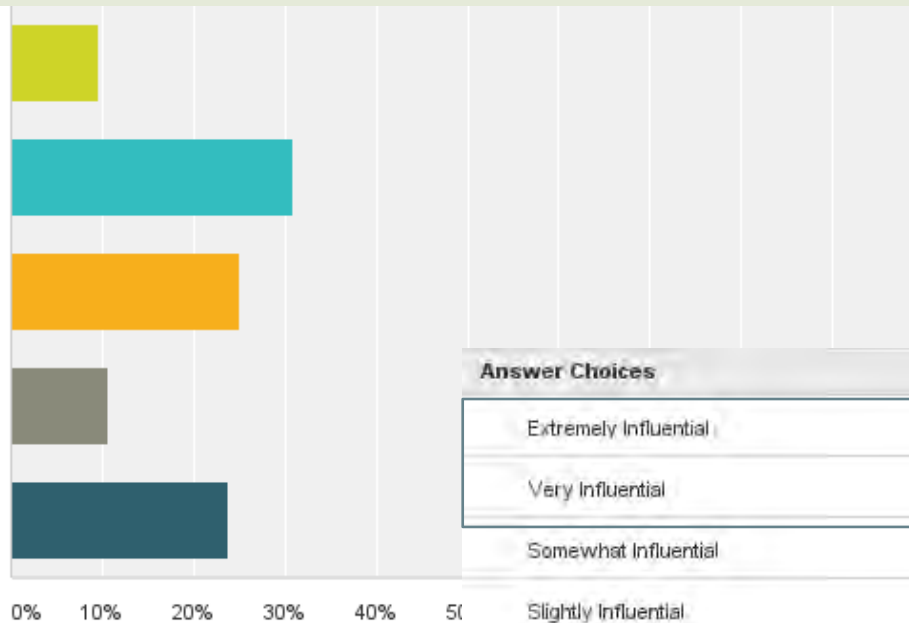
Extremely Influential

Very Influential

Somewhat Influential

Slightly Influential

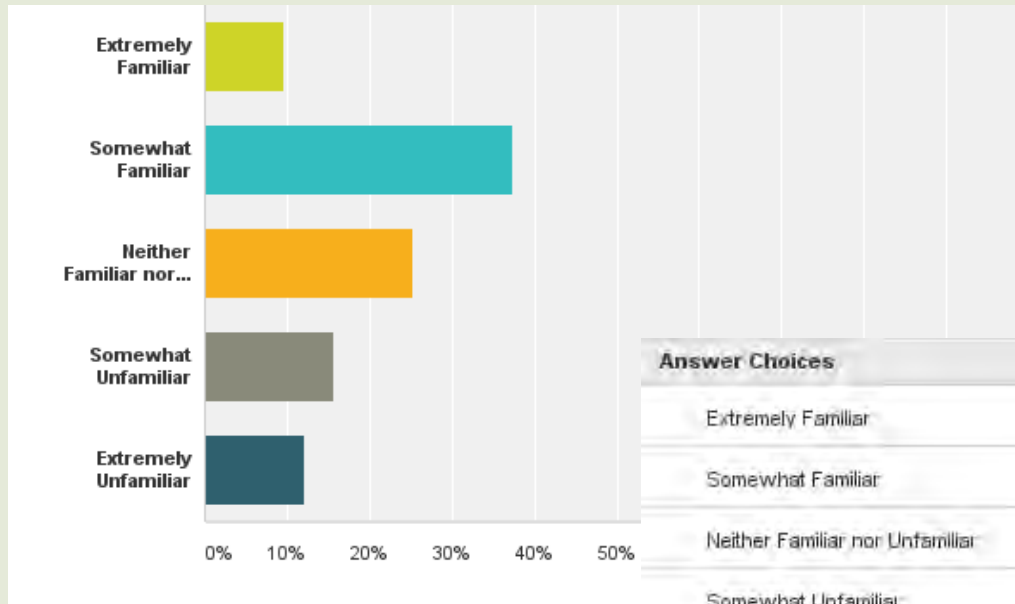
Not at all Influential



Answer Choices	Responses
Extremely Influential	9.52% (8)
Very Influential	30.95% (26)
Somewhat Influential	25.00% (21)
Slightly Influential	10.71% (9)
Not at all Influential	23.81% (20)
Total	84

RESPONDENTS ARE LESS FAMILIAR WITH THE ASC LOGO (47%)

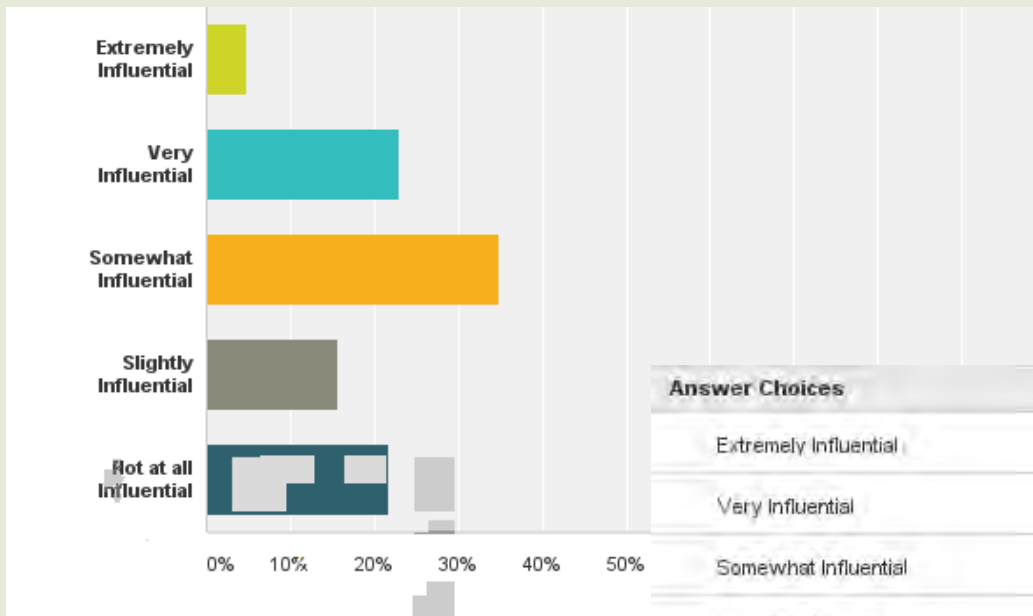
- Q13: How familiar are you with this logo?
- n = 83



Answer Choices	Responses
Extremely Familiar	9.64% 8
Somewhat Familiar	37.35% 31
Neither Familiar nor Unfamiliar	25.30% 21
Somewhat Unfamiliar	15.66% 13
Extremely Unfamiliar	12.05% 10
Total	83

ASC LOGO MINIMALLY INFLUENCES PURCHASE DECISIONS – (28%)

- Q14: To what extent seeing this logo on fish packaging influence your purchase decision?
- n: 83



Answer Choices	Responses
Extremely Influential	4.82% 4
Very Influential	22.89% 19
Somewhat Influential	34.94% 19
Slightly Influential	15.66% 13
Not at all Influential	21.69% 18
Total	83

CHEFS ARE MOST LIKELY TO FIND CONFIDENCE IN VENDORS WHEN IT COMES TO SUSTAINABILITY (91%) AND LEAST LIKELY TO RELY ON BRAND

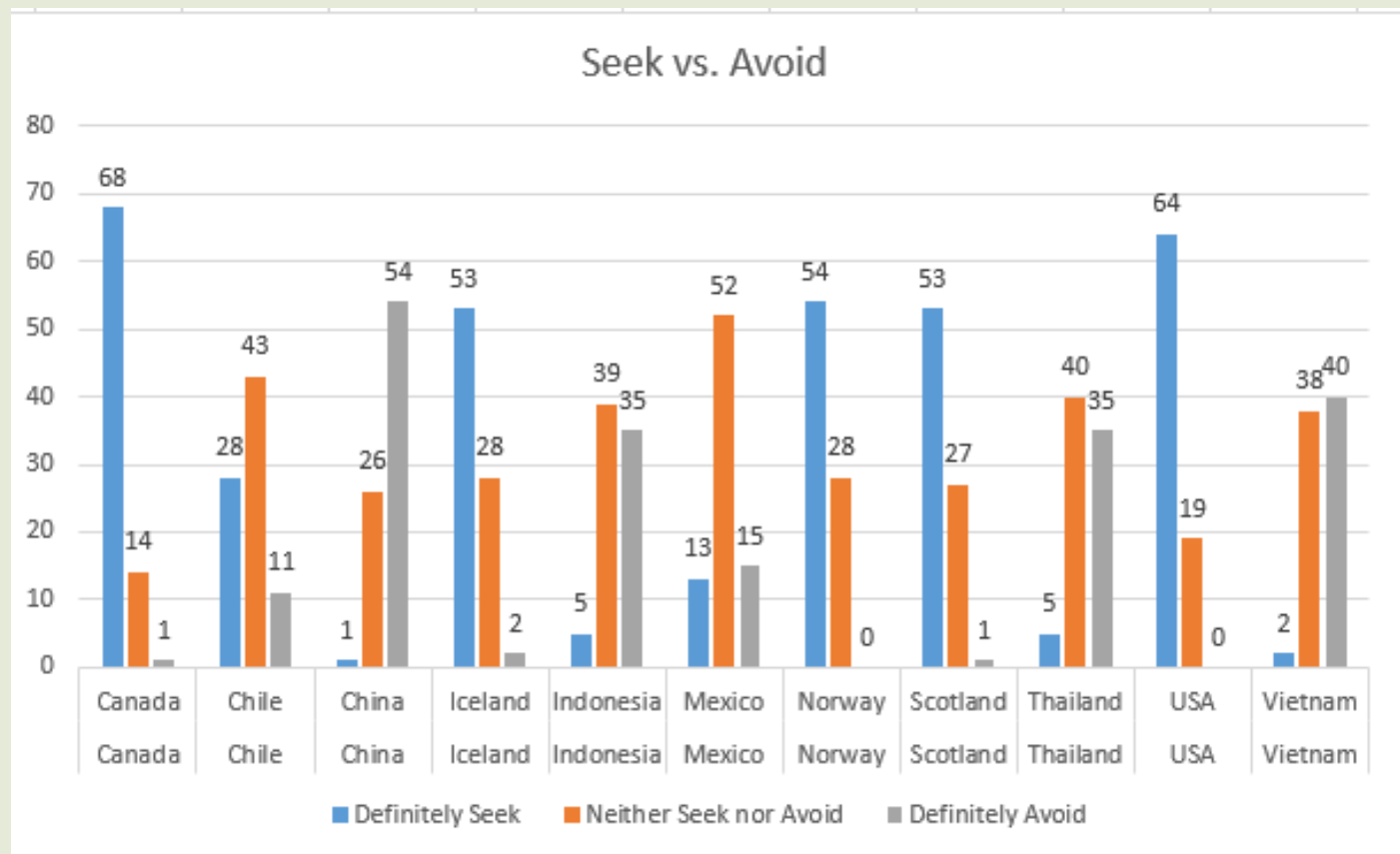
- Q15: When evaluating the sustainability of seafood, what factors give you confidence that you are buying sustainable seafood? Select all that apply.
- N=82

	Enhances confidence	Does not enhance confidence	Total
Supplier or Vendor	91.25% 73	8.75% 7	80
Certification Logos	71.25% 57	28.75% 23	80
Source (Country or State of Origin)	74.39% 61	25.61% 21	82
Brand	55.41% 41	44.59% 33	74
Seafood Type (species)	81.25% 65	18.75% 15	80

CHEFS PREFER SEAFOOD FROM NORTH AMERICA/EUROPE (#1) , FOLLOWED BY SOUTH AMERICA (#2) AND ASIA (#3)

- Q16: Please indicate how you would feel about purchasing seafood from each of the following countries.

■ n = 83



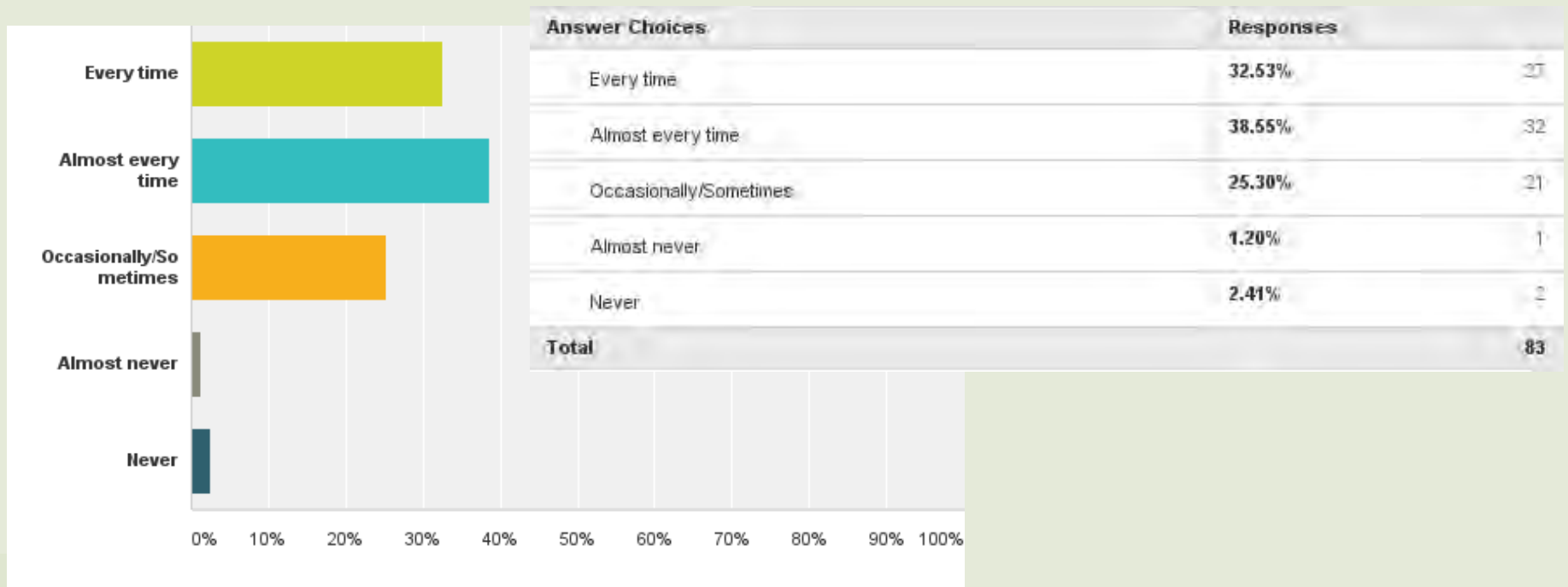
Q16: PLEASE INDICATE HOW YOU WOULD FEEL ABOUT PURCHASING SEAFOOD FROM EACH OF THE FOLLOWING COUNTRIES.

■ N = 83

Please indicate how you would feel about purchasing seafood from each of the following countries.						
Answer Options	Definitely Seek	Neither Seek nor Avoid	Definitely Avoid	% Seek	% Neutral or Avoid	Response Count
Canada	68	14	1	82%	18%	83
Chile	28	43	11	34%	66%	82
China	1	26	54	1%	99%	81
Iceland	53	28	2	64%	36%	83
Indonesia	5	39	35	6%	94%	79
Mexico	13	52	15	16%	84%	80
Norway	54	28	0	66%	34%	82
Scotland	53	27	1	65%	35%	81
Thailand	5	40	35	6%	94%	80
USA	64	19	0	77%	23%	83
Vietnam	2	38	40	3%	98%	80

SOME CHEFS ALWAYS CHECK FOR SUSTAINABILITY (33%) WHILE OTHERS CHECK ALMOST EVERY TIME (39%) OR OCCASIONALLY (25%)

- Q17: When purchasing seafood, how often do you check to see if it has come from a sustainable source?
- n = 83



THE PRIMARY ADVANTAGE TO BUYING FARMED SEAFOOD IS CONSISTENCY IN SUPPLY AND PRICE

- Q18: Which of the following, if any, are advantages to buying farm-raised seafood over wild-caught seafood?
- n=83

	Is an advantage	Is NOT an advantage	Total	Weighted Average
Consistency in supply and price	95.18% 79	4.82% 4	83	1.05
Consistency in product quality	79.27% 65	20.73% 17	82	1.21
Full trace-ability from egg to plate/control production	65.85% 54	34.15% 28	82	1.34
Taking pressure off of wild fish stocks	82.93% 68	17.07% 14	82	1.17
Meeting the world's needs for a healthy, lean protein source	75.31% 61	24.69% 20	81	1.25
It is healthier for you	28.57% 22	71.43% 55	77	1.71

CHEF'S PERCEPTIONS OF FARMED SEAFOOD REMAINS MIXED

- Q19: Do you have a positive, neutral, or negative opinion of farm-raised seafood? Please explain your answer.
- n=83

Answer Choices	Responses	
Positive	43.37%	36
Neutral	43.37%	36
Negative	13.25%	11
Total		83

Its necessary to keep up with demand...certainly not the best.

10/9/2015 1:16 PM [View respondent's answers](#)

It seems evidence supports that some species farm raising works and is better for susstainability/ environment and others it does not.

10/9/2015 11:52 AM [View respondent's answers](#)

Some farm raised seafood is essential to make it more readily available and consistent. If it is farmed properly you can still get a great product.

10/9/2015 9:58 AM [View respondent's answers](#)

Personnally very interested in Aquaculture. Feel it is necessary for the future.

10/7/2015 12:02 PM [View respondent's answers](#)

If practices in farm raised fish are upheld i am all for it unfortunately i hear and read of horror stories taking place in parts of Asis

10/6/2015 8:51 AM [View respondent's answers](#)

Q20: WHICH OF THE FOLLOWING FACTORS DRIVE THAT NEGATIVE FEELING? SELECT ALL THAT APPLY.

■ n = 11

	Increases negative feeling	DOES NOT increase negative feeling	Total	Weighted Average
Food Safety	81.82% 9	18.18% 2	11	1.18
Environmental/Ecological concerns	90.91% 10	9.09% 1	11	1.09
Social concerns	50.00% 5	50.00% 5	10	1.50
Quality of the Product	100.00% 11	0.00% 0	11	1.00
Country of Origin	81.82% 9	18.18% 2	11	1.18
Animal Welfare	90.91% 10	9.09% 1	11	1.09
Questionable Nutritional Value	81.82% 9	18.18% 2	11	1.18
Resource Management (product availability)	40.00% 4	60.00% 6	10	1.60

CHEF'S PREFER COMMUNICATION VIA A NATIONAL ORGANIZATION (85%) WEBSITES (83%) AND BUYING GUIDES (82%)

- Q21: If you wanted communication from the seafood industry on sustainability, food safety, sourcing information, which methods would you be open to receiving this information from?
- n = 83

	I would prefer this method	I would NOT prefer this method	Total	Weighted Average
Social media	42.86% 33	57.14% 44	77	1.57
QR code on packaging	48.10% 38	51.90% 41	79	1.52
TV advertising	28.38% 21	71.62% 53	74	1.72
Vendor or Seafood Brand website	82.72% 67	17.28% 14	81	1.17
National Organization (James Beard, Chef's Collaborative, ACF)	85.19% 69	14.81% 12	81	1.15
Magazine/News Article	80.77% 63	19.23% 15	78	1.19
Seafood buying guides produced by environmental groups	81.48% 66	18.52% 15	81	1.15

CHEF'S DO CHECK FOR COO – EVERY TIME (51%) OR OFTEN (38%)

- Q22: How often do you check for Country of Origin Label on your frozen seafood packaging?
- n=82

Answer Choices	Responses	
Every Time	51.22%	42
Often	37.80%	31
Sometimes	10.98%	9
Never	0.00%	0
Total		82

PROCUREMENT: FOOD SAFETY TRUMPS PRICE

- Q23: When purchasing seafood from a supplier, rank each of the following in order of importance (most important to least).
- n=83

	Most Important	Average	Least important	Total	Weighted Average
Price	43.90% 36	51.22% 42	4.88% 4	82	2.22
Country of origin	46.99% 39	49.40% 41	3.61% 3	83	2.13
Sustainability	60.24% 50	38.55% 32	1.20% 1	83	1.82
No Dyes and/or Additives	82.72% 67	13.58% 11	3.70% 3	81	1.42
High Nutritional Value	43.21% 35	50.62% 41	6.17% 5	81	2.26
High Food Safety	86.75% 72	12.05% 10	1.20% 1	83	1.29
Availability	70.37% 57	27.16% 22	2.47% 2	81	1.64
Frozen not Fresh	12.20% 10	48.78% 40	39.02% 32	82	3.54
Fresh not Frozen	69.51% 57	26.83% 22	3.66% 3	82	1.68