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New Study Finds most US Consumers Preference for Farmed or Wild Fish and Seafood Declines as Shrimp and Salmon Remain Most Popular Choices

Younger consumers most open to various production methods and consumer acceptance for cellular is already substantial.

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Lenox, MA, February 5, 2020 — A new study by Changing Tastes finds that American consumers continue to have no strong established preference for farmed or wild fish and seafood. The lack of preference for farmed or wild upends the conventional wisdom that US consumers prefer wild fish and seafood and shows a continued erosion in preference that Changing Tastes first identified in a prior study two years ago.

A majority of US consumers now consider both wild capture and aquaculture to be acceptable ways of producing fish and seafood. But only 17% eat fish because they consider it to be a better choice for the environment compared to other protein options. 80% of consumers are concerned about overfishing while 67% are concerned about environmental impacts of aquaculture.

Preferences for farmed and wild seafood vary significantly by age. The oldest consumer cohort — Boomers, or the “silent generation” who are now 55 or older — have the strongest preference for wild fish and seafood. Younger generations have less pronounced preferences, with Millennials and Gen Z ‘s having less of a particular preference and generally accepting all types of fish and seafood production.

“Consumer preference for wild fish and seafood used to be true and we see remnants of it in the preference among older consumers. But recognizing that consumer preference for farmed and wild seafood has eroded is important for the seafood industry and also the food industry overall,” says Arlin Wasserman, founder of Changing Tastes. “Our customers are now recognizing and accepting changes in seafood production as it evolves from hunting and foraging to also rely on small- and large-scale farming. These are the same changes that happened in land-based livestock production over decades, and it’s happening much faster for fish and seafood.”

“Consumers are signaling that they are delegating to the food industry the relatively complex choices about what kinds of fish and seafood offer them, where it comes from and how it’s produced”, said Wasserman. “It’s the same role the foodservice industry and some grocery retailers have taken on and it’s another way to create value for customers. Attending to concerns such as overfishing and other sustainability issues is also part of that new bargain.”

The study found that consumers are also willing to switch from seafood to cellular seafood. About 1 in 5 US consumers who eat fish today are willing to switch entirely from wild to cellular, although many consumers remain unfamiliar with cellular aquaculture and have concerns about it.

The study also found that over 40% of restaurants in the US now have salmon on their menu and nearly two-thirds currently offer shrimp. Of those, nearly a third anticipate purchasing more salmon and

shrimp in the near future. About a fifth of operators say either salmon or shrimp is their favorite type of seafood to put on the menu. That's not surprising given that half of all US consumers identify salmon as being one of their top three favorite fish and shrimp as their favorite seafood. Again, that varies with age, and older consumers are more likely to choose salmon as their favorite type of fish.

“With aquaculture supplying a significant share of shrimp and salmon to the US market, the erosion of consumer preference gives greater flexibility in making responsible purchasing decisions, as does openness to newer production technologies,” said Wasserman.

Jada Tullos Anderson, a seafood sustainability consultant with Changing Tastes, notes that, “Many consumers want to have healthy options on the menu when they go out, and this frees up restaurants to make the best choice they can on the attributes that matter most, like taste, quality, sustainability, and price.”

Changing Tastes is a values-driven consultancy firm that provides business strategy and culinary consulting to Fortune 500 companies, growth stage restaurant and hospitality firms, investors, and the philanthropic sector. Through its work, the firm has created more than \$2.5B in value for its clients while catalyzing some of the most significant changes in the US food industry including reaccelerating growth in the natural and organic food industry by developing a new marketing strategy focused on personal health benefits, helping the leading US restaurant companies address antibiotic use in livestock production, and pioneering the now popular plant-forward dining strategy.