



Tribal Seafood Fishers Customer Preferences

Purpose

In 2020, the Covid-19 Pandemic disrupted the seafood markets. With restaurants, travel, and food processing businesses curtailed or closed for good, more salmon became destined for retail supermarkets and grocery home delivery, restaurants conducting carry-out or delivery, and subscription meal-kit delivery services. The purpose of this survey is to better understand the sales and distribution of seafood in the marketplace, and how COVID-19 influences seafood supply purchasing decisions at the retail level, and the demand of seafood options amongst customers. This information can be used to help tribal fishers better understand the current market dynamics and how best to respond.

1. Please describe the primary focus of your seafood business as:

- Wholesaler
- Retailer
- Restaurant
- Other (please describe)

2. Please check the seafood species you process or sell:

- King Chinook - Alaska fish runs
- King Chinook - Columbia River fish runs
- Steelhead
- Coho
- Chum
- Sockeye
- Pink
- None of the above

Other Seafood (please specify)

3. In 2020, would you describe consumer interest in purchasing fresh salmon? (Please check all that apply)

- About the same
- More interest
- Less Interest
- Depends on the season and product
- Depends on the price
- Please feel free to share other relevant information:

4. Does your wholesaler provide your fish products?

- Yes
- No
- If no, please share where you get your fish products

- None of the above

5. Do you purchase seafood directly from West Coast Fisheries? (Please check all that apply)

Washington Fisheries

Oregon Fisheries

California Fisheries

Other (please specify)

None of the above

6. In 2020, were you able to purchase the amount of salmon needed through your supplier?

Yes

No

Sometimes, but not on a consistent basis

7. In 2020, did the amount of frozen salmon you purchased off season:

Increase

Decrease

Remain about the same

We don't purchase frozen salmon

Other (please specify)

8. Have you seen an increase in demand for these salmon products? (Please check all that apply)

Yes, in smoked salmon

Yes, in canned salmon

Yes, in salmon candy

Yes, in other salmon products (please specify)

Not applicable

9. Fish can be purchased directly from the tribal fishers in season. What can be done to help you build better relationships with tribal fishers to increase sales of salmon? (Please check all that apply)

- More information about the tribal fishers (people)
- More information about the fishery (location / product)
- Meeting with tribal fisher(s)
- Other (please specify)

- Not applicable

10. If you were not able to purchase the amount of salmon needed on a consistent basis, what are some of the reasons you believe this was not possible: (Please check all that apply)

- Industry food safety requirements
- Pricing
- Supply for seafood
- Demand for seafood
- Market/Distribution channels disrupted
- Other (please specify)

11. Wild Caught Sockeye enjoys a large share of the Salmon market. In 2020, what other species were customers interested in purchasing? (Please check all that apply)

- King Chinook - Alaska fish runs
- King Chinook - Columbia River fish runs
- Steelhead
- Coho
- Chum
- Pink
- Other (please specify)

- Not applicable

12. Do your customers know, and make purchasing decisions, on the differences between farm raised, wild caught, and Tribal caught salmon, or do they ask you?

- Yes, they ask often
- Yes, they ask occasionally
- Does not seem to be of interest
- Unsure
- Other (please specify)

- Not applicable

13. If your customers prefer Wild Caught Salmon over Farm Raised Salmon, what are some of the reasons that you are aware of? (Please check all that apply)

- Taste and quality
- Pricing
- Wild and sustainable
- Indian-caught tradition of harvesting salmon or other human-interest story associated with harvesting salmon
- In season
- Freshness
- No artificial coloring or additives
- Unsure
- Other (please specify)

- Not applicable

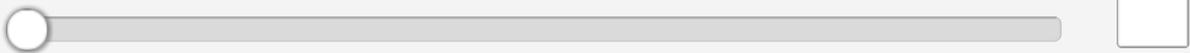
14. If your customers prefer Farm Raised Salmon over Wild Caught Salmon, what are some of the reasons you are aware of: (Please check all that apply)

- Taste and quality
- Pricing
- Uniform fillet sizing
- Convenience
- Availability
- Unsure
- Other (please specify)

- Not applicable

15. Please complete the following statement: "I believe _____% (please indicate 0% to 100% on the sliding scale below) of my salmon purchases are Tribal Wild Caught Salmon from the Pacific Northwest."

0% 100%



16. Do you believe that providing more information to customers about Tribal Wild Caught Salmon would be beneficial to increasing consumer knowledge and/or purchase intent?

- Yes, this would be beneficial to increasing knowledge and purchasing intent.
- Yes, this would be beneficial to increasing knowledge, but not sure about purchasing intent.
- No, I don't think this would make a difference to our customers.
- Please comment on your reasoning to provide further insight:

17. Would you like to know more about supporting Tribal Wild Caught Salmon, and to share these Fishers' stories with your customers? (For example, information about the Tribal Fishers' harvest and sustainability practices, and/or their families) (Please check all that apply)

- Yes, with a brochure
- Yes, with display materials
- Yes, with QR Code link to Fisher's story on packaging
- Yes, interested in meeting Indigenous Fishing Families
- Not interested at this time
- Other (please specify)

18. In 2021, do you anticipate any changes to the price point and demand for salmon?

- No change
- Increase in price and demand
- Decrease in price and demand
- Increase in price; decreased demand
- Decrease in price; increased demand

19. Please complete the following statement: "On a yearly basis, our business purchases approximately _____ pounds of seafood."

- 0 lbs - 500 lbs
- 501 lbs - 1000 lbs
- 1001 lbs - 5000 lbs
- 5001 lbs - 50,000 lbs
- Greater than 50,000 lbs
- Prefer not to answer

20. What capabilities does your business have to purchase, process, and store seafood on site: (Please check all that apply)

- Handle whole, or headed and gutted fish only
- Filleting, or other processing, on-site
- Boxing, icing on-site
- Blast freezing on-site
- Freezer storage on-site
- Refrigeration on-site
- Shipping
- Smoking
- Canning
- Other (please specify)

21. Do you have purchasing authority for your business?

- Yes
- No

22. Feel free to add any additional comments:

23. Your time and answers are much appreciated. We are happy to share the results of this survey, would you like a copy of the final report?

- Yes
- No

24. Would you like to be contacted by the Affiliated Tribes of Northwest Indians Economic Development Corporation?

Yes

No

25. Please share your full name. (Optional)

26. Please share the full legal name of your business. (Optional)

27. Please provide your business location. (Optional)

Street Address

City

State

Zip Code