positively GROUNDFISH

PILOT SURVEY: CHEFS' SEAFOOD CHOICES

Exploring a path to get underutilized sustainable West Coast groundfish species back on the menu

2019

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HELLO!

Welcome to Positively Groundfish's 2019 pilot survey of chefs, primarily based on the United States West Coast. This study examines chefs' decision-making processes about seafood items in general, and their experience and preference for white fish species, and West Coast groundfish in particular. These insights will help map the path to getting these sustainable but underutilized species back on American menus.

Chefs hold a unique and exceedingly important position within the seafood supply chain. Not only are chefs the key purchase decision-makers in the foodservice sector, which accounts for the vast majority of West Coast groundfish sales. But they are also influencers and tastemakers, that have the power to inspire their guests to try and come to like new seafood items, and with that spark a change in Americans' eating habits.

Yet, as a stakeholder group, chefs are only rarely represented in industry discussions about the seafood system and are too seldom surveyed. To date, their perspectives and experience with West Coast groundfish and relevant competitive white fish species are only poorly understood.

There's a clear opportunity to better understand chefs and recruit them to become advocates for lesser-known underutilized seafood, such as Rockfish, Pacific Dover Sole, Lingcod and other West Coast groundfish species. Our hope is that this survey will prove insightful for fishermen, processors and distributors, and all those who work to promote underutilized sustainable species.

Yours positively,

Jana Hennig
ExecutiveDirector

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KEY INSIGHTS

1
Chefs cook to their customers' taste. Most chefs are guided by what they believe or know their customers already like, rather than acting as true pioneering tastemakers.

2
Chefs most likely introduce a new seafood item on the specials menu, where it needs to sell well and find diner's approval, if it is to make it onto the main menu. There is a potential of food waste and financial loss associated with trying a new seafood item, that could be eased with lower introductory pricing.

3
Chefs strongly favor 'local', even hyper-local, seafood, which is reflected both in their prioritization of product factors, as well as their current seafood purchasing. "Local" beats "sustainable".

4
Most chefs agree that sustainability is an important factor in their seafood purchase decisions and will be even more so in future. Nonetheless, it is a secondary factor.

5
Chefs have tasted and cooked with a larger number of species at home than they serve at work. Lesser-known groundfish species such as Lingcod or Sanddabs have promising levels of chef awareness and cooking experience that can be built on.

6
Fine dining should be the primary target for West Coast groundfish: chefs in this sector have the most flexibility, openness to trying new species, and rotate items most often. They favor sustainable, local and fresh product more than any other, and are most likely to currently sell groundfish species. Rockfish in particular seems to work for them.

7
Institutional/campus dining currently has little room for seafood on menus, only rarely introduces new items, has little flexibility, and cares the least about sustainability or localness; making this sector a tough one for West Coast groundfish to break into.

8
Rockfish is already on the menus of a large number of chefs in this survey, across all dining categories. This points to rockfish's great versatility across restaurant concepts, as well as its popularity with customers, meeting restaurants' commercial threshold. It's promising.

9
To drive higher usage of Pacific Dover Sole, chefs want to see better size consistency, better prices, more guidance on recipes and preparation methods that work well, and incentives to reinvent this species.

10
While chefs have great influence and power over American's seafood eating habits, there is still a need to directly target and drive desire with consumers. We can't rely on chefs to assume all the risk and communication work involved with successfully introducing new seafood items.

INTRODUCTION

In the United States the vast majority of seafood is consumed in restaurants and other types of food service establishments rather than in the home. For West Coast groundfish species such as Rockfish, Sole or Lingcod that is even more true, as this fishery relies primarily on sales of fresh product to the domestic food service sector. Driving greater adoption by the foodservice market is crucial for the commercial success of this fishery.

As the primary decision-makers about menus and ingredient sourcing, chefs play an exceedingly important role in seafood markets, and are in and of themselves key target clients for business-to-business marketing. They play the role of gatekeeper, influencer and even tastemaker. Many food trends that eventually went mainstream can be traced back to individual chefs that innovated and inspired their guests [8]. Chefs have the potential to introduce, showcase and elevate ingredients to their guests, and thus drive consumer awareness, trial and preference, and with that Americans' eating habits. This is particularly important for the species of the West Coast Groundfish fishery, which are sustainably-managed and now abundantly available but as yet, not well known, underloved and underutilized.

The West Coast Groundfish fishery spans the coasts of California, Oregon, and Washington and is one of the West Coast's most important recreational and commercial fisheries [1], both in economic and ecological terms. This fishery comprises over 90 different species, including over 50 species of Pacific Rockfish (hereafter simply referred to as "Rockfish"), a handful of species of Sole, as well as Lingcod, Sablefish, Thornyheads, Sanddabs, Skates and more [2].

The West Coast Groundfish fishery is the mark of good fisheries management and diligent, collaborative and hard work by all stakeholders to return it to abundance after it collapsed in 2000/01. In the 1970's, a combination of growing market demand, improved processing technologies, and policies encouraging the expansion of domestic fisheries (i.e. the 1976 Magnuson-Stevens Act) drove increased groundfish landings [3], which continued throughout the 80's and early 90's [4]. The groundfish harvest reached its peak in 1982, landing 160,000 million tons of fish [2]. As overfishing and mismanagement started to become apparent during the boom of the fishery, an amendment to the Magnuson-Stevens Act, as well as new management strategies, were put into place. However, because of the poor state of the fishery, catch limits continued to decrease, causing the Secretary of Commerce to declare the fishery an economic disaster in 2000 [2, 3]. This economic failure is estimated to have caused a loss of $11 million of fishing revenue in a single year [3]. In 2011, under additional amendments to the Magnuson-Stevens Act, a catch share program was implemented [2], accelerating the recovery of the fishery and allowing fish populations to rebound earlier than expected. Overall, "this Individual Fishing Quota (IFQ) program allocates a guaranteed share of landings to groundfish trawlers on the West Coast" [2], who contribute to over 90% of groundfish landings [4].

Today, this fishery is hailed the poster child of sustainability. Eighteen of the most commercially important species are now certified sustainable by the Marine Stewardship Council and are rated as "Best Choice" by Monterey Bay Aquarium's Seafood Watch [5]. Regardless of ecological success, economic success has been slow to come around [2]. Because many groundfish species were essentially absent from the market for a decade or longer, other whitefish species such as Tilapia, Cod or Halibut were able to replace groundfish on menus and strengthen their market position [6]. Moreover, as groundfish species disappeared from menus and seafood counters, consumers were no longer exposed to them, and so have simply forgotten about these species. And younger consumers may have never seen or heard of these species and may be entirely unaware. This now presents a considerable challenge, that the collective groundfish industry must meet with increased marketing, education and outreach [7].

Restaurants and chefs will play a critical role in the reintroduction of West Coast groundfish species to the market. Thus, understanding what drives chefs' decisions about seafood menu items, as well as their experience and preferences toward key white fish species is vital to developing successful go-to-market strategies. To get a more comprehensive understanding of chefs, this report is not confined to groundfish, although a section of the survey was dedicated exclusively to two key groundfish species, Rockfish and Pacific Dover Sole.

DATA COLLECTION

This survey intended to reach a diverse range of chefs, based primarily on the West Coast, which is the focus geography for Positively Groundfish's outreach activities. The surveys were made available both in electronic as well as paper-based formats and were independently filled in by each respondent. Nine further surveys were collected over the phone via an interview. Surveys consisted of both multiple choice and open-ended questions. All surveys were filled out in Google Forms. For surveys administered over the phone, answers were input into Google Forms by the survey lead.

We employed a variety of outreach tactics to recruit chefs to participate in this survey. We posted it in two chef-oriented online forums (ChefsTalk and Chef Steps) and we "cold messaged" chefs via LinkedIn InMail. However, the majority of respondents were recruited through personal and professional networks of Positively Groundfish, especially through the groundfish processors' network. This will have undoubtably introduced bias into the survey, as chefs that are in the networks of West Coast groundfish processors, are more likely to be aware of groundfish species through repeated interactions with processors. As all participation was voluntary and un-incentivized, we may have largely got respondents that did it as a favor for the groundfish processors, and may be positively predisposed.

Truthfully, participant recruitment was much harder than expected. Chefs are a stakeholder group that is not easily persuaded to participate in a survey such as this. There were over 40 attempts to interview chefs in person. We also dropped off surveys with stamped envelopes at restaurants for chefs to return through the mail. With 0% interview and 0% return rates, this effort proved entirely unsuccessful. Other avenues, such as reaching out to universities and to larger chef networks, were attempted, but were again unsuccessful. In the end, we received 39 responses, against a target of 150-200. That is an insufficiently small sample group to draw conclusions from – this survey may only serve as a pilot study to guide the design of larger studies.

RESPONDENT PROFILE

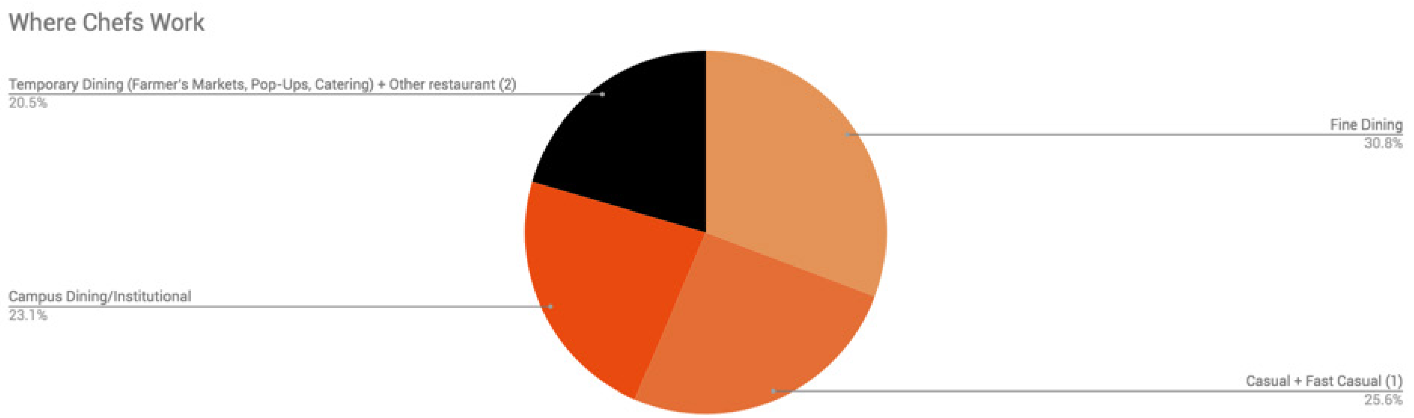
Geography

This report includes 39 chef surveys from 9 different states and 1 United States Territory. 80% of responses were from the West Coast – California (43%), Oregon (28%), or Washington (9%). The other six states (Colorado, Florida, Massachusetts, Michigan, North Carolina, Vermont) and one U.S. Territory (St. John, U.S. Virgin Islands) had one chef response each, contributing to 20% of the responses combined.

Restaurant Type

Chefs who participated in this survey came from a range of restaurants and dining establishments, which were categorized into fine dining, casual/fast casual dining, institutional/campus dining, and temporary outlets (such as Farmer's Markets, Pop-Ups, Catering)/"other" dining workplaces (Graph 1). Responses are relatively evenly distributed across these categories, with a slight skewing toward fine dining but fewer temporary dining establishments.

Graph1: *Types of restaurants that respondents work at*

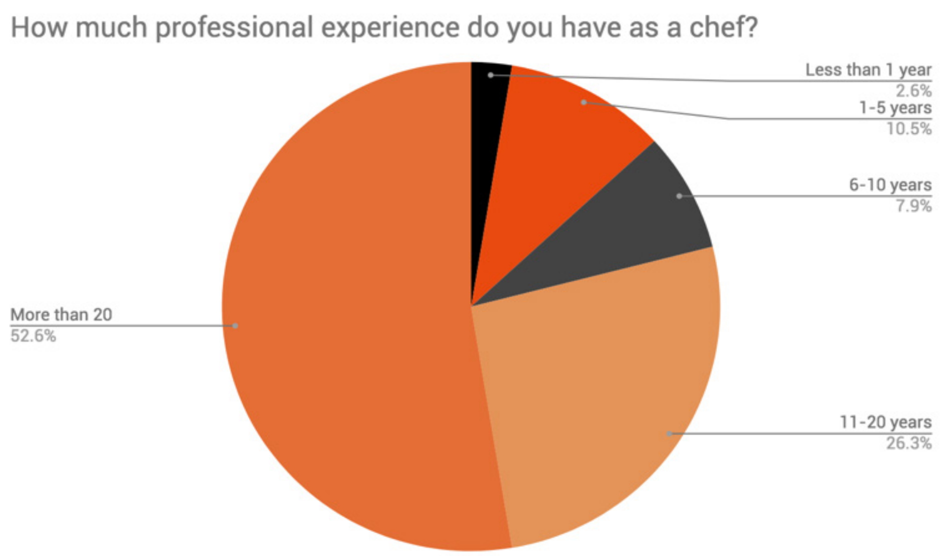


Professional Experience Level

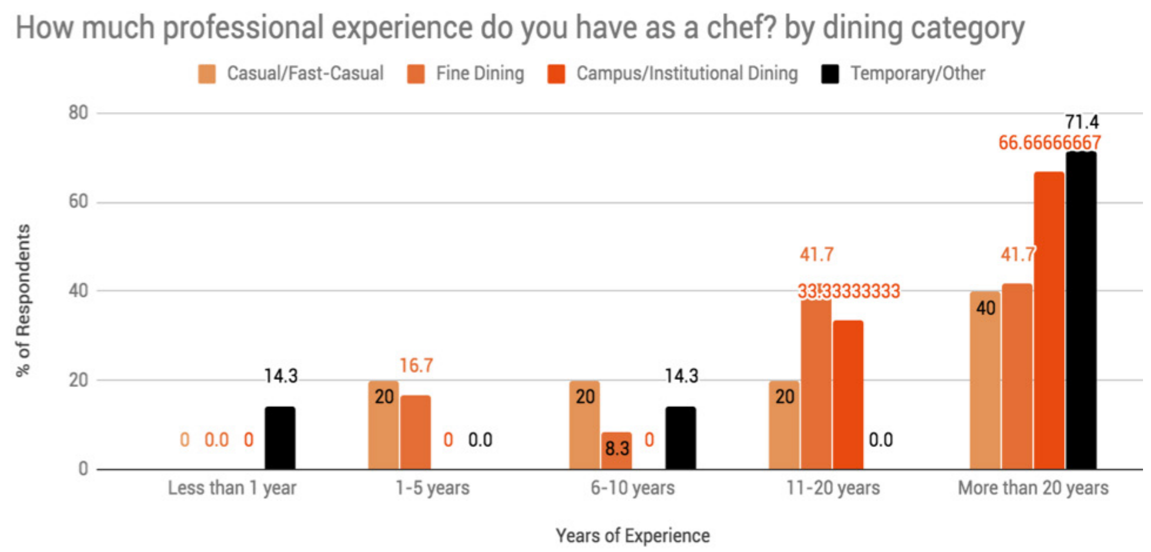
The majority of the participating chefs (52.6%) have over 20 years of professional experience in the kitchen (Graph 2). And an additional quarter of the chefs (26.3%) are in the next most experienced group that has between 11 and 20 years of experience.

Experience level distribution is relatively similar between dining establishment types. We find the same leaning toward high levels of experience across the board, with 20 or more years being the predominant answer across all restaurant types. Campus dining's respondents tended to be more experienced than others, while casual/fast casual dining respondents tended to more distributed across a wider range of experience levels.

Graph 2: *Years of respondents' professional experience*



Graph 3: *Years of respondents' professional experience by dining establishment type*

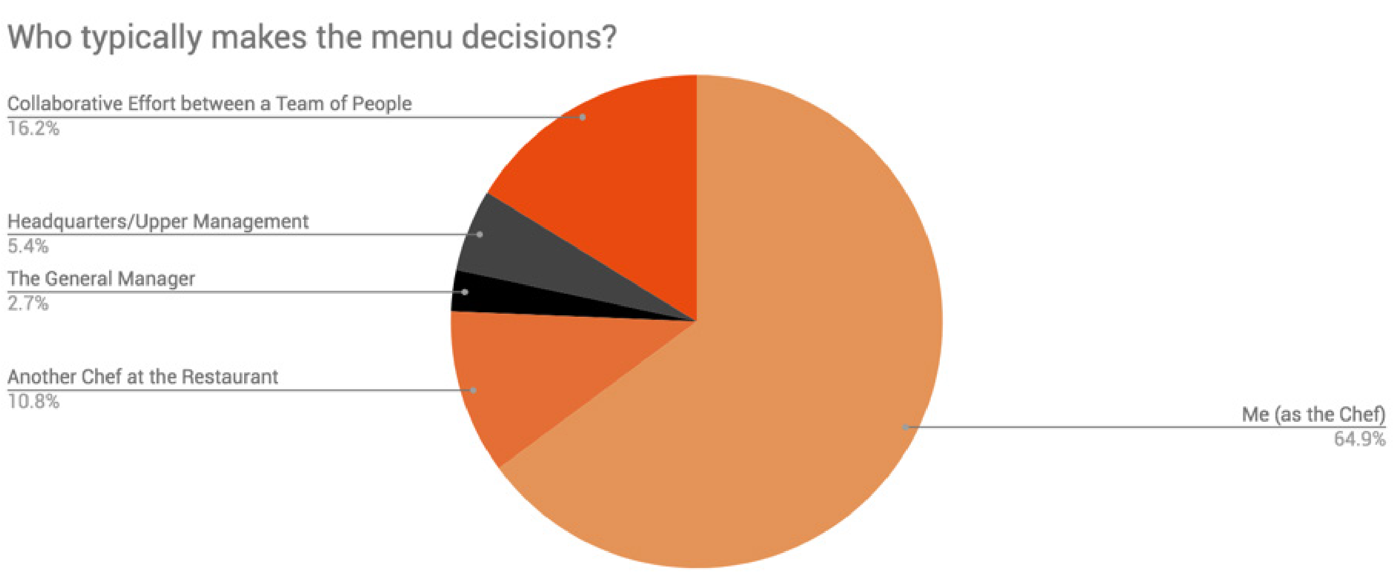


Decision-making Power

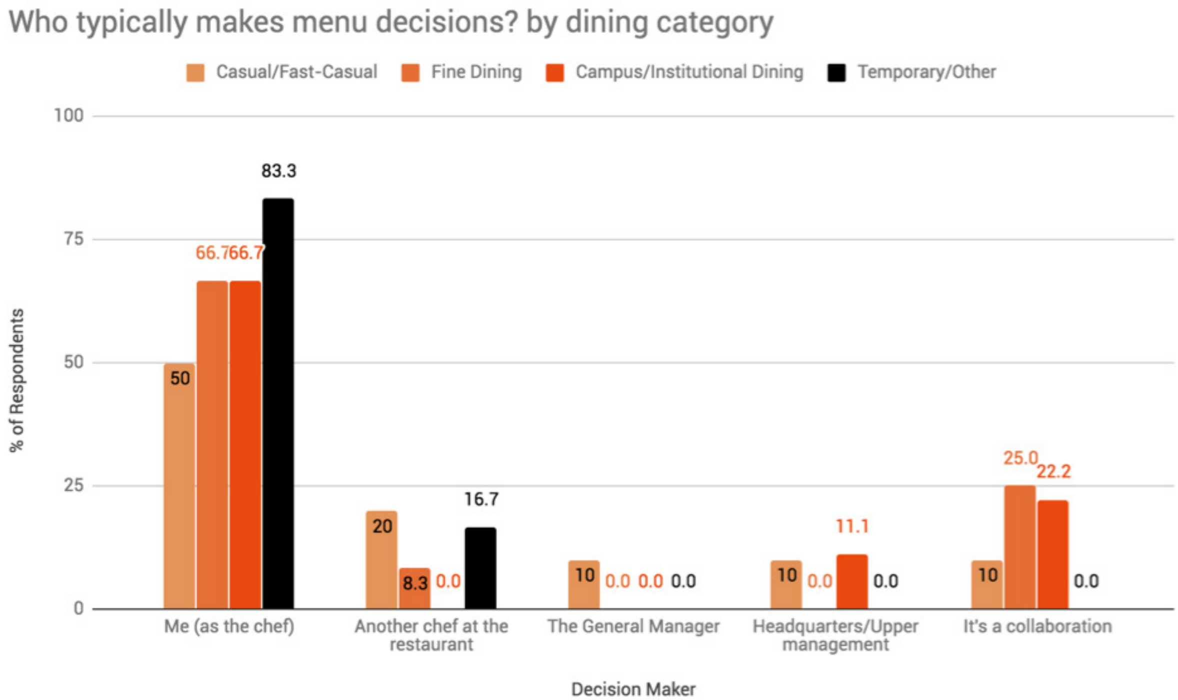
Almost two thirds (64.9%) of the chefs in this survey are the primary person in charge of the menu decisions for their restaurants or food service (Graph 4). A collaborative effort between a team of people is the second most common way (16.2%) to make menu decisions. In total 18.2% of survey respondents do not have decision-making power over the menu; instead those then sit with either another chef, the general manager or head office (for chains).

Survey respondents across all dining categories were generally chefs with the highest degree of decision-making power in their dining institution/restaurant (Graph 5). At least half of respondents in all dining categories are the primary person responsible for making menu decisions. Fine dining and campus/institutional dining are also likely to make menu decisions among a team of people. In casual/fast casual dining settings, 20% of respondents do not hold decision-making power; rather another chef in the restaurant makes the menu decisions.

Graph 4: *Person(s) with menu decision-making power over menu items*



Graph 5: *Person(s) with menu decision-making power, segmented by dining establishment type*



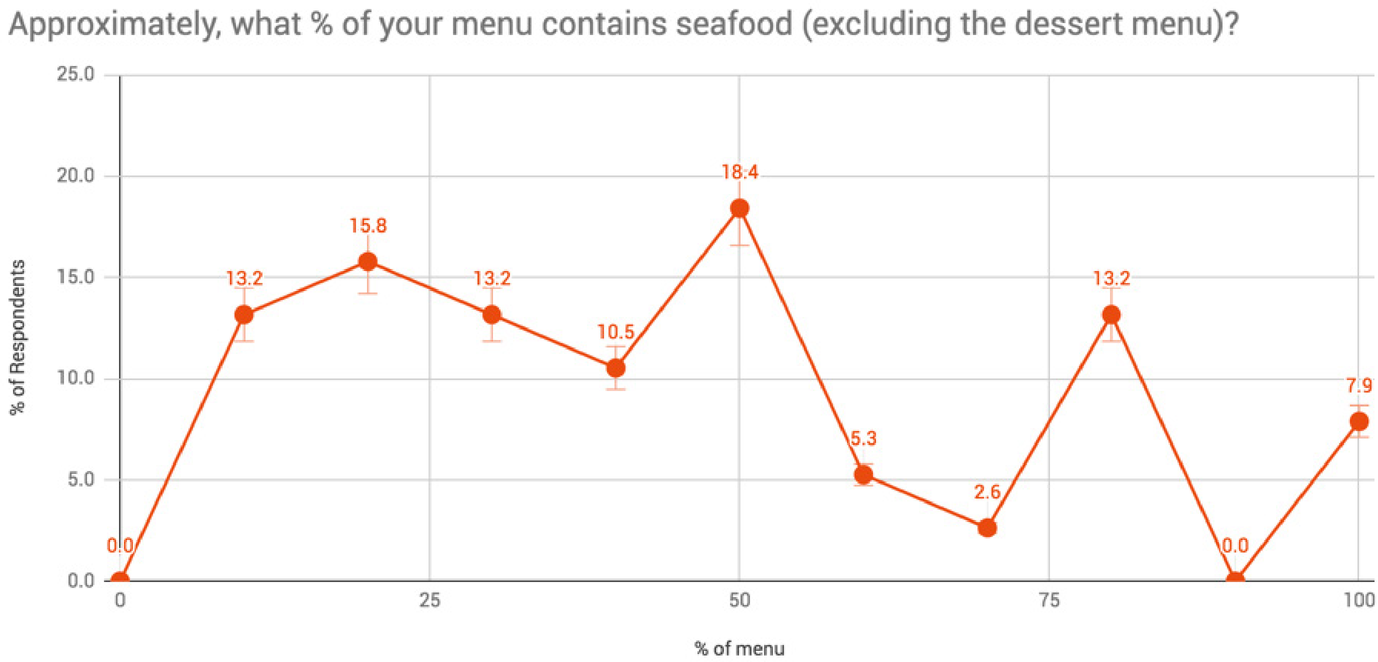
SEAFOOD MENU CHOICES

Seafood Share of Menu

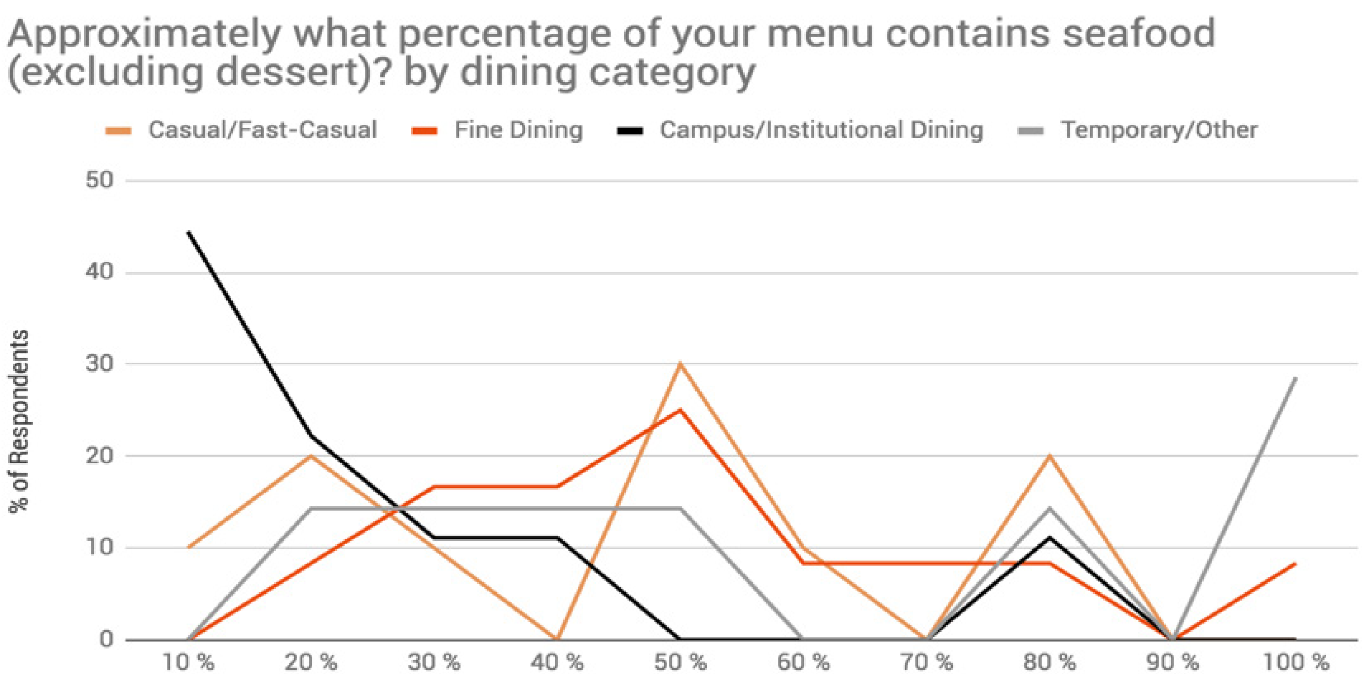
The chefs that participated in this survey generally work at restaurants where 20 to 100% of the menu items contain seafood (Graph 6). On average, 45.3% of menu items contained seafood. In this survey, the most common response (18.4%) indicated that 50% of dishes on their menus contained seafood of some kind, which closely reflects this report's average menu (45.3%). These are unusually high share-of-menu levels for seafood and indicates that a lot of respondents work in specialized seafood restaurants.

Looking at responses more closely by dining establishment type, we find that institutional and campus dining give seafood the least share of their menus. On the other end of the spectrum, respondents from temporary dining/other restaurant concepts are most likely to have menus that are exclusively (100%) seafood. 28.6% of temporary dining concepts represented in this survey are specifically designed to serve seafood. Finally, participating chefs from fine dining as well as casual/fast casual dining establishments are most likely to have menus in which 50% of the offerings contain seafood (Graph 7). This is still a very high number, commonly found in "seafood restaurants".

Graph 6: *The share of menu items containing seafood/ share of respondents*



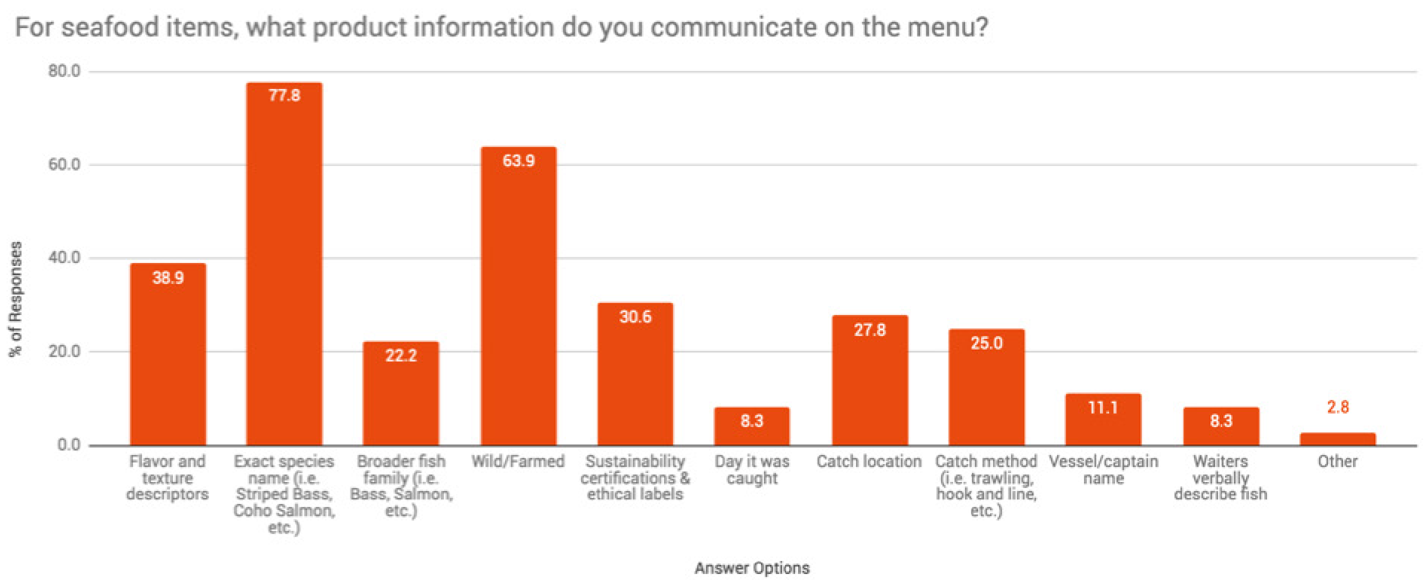
Graph 7: *The share of menu items containing seafood/ share of respondents, segmented by dining establishment type*



Product Information Provided on Menu

For menu items that contain seafood, the majority of menus (77.8%) communicate the exact species name of the fish, e.g. Coho Salmon, while only 22.2% give a more generic fish genus descriptor, i.e. salmon. Almost two-thirds of menus (63.9%) have descriptors to indicate whether seafood items were wild or farmed. Among the more secondary descriptors, flavor and texture descriptions (i.e. flakey, buttery) are prioritized ahead of sustainability credentials. Information pertaining to where, when, how or by whom it was caught are less common on menus, but are most likely used by fine dining and temporary dining establishments. (Graph 8).

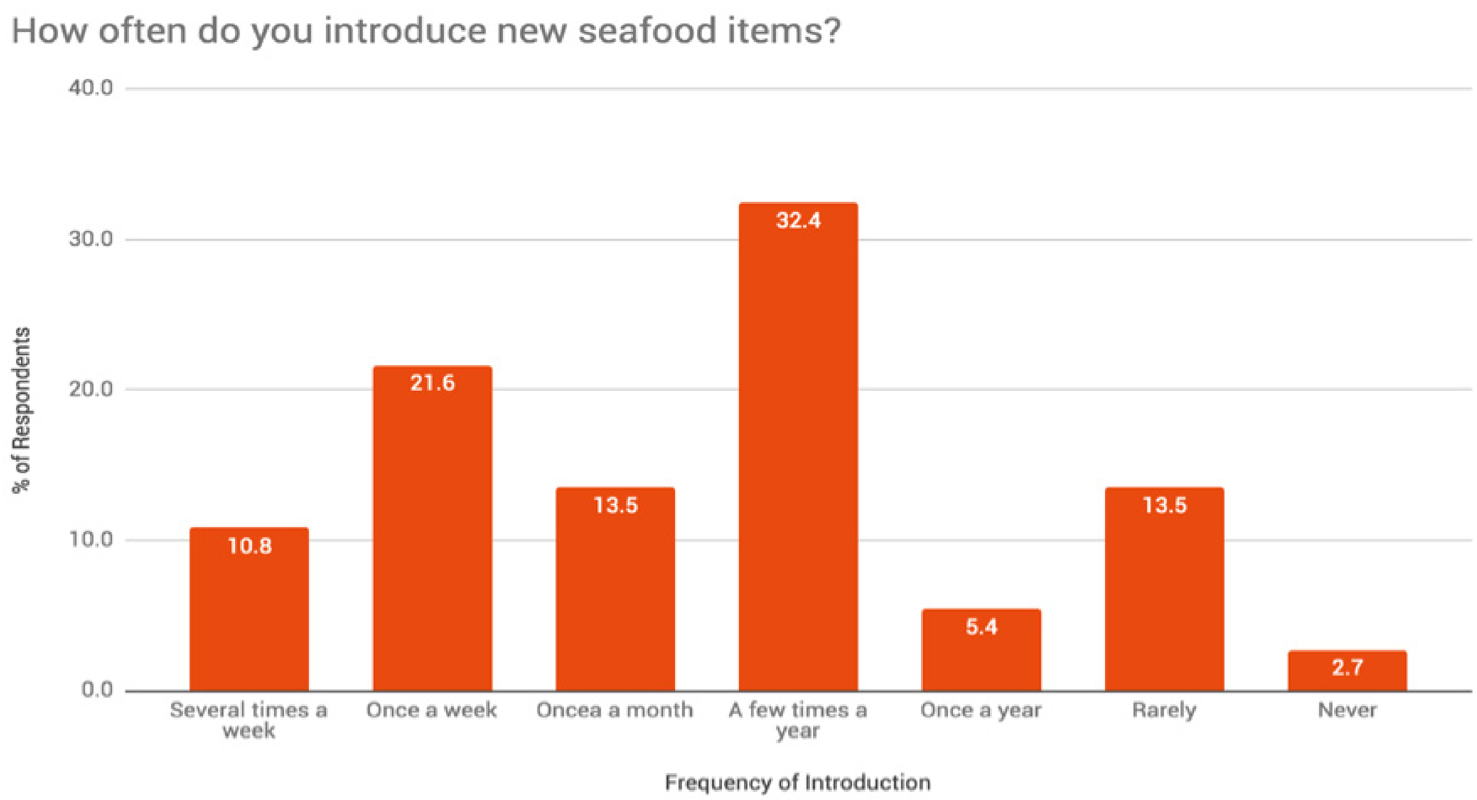
Graph 8: *Prevalence of seafood descriptors communicated on menus*



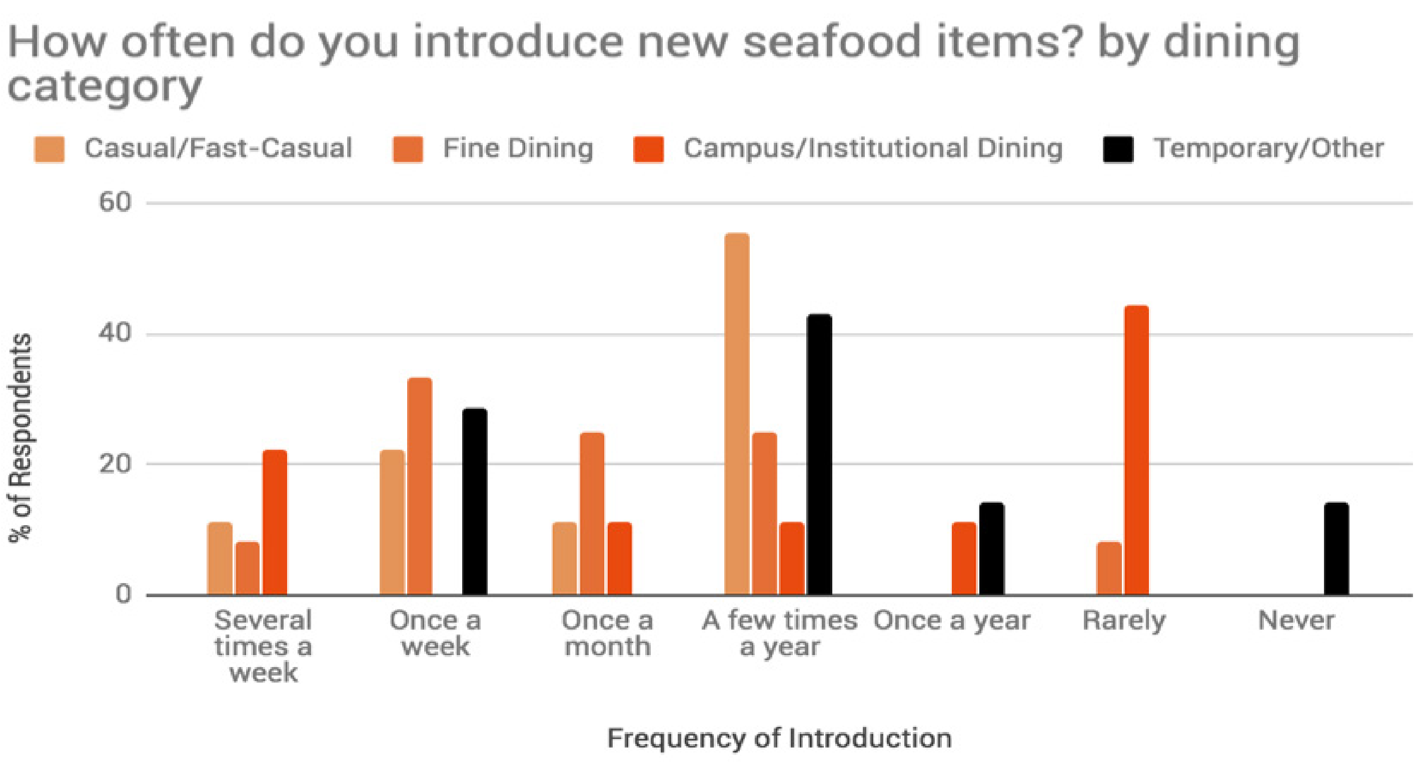
Frequency of New Item Introductions

The majority of chefs regularly introduce new seafood items to their menu. A combined 45.9% introduce new items on at least a monthly basis, with 21.6% doing so on a weekly basis (Graph 9). The largest contingent in this survey (32.4% of respondents) introduces new seafood items seasonally "a few times per year". The frequency that chefs introduce new seafood items reflects subtle differences between dining types (Graph 10). Casual/Fast casual and Temporary/Other dining are most likely to introduce new seafood a few times per year. Fine dining is most likely to introduce new seafood once a week. Campus/Institutional dining stands in contrast and only rarely introduces new seafood onto their menu.

Graph 9: *Frequency of new seafood items introductions*



Graph 10: *Frequency of new seafood items introductions, segmented by dining establishment type*

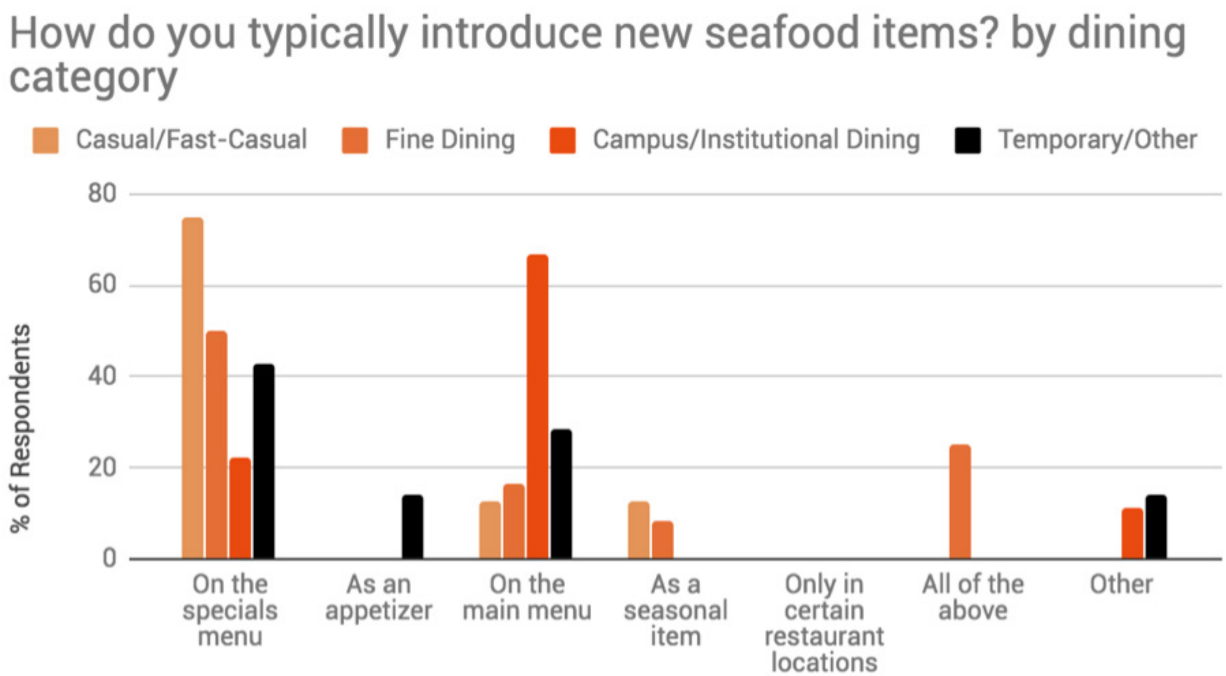


New Item Introduction Tactics

All types of dining will typically introduce a new item onto the specials menu first, with the exception of campus/ institutional dining (Graph 11). Institutional dining rarely introduces new items, but when it does, it is more likely to go straight on the main menu. Often institutional dining doesn't have a "specials menu". Instead, institutional dining typically rotates its menu items daily, each day presenting a small subset of items from a large standardized items list, which only rarely changes. Thus, the hurdle to entry is comparatively high in institutional dining.

In contrast, 25% of fine dining chefs chose "all of the above," meaning that they introduce new items on the specials menu, as an appetizer, on the main menu, as a seasonal item, and in select restaurant locations. Fine dining seemingly has the most menu flexibility of any restaurant type.

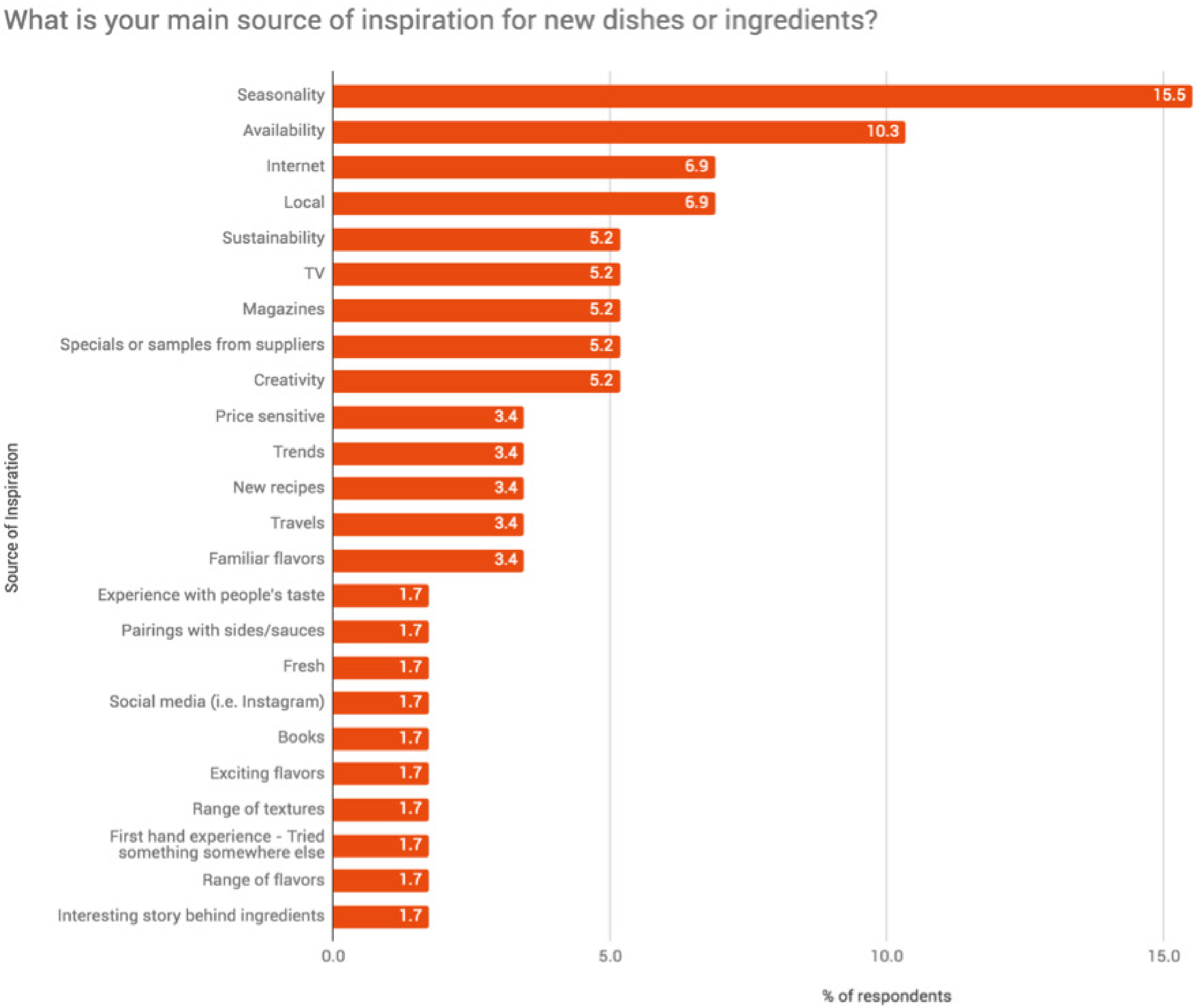
Graph 11: *Method by which a seafood item gets introduced on the menu, segmented by dining establishment type*



Sources of Inspiration for Menu Items

This question was posed open-ended, and received a plethora of different answers, indicating that the creative process is highly varied (Graph 12). The changing seasonality of produce and seafood items serves as the greatest source of inspiration for chefs – 15.5% of chefs cited "seasonality" and a further 10.3% "availability of ingredients", two related factors. Otherwise, we see a range of media serving as inspiration – the internet, magazines, social media and books. But also new personal experiences, be they through samples provided by a supplier, or through travels and having tried a dish at a different dining establishment.

Graph 12: *Most common sources of inspiration for new menu items*



Important Product Factors

Chefs were asked what factors they value when choosing seafood items, specifically factors outside of general primary factors that are key for any kind of food product - being fresh, high quality, and well-priced. We asked them to stack-rank their top 3 factors out of a list of 11, with the option of providing an "other" answer as well.

In total, chefs rank a seafood item's "popularity with customers" as the most important product factor (Chart 1). This perceived popularity may derive from personal experience serving it at their restaurant, or through emerging media coverage, perceived trendiness or supplier information about the item's popularity. This brings to light that most chefs are primarily concerned about serving food that they know diners will like, and are thus more often "taste followers" than "taste makers".

"Sustainability" (37.8%) and being "local" (35%) follow in second and third place, respectively. However, it's worth noting that "local" was the most commonly 1st ranked factor, whereas sustainability was the most common 3rd ranked factor. So, while they're very equal across the total top 3, "local" may indeed edge out "sustainability" in actual product choice.

It is interesting to see that an item's "Versatility in dishes" is the most highly ranked factor (34.3%) that relates to cooking/recipes and kitchen operations, and is ahead of "ease of preparation" (22.8%) or mild flavor (15.7%). So while the mild flavor or ease of preparations may make the item an all-star ingredient, chefs frame this benefit as "versatility" for themselves.

Chart 1: *Responses to the question; "Besides getting a product that is fresh, high quality and well-priced, what other factors are important to you when choosing seafood species/items? Rank your top 3."*

Response Option	Total Top 3 responses	1st (%)	2nd (%)	3rd (%)
Popularity with customers	41.1	14.3	12.5	14.3
Sustainability	37.8	12.5	7.8	17.5
It's local	35.0	16.1	9.4	9.5
Versatility in dishes	34.3	10.7	10.9	12.7
Fits with our restaurant concept	24.3	5.4	7.8	11.1
Ease of preparation & cooking	22.8	7.1	7.8	7.9
Previous experience cooking with it	21.7	10.7	9.4	1.6
Long shelf-life	21.1	5.4	9.4	6.3
Other	16.6	7.1	4.7	4.8
A unique & interesting flavor	16.6	7.1	6.3	3.2
Mild Flavor	15.7	0.0	10.9	4.8
Associated food waste	13.0	3.6	3.1	6.3

Reasons for Previous Discontinuations

At times, seafood items do not fit the needs of the chef or the restaurant. The top reason (50.1%) a seafood item has been discontinued is that it did not sell well (Chart 2), showing chefs' focus on the customer. Interestingly, while in the previous questions flavor and texture factors, preparation labor or food waste related factors didn't rank very highly as a reason for choosing a seafood item, they rank much higher as reasons to discontinue items. We can think of those factors as right-to-play rather than as winning factors.

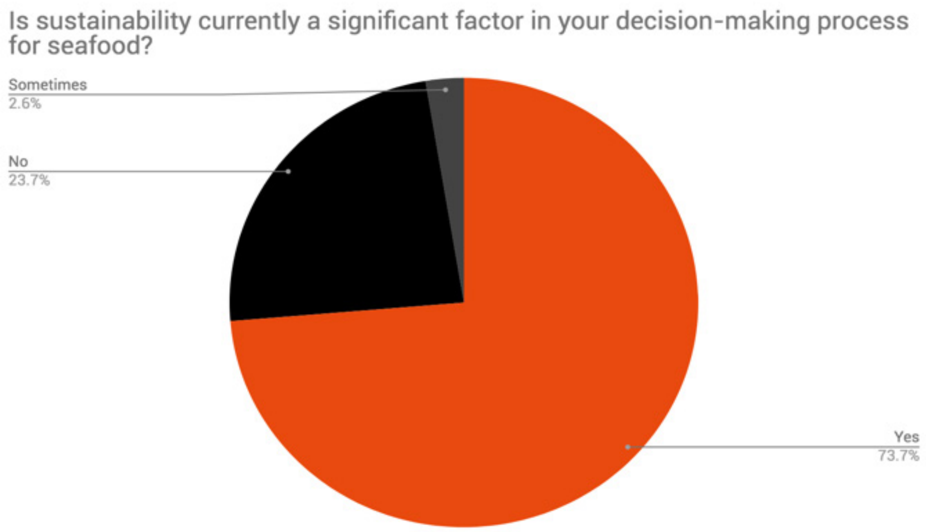
Chart 2: *Responses to the question; "What were the top reasons you've previously discontinued seafood items? Rank your top 3."*

Response Option	Total Top 3 responses	1st (%)	2nd (%)	3rd (%)
Did not sell well enough	50.1	18.8	13.3	18.0
Poor flavor & texture	34.8	16.7	3.3	14.8
Too labor-intensive to prep	33.1	8.3	10.0	14.8
Not sustainable	32.4	12.5	13.3	6.6
Not locally available	32.4	12.5	13.3	6.6
Poor shelf-life	24.0	4.2	10.0	9.8
Associated food waste	24.0	4.2	10.0	9.8
Not versatile enough	20.3	2.1	13.3	4.9
Did not fit with restaurant concept	18.7	2.1	10.0	6.6
Too difficult to cook	16.5	8.3	0.0	8.2
Other	13.7	10.4	3.3	0.0

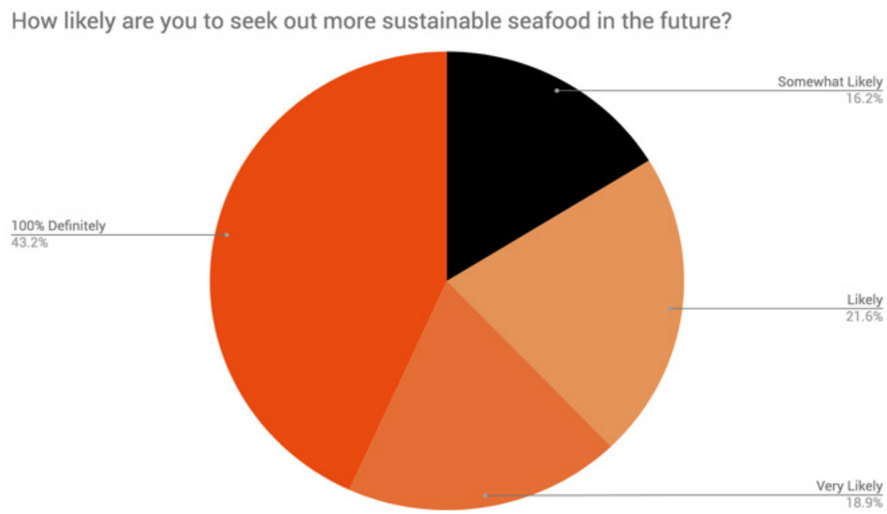
Importance of Sustainability

At the very end of the survey, we asked chefs specifically about the role of sustainability in their purchase decisions for seafood items, currently as well as in future. When asked in this way, 73.7% say that sustainability is currently a significant factor in their choice of seafood item (Graph 13). "No" responses came primarily from chefs who work in institutional/campus dining' And 83.8% of respondents say that they are either likely, very likely, or 100% likely to seek out more sustainable seafood options in the future (Graph 14). There was no noticeable difference between respondents in different experience levels. It is worth noting that not all respondents who say that sustainability is currently a significant factor will 100% definitely seek out sustainable options in the future. Moreover, even though many chefs claim here that sustainability is important, they haven't necessarily ranked sustainability among the top 3 product factors (Chart 1). This demonstrates powerfully that questions asked in slightly different ways can elicit different responses. Thus, although sustainability is important, it may be a "nice-to-have" but not a deciding factor in seafood purchasing.

Graph 13: *Importance of sustainability in seafood item choice*



Graph 14: *Likelihood of seeking out more sustainable seafood in future*

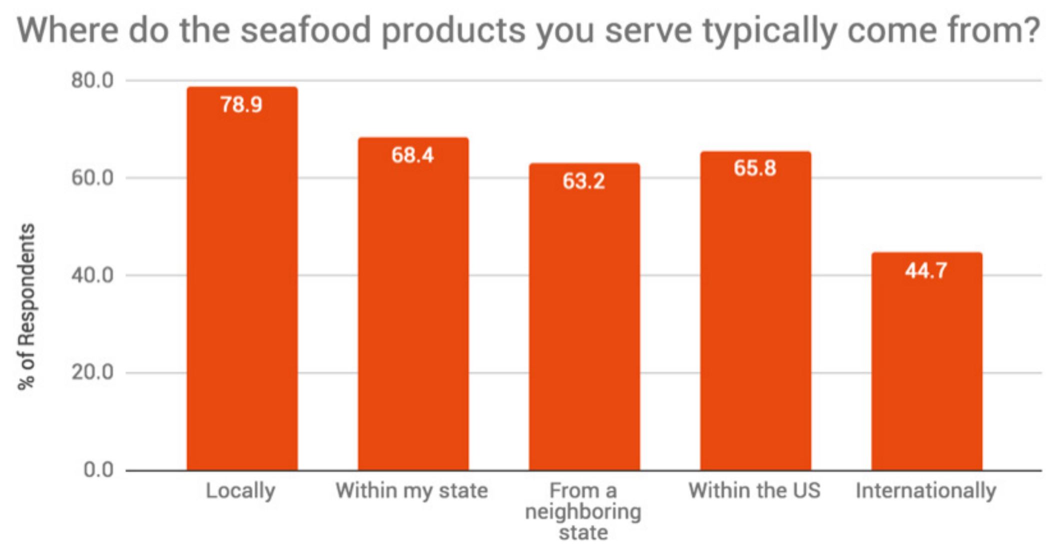


CURRENT SEAFOOD SOURCING

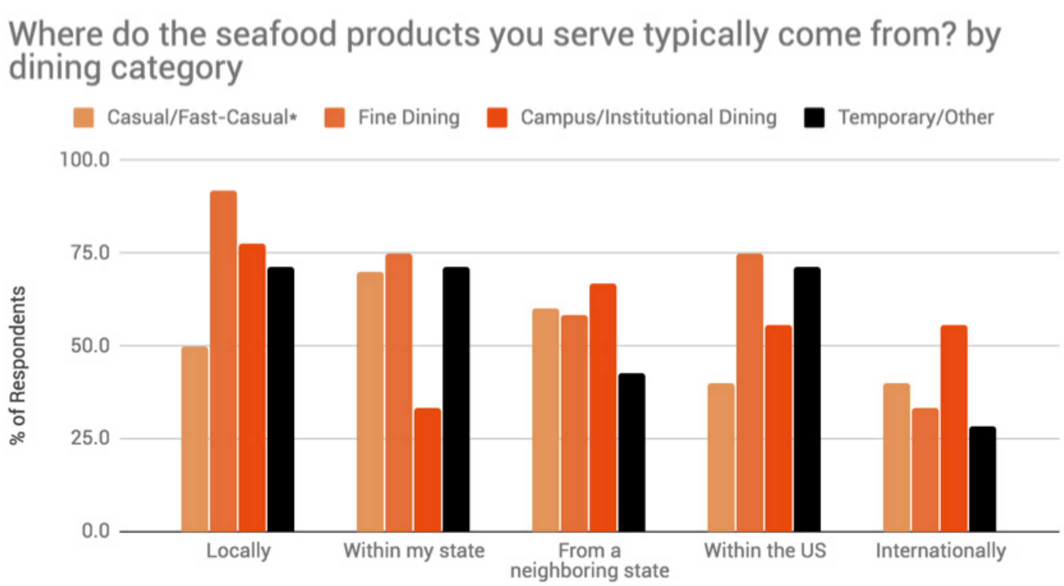
Degrees of Localness

The majority of chefs (84.2%) buy seafood sourced from multiple locations and degrees of "localness". Participating chefs currently source most of their seafood locally (78.9%) and from within their own state (68.4%), which was mostly California, Oregon and Washington (Graph13). Sourcing internationally is least favored although still common - 44.7% do so. This picture stands in stark contrast to the general seafood trade pattern in the US, which imports over 80% of the seafood it consumes from abroad [Source: NOAA]. Local seafood is most favored by all types of dining establishments, except for casual/fast-casual which will most frequently buy within the state (Graph 26).

Graph 15: *Degrees of "localness" of seafood currently sourced [multiple answers possible]*



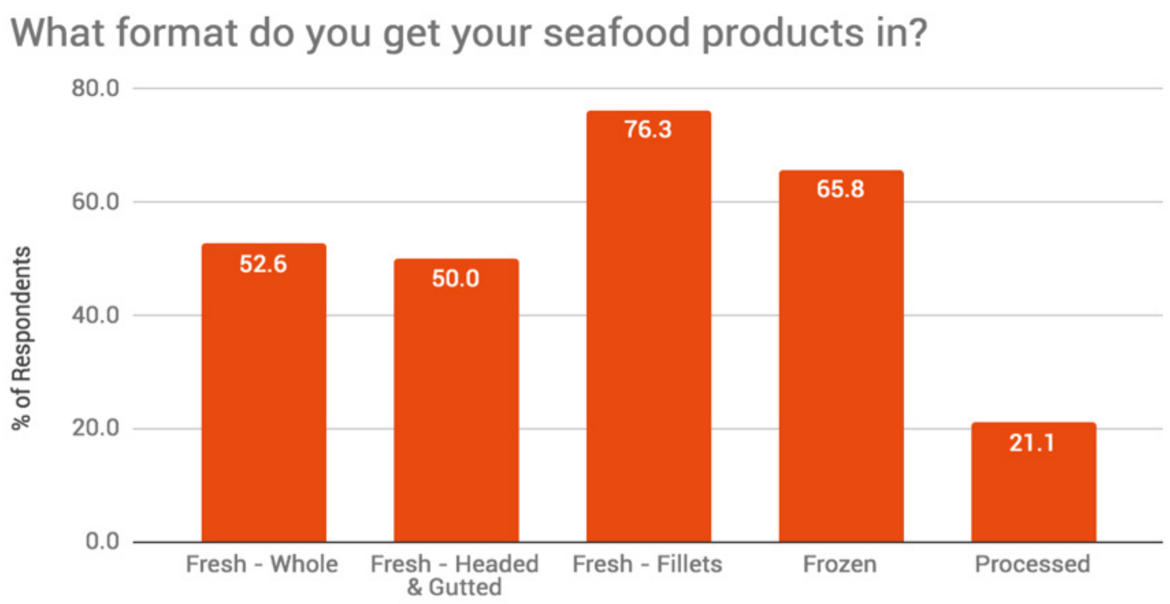
Graph 16: *Degrees of "localness" of seafood currently sourced, segmented by dining establishment type*



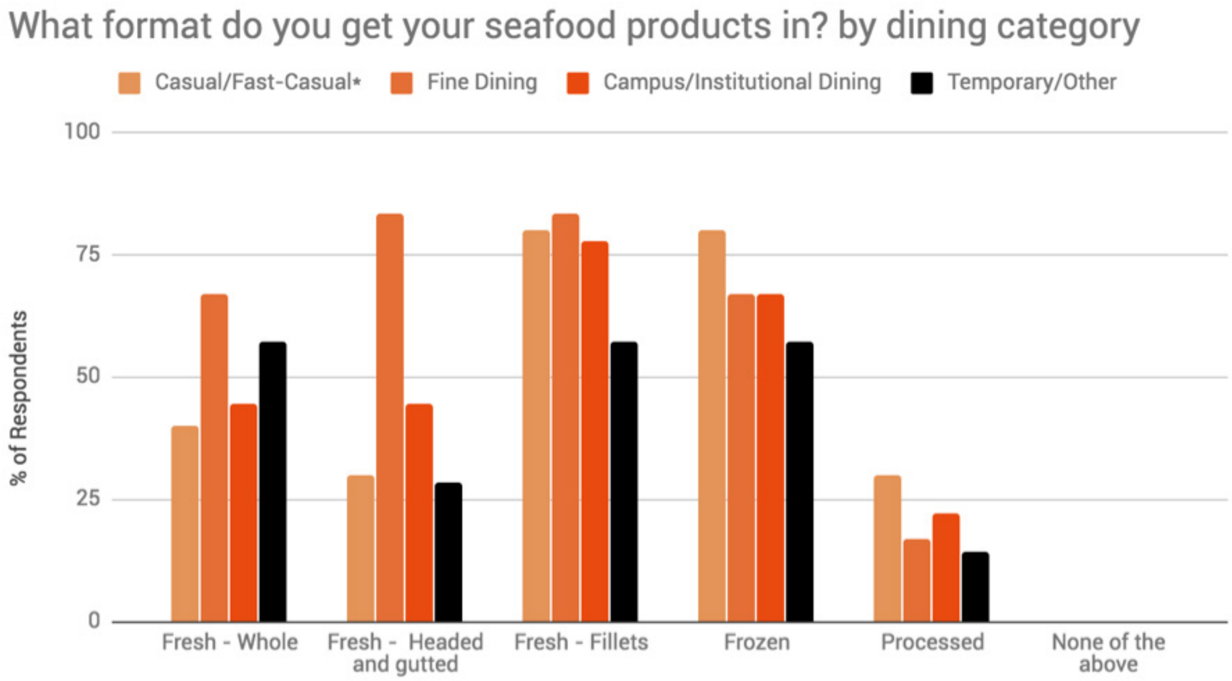
Product Format

Chefs most commonly buy fresh fillets of fish (76.3%) followed by frozen (65.8%) (Graph 17). While chefs in all restaurant categories are most likely to purchase fresh fillets (Graph 18), casual/fast casual dining will equally buy fish in a frozen form. Fine dining is most likely to buy whole or headed & gutted fresh fish and is least likely to buy processed fish. Interestingly, institutional dining is not the most likely to buy processed fish.

Graph 17: *Product formats currently purchased [multiple answers possible]*



Graph 18: *Product formats currently purchased, segmented by dining establishment type*



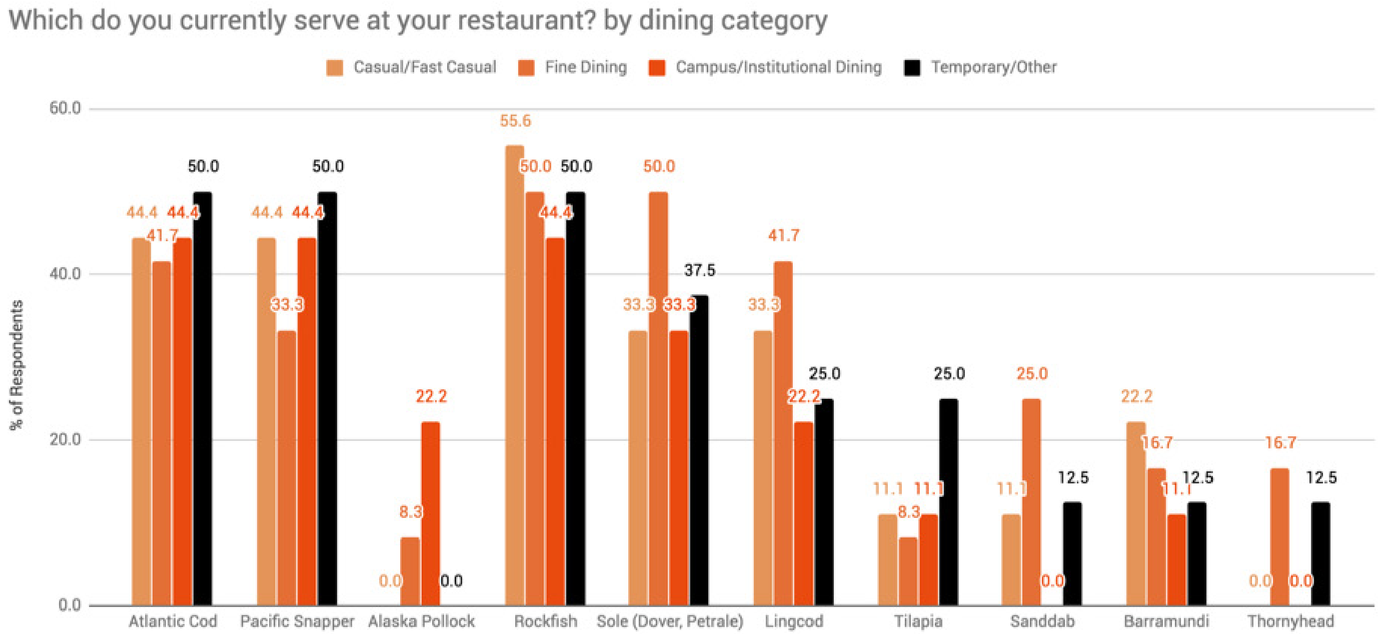
Usage of White Fish Species

West Groundfish species - Rockfish and its other market name Pacific Snapper, Sole, Lingcod, Sanddab and Thornyhead - are relatively popular among the chefs surveyed for this report. This popularity is perhaps not surprising given how many respondents were recruited from the network of groundfish processors, and given these chefs' particular focus on local sourcing. The West Coast groundfish species were the only species in this list that could possibly qualify as "local" for most of these chefs who mostly live on the West Coast.

Out of a list of ten white fish species, Rockfish is, in fact, the most likely to currently be served by chefs across all dining establishment categories (Graph 19). The discrepancy between answers for Pacific Snapper and Rockfish, which are two common and acceptable names for the same fish, tells us that this equivalence is not fully known by chefs.

Sole (Dover, Petrale) is particularly popular in fine dining establishments, matching the presence of Rockfish. Similarly, lesser-known West Coast groundfish species such as Lingcod, Sanddab and Thornyhead are also most likely served in fine dining establishments. Conversely, Alaska Pollock is most likely found in institutional dining, but otherwise has limited presence on menus.

Graph 19: *White fish species currently served at restaurants, by dining establishment category*

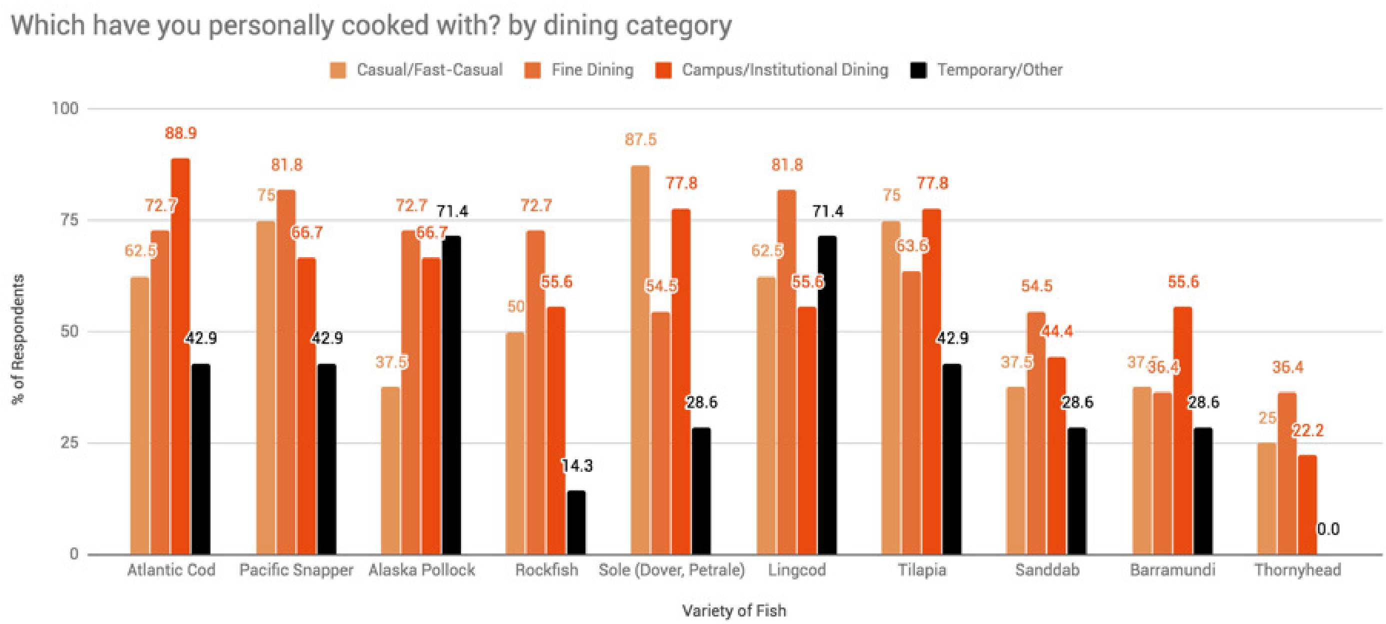


Chefs' Personal (at-home) Cooking Experience

Chefs are generally more likely to have cooked one of the 10 species of white fish in our study at home, than they are to serve them currently in their restaurants (Graph 20). That means that their personal awareness, trial and cooking experience of species goes beyond the current level of foodservice distribution and are generally encouragingly high. Sole, Lingcod and Sanddab, in particular, have been prepared by respondents at much higher levels at home than in their restaurants.

However, the rankings of species are different for at-home usage and at-work usage. Usage of Alaska Pollock, Tilapia and Sole ranks much higher at-home than at-work. There are species that chefs cook in their restaurants but not at home – which may indicate a lack of personal preference for these. In particular chefs that work in the temporary dining segment are often less likely to cook a species at home than they are to use them professionally.

Graph 20: *Personal at-home cooking experience, segmented by dining establishment type*

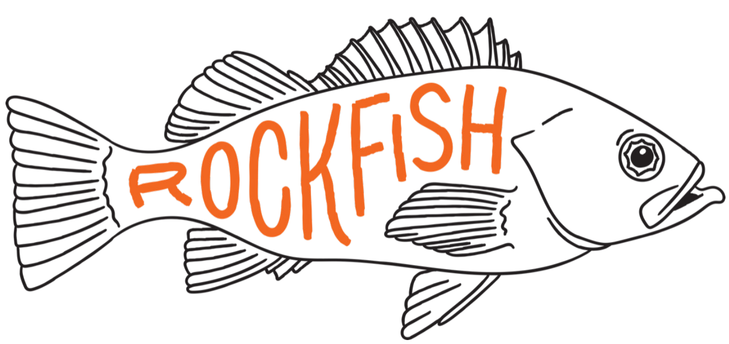


CHEF'S EXPERIENCE AND ATTITUDE - ROCKFISH

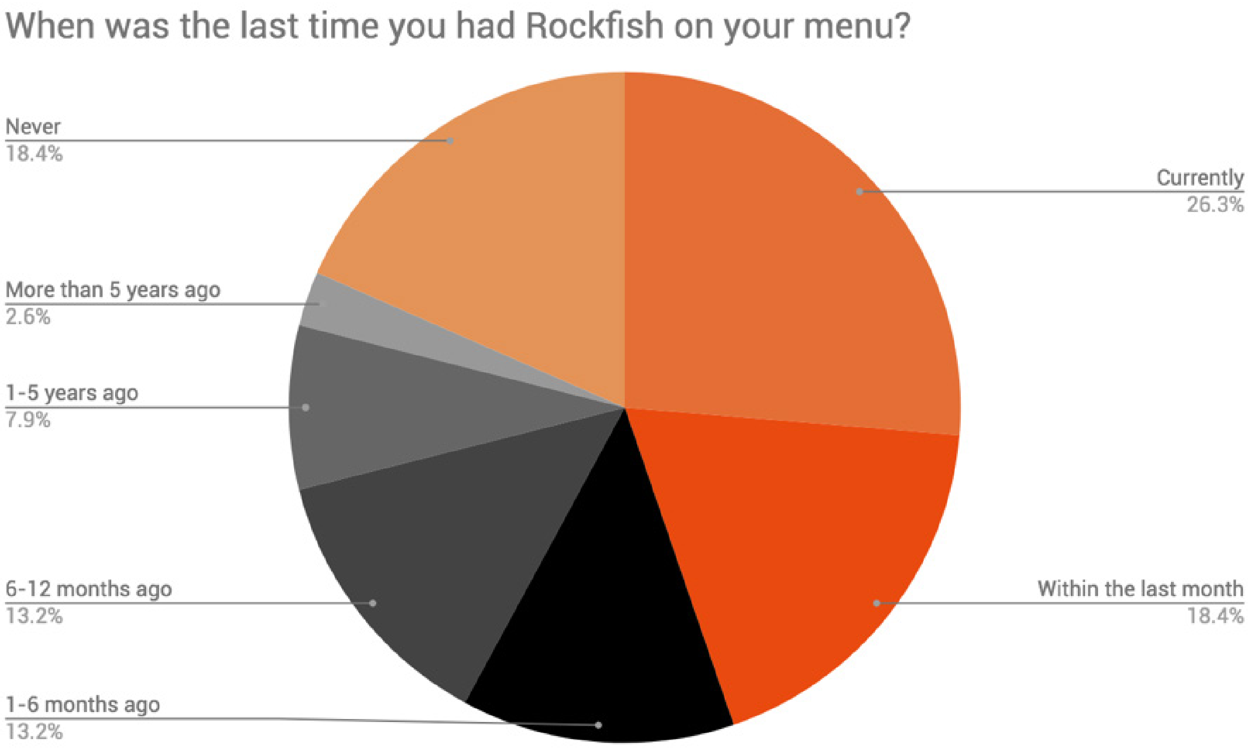
Usage Recency

44.7% of chefs are currently serving Rockfish or have sold Rockfish in the past month (Graph 21). The majority of chefs have served Rockfish within the last 6 months. Only 18.4% of chefs in this survey have never worked with it professionally. Note that the percentage of chefs who stated that they currently serving Rockfish in their restaurants on this question differs (26.3%) from the percentage of chefs who stated that they currently use it in the previous question (approximately 50%) (Graph 19). We can't be sure what explains this discrepancy, though we suspect it's due to differing interpretations or scopes of the word "currently". Whereas chefs may have answered more generally about it being currently on the menu on Question 14, when asked very specifically about it on Question 15 they provided more nuanced answers. We believe answers in Question 15 to be more precise, and more reflective of actual usage of Rockfish.

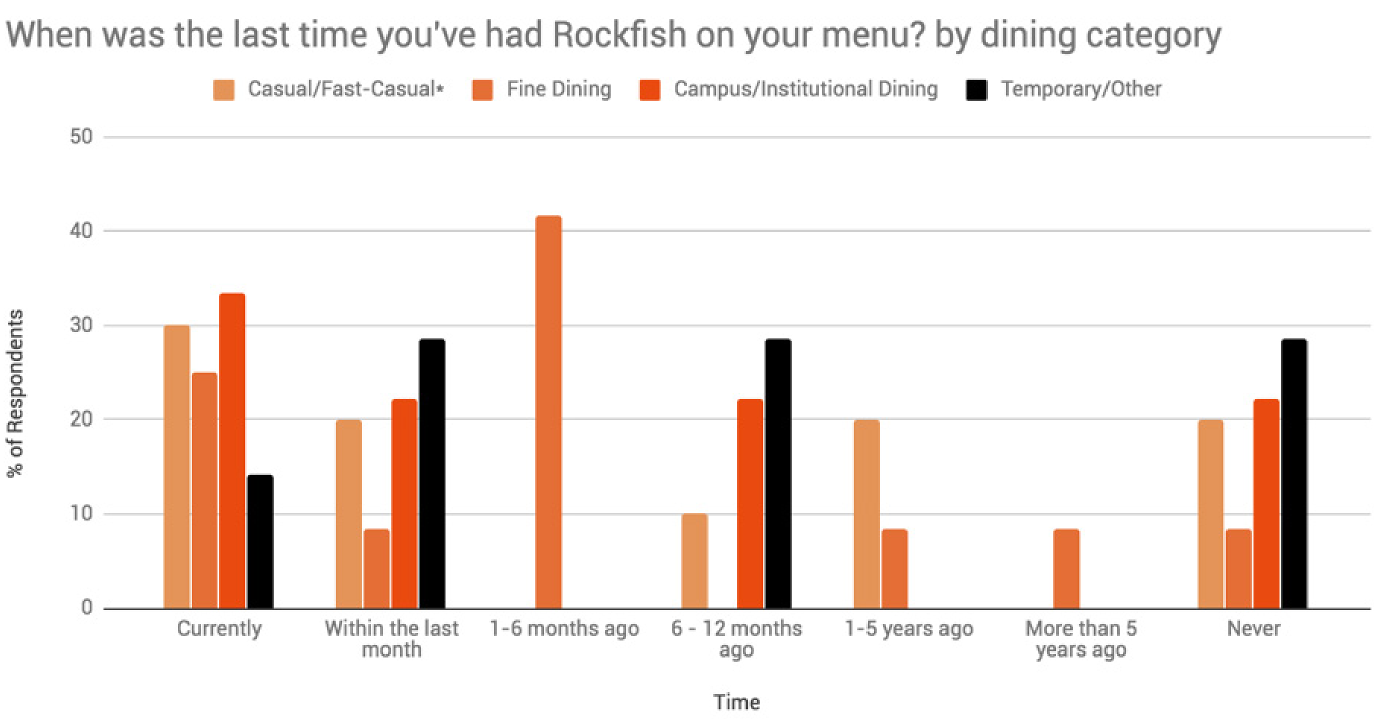
Casual/fast casual and campus/institutional dining are the two dining categories that are most likely to serve Rockfish today (Graph 21). Fine dining most likely served it between 1-6 months ago, perhaps reflecting seasonality or their more frequently changing menus. There is no clear pattern of recency for the temporary/other dining segment.



Graph 21: *Recency of Rockfish being on a respondents' menus*



Graph 22: *Recency of Rockfish being on a respondents' menus, segmented by dining establishment type*

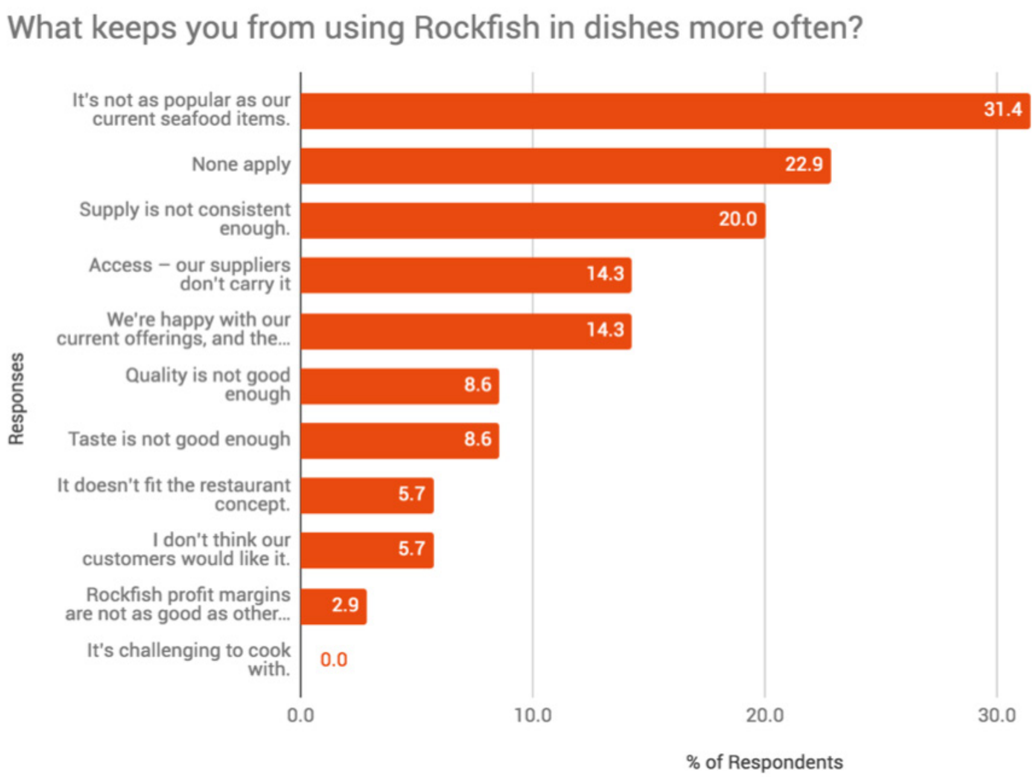


Barriers to Higher Usage of Rockfish

Those chefs that don't currently serve Rockfish most often state that it was simply not as popular with their customers as other seafood items (31.4%), which was the majority answer from chefs who work in casual/fast casual or temporary dining establishments (Graph 23). This highlights the need to do marketing outreach work that directly targets consumers, in order to drive more distribution and usage in restaurants, who are above all concerned about what their customers will like and demand.

Moreover, inconsistent supply or lack of access through their distributors of choice are important barriers to greater usage for Rockfish at the moment, especially for chefs who work in fine dining restaurants and temporary dining establishments. Issues with quality and taste were mentioned by 8.6% of respondents respectively, mainly by chefs from fine dining restaurants.

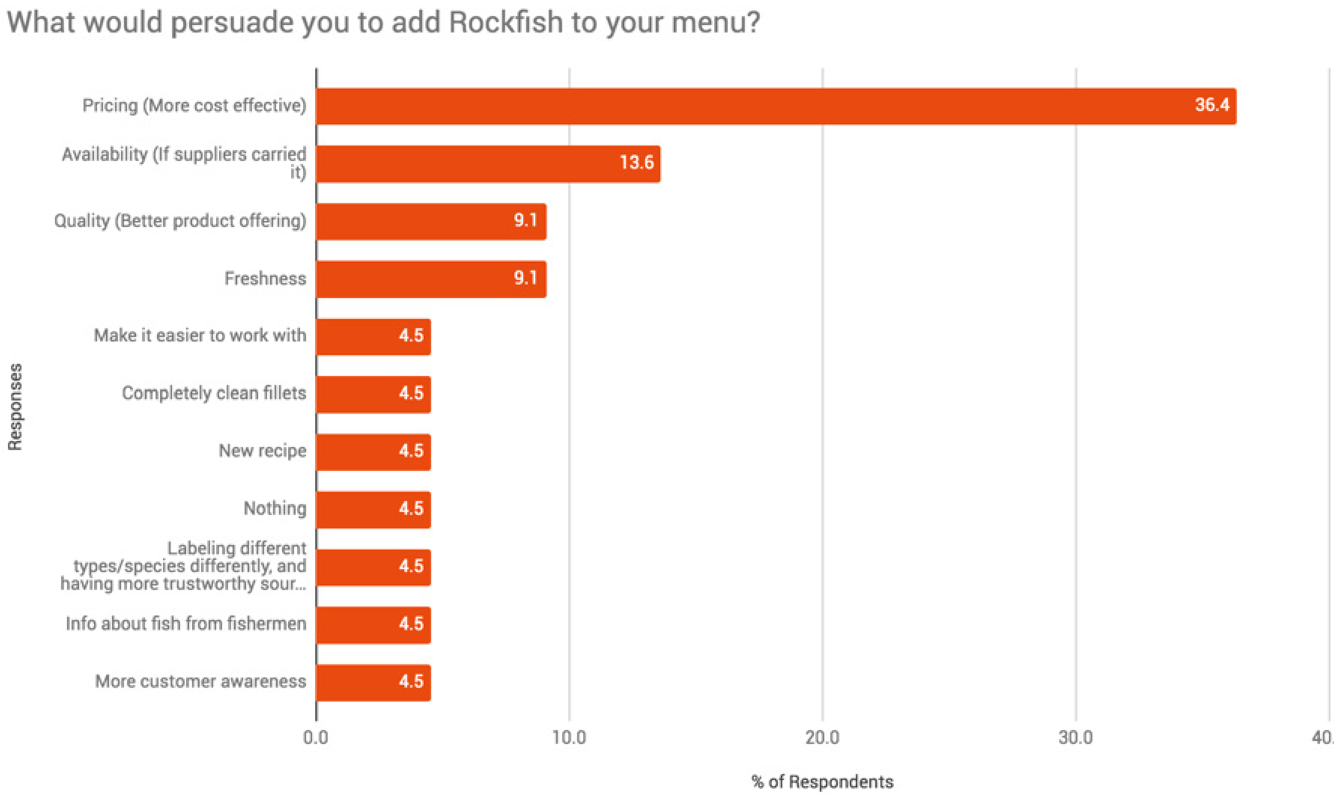
Graph 23: *Barriers to higher usage of Rockfish, according to chefs*



Potential Incentives to Higher Usage of Rockfish

We asked chefs an open-ended question: what could persuade them to use Rockfish more often. Though price has not come up in other parts of the survey, lower pricing was the greatest potential incentive for chefs to use rockfish more often going forward at 36.4% of responses (Graph 24). Making Rockfish more available and improving distribution levels of course came up (14.1%). Processing related factors such as improvements in quality (general), freshness, specific mentions of cleaner cut fillets or improving ease to work with the product combined amounted to 27.2% of responses. Greater product transparency (i.e. providing fish species level information or the name of the fishermen) was mentioned by 9% of chefs.

Graph 24: *Potential incentives to using more Rockfish*

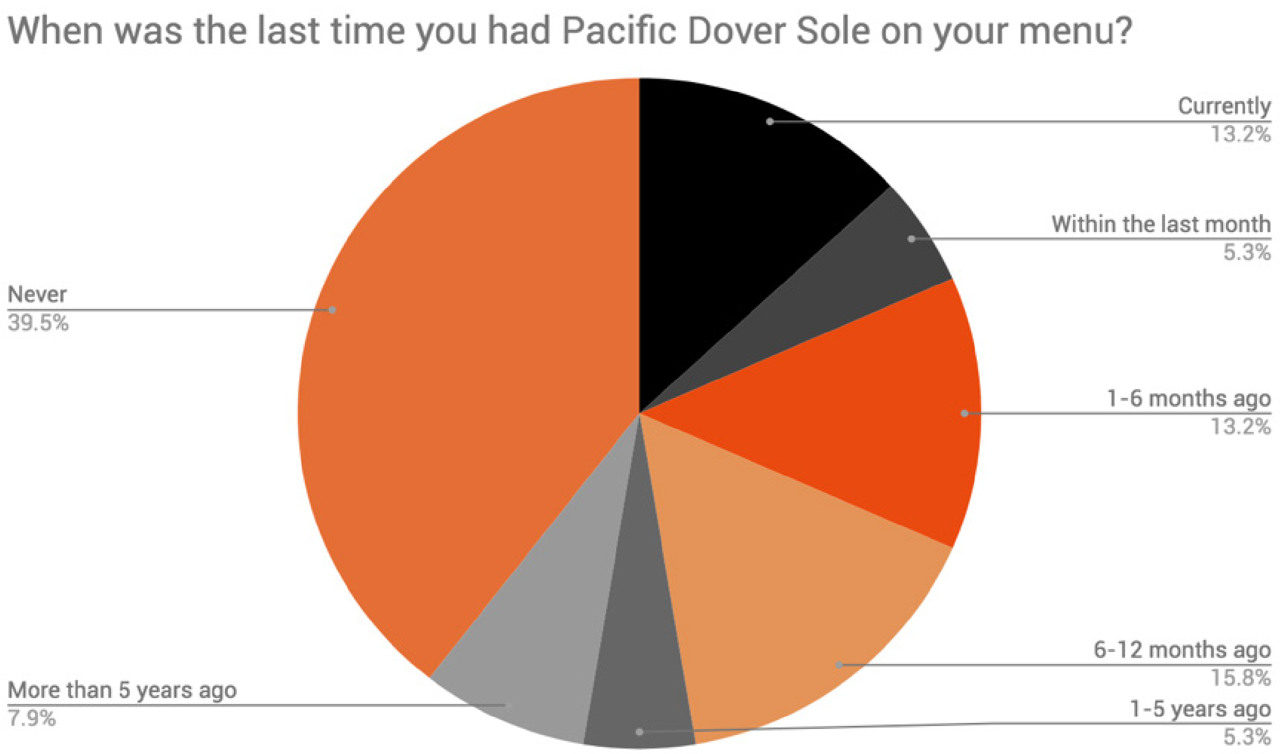


CHEF'S EXPERIENCE AND ATTITUDE - PACIFIC DOVER SOLE

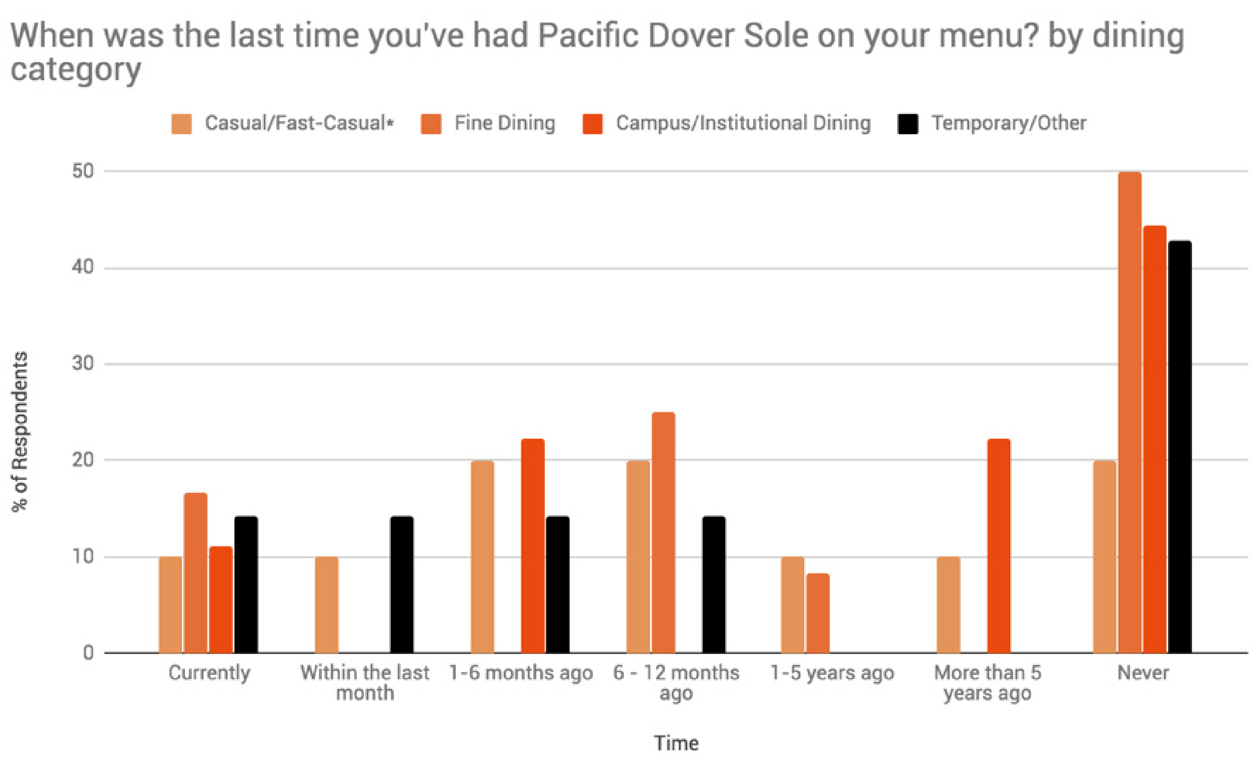
Usage Recency

Pacific Dover Sole is less used by survey respondents than Rockfish. Only 47.5% have served it in their restaurant over the last year, while 39.5% of chefs have never sold Pacific Dover Sole (Graph 25). And only 13.2% were currently serving it at the time the survey was conducted, which again stands in contrast to the answers chefs provided on Question 14 where between 33%-50% of chefs said they currently serve it (depending on dining establishment) (Graph 19). We can't be sure what explains this discrepancy, though we suspect it's due to differing interpretations or scopes of the word "currently". Whereas chefs may have answered more generally about it being currently on the menu on Question 14, when asked very specifically about it on Question 15 they provided more nuanced answers. We believe answers in Question 15 to be more precise and more reflective of actual usage of Pacific Dover Sole. For three of the four dining establishment categories the largest percentage of respondents said that they have never served Pacific Dover Sole (Graph 30). The one remaining category, casual/fast-food, has no consensus on when chefs generally served Pacific Dover Sole last. Responses are scattered relatively evenly across the response options.

Graph 25: *Recency of Pacific Dover Sole being on a respondents' menus*



Graph 26: *Recency of Pacific Dover Sole being on a respondents' menus, by dining establishment type*

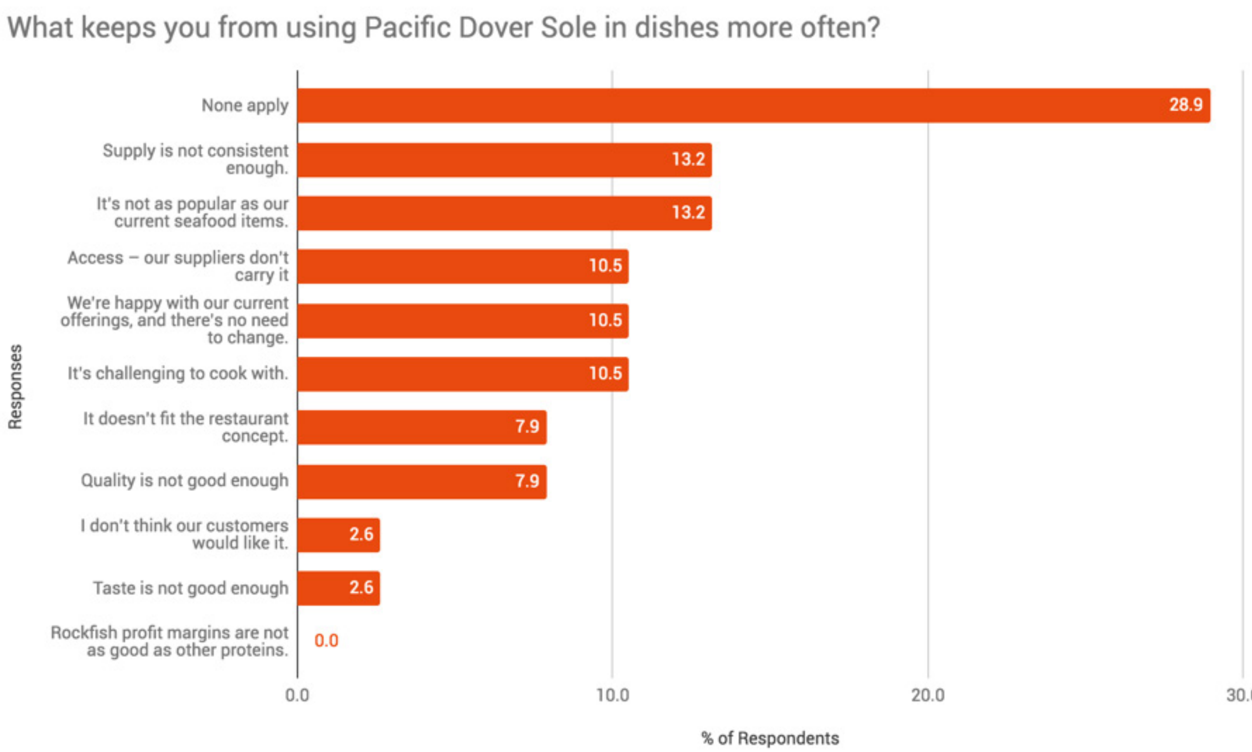


Barriers to Higher Usage of Pacific Dover Sole

Unfortunately, this survey was not able to identify a clear reason why chefs don't choose Pacific Dover Sole more often, as the most chosen answer was that "none of the proposed answers apply" (Graph 27). The next two most common answers were that Pacific Dover Sole is not as popular as current seafood offerings (13.2% of respondents) and that supply is not consistent enough (13.2%).

For campus/institutional dining and temporary/other dining, there was no clear barrier explaining why chefs are not serving Pacific Dover Sole (Chart 4). The highest number of responses for both of those sections came in as "None Apply." Fine dining chefs feel that access to this fish is limited through their suppliers and that it's not as popular as the current selection. Lastly, casual/fast casual restaurant chefs feel that the biggest reason they do not buy Pacific Dover Sole is because they are happy with their current offerings.

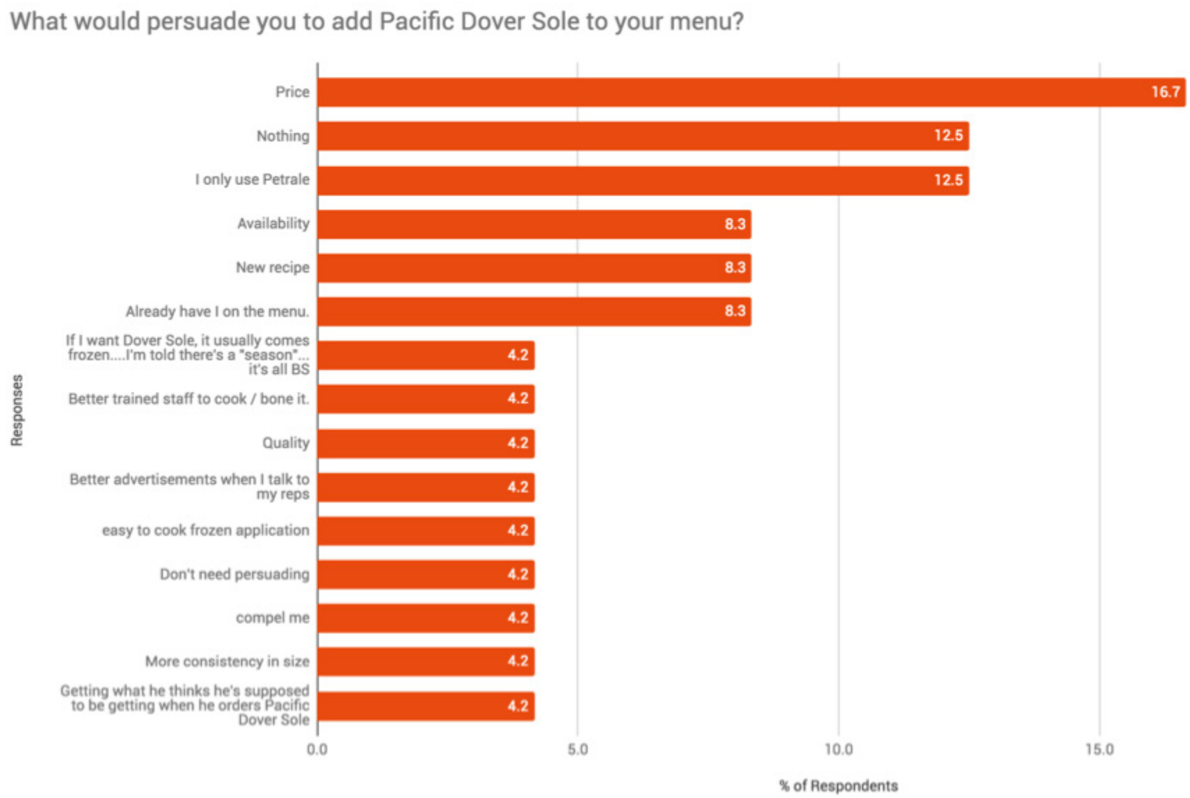
Graph 27: *Barriers to higher usage of Pacific Dover Sole, according to chefs*



Potential Incentives to Higher Usage of Pacific Dover Sole

We finally put an open-ended question to participating chefs, asking them what could persuade them to use Pacific Dover Sole more often in their restaurants. As with Rockfish, lower pricing was the greatest potential incentive for chefs to use Pacific Dover Sole more often going forward at 16.7% of responses (Graph 28). Note though that lower pricing would be much less persuasive with Dover Sole than it would be for Rockfish. Overall, chefs tended to be more pessimistic about Pacific Dover Sole. The next two most common responses were that "nothing" could persuade them (12.5%) and a flat-out statement that they only used Petrale Sole (12.5%). The suggestions that are potentially easiest to deliver on by Positively Groundfish were "new recipes", "easy to cook frozen applications", "better advertisement" and "better consistency with sizes".

Graph 28: *Potential incentives to using more Pacific Dover Sole*



TAKEAWAYS

Chefs surveyed in this report inspire an optimistic outlook for the West Coast Groundfish fishery, but they may represent a group that deviates from the broader industry. These surveys were completed on an entirely voluntary basis without any incentive besides helping a non-profit better understand a chef's decision-making process around seafood. Thus, respondents may have been sympathetic to the cause. Furthermore, the survey taker and Positively Groundfish drew from their own networks, making it more likely that the chefs would share similar values and worldviews. For instance, the chefs may have already received information about the West Coast Groundfish fishery and the importance of sustainable fishing practices. To compound these biases, the sample size of this survey is relatively small, which may make biases more pronounced. Thus, all results and discussion should be used as an understanding of chefs but not as a rule for the broader chef community.

Chefs Cook to Customers' Taste

Chefs are often talked about as taste makers and crucial influencers that have the power to turn the public on to particular (new) foods. However, only few chefs truly act as taste makers. Most chefs are primarily concerned with what the public and their customers already like, and they will develop menus and buy ingredients accordingly. This perceived popularity may derive from chefs' own experience serving it at their restaurant, or through what chefs see in the media, industry forums, or hear from their suppliers.

"Popularity with Customers" was ranked as the single most important factor for choosing seafood items (41.1%), ahead of product factors such as "sustainable" or "local". Conversely, a lack of popularity with their customers was the most common reason seafood items were discontinued – 50% of chefs ranked "item did not sell well" in their top 3 choices.

One chef who was interviewed over the phone gave a relevant anecdote to illustrate this decision. He worked in a hotel restaurant in the Mountain Region, that served a Bass dish that didn't sell well. The Bass dish only appealed to a small subset of customers who were accustomed to eating Bass, but didn't catch on with the mainstream clientele. When the restaurant substituted the Bass for Salmon, the dish became significantly more popular, which justified keeping that dish on the menu. Buying fish that customers do not like means waste – food waste and financial waste. With low profit margins, restaurants can't afford this.

This highlights the need for marketing work that directly targets consumers and builds up desire and demand for species, rather than relying on chefs to take on the financial risk of unproven new products and do all the heavy lifting to create consumer demand. Most chefs and restaurants cook what their customers like and are "taste followers" rather than true "taste makers".

Chefs Want Local Seafood

According to our results, sourcing seafood that is "local" is important to chefs. 16.1% of respondents ranked it number one for important factors when buying seafood. A vast majority of chefs (78.9% of respondents) reflect this sentiment in their actual purchasing habits. This number appears surprisingly large considering that over 80% of seafood sold in the United States is imported [9]. So how could these differences in our survey and national statistics be reconciled? First, because a significant amount of this 80+% is originally caught in the US, exported (to be processed), then reimported, chefs may think they are buying from local fishermen when, in fact, their locally sourced seafood has travelled around the world. Second, it is unclear whether this 78.9% of respondents is buying a large or small quantity of local seafood. In fact, 84.2% of respondents buy their fish sourced from multiple locations showing that chefs diversify where they buy fish from. Of the respondents, only 2.6% of chefs buy exclusively local fish. Third, chefs may be misinterpreting where the fish they purchase originates. Phone interviews brought to light that some chefs had misconceptions that, for instance, Rockfish is an East Coast variety and Pacific Dover Sole is European. Lack of or mislabeling most likely amplifies this confusion [10]. Another explanation may lie in the profile of survey respondents. This survey favored chefs who work in fine dining, which is also the dining establishment segment that favors buying local more than any other (91.7%). Thus, results were most likely skewed towards fine dining chefs' perceptions and habits. Lastly, if the chefs interviewed over the phone were comparable to chefs who responded electronically to this survey, chefs tended to be sustainability minded and aware of the downfalls of the fishing industry, which may lead to favoring purchasing local seafood. Although this may not be indicative of all chefs, these results show that localness is a factor that chefs pay attention to and that it is worth using in marketing for the West Coast Groundfish fishery. And chefs who occupy the fine dining space will be particularly receptive to this marketing.

Chefs May Not Serve What They Eat at Home

When comparing the two questions "Which have you personally cooked with?" and "Which do you currently serve at your restaurant?", there is a discrepancy in the fish that chefs like to cook at home and the fish that chefs serve in their restaurants. There may be multiple reasons for this difference: 1) Chefs may want to cook a different species of fish at home to add variety into their diet or cooking skill set. 2) Chefs may be more aware of fish available for purchase and may not feel comfortable serving this particular variety of fish in their restaurant if they're not convinced that their customers will like it. 3) There was a difference in time horizon implicit in the questions asked: the survey asked if they had ever cooked a specie at home, but asked if they are currently serving it at their restaurant. Question 14 was primarily designed to establish chefs' level of awareness, trial, cooking experience as well as current (professional usage), rather than setting out to determine the difference between chefs' personal and professional species preferences. Nonetheless, the answers still revealed some potential opportunities.

Lingcod, in particular, is popular with chefs for cooking at home, especially so with chefs that work in fine dining and temporary popup dining settings – i.e. a trendsetting part of the foodservice industry. There may be an opportunity to tap into these chefs' personal preferences and familiarity and persuade and enable them to serve it more often at their restaurants. Likewise, chefs in casual/fast casual dining have likely cooked Sole (Dover, Petrale) at home, presenting a similar opportunity in this dining category. Two other groundfish, Sanddab and Thornyhead, are rarely served at restaurants, but are not uncommon to find in chefs' personal kitchens.

According to this report's survey data, about half the chefs in each dining category are likely to serve Rockfish at their restaurant, which, again, may be caused by biases in the respondent pool. This statistic points to a market for Rockfish, although we do not know from this survey how much Rockfish they sell. However, Rockfish must be popular enough among customers that they continue to use it in their restaurant.

Chefs Need Help with Pacific Dover Sole

Chefs did not particularly favor Pacific Dover Sole. Three out of the four dining categories state that they most likely have never had Pacific Dover Sole on their menu. In fact, many chefs, through survey comments and over the phone interviews, state that they favor Petrale Sole over Pacific Dover Sole. From interviews, chefs seem unhappy with the inconsistencies in Pacific Dover Sole. Chefs complained that the Pacific Dover Sole they ordered were inconsistent sizes, "not actually the fish [he] thought he was purchasing," or not as good as Petrale. One chef stated that there simply weren't enough recipes for Pacific Dover Sole or incentives for chefs to "reinvent" the fish. These complaints need to be addressed in order to drive sales in the restaurant market.

Dining Establishment Categories with the Most Quirks

Fine Dining

Fine dining is interesting in that about a quarter of the chefs collaborate on menu decisions, a sign of their openness to others' opinions and the work culture in these types of establishments. Furthermore, their introduction of new seafood differs from other dining categories. Instead of exclusively placing new dishes on one particular part of the menu (i.e. the specials menu), about a quarter of fine dining chefs will use all potential methods to introduce new seafood items. This further indicates a potential level of flexibility from the chefs.

Campus/Institutional Dining

Compared to the other three dining categories, campus/institutional dining tends to have significantly less fish on their menus (10% compared to the average of 45.3%) and will generally place new seafood introductions on the main menu only, which for many is their only menu (i.e. there are no specials menus). Instead, institutional dining typically rotates its menu items daily, each day presenting a small subset of items from a large standardized items list, which only rarely changes. Thus, the hurdle to entry is comparatively high in institutional dining. Furthermore, campus/institutional dining is the only dining category in which the majority of chefs rank sustainability as an insignificant factor when choosing a seafood item.

Other Ideas that Surfaced in the Over-the-Phone Interviews

Phone interviews are able to capture a more robust understanding of a chef's relationship to seafood. One idea that surfaced during phone interviews but not in online surveys is that chefs are looking for a high level of trust in the seafood buying process. The discovery of a lack of transparency will erode trust and will cause frustration for chefs. As an example, one chef who worked at a luxury hotel restaurant in Southern California is skeptical of Rockfish since multiple species are sold under one name. Because of this, he does not trust that he will get a consistent product. Thus, he will only buy this fish through a local market, not a vendor, since he feels they are more transparent. A lack of trust, in this situation, caused the vendor to lose business and resulted in less Rockfish being purchased. Furthermore, it implies that chefs feel more in control of the buying process if they see the fish first. Another chef who had her own restaurant in the Pacific Northwest described a whole routine that she had to test if the fish she was about to purchase was up to her standards. A feeling of more control over the process means a feeling of trust towards the product a chef is purchasing and the company the chef is buying the fish from.

The idea of trust is also intertwined with sustainability. When asked "How likely are you to seek out more sustainable seafood in the future?", a chef who runs a fine dining restaurant in coastal/central California stated "100% definitely. I can't be bought!" This associates sustainability with a lack of deception. If a fish is truly sustainable, the chef may feel that those selling the fish are trustworthy and honest. Trust is foundational for seafood purchasing.

Next Steps and Lessons for Upcoming Chef Surveys

The most glaring point for improvement for following chef surveys is a dramatic increase in the sample size to make the survey and correlations more statistically robust. Moreover, strong efforts need to be taken to get a more random sample of chefs, that is less picked from with the groundfish industry's existing network. This is no easy task as chefs are a difficult group to get a hold of or persuade to participate in this survey. Perhaps participation needs to be incentivized. Or perhaps this type of study needs to be contracted out to organizations that have large numbers of chefs in their network.

While this first study was broad in scope by design, subsequent studies would benefit from greater focus around specific topics and being shorter and faster for chefs to participate in. In fact, single-question polling in online forums or social media accounts could yield much greater participation and faster results – so long as the questions are well chosen and results actionable. For example, clarification of how chefs define "local" in terms of distance, could be a good follow-up question that could be carried out in this manner. Conversely, other qualitative topics and brainstorming potential solutions should be done in deep-dive 1-on-1 interviews or small chef focus groups.

CONCLUSION

Chefs' (seafood) purchasing largely reflect what they think their customers already like and what does/ will sell well. So even if chefs personally like groundfish species and cook them at home, they may not be serving these varieties in their restaurants. However, running an incentive program to help chefs try a species repeatedly on their specials menu, perhaps also with different preparations, could lower their financial risk and instill confidence in the dish's success and viability. Fine dining seems to be the best sector for re-introducing underutilized West Coast groundfish species to the market – this sector has the most flexibility and openness to work with new ingredients, and they are already the most likely to have groundfish on the menu.

Encouragingly, West Coast groundfish are poised for market success. These species already tick a lot of important boxes for chefs: local, sustainable, fresh, well priced, and they are becoming increasingly available and more consistently throughout the year. In fact, Rockfish is already on the menus of a large number of chefs in this survey, across all dining categories. This points to Rockfish's great versatility across restaurant concepts and indicates that its sales performance is great enough to continue having it on the menu. On the other hand, Pacific Dover Sole needs to be delivered to chefs with better size consistency, more guidance on recipes and preparation methods, and other incentives to work with this species. Anything that can be done to create demand at the consumer level, will help make these species commercial successes at the restaurant level, and help improve distribution and usage in this sector. While chefs do have great influence and power over American's seafood eating habits, we can't rely entirely on chefs to do the heavy lifting with successfully re-introducing America to these wonderful underutilized sustainable species.

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SURVEY QUESTIONS

Positively Groundfish

Chef Survey

1) Where is your restaurant located? ____

city *state*

2) What type of restaurant or institution do you work for?

- ☐ Fine Dining restaurant
- ☐ Casual restaurant
- ☐ Fast-casual restaurant
- ☐ Fast-food restaurant
- ☐ Other restaurant
- ☐ Catering
- ☐ Institutional foodservice
- ☐ I'm in culinary school
- ☐ Other: ______________

3) How much professional experience do you have as a chef?

- ☐ Less than 1 year
- ☐ 1-5 years
- ☐ 6-10 years
- ☐ 11-20 years
- ☐ More than 20 years

4) Who typically makes menu decisions?

- ☐ Me (as the chef)
- ☐ Another chef at the restaurant
- ☐ The General Manager
- ☐ Headquarters/Upper management
- ☐ Other: ______________

5) Approximately what percentage of your menu contains seafood (excluding the dessert menu)?

______________ %

6) How often do you introduce new seafood items?

- ☐ Several times a week
- ☐ Once a week
- ☐ Once a month
- ☐ A few times a year
- ☐ Once a year
- ☐ Rarely
- ☐ Never

7) How do you typically introduce new seafood items?

- ☐ On the specials menu
- ☐ As an appetizer
- ☐ On the main menu
- ☐ As a seasonal item
- ☐ Only in certain restaurant locations
- ☐ Other: ______________

8) What is your main source of inspiration for new dishes or ingredients?

9) What inspired your most recent introduction of a seafood item?

10) Besides getting a product that is fresh, high quality and well priced, what other factors are important to you when choosing seafood species/items? Please rank your top 3.

- ___ A mild flavor
- ___ A unique & interesting flavor
- ___ Versatility in dishes
- ___ Ease of preparing and cooking
- ___ Having previous experience cooking with it
- ___ Popularity with customers
- ___ Fits with our restaurant concept
- ___ Sustainability
- ___ It's local
- ___ Long shelf-life
- ___ Associated food waste
- ___ Other: ______________

11) What are the top reasons you have previously discontinued seafood items? Please rank your top 3.

- ___ Poor flavor & texture
- ___ Not versatile enough
- ___ Too difficult to cook
- ___ Too labor-intensive to prep
- ___ Did not sell well enough
- ___ Did not fit with our restaurant concept
- ___ Not sustainable
- ___ Not locally available
- ___ Poor shelf-life
- ___ Associated food waste
- ___ Other: ______________

12) Where do the seafood products you serve typically come from? Check all that apply.

- ☐ Locally
- ☐ Within my state
- ☐ From a neighboring state
- ☐ Within the US
- ☐ Internationally
- ☐ Other: _______________

13) What format do you get your seafood products in? Check all that apply.

- ☐ Fresh - Whole
- ☐ Fresh - Headed and gutted
- ☐ Fresh - Fillets
- ☐ Frozen
- ☐ Processed
- ☐ None of the above

14) What is your experience level with the following species? Check all that apply.

	Which have you heard of?	Which have you tasted?	Which have you personally cooked with?	Which do you currently serve in your restaurant?
Atlantic Cod	☐	☐	☐	☐
Pacific Snapper	☐	☐	☐	☐
Alaska Pollock	☐	☐	☐	☐
Rockfish	☐	☐	☐	☐
Sole (Dover, Petrale)	☐	☐	☐	☐
Lingcod	☐	☐	☐	☐
Tilapia	☐	☐	☐	☐
Sanddab	☐	☐	☐	☐
Barramundi	☐	☐	☐	☐
Thornyhead	☐	☐	☐	☐

15) When was the last time you've had rockfish on your menu?

- ☐ Currently
- ☐ Within the last month
- ☐ 1-6 months ago
- ☐ 6 - 12 months ago
- ☐ 1 - 5 years ago
- ☐ More than 5 years ago
- ☐ Never
- ☐ Other: _______________

16) What keeps you from using rockfish in dishes more often? Check all that apply.

- ☐ Access – our suppliers don't carry it.
- ☐ Supply is not consistent enough.
- ☐ We're happy with our current offerings, and there's no need to change.
- ☐ It's not as popular as our current seafood items.
- ☐ It doesn't fit the restaurant concept.
- ☐ I don't think our customers would like it.
- ☐ It's challenging to cook with.
- ☐ Quality is not good enough
- ☐ Taste is not good enough
- ☐ Rockfish profit margins are not as good as other proteins.
- ☐ None apply
- ☐ Other: _______________

17) What would persuade you to add rockfish to your menu?

18) When was the last time you've had Pacific Dover Sole on your menu?

- ☐ Currently
- ☐ Within the last month
- ☐ 1-6 months ago
- ☐ 6 - 12 months ago
- ☐ 1 - 5 years ago
- ☐ More than 5 years ago
- ☐ Never
- ☐ Other: _______________

19) What keeps you from using Pacific Dover Sole in dishes more often? Check all that apply.

- ☐ Access – our suppliers don't carry it.
- ☐ Supply is not consistent enough.
- ☐ We're happy with our current offerings, and there's no need to change.
- ☐ It's not as popular as our current seafood items.
- ☐ It doesn't fit the restaurant concept.
- ☐ I don't think our customers would like it.
- ☐ It's challenging to cook with.
- ☐ Quality is not good enough
- ☐ Taste is not good enough
- ☐ Rockfish profit margins are not as good as other proteins.
- ☐ None apply
- ☐ Other: _______________

20) What would persuade you to add Pacific Dover Sole to your menu?

21) For seafood items, what product information do you communicate on the menu? Check all that apply.

- ☐ Flavor and texture descriptors
- ☐ Exact species name (i.e. Striped Bass, Coho Salmon, etc.)
- ☐ Broader fish family (i.e. Bass, Salmon, etc.)
- ☐ Wild/Farmed
- ☐ Sustainability certifications & ethical labels
- ☐ Day it was caught
- ☐ Catch location
- ☐ Catch method (i.e. trawling, hook and line, etc.)
- ☐ Vessel/captain name
- ☐ Other: _______________

22a) Is sustainability currently a significant factor in your decision-making process for seafood?

- ☐ Yes
- ☐ No
- ☐ Other: _______________

22b) Why/Why not?

23) How likely are you to seek out more sustainable seafood in the future?

- ☐ Not Likely
- ☐ Somewhat likely
- ☐ Likely
- ☐ Very Likely
- ☐ 100% Definitely

ABOUT POSITIVELY GROUNDFISH

Positively Groundfish is a new non-profit organization (501c6) that was incorporated in April 2018, but it represents a fishery that has been around for generations and that was once the economic and cultural backbone of coastal communities along the West Coast. The story of the West Coast Groundfish fishery has all the elements of a classic tale of success, downfall, and redemption; and Positively Groundfish was formed to give it its happily-ever-after. West Coast Groundfish faced ecological collapse and was declared a federal economic disaster in 2000, but, thanks to comprehensive sustainability measures, has since experienced a remarkable recovery and is now considered "the ecological comeback story of the century" (quote: NOAA) and a posterchild for what sustainable fisheries management can achieve. However, more work is needed to also make it an economic success story, to communicate this hopeful story to the public, and make West Coast Groundfish a truly compelling case study that can persuade other fisheries around the world to adopt better practices. That is the work of Positively Groundfish.

Positively Groundfish was formed as a collaborative multi-stakeholder initiative by a collective of environmental non-profits, fishermen associations, seafood processors and academia that have partnered with a shared vision for a healthy and vibrant fishery. Positively Groundfish's stated mission is to tell the positive story of sustainable underutilized West Coast Groundfish to cultivate public appreciation and support the long-term economic success of local fishing communities. It is spreading a message of hope and positive responsible engagement with our ecosystems in which ecological and economic goals go hand-in-hand.

To learn more visit www.positivelygroundfish.org.

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