

ALASKA SEAFOOD AT FOODSERVICE



this **study**

// fielded 8.2019

OBJECTIVES

- ✓ Gather detail on seafood consumption habits and preferences in QSR, fast casual, and casual dining restaurants.
- ✓ Determine where consumers are interested in seeing more seafood dishes on the menu.
- ✓ Understand consumer perceptions of seafood from Alaska and gauge the lift in consumer interest in a dish if it is made with Alaska seafood.
- ✓ Investigate consumers' approach to plant-based protein in restaurants, and whether consumers are choosing plant-based protein over seafood.

METHOD

- ✓ Online 18-minute survey of **1000 consumers**
 - ✓ All consumers were required to be weekly visitors of QSR, fast casual, or casual dining restaurants.

3		what we learned
4		protein consumption
11		seafood consumption landscape
17		seafood attitudes & preferences
23		menuing Alaska seafood
29		seafood perceptions at QSRs
34		seafood perceptions at fast casual restaurants
39		seafood perceptions at casual dining restaurants
44		consumer profile
46		appendix

what we **learned**

1

Health is a key lever to pull for increasing seafood consumption.

Consumers' desire to reduce meat consumption is a key selling point to increase seafood consumption. Highlight Alaska seafood's health profile in marketing and advertising to persuade consumers to choose seafood. Consumers prefer seafood over plant-based protein, which supports shifting more of operators' menu to seafood.

2

There is opportunity to expand seafood offerings at quick service and fast casual.

While seafood is more commonly ordered at casual dining restaurants, consumers are interested in seeing more seafood entrées and appetizers at LSRs. Look for opportunities to adapt what's currently offered in casual dining to limited service restaurants, benefiting potential for volume growth and consumer demand. Compared to the rest of the population, Gen Z is more likely to visit QSR; tailoring limited service options to their tastes could help keep that generation interested in seafood as well.

3

In-store signage and other on-premise touchpoints are essential to influencing consumers at the time of ordering.

Ordering seafood tends to be an impulsive decision so focus efforts on impacting consumer choice at the time of their decision.

4

Leverage the Alaska brand in menu names or descriptions wherever possible.

Alaska is not only the most appealing origin for seafood at restaurants, it also cues healthy and fresh seafood. Consumers want to know where their seafood comes from so mentioning "Alaska" as the origin makes the dish more appealing. Adding the Alaska Seafood logo reinforces positive perceptions about the restaurant.

5

Indicating seafood is "wild-caught" on menus is favored by consumers and reinforces the perception that the seafood it is healthy & fresh.

Half of consumers prefer wild-caught seafood because they believe being in a natural environment produces healthier and better tasting seafood. Mentioning "wild-caught" in a description helps to mitigate any concerns about seafood not being fresh, which is one of the barriers to ordering seafood AFH.

6

Gen Z is a prime target for seafood.

The Gen Z generation eats seafood AFH more than other generations, and they are also more flexitarian and more tuned in to environmental issues surrounding seafood. Consider focusing communication efforts on sustainability and health benefits to keep these consumers interested in seafood.



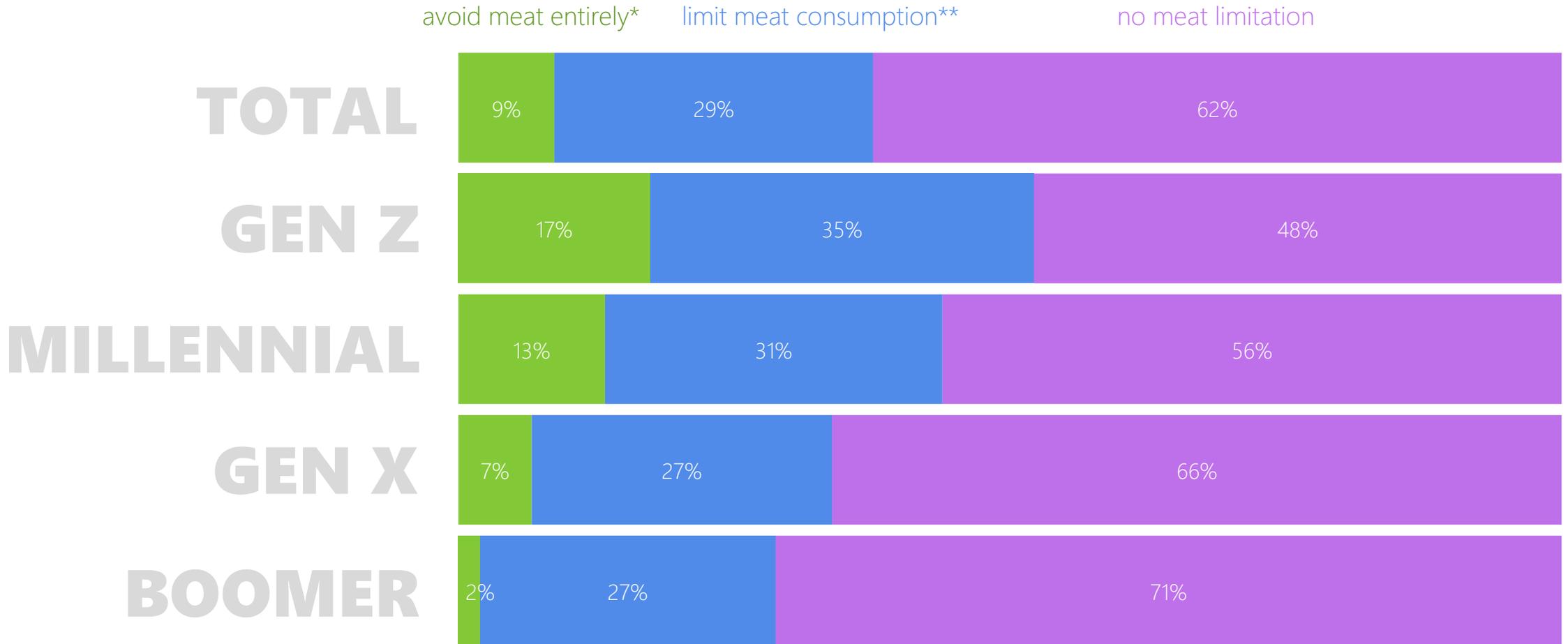


protein consumption

Over a third of consumers follow a diet that limits or avoids meat consumption.

« The degree to which consumers limit or avoid meat varies greatly by generation; younger generations limit or avoid meat more so than older generations.

APPROACH TO MEAT LIMITATION

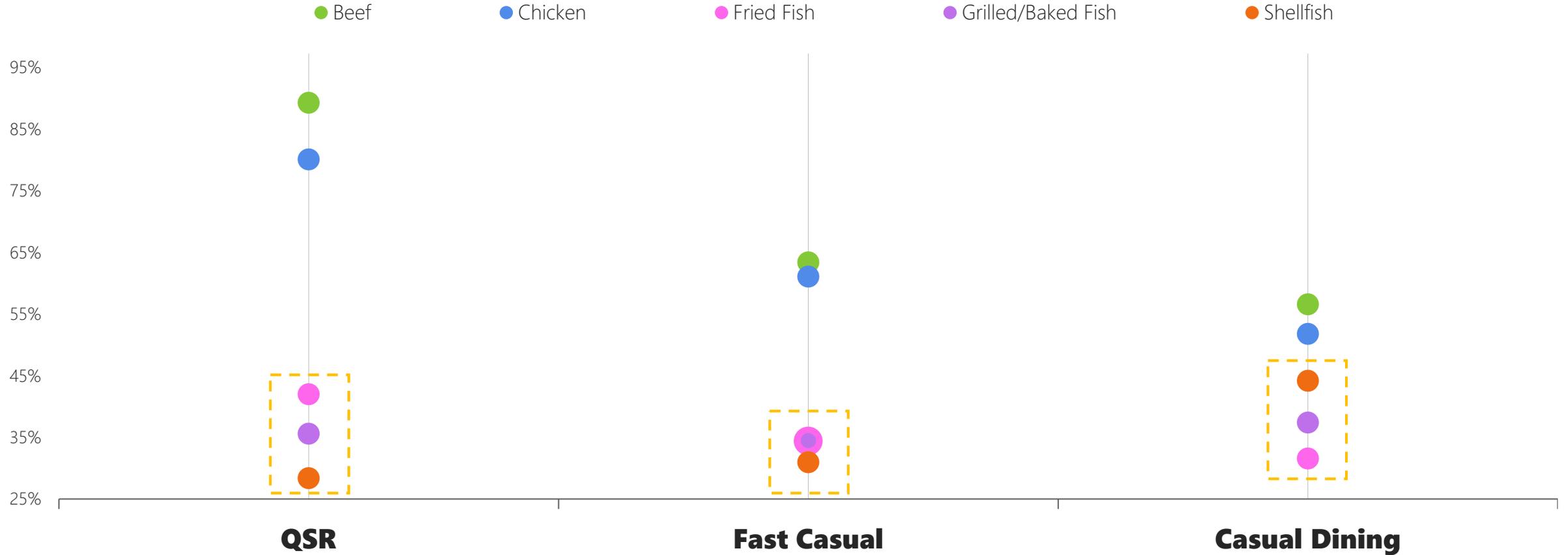


*vegetarians and vegans; **flexitarians and pescatarians

Seafood is eaten less frequently than beef or chicken at chain restaurants each month, especially at QSRs.

- « Shellfish like shrimp, crab, or lobster is more frequently consumed at casual dining restaurants than at QSRs or fast casual restaurants.
- « Fried fish is a more popular choice than grilled/baked fish or shellfish at QSRs.

MONTHLY CONSUMPTION OF PROTEINS AT DIFFERENT CHAIN RESTAURANTS

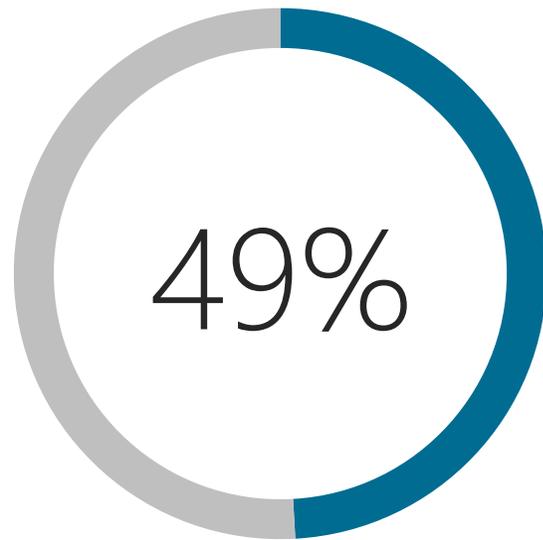


Seafood is more commonly ordered at casual dining restaurants than QSRs or fast casuals.

« Seafood is menued at fewer fast casual restaurants than QSRs or casuals, so it is not surprising to see lower monthly ordering percentages.

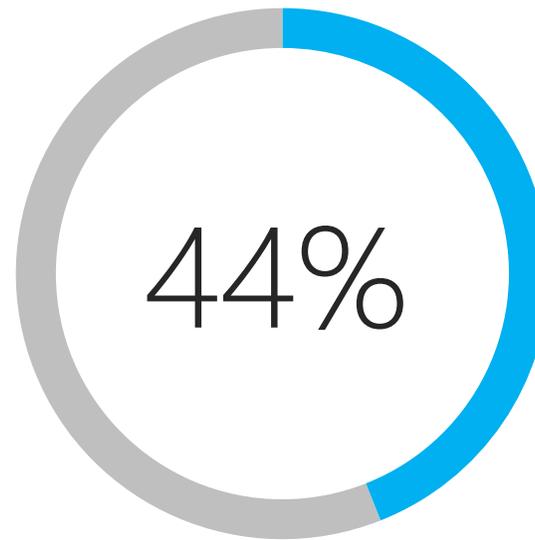
MONTHLY CONSUMPTION OF SEAFOOD AT DIFFERENT CHAIN RESTAURANTS

QSR



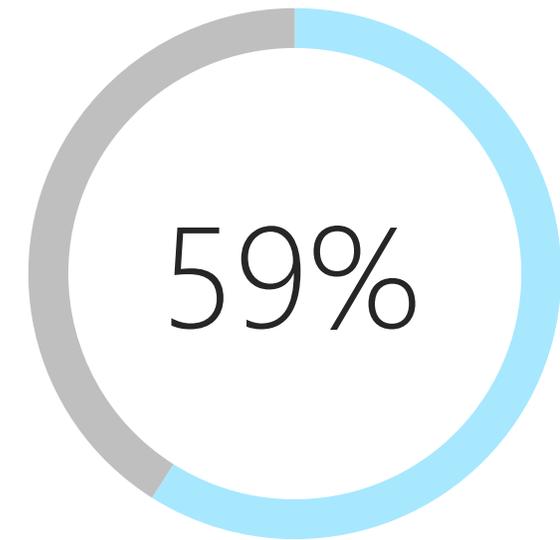
eat seafood at QSR restaurants in a typical month

FAST CASUAL



eat seafood at fast casual restaurants in a typical month

CASUAL DINING

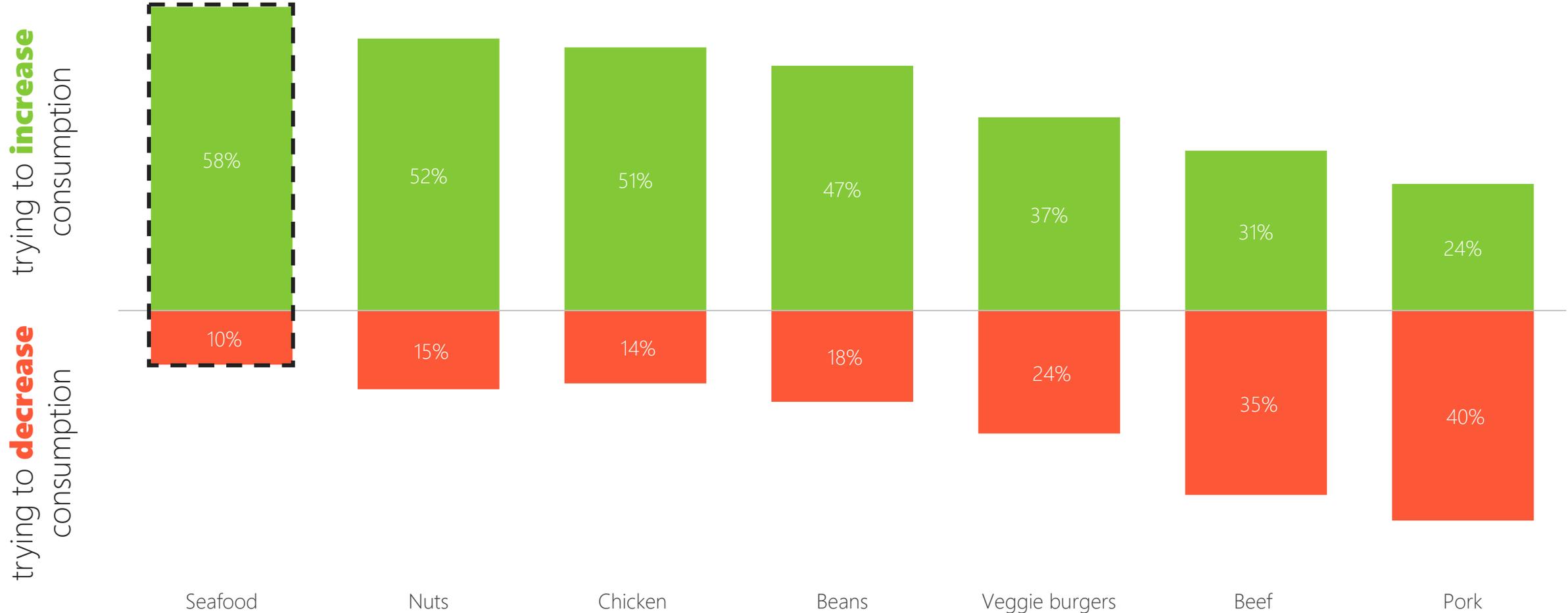


eat seafood at casual dining restaurants in a typical month

Increasing seafood consumption is more desirable than any other protein.

« More consumers are trying to decrease their red meat consumption than increase it.

DESIRED CHANGE IN CONSUMPTION BY PROTEIN TYPE



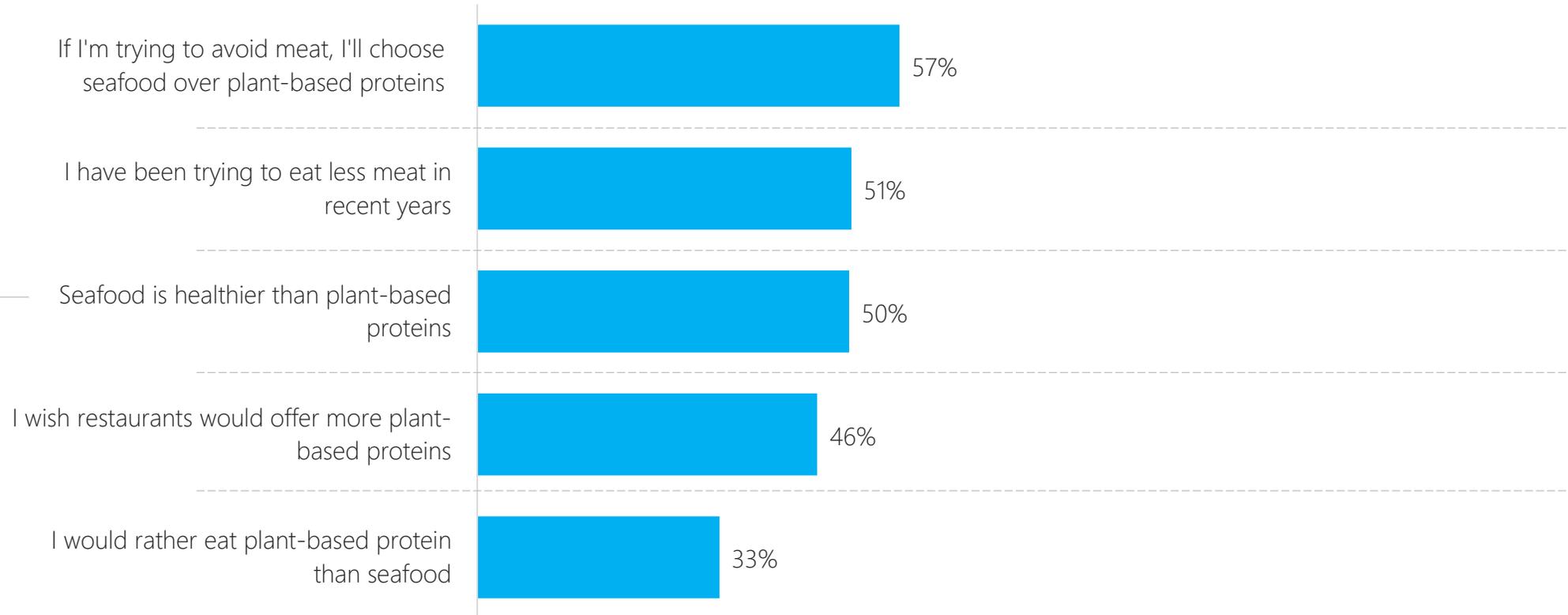
Seafood is generally more appealing than plant-based protein because seafood is perceived to be healthier.

« Highlighting seafood's health benefits versus plant-based proteins will be key in marketing messaging

PLANT-BASED PROTEIN AND SEAFOOD

top 2 box, 5 pt. scale

Only 13% of consumers disagree with this statement; the rest aren't sure.

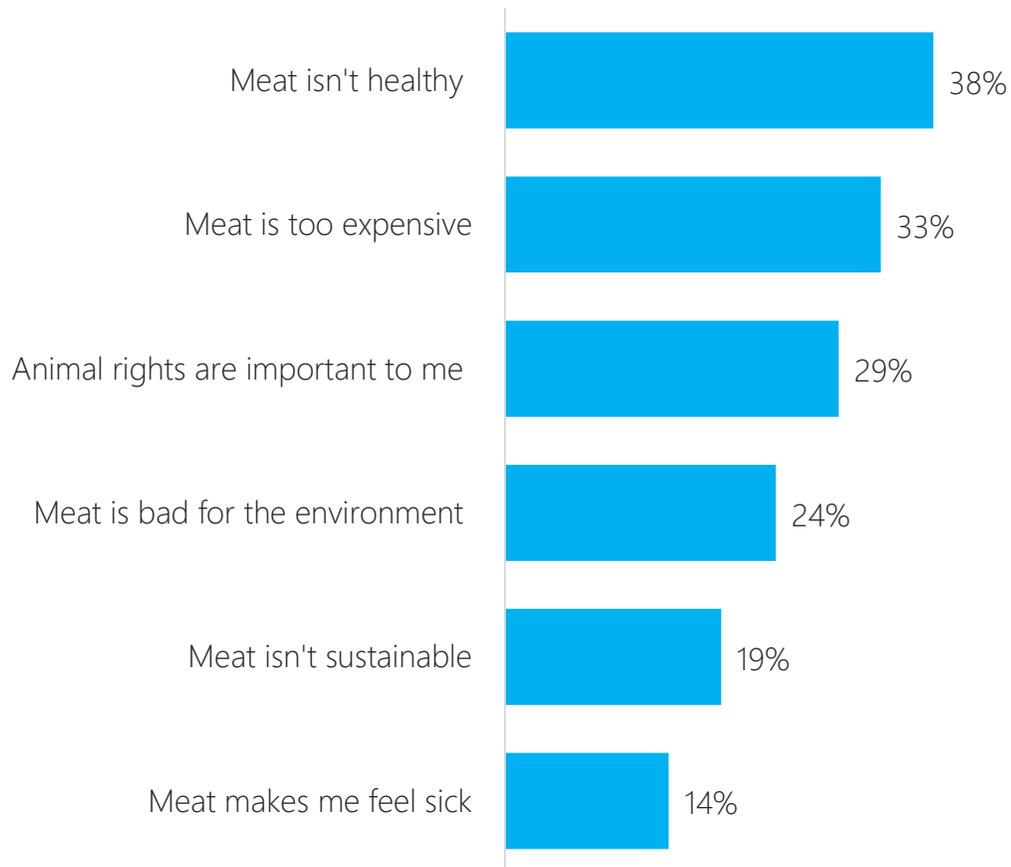


There's no one reason why consumers are limiting meat, but most are interested in replacing it with seafood and veggies.

« The most preferred way to reduce meat consumption is with seafood.
 « Gen Z are most likely to limit their meat consumption because of animal rights, and they are more interested in plant-based proteins as a replacement.

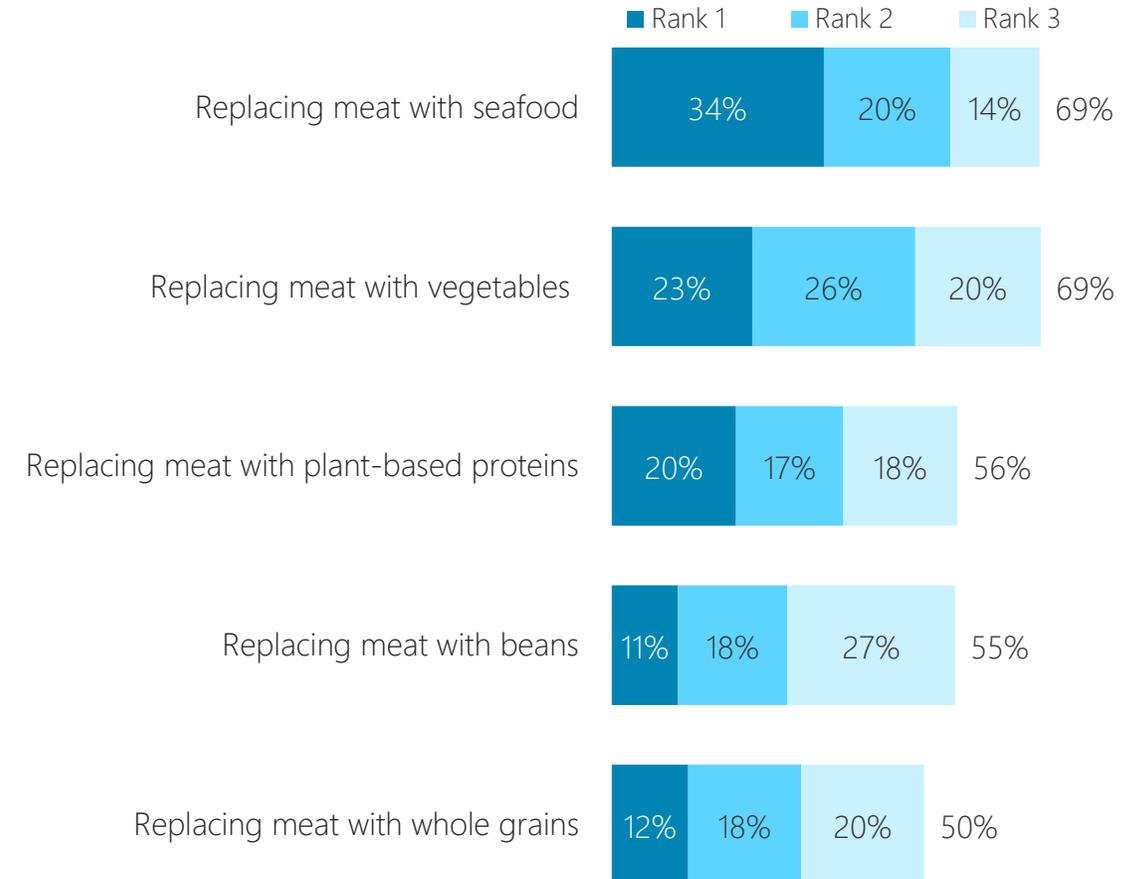
REASONS FOR LIMITING MEAT

among those who limit meat consumption



PREFERRED WAYS TO LIMIT MEAT

ranking; among those who limit meat consumption



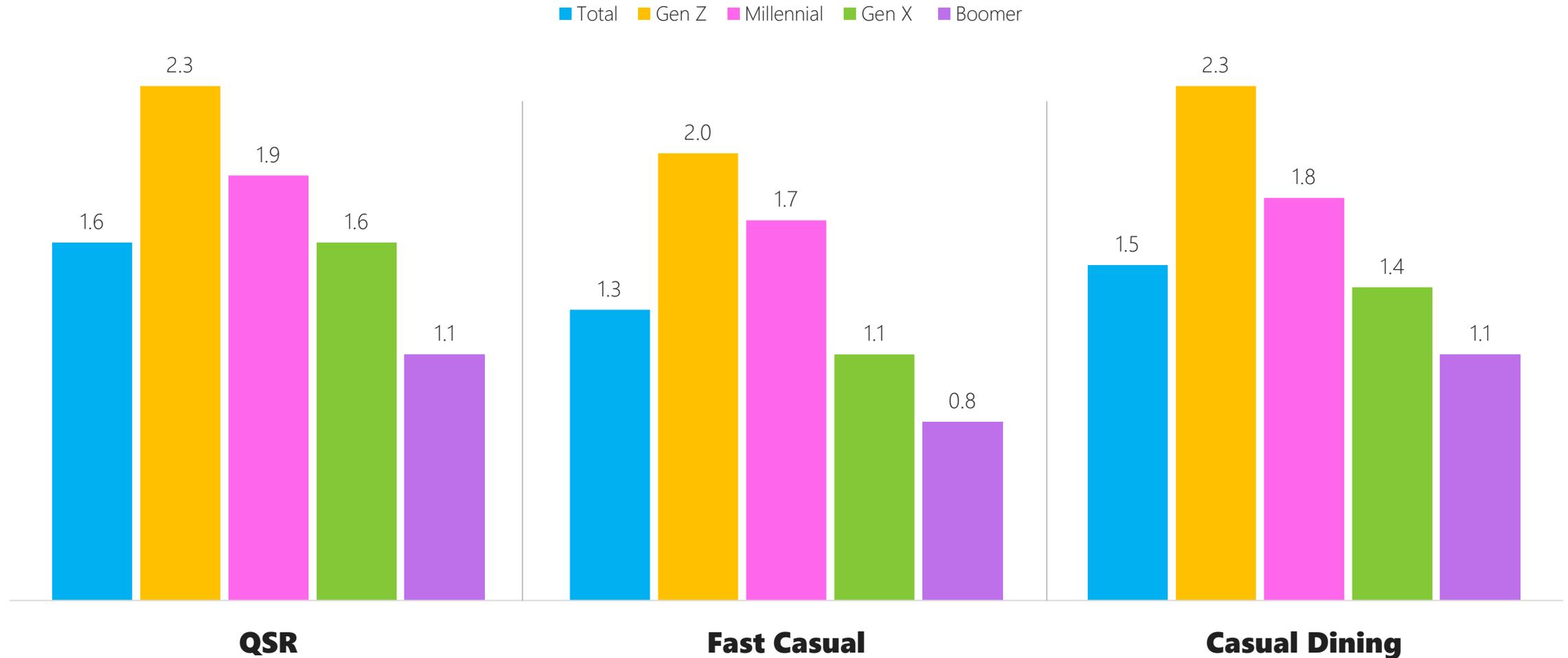


seafood consumption landscape

Regardless of restaurant type, Gen Z consumers eat the most seafood away from home, typically two times each month.

« Consumption is similar across all restaurant segments, but seafood is a slightly less-frequent choice at fast casual restaurants for all generations.

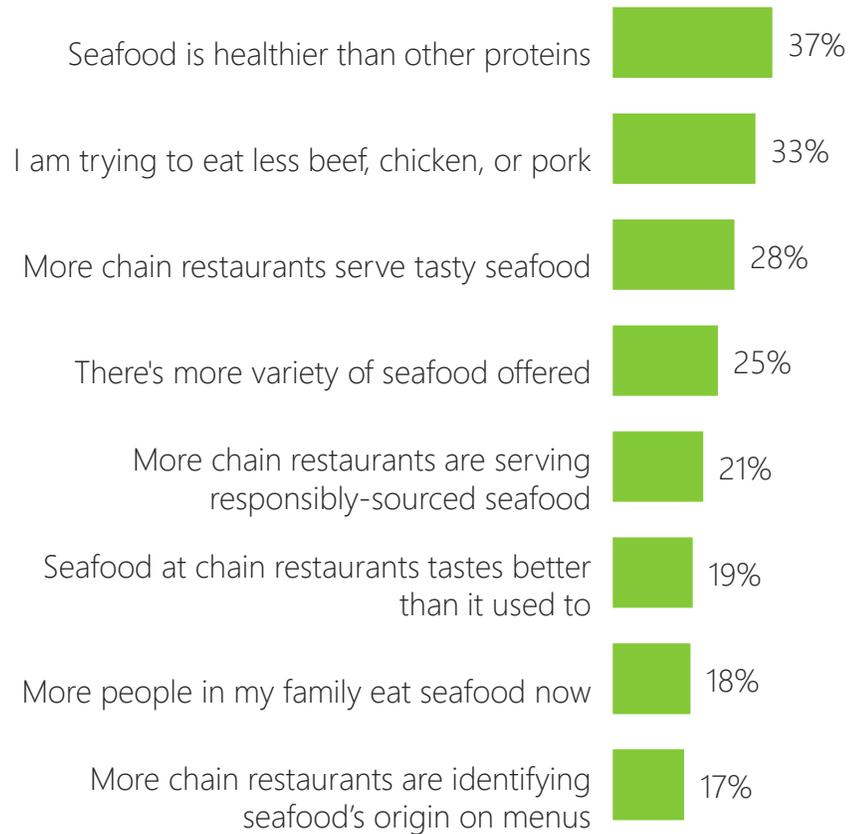
NUMBER OF MONTHLY OCCASIONS EATING SEAFOOD AT CHAIN RESTAURANTS



Like overall seafood consumption, the increase in seafood consumption is driven by a desire for healthy protein.

CHANGE IN AFH SEAFOOD CONSUMPTION IN PAST TWO YEARS

Why has consumption **increased**?

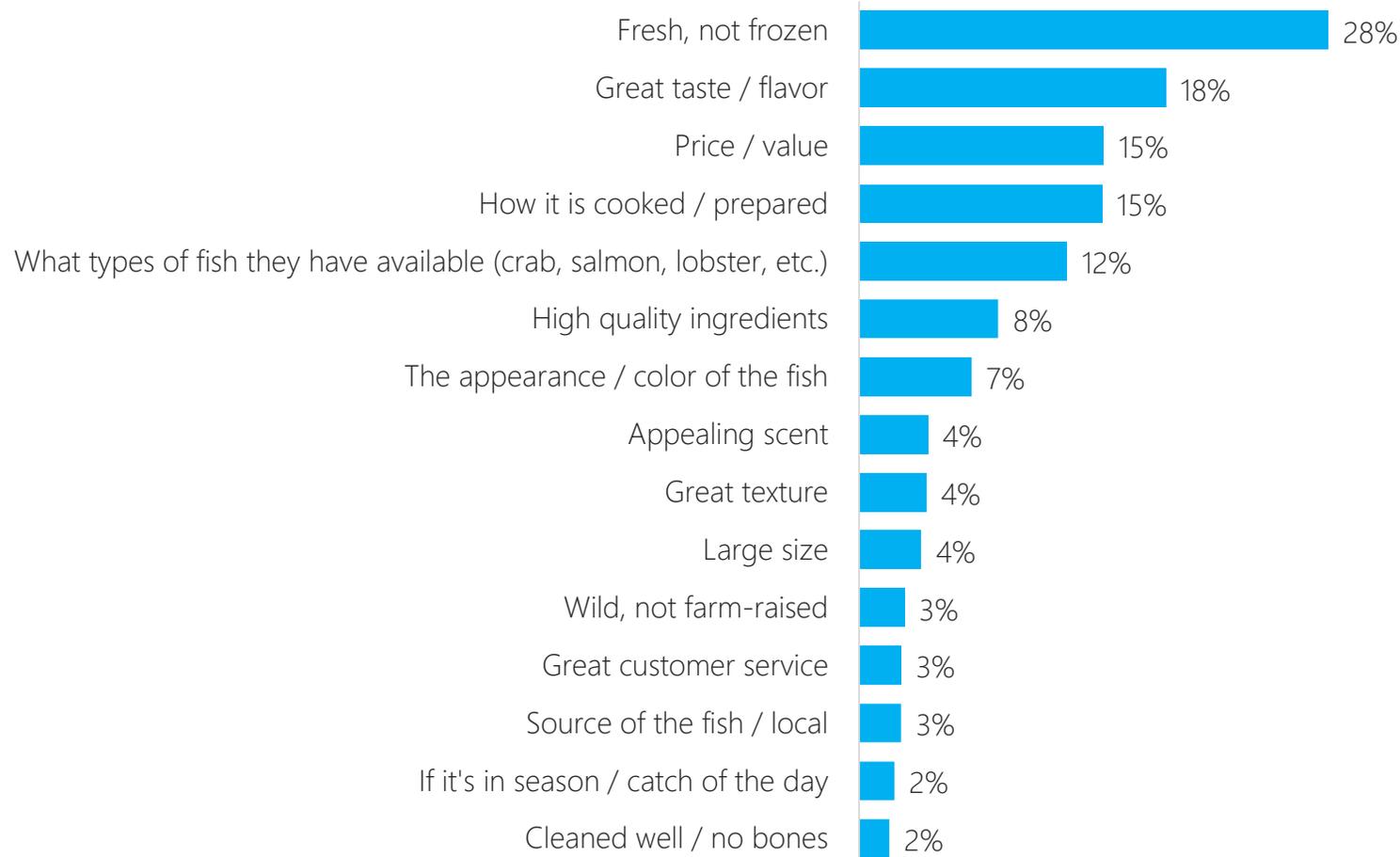


20%
consumption has
increased

Frozen seafood is perceived to be of lower quality than fresh seafood.

« Aside from freshness, high quality seafood also needs to have a great taste, a good value for the money, and be cooked and prepared well.

INDICATORS OF HIGH-QUALITY SEAFOOD AT CHAIN RESTAURANTS (UNAIDED)



"Flavor of the food should be high quality, how it's cooked, the texture and tenderness of the food, how it smells and the presentation."

"The most important is the quality of the fish if it's fresh or not."

"I am looking for fish that is fresh and just caught the following day. I want it to be seasoned well and cooked to how I like it."

"Wild caught seafood. More prestigious options such as halibut & lobster instead of tilapia & bay shrimp. Perceived value is also important. Portion size and quality are important as well."

"If it looks fresh, tastes fresh and is fresh."

"When looking for high quality seafood, I look for fresh tasting seafood that can be served grilled or broiled and not fried to cover up how old the seafood is."

"I'm looking for the source of the fish, type of fish, and that the fish is cooked properly."

seafood attitudes & preferences

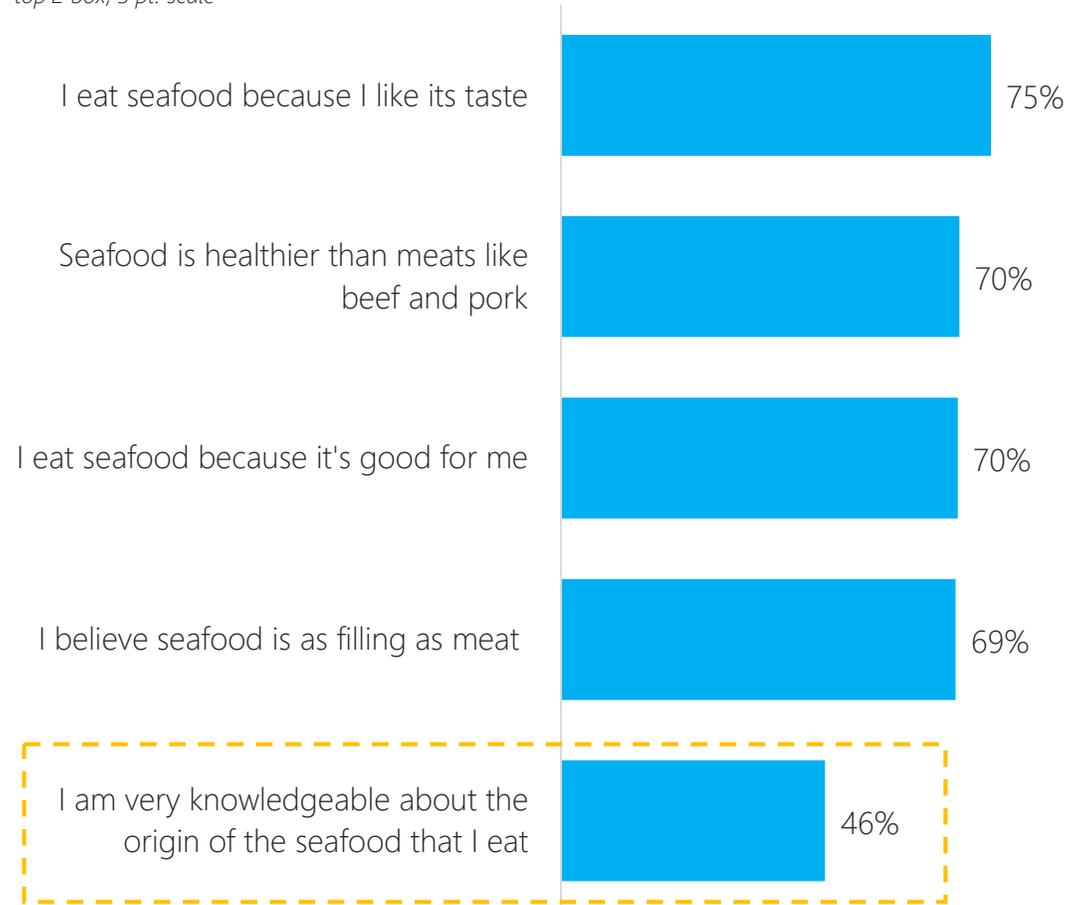


Few consumers feel very knowledgeable about the origin of the seafood they eat, yet it would be ordered more often if they knew its origin.

« This interest in origin is beneficial for ASMI to promote including Alaska origin on menus.

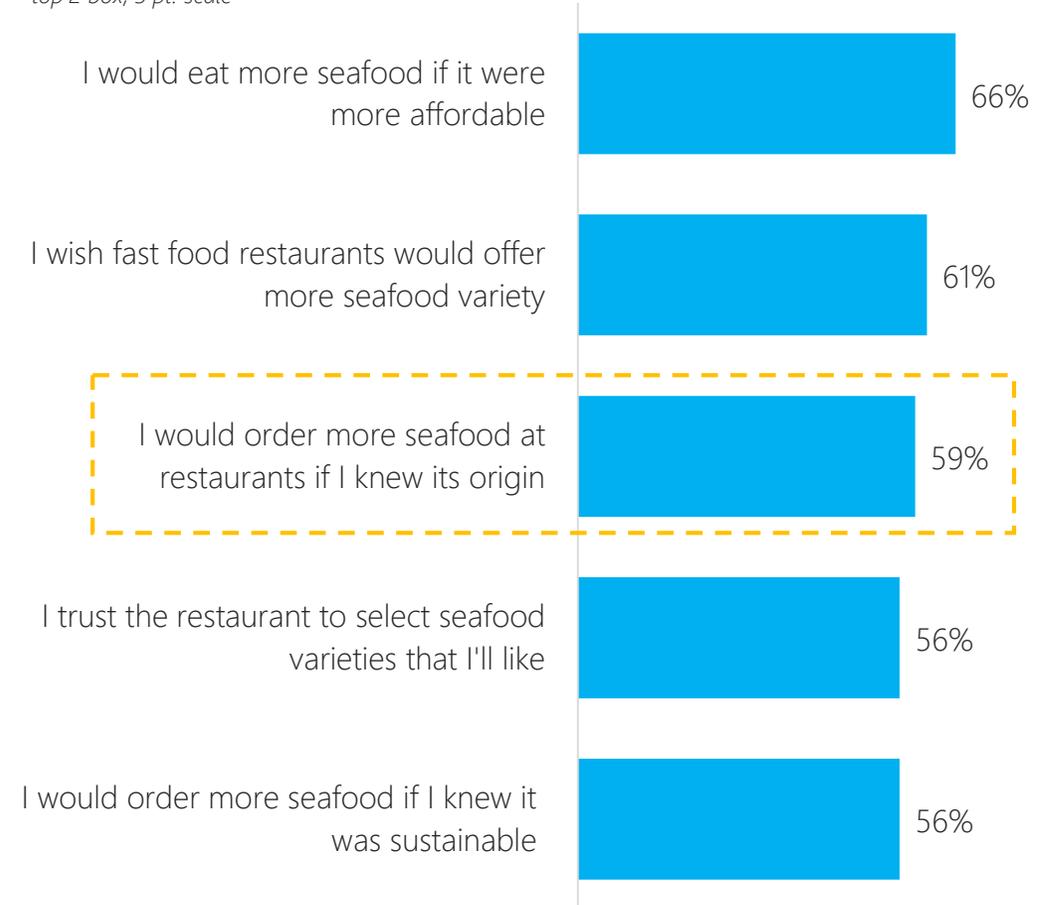
SEAFOOD ATTITUDES

top 2 box, 5 pt. scale



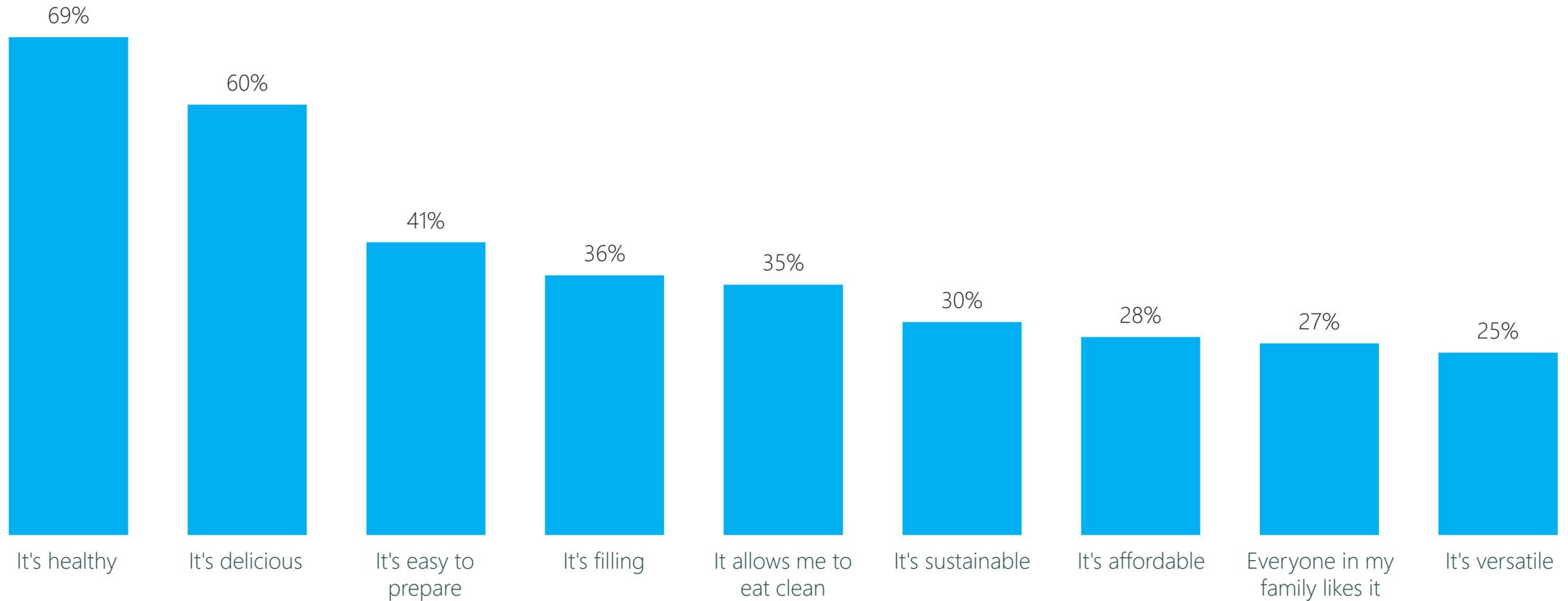
SEAFOOD DESIRES AFH

top 2 box, 5 pt. scale



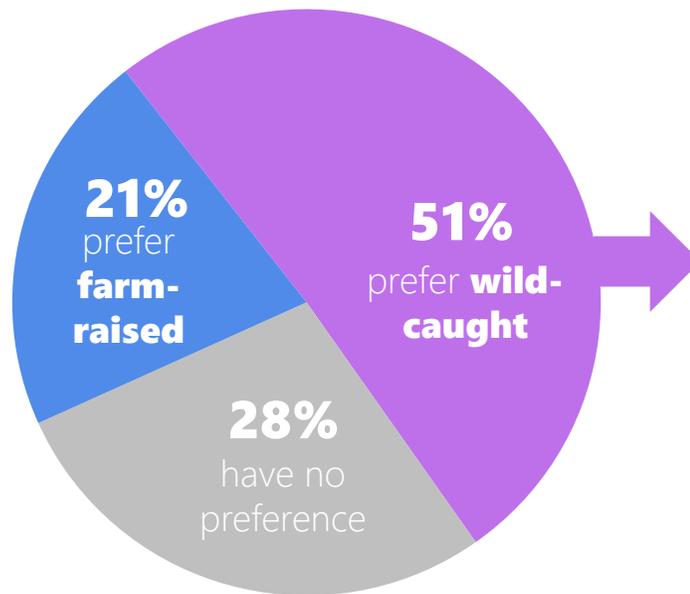
TOP 2 Benefits by a wide margin – healthy and taste.

BENEFITS OF EATING SEAFOOD

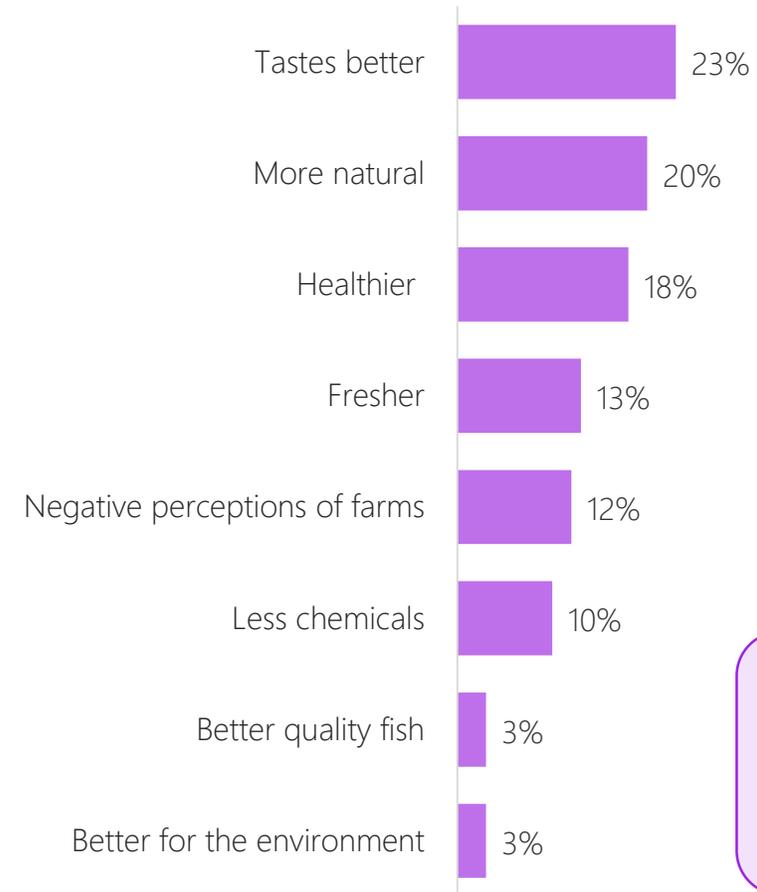


Wild-caught seafood is preferred because it's perceived to taste better, be healthier and more natural.

SEAFOOD PREFERENCE: FARM-RAISED VS. WILD-CAUGHT



Why do you prefer **wild-caught**?

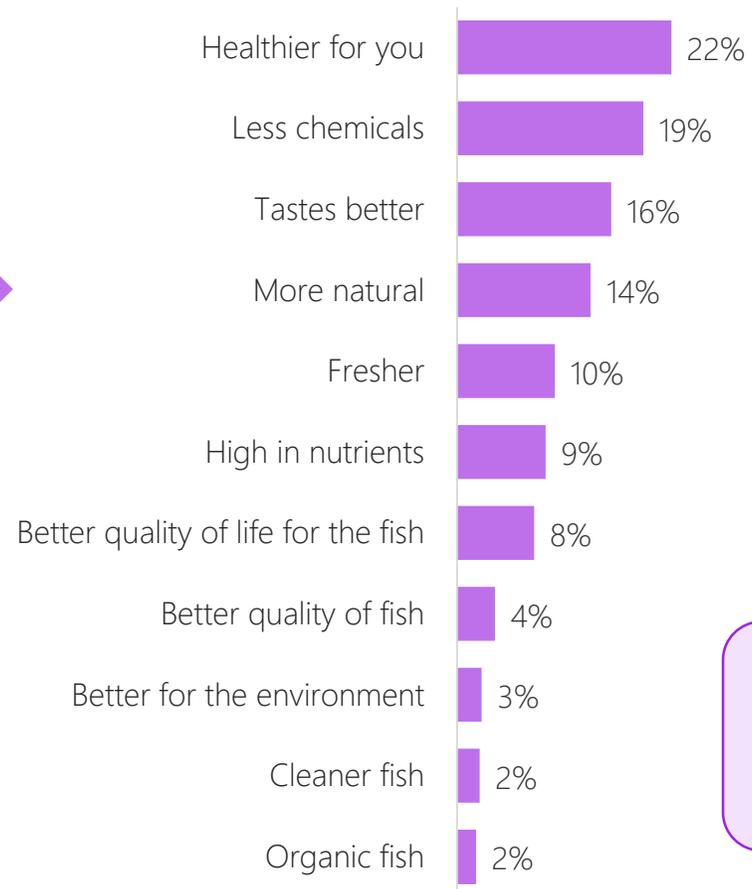
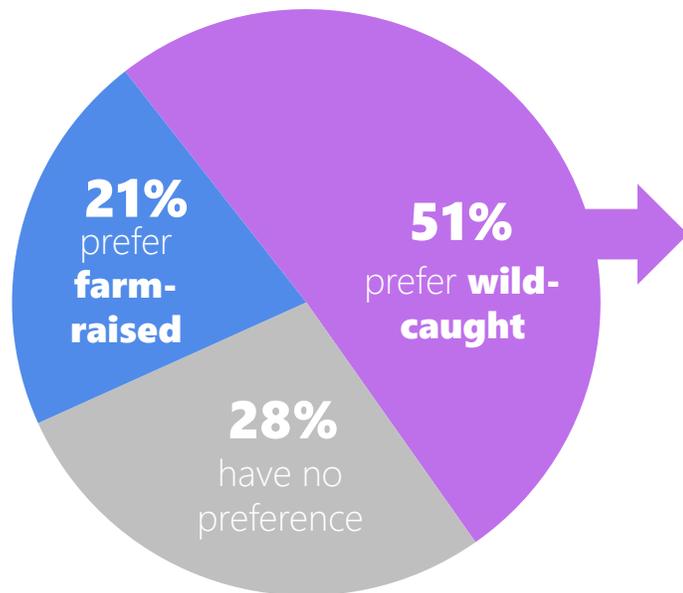


"Fish from the wild has a better taste and is going to be natural as intended. Whereas farmed fish are on a select diet of the farmer's choice and it's not natural."

A key benefit of wild-caught is thought to be healthier and tastier, while using less chemicals.

BENEFITS OF FARM-RAISED VS. WILD-CAUGHT SEAFOOD

What are the benefits of **wild caught**?



"It is much healthier. The fish or seafood is able to consume its normal diet and it lives in a more pristine environment."

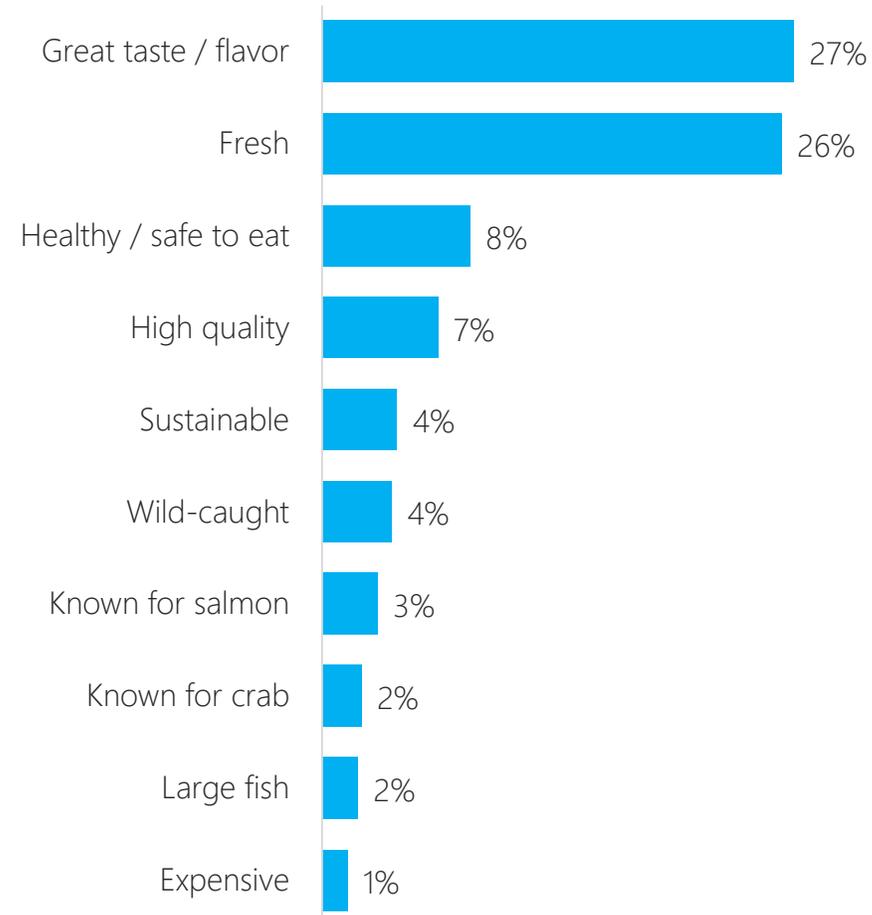
menuing Alaska seafood



Seafood from Alaska has very positive perceptions and is known for its great taste and freshness.

« Due to Alaska's cold waters, many consumers also find the seafood from Alaska to be safer and less polluted than seafood other regions.

IMPRESSIONS OF SEAFOOD FROM ALASKA (UNAIDED)



"Alaska is just an overall cleaner place, so it makes me think and believe that their fish is cleaner and fresher and because they care about their fish."

"I feel it is wild, natural, safe, a very good business that Alaskans take pride in & are serious about quality & not abusing the catch limits, etc. The taste is excellent. I trust the Alaskan fishing industry as a whole."

"I always think that Alaska seafood is better quality because of the cold waters, the species of fish / seafood which is harvested, and the flavor of that seafood."

"The best seafood comes from Alaska. The ocean is cleaner and the wildlife is abundant."

"Filled with a bountiful array of wild fish and shellfish such as king crab, scallops, shrimp, halibut and salmon, to name a few. Quality is unparalleled, with wholesome and highly nutritious meat that boasts a rich and natural flavor, making it some of the finest fish in the world."

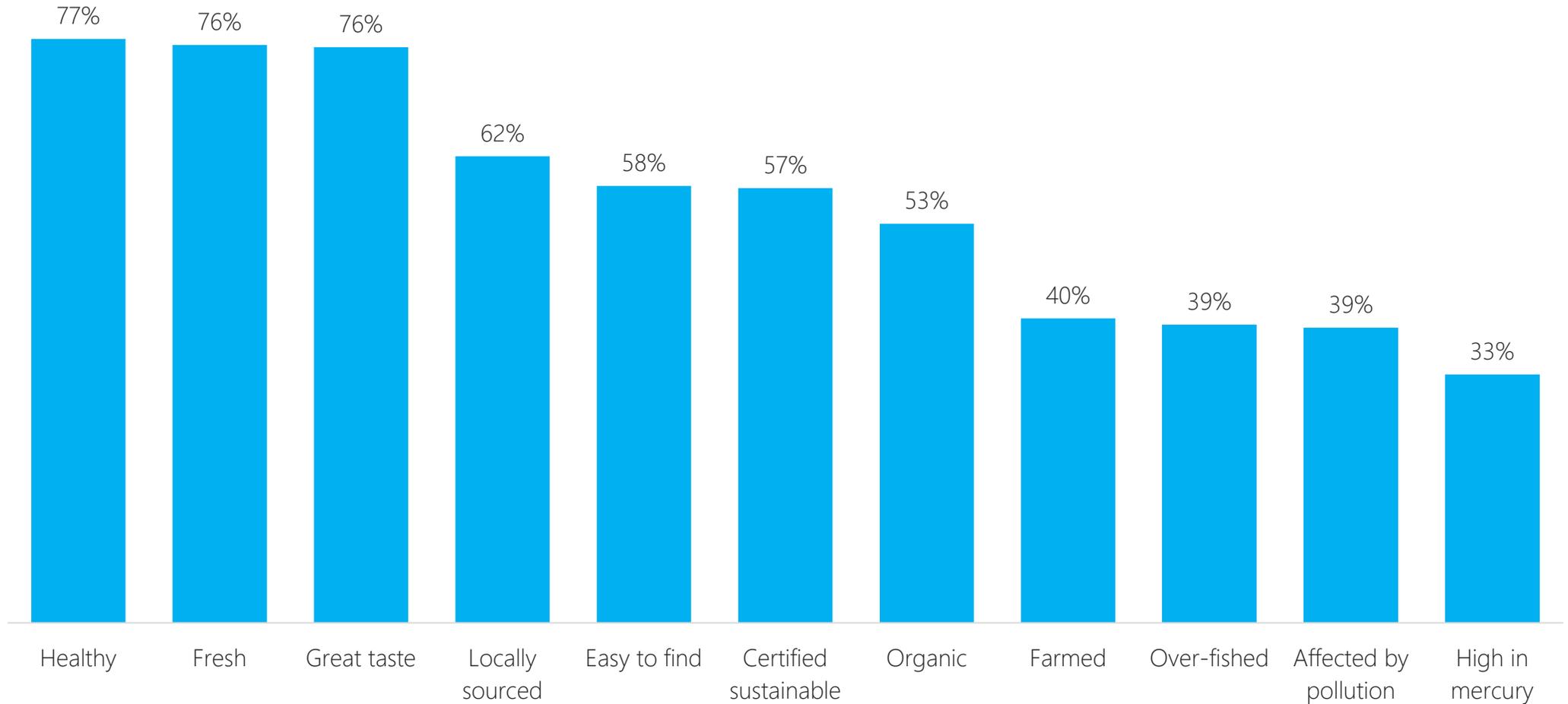
"It's a lot more fresh than other brands, as well as the prices are more reasonable than some other brands. Alaska seafood seems to also be healthier than other brands."

Mentioning Alaska on menus tells consumers the dish is fresh, high quality, and great tasting.

« More negative descriptors, such as being high in mercury, overfished, or affected by pollution, are less associated with fish and seafood from Alaska.

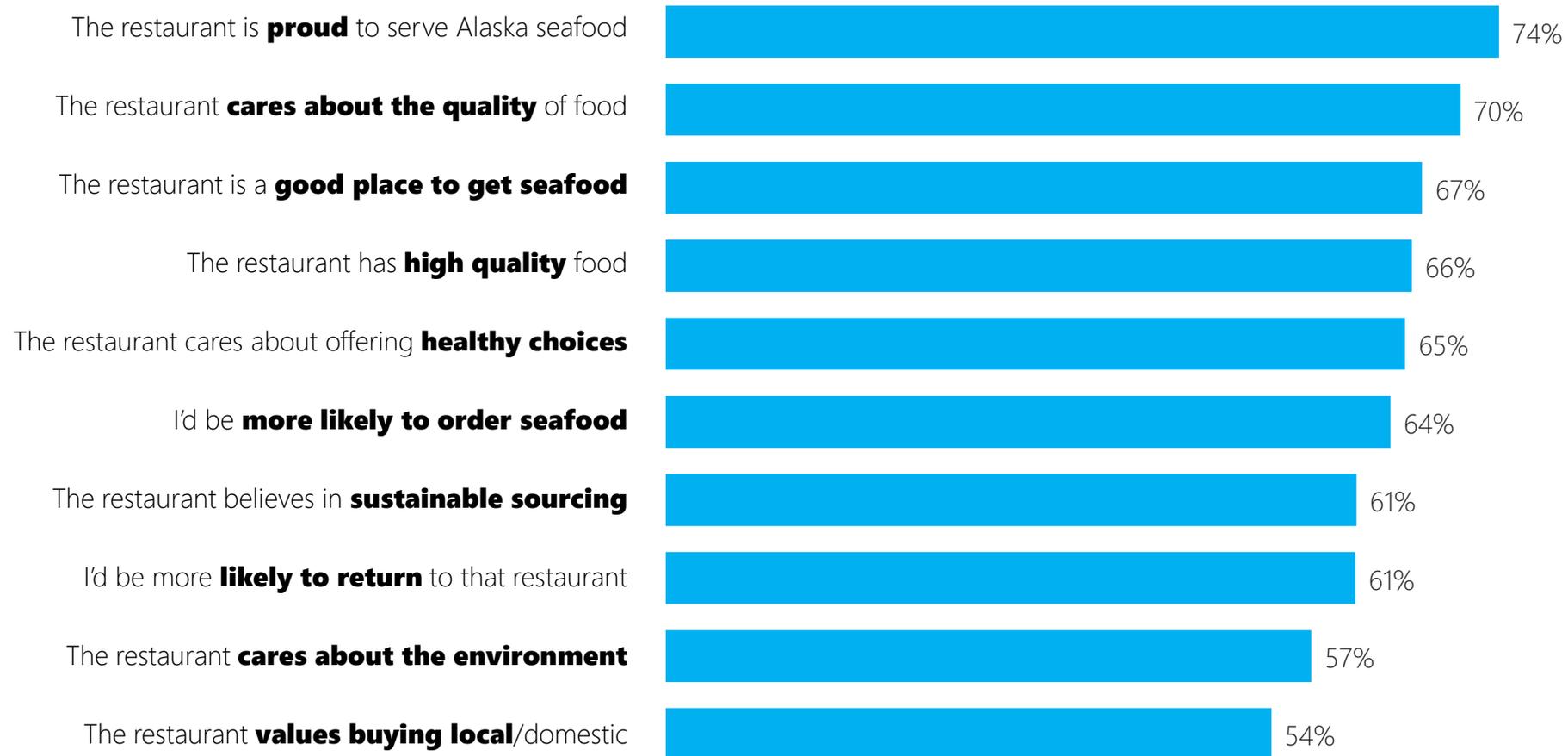
ALASKA SEAFOOD ASSOCIATIONS

true of
Alaska
Seafood



Having the Alaska Seafood logo on restaurant menus drives home that the restaurant cares about serving the best seafood.

IMPACT OF ALASKA SEAFOOD LOGO ON RESTAURANT PERCEPTIONS

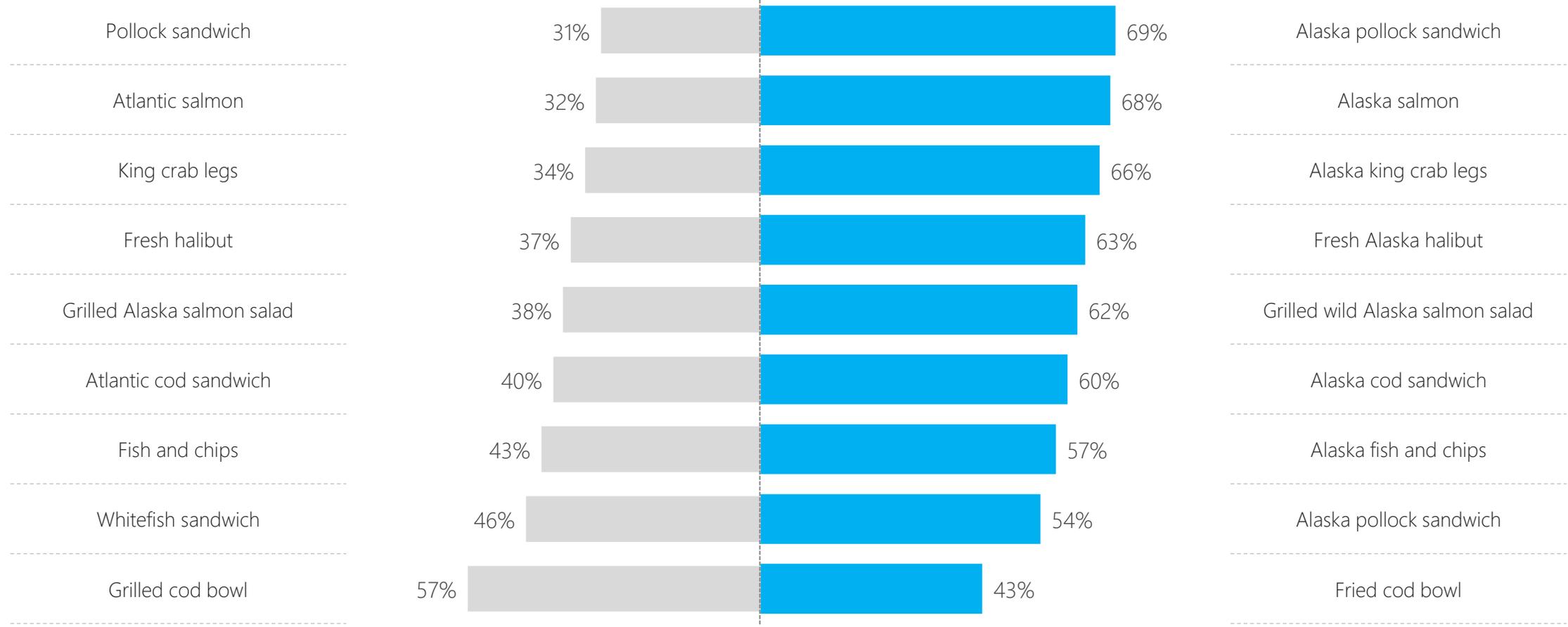


Consumers prefer seafood that specifies its origin on menus, and "Alaska" or "wild" descriptors are favored.

« Adding "wild" within the menu description of Alaska seafood increases its appeal.
 « In most cases, consumers are one and a half to two times more likely to order seafood when "Alaska" is present in the name of the dish.

PREFERRED SEAFOOD MENU ITEM NAME AT CHAIN RESTAURANTS

do you prefer...



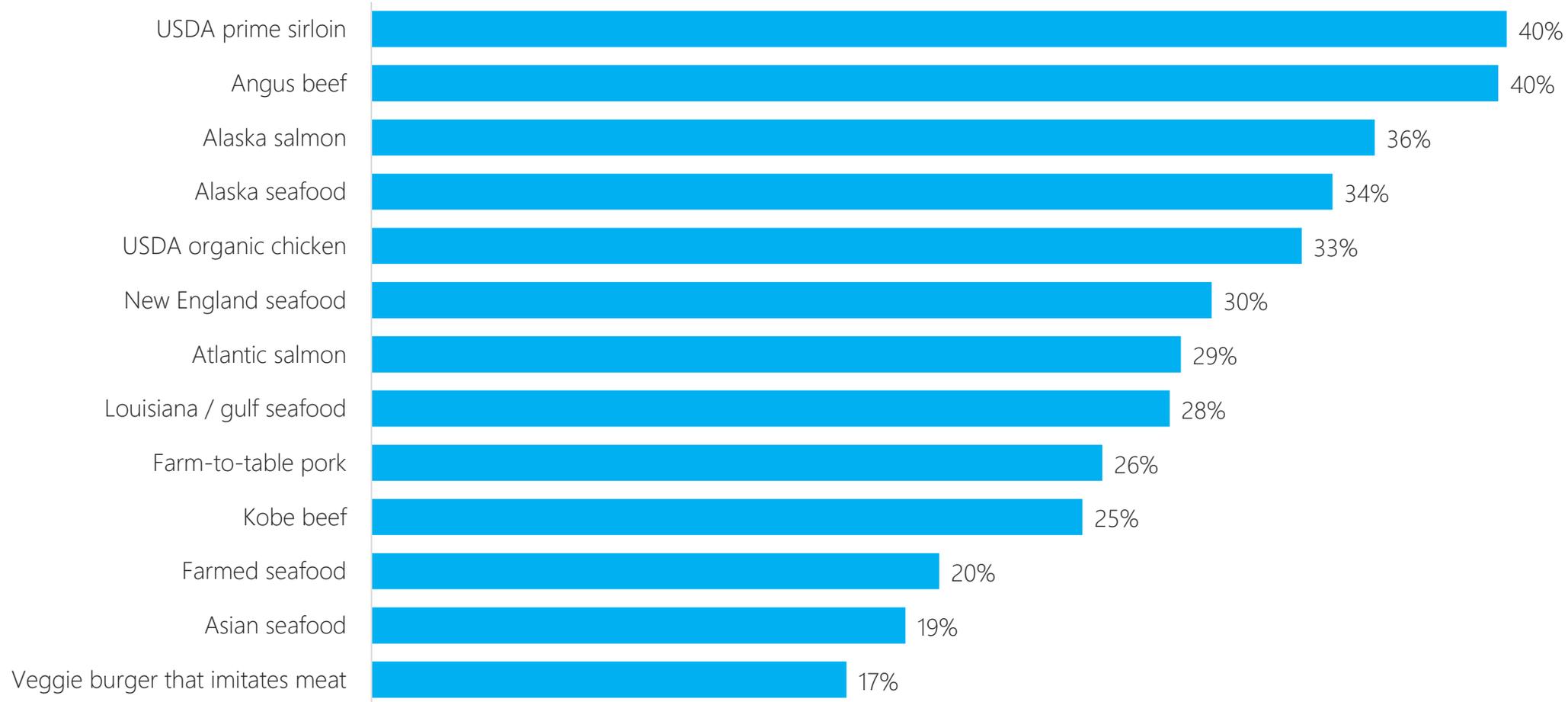
E1: For each of the following pairs of menu items, please indicate which one you would be more likely to order at a chain restaurant. (n=1000)

Alaska salmon and seafood hold higher regard than any other region, reinforcing its superior positioning.

« USDA prime sirloin and Angus beef have a slight advantage over Alaska salmon and seafood, likely due to broader familiarity.

LIKELIHOOD TO RECOMMEND DIFFERENT PROTEINS

top 2 box, 11 pt. scale

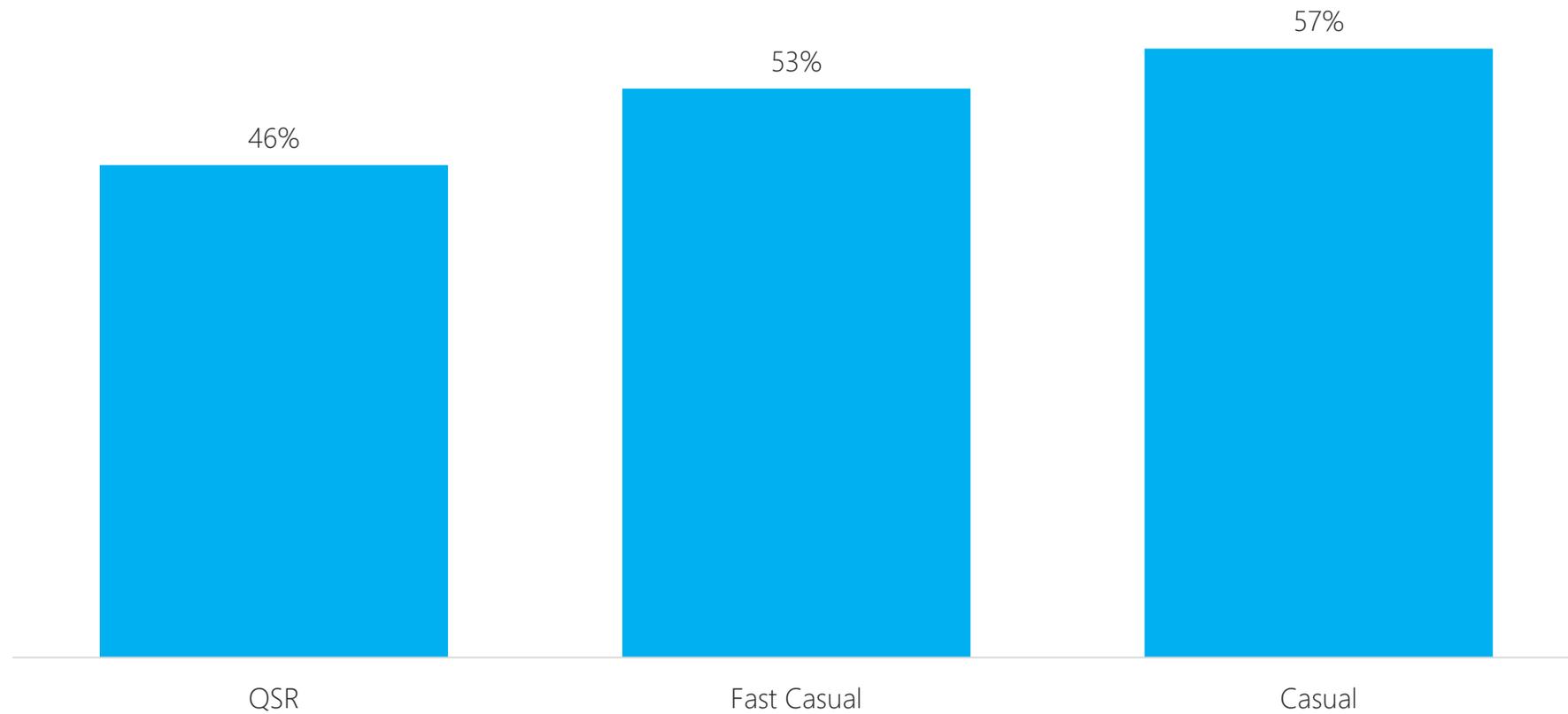


**seafood perceptions
at foodservice
segments**



Half of consumers are interested in seeing more seafood species variety in all restaurant segments.

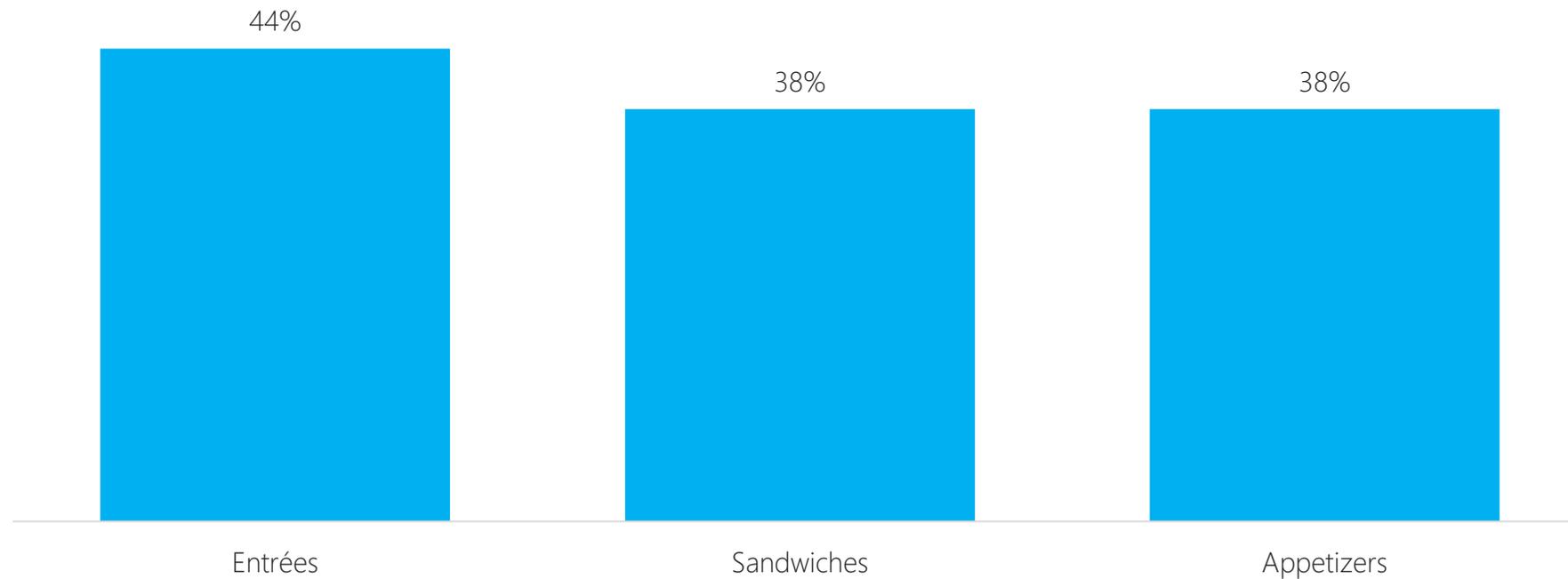
INTEREST IN SEEING MORE **SEAFOOD SPECIES VARIETY** AT EACH SEGMENT



At least a third of customers would be interested in more seafood entrées, sandwiches, and appetizers.

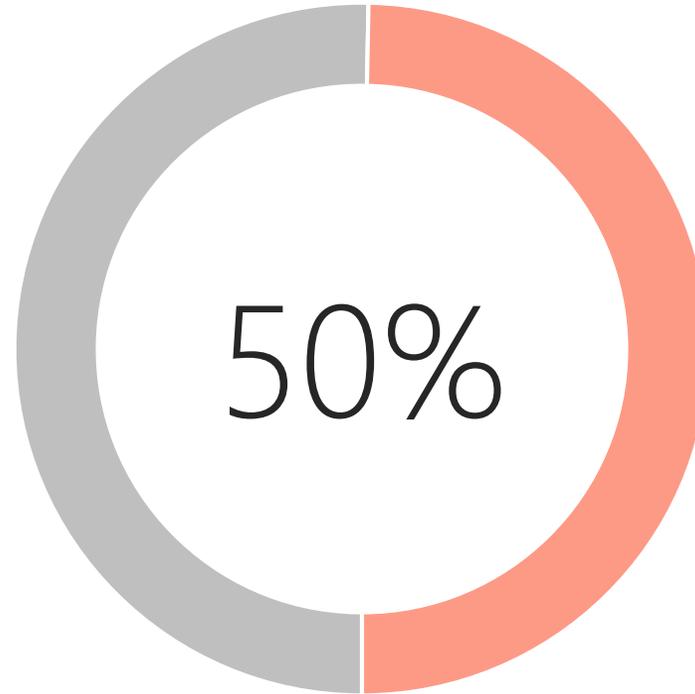
INTEREST IN SEEING MORE SEAFOOD DISHES IN EACH CATEGORY AT **QSR**

among those who have had seafood at QSRs in past 6 months



Half of consumers are unsatisfied with current seafood offerings at QSRs.

SATISFACTION WITH SEAFOOD OFFERINGS AT **QSR**



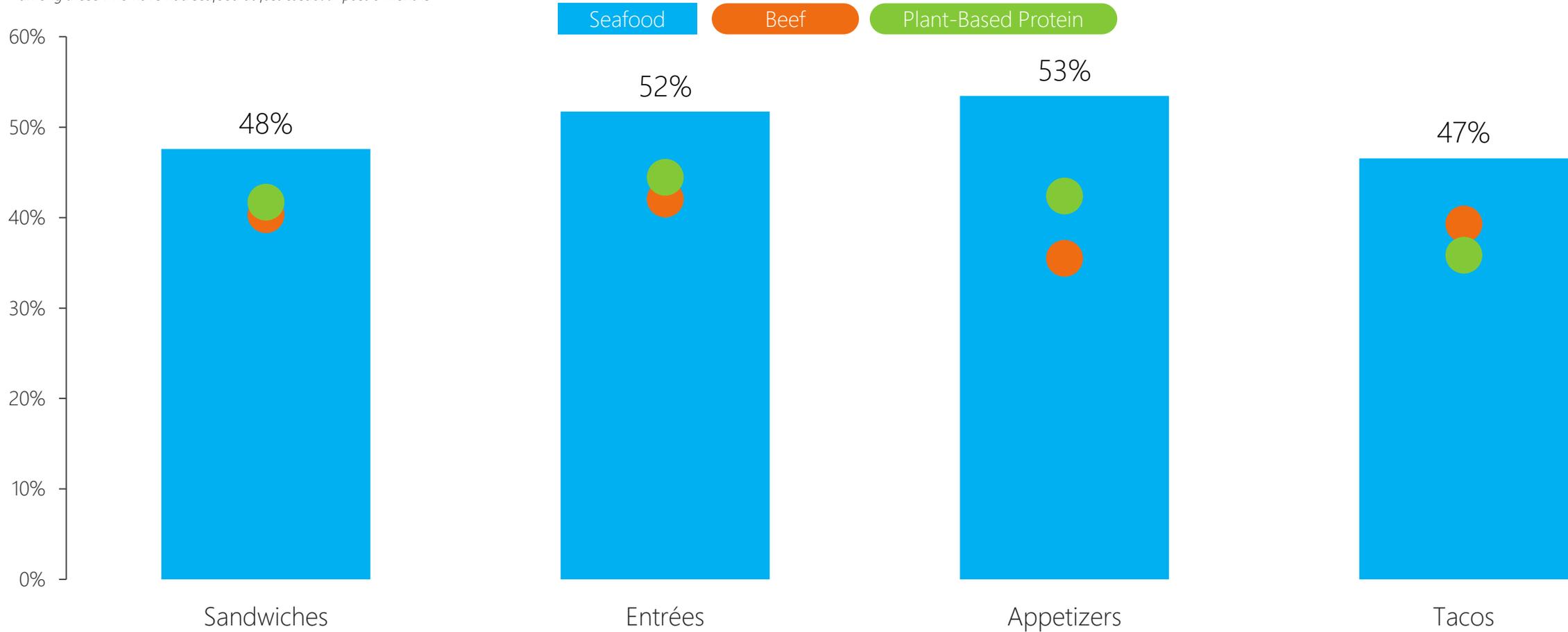
are NOT satisfied with current QSR seafood offerings

More consumers are interested in seeing more seafood at fast casual than beef or plant-based protein.

« Seafood has the largest lead over beef and plant-based protein in entrées and appetizers.

INTEREST IN SEEING MORE OF EACH PROTEIN AT **FAST CASUAL**

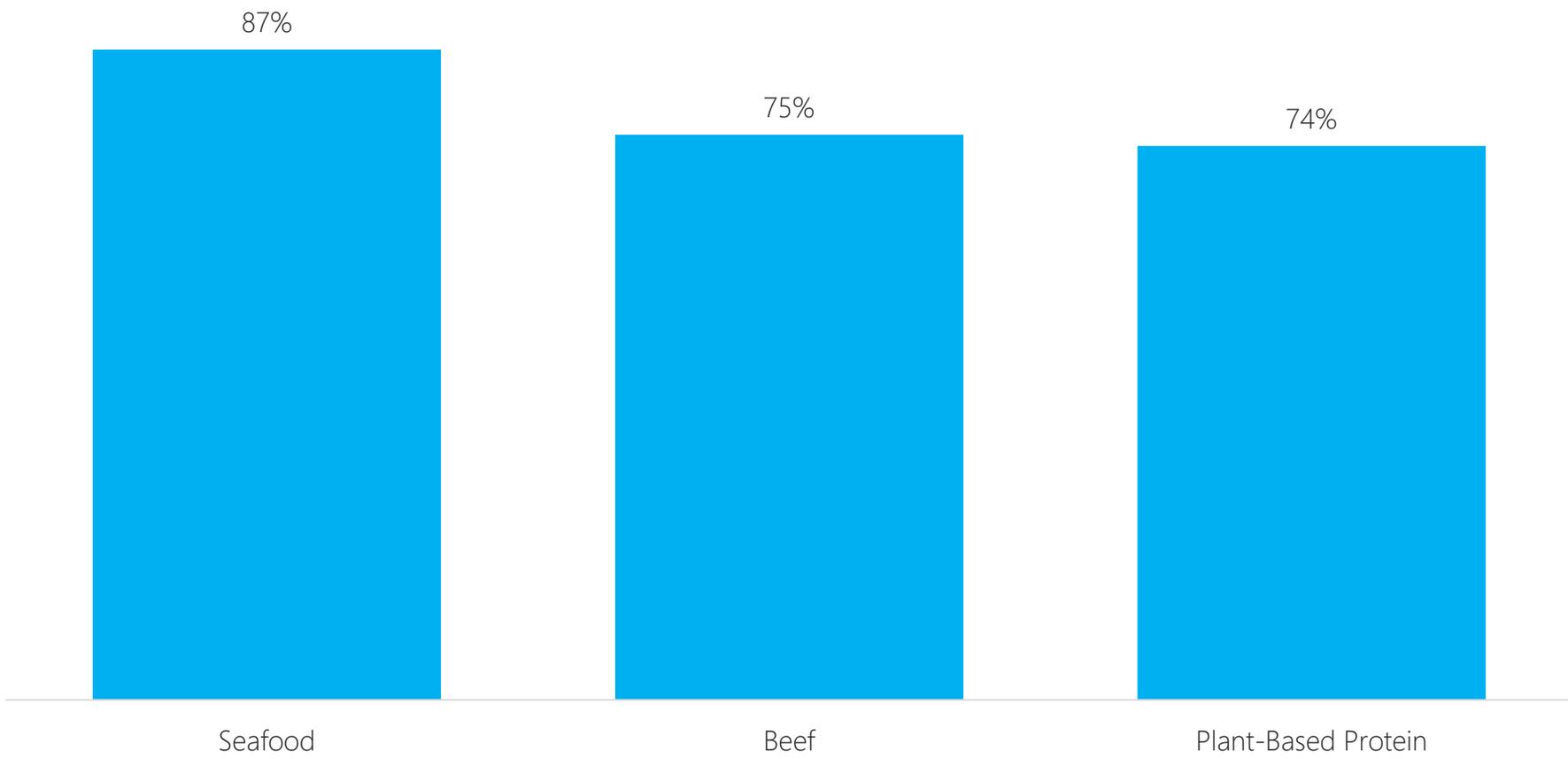
among those who have had seafood at fast casual in past 6 months



Nearly all consumers want to see more seafood at casual dining; more consumers are interested in additional seafood dishes than beef or plant-based protein.

INTEREST IN SEEING MORE OF EACH PROTEIN AT **CASUAL DINING**

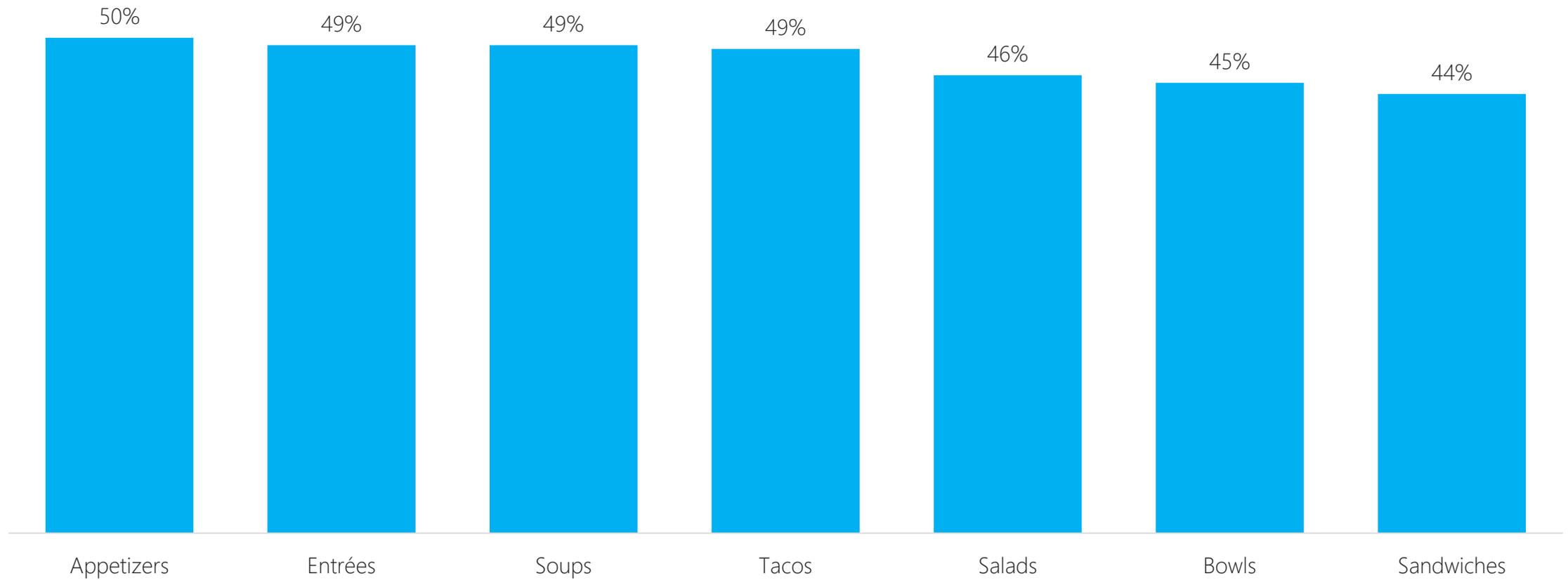
among those who have had seafood at casual dining in past 6 months



Around half of consumers want to see more seafood on every part of casual dining menus.

INTEREST IN SEEING MORE SEAFOOD DISHES **CASUAL DINING**

among those who have had seafood at casual dining in past 6 months

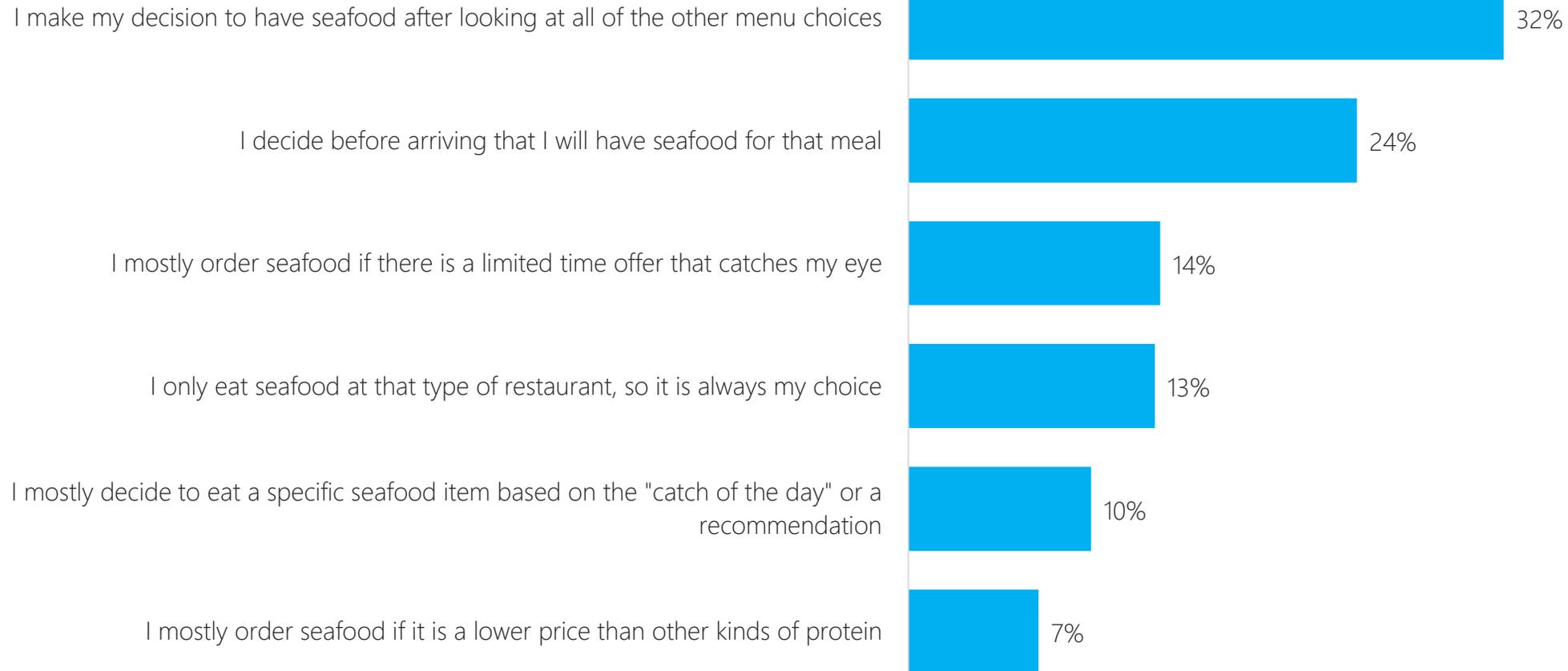


Most consumers decide to order seafood after reviewing other menu choices or before arriving at the QSR.

- « In-store marketing is critical given decisions are made at the time of ordering.
- « Staff recommendations and price points are not commonly part of consumers' decision-making process when ordering seafood at QSRs.

QSR – SEAFOOD ORDERING STRATEGY

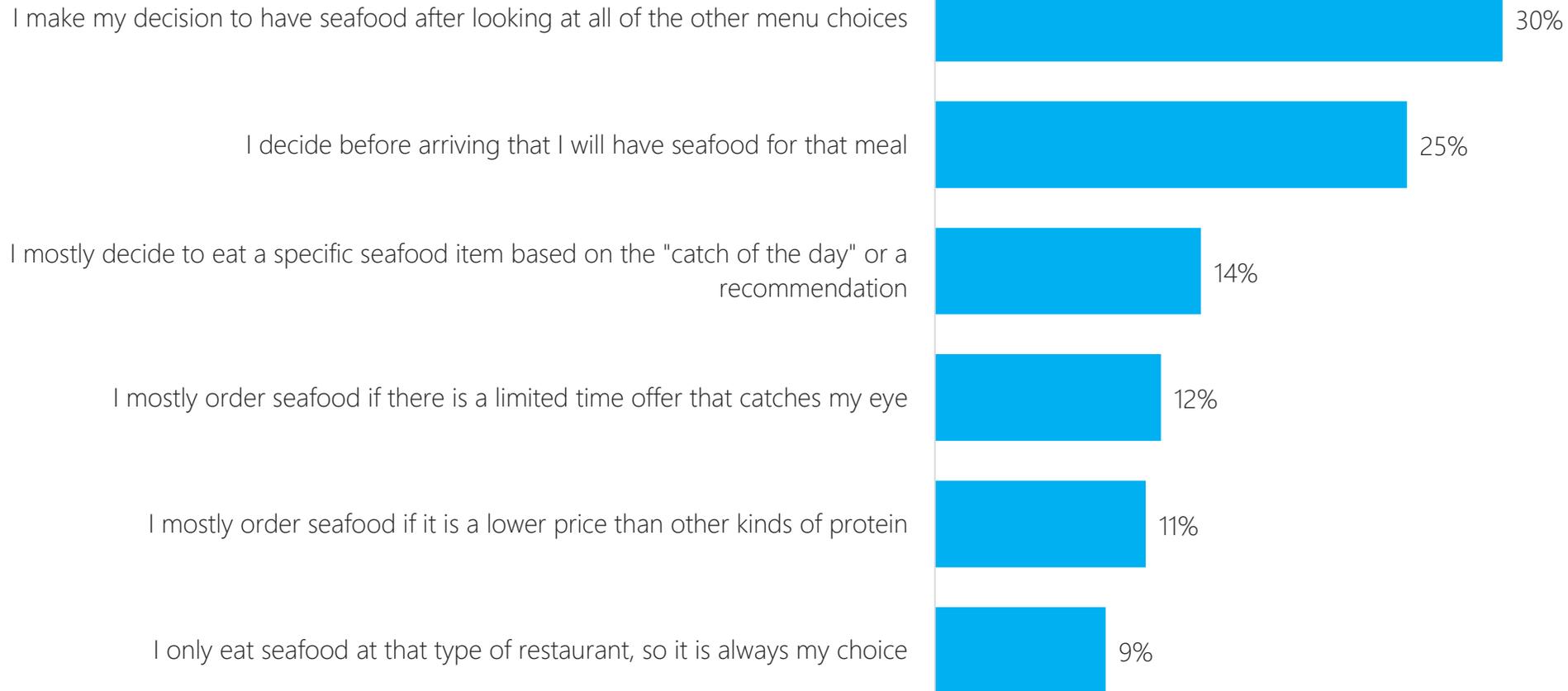
among those who have had seafood at QSRs in past 6 months



Similar to QSRs, most consumers decide to order seafood after reviewing other menu choices or before arriving at the fast casual restaurant.

FAST CASUAL – SEAFOOD ORDERING STRATEGY

among those who have had seafood at fast casual restaurants in past 6 months

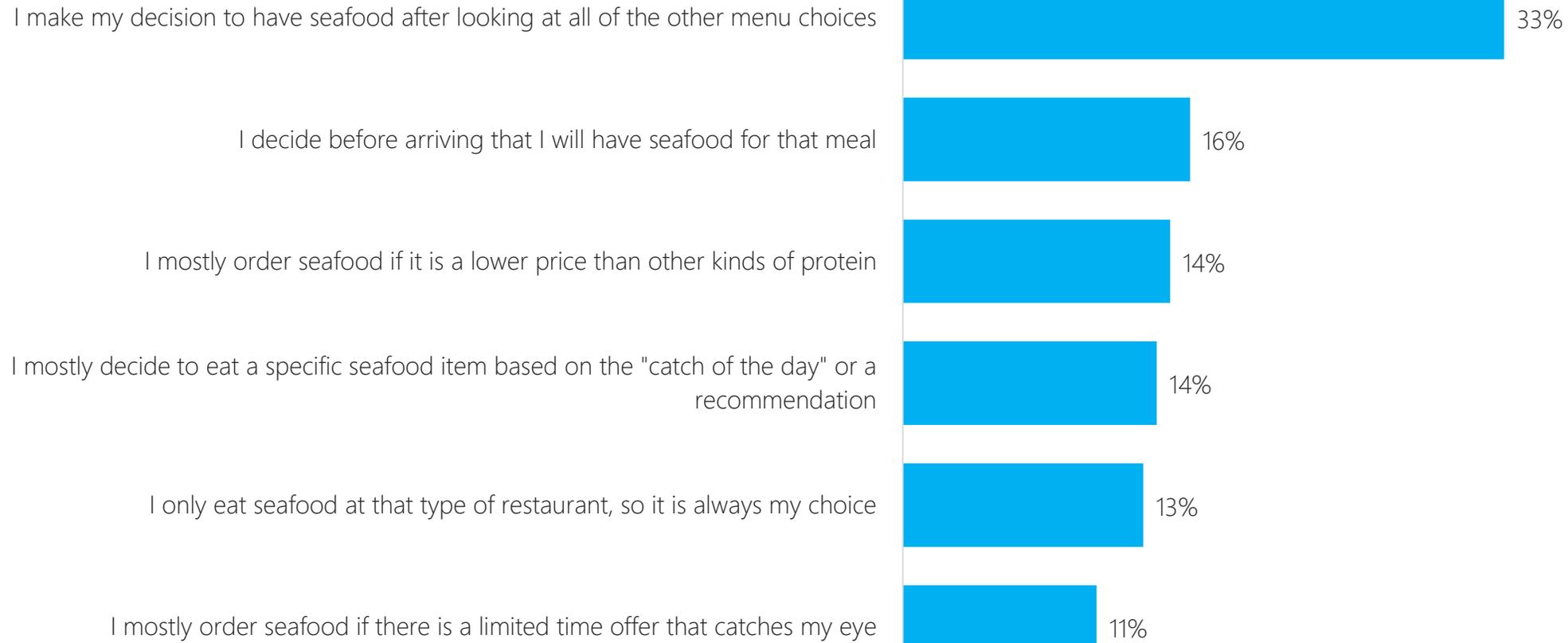


The decision to order seafood at casual dining restaurants is most often done after looking at all menu options.

« Compared to QSRs and fast casual restaurants, fewer consumers decide to have seafood before arriving at casual dining restaurants.

CASUAL DINING – SEAFOOD ORDERING STRATEGY

among those who have had seafood at casual dining restaurants in past 6 months

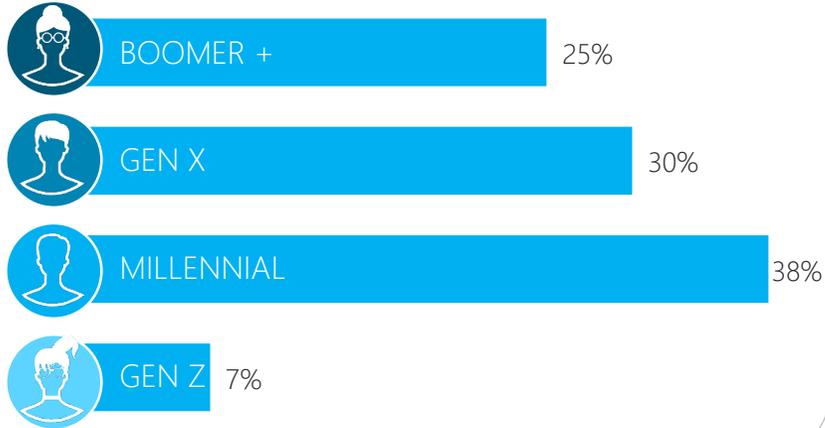


consumer profile

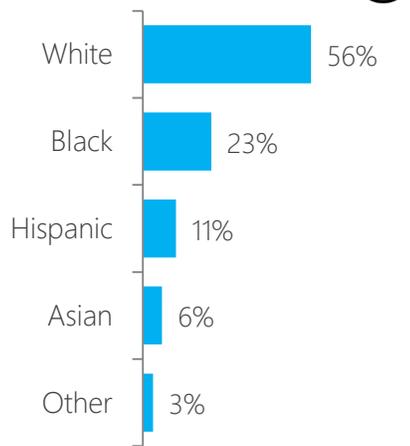


1000 CONSUMERS

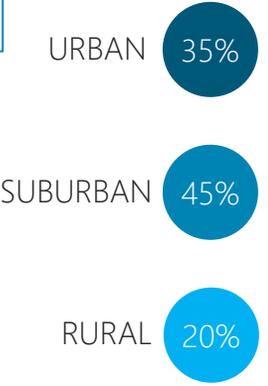
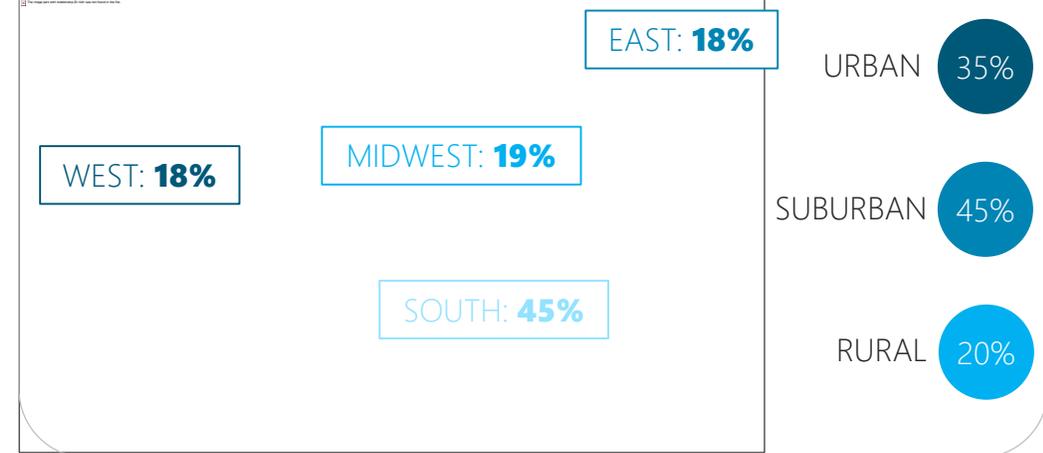
GENERATION



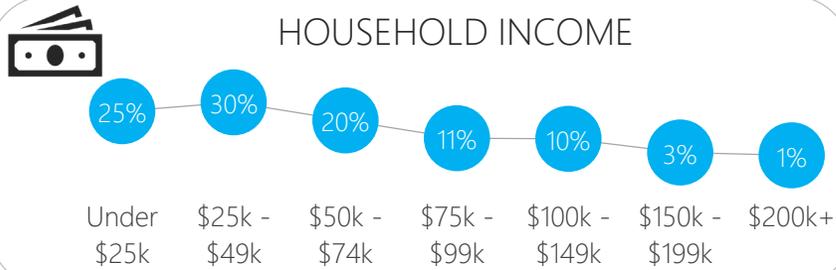
ETHNICITY



REGION



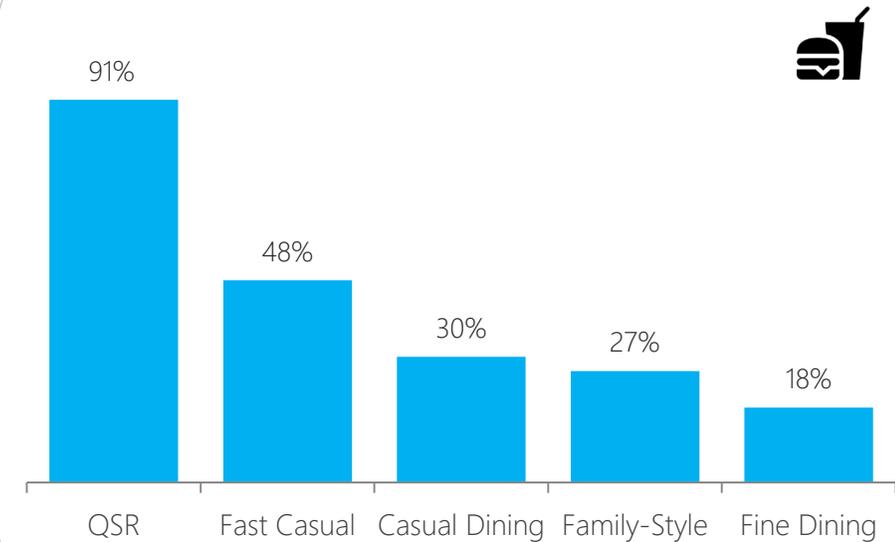
HOUSEHOLD INCOME



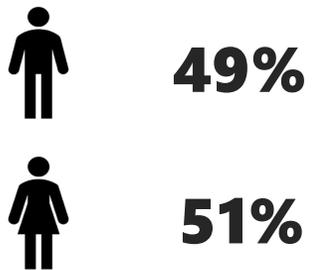
EMPLOYMENT



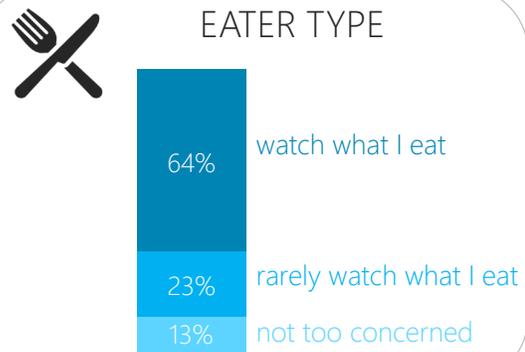
EAT AWAY FROM HOME ONCE PER WEEK AT...



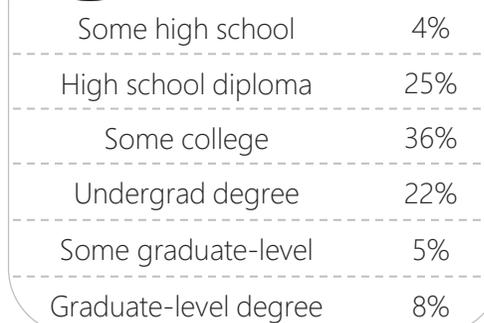
GENDER



EATER TYPE



EDUCATION





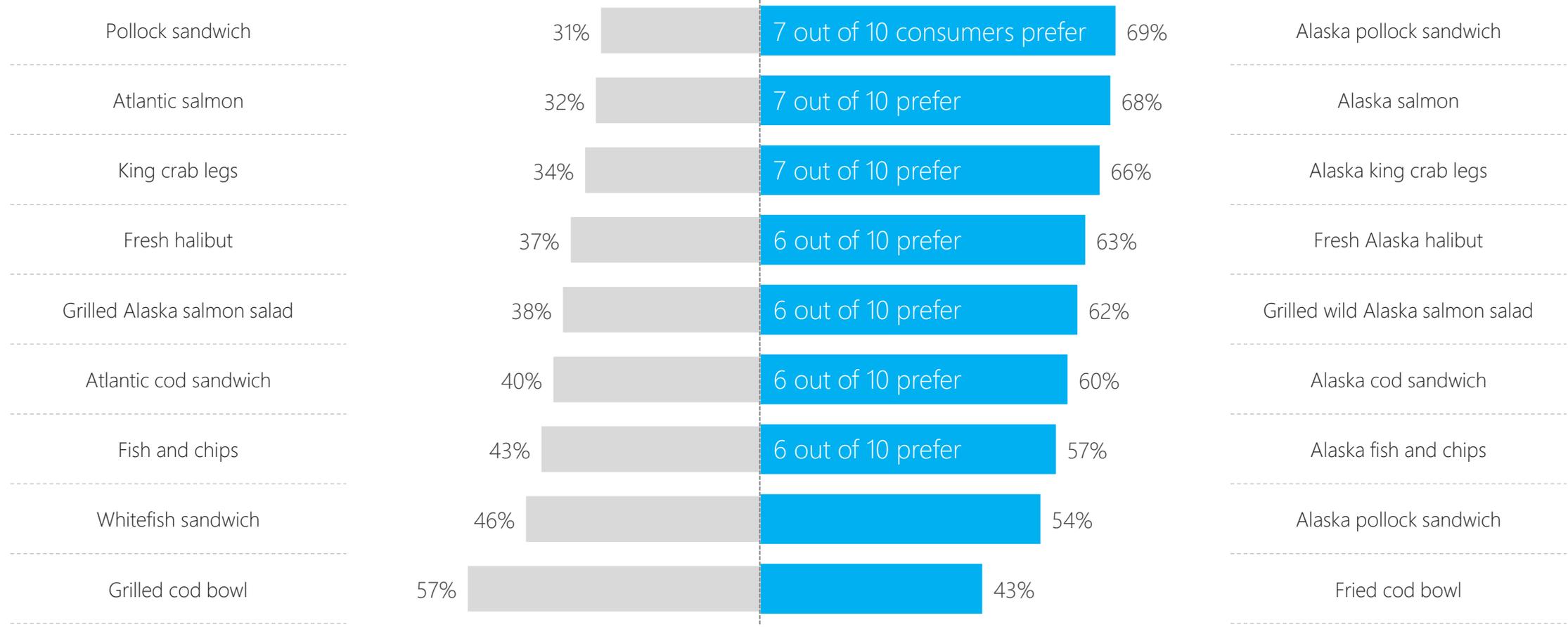
appendix

Consumers prefer seafood that specifies its origin on menus, and "Alaska" or "wild" descriptors are favored.

« Adding "wild" within the menu description of Alaska seafood increases its appeal.
 « In most cases, consumers are one and a half to two times more likely to order seafood when "Alaska" is present in the name of the dish.

PREFERRED SEAFOOD MENU ITEM NAME AT CHAIN RESTAURANTS

do you prefer...



E1: For each of the following pairs of menu items, please indicate which one you would be more likely to order at a chain restaurant. (n=1000)