

MENU ALASKA

RESTAURANT CUSTOMER RESEARCH



Wild, Natural & Sustainable™

Alaska Seafood

There's so much to its story.

Wild-caught by generations of dedicated families amid majestic snow-capped mountains, rugged coastal shores and pristine icy waters. Alaska is where the best quality seafood thrive and according to Datassential, it's the most appealing origin for seafood at restaurants.

Read on to learn more about consumer seafood preferences at chain restaurants and how Alaska is a call-to-action, empowering the restaurants that menu it.



WHAT'S HAPPENING WITH PROTEIN

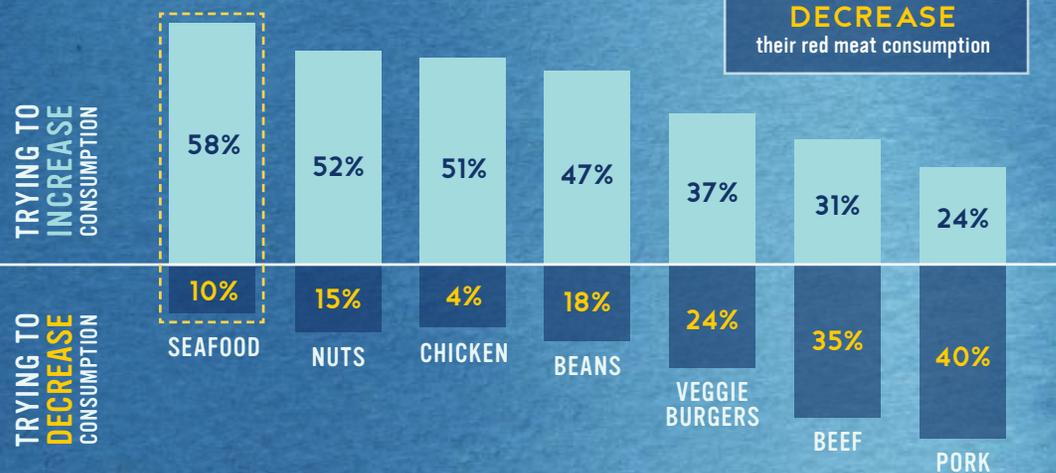
1/3

OF CONSUMERS LIMIT OR AVOID MEAT CONSUMPTION WITH YOUNGER GENERATIONS LEADING THE WAY



SEAFOOD WINS OVER ANY OTHER PROTEIN

Desired Change In Consumption By Protein Type



SEAFOOD IS MORE APPEALING THAN PLANT-BASED PROTEIN

If I'm trying to avoid meat, I'll choose seafood over plant-based proteins **57%**

I have been trying to eat less meat in recent years **51%**

Seafood is healthier than plant-based proteins **50%**

I wish restaurants would offer more plant-based proteins **46%**

I would rather eat plant-based proteins than seafood **33%**

#1 PREFERRED WAY TO

REDUCE MEAT CONSUMPTION IS

with Seafood



CONSUMER SEAFOOD CONSUMPTION

TRENDS *at* FOODSERVICE



GEN Z LOVES SEAFOOD!

NUMBER OF MONTHLY OCCASIONS EATING SEAFOOD AT CHAIN RESTAURANTS



GEN Z eats the most seafood away from home **2X PER MONTH** across all restaurant segments!

SEAFOOD CONSUMPTION INCREASE IS DRIVEN

by desire for

HEALTHY PROTEIN

TOP 2 CONSUMER STATED BENEFITS OF

Eating Seafood

HEALTHY **69%**
DELICIOUS **60%**



20% OF CONSUMERS ARE EATING MORE SEAFOOD AT CHAIN RESTAURANTS THAN 2 YEARS AGO

TOP 2 REASONS

37%

Seafood is healthier than other proteins

33%

Consumers are trying to eat less beef, chicken, or pork

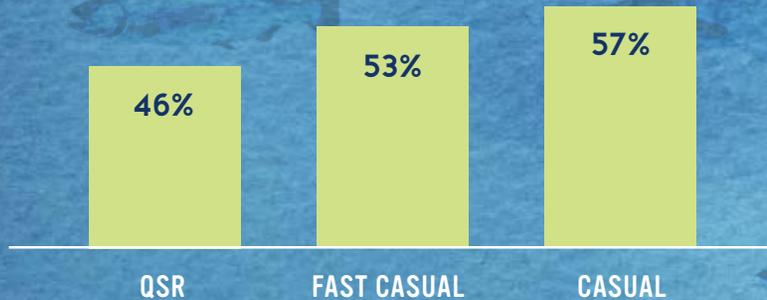
CONSUMERS WANT MORE SEAFOOD ON THE MENU ACROSS SEGMENTS



Half OF CONSUMERS ARE UNSATISFIED WITH CURRENT SEAFOOD OFFERINGS AT QSRs

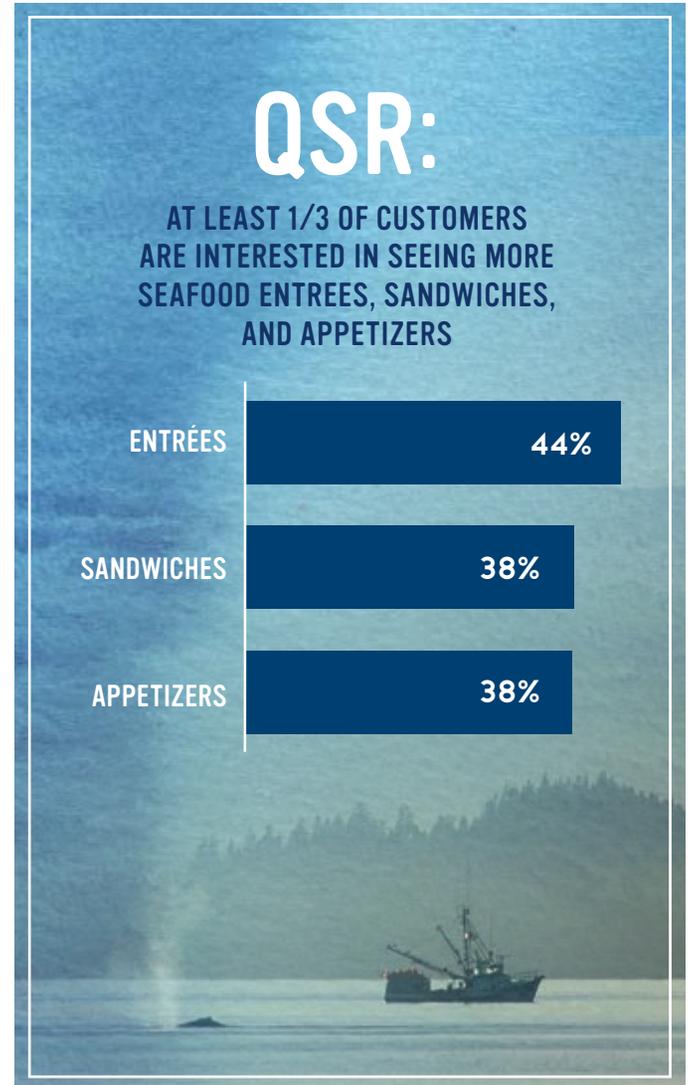
HALF OF CONSUMERS ARE INTERESTED IN SEEING MORE SEAFOOD SPECIES VARIETY IN ALL RESTAURANT SEGMENTS

Interest In Seeing More Seafood Species Variety At Each Segment



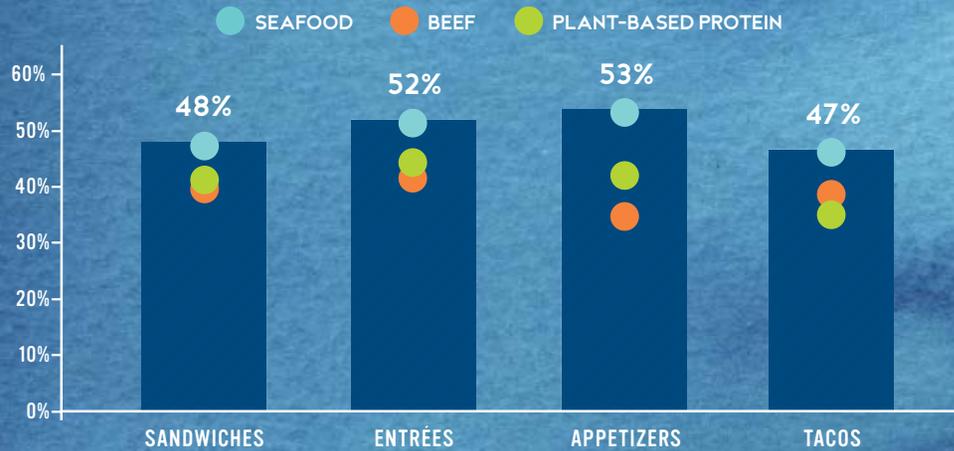
QSR:

AT LEAST 1/3 OF CUSTOMERS ARE INTERESTED IN SEEING MORE SEAFOOD ENTREES, SANDWICHES, AND APPETIZERS



FAST CASUAL: Consumers WANT MORE SEAFOOD than beef or plant-protein

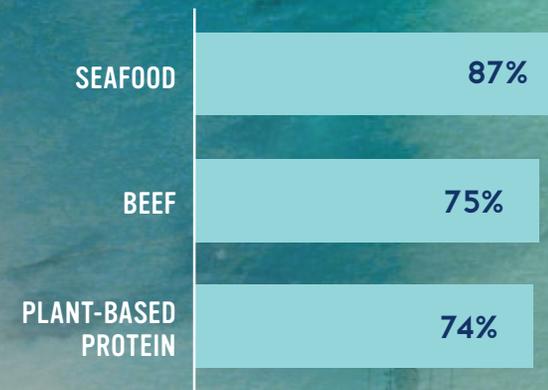
Interest In Seeing More of Each Protein at Fast Casual



CASUAL DINING:

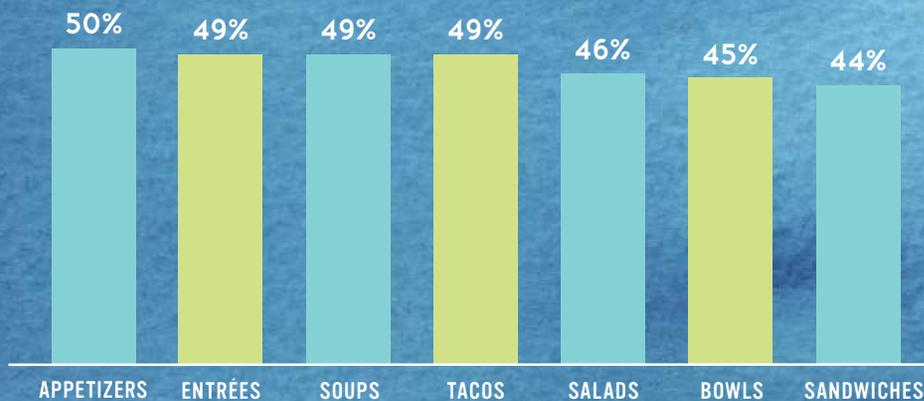
87% WANT MORE SEAFOOD
on the menu, beating out beef and plant-based protein

Interest In Seeing More of Each Protein at Casual Dining



CASUAL DINING: Nearly half of consumers WANT MORE SEAFOOD on every part of casual dining menus

Interest In Seeing More Seafood Dishes at Casual Dining



SEAFOOD MENU TRENDS



The menu description is
KEY FOR SEAFOOD



Across all segments,
consumers #1 way they decide to
ORDER SEAFOOD IS AFTER
reviewing other menu choices

SUSTAINABLE
SEAFOOD
HAS SEEN A

+2075%
MENU PENETRATION
GROWTH

SINCE 2009

66%

LOVE / LIKE IT

AMONG THOSE
THAT TRIED
**SUSTAINABLE
FOODS**

SEAFOOD ADD ONS

+36% MENU
PENETRATION
GROWTH
SINCE 2009

A growing number of restaurants
are offering opportunities to customize by
adding fish or seafood to their meals



TOP SEAFOOD PREP METHODS

OPERATORS ARE UPDATING SEAFOOD
MENUING LANGUAGE

TOP ranked by penetration	PENETRATION	1 YEAR GROWTH	4 YEAR GROWTH
FRIED	53.8%	-	1%
GRILLED	53.2%	-	+1%
SAUTEED	35.3%	-1%	-8%
ROASTED	31.6%	+2%	+4%
SMOKED	25.9%	+1%	+7%
SEARED	22.0%	+2%	+10%
STEAMED	20.2%	-1%	-7%
BAKED	19.7%	-3%	-8%
BATTERED	18.0%	+1%	+5%
BREADED	17.6%	-	-4%
GLAZED	13.2%	+3%	+5%
BLACKENED	12.5%	-	+11%
DEEP FRIED	12.4%	-8%	-16%
ENCRUSTED	10.8%	-7%	1%
PAN SEARED	10.0%	-	+5%

TRENDING ranked by 4-year growth	PENETRATION	1 YEAR GROWTH	4 YEAR GROWTH
TARTARE	4.1%	-13%	+24%
SESAME CRUSTED	2.2%	+10%	+22%
SALTED	2.3%	-	+16%
SHUCKED	1.2%	-4%	+15%
CEDAR PLANK	1.2%	-	+15%
BRAISED	6.2%	+3%	+12%
CHAR GRILLED	3.4%	+8%	+11%
BLACKENED	12.5%	-	+11%
SEARED	22.0%	+2%	+10%
POACHED	9.9%	+6%	+8%
SMOKED	25.9%	+1%	+7%
BEER BATTERED	8.7%	-	+7%
CURED	3.8%	-2%	+7%
CHILLED	7.1%	-1%	+7%
TEMPURA	9.1%	+2%	+6%

TOP SAUCES AND FLAVORS

WHEN IT COMES TO SEAFOOD, IT'S ALL ABOUT ASIAN FLAVORS

TOP ranked by penetration	PENETRATION	1 YEAR GROWTH	4 YEAR GROWTH
GARLIC	40.6%	+1%	-3%
BUTTER	27.0%	+1%	-3%
TARTAR	15.6%	+6%	+5%
GINGER	15.0%	+1%	+2%
HERB	12.0%	-	-
CURRY	11.6%	+6%	+2%
RED SAUCE	10.8%	-4%	-14%
BASIL	10.4%	-4%	-9%
CILANTRO	10.3%	+3%	+10%
SWEET AND SOUR	9.3%	+3%	-7%
CREAM SAUCE	9.2%	+7%	-1%
JALAPENO PEPPER	8.5%	+4%	+21%
SALSA	8.1%	+2%	-10%
COCKTAIL SAUCE	7.8%	+4%	+8%
SOY SAUCE	7.4%	-3%	+16%

TRENDING ranked by 4-year growth	PENETRATION	1 YEAR GROWTH	4 YEAR GROWTH
SRIRACHA	2.2%	+7%	+70%
SALSA VERDE	1.2%	+29%	+66%
CHUTNEY	1.0%	+1%	+44%
TRUFFLE	2.0%	+16%	+43%
COCONUT CURRY	1.6%	+17%	+38%
AIOLI	5.4%	-3%	+38%
EEL SAUCE	2.5%	+8%	+35%
PONZU	3.0%	+6%	+34%
BOURBON	1.8%	-10%	+31%
CHIPOTLE SAUCE	1.1%	+23%	+30%
SOUR CREAM	1.8%	+13%	+28%
SPICY MAYO	3.1%	+5%	+27%
THAI CHILI	1.2%	-11%	+27%
GINGER SOY	1.4%	+11%	+26%
LEMON DILL	1.0%	+8%	+22%

ALASKA MENU TRENDS



Alaska Seafood HAS SEEN **+8%** MENU PENETRATION GROWTH SINCE 2009

ALASKA SEAFOOD COMMANDS A HIGHER PRICE POINT

MEDIAN PRICE BY SEGMENT: ALASKA SEAFOOD OVERALL SEAFOOD



	PRICE GAP	% INCREASE
FAST CASUAL	\$ 0.29	+3%
MIDSCALE	\$ 1.65	+14%
CASUAL	\$ 2.04	+15%
FINE DINING	\$ 13.00	+72%

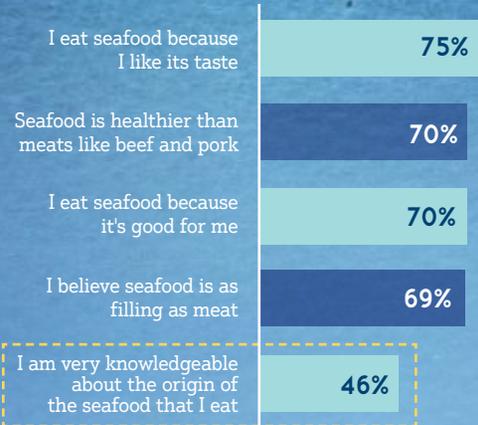
CONSUMERS WANT TO KNOW THE ORIGIN *and that it's* WILD-CAUGHT



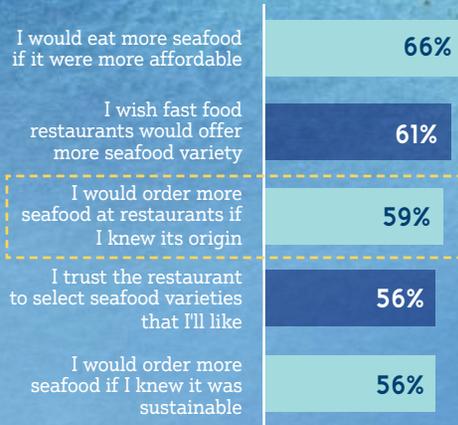
ORIGIN = INCREASE IN ORDERS

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

SEAFOOD ATTITUDES



SEAFOOD DESIRES



59%
of consumers would order
MORE SEAFOOD AT RESTAURANTS
IF THEY KNEW ITS ORIGIN



51% OF CONSUMERS PREFER WILD-CAUGHT SEAFOOD

It's perceived to taste better and be more natural

WHY DO YOU PREFER WILD-CAUGHT?



Of those with a preference, **71%** prefer wild-caught

"FISH FROM THE WILD HAS A BETTER TASTE AND IS GOING TO BE NATURAL AS INTENDED"

WILD
IS PREFERRED
5:2
TO FARMED

71% LOVE /
LIKE IT
AMONG THOSE THAT TRIED
WILD-CAUGHT SEAFOOD

WILD HAS
SEEN **+47%**
MENU PENETRATION GROWTH
SINCE 2009

TOP 2 CONSUMER STATED BENEFITS OF WILD SEAFOOD

WILD-CAUGHT
SEAFOOD =
Tastes better



1. HEALTHIER
2. LESS CHEMICALS

WILD-CAUGHT
SEAFOOD =
MORE NATURAL



WILD + ALASKA
IS THE MAGIC COMBINATION FOR
DRIVING PURCHASE

6 out of 10 consumers are more
likely to buy a grilled Alaska salmon
salad, when it's menued as
GRILLED **WILD** ALASKA SALMON SALAD



ALASKA *on the menu* IS POWERFUL AND DRIVES SALES



MENUING ALASKA SEAFOOD

tells consumers the dish is fresh, healthy, and great tasting

Alaska Seafood associations



**SEAFOOD
FROM ALASKA**
is more appealing

**THAN ANY
OTHER
SEAFOOD
ORIGIN**



TOP 2 UNAIDED CONSUMER DESCRIPTORS OF SEAFOOD FROM ALASKA

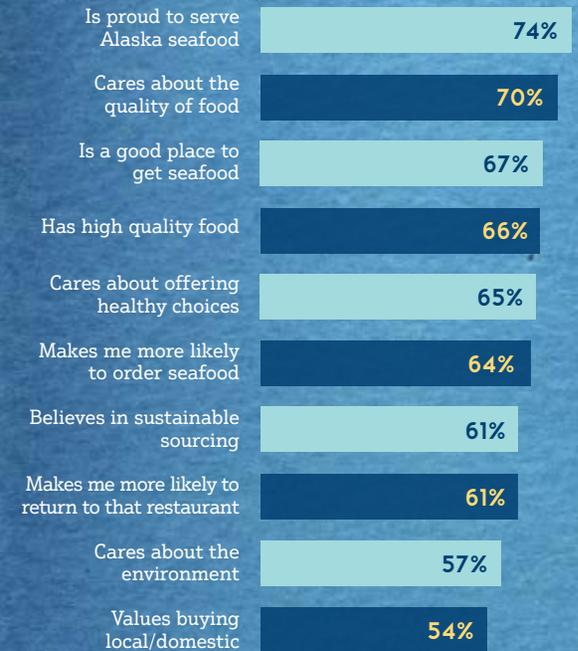
1. GREAT TASTE / FLAVOR
2. FRESH



Mentioning
“ALASKA SEAFOOD”
on the menu drives home
that the restaurant cares about
serving the best seafood

Impact of Alaska Seafood Logo on
Restaurant Perceptions

THE RESTAURANT...

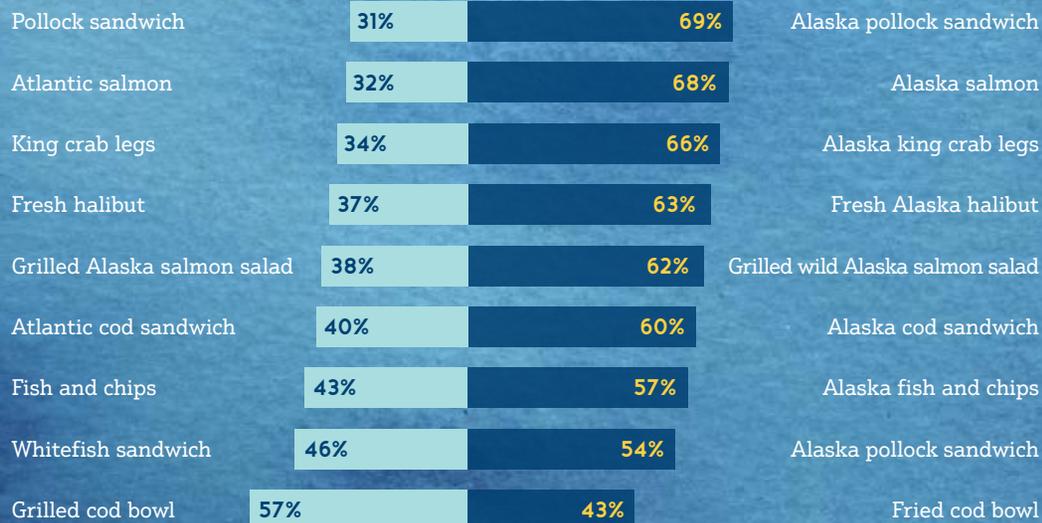


Wild, Natural & Sustainable®

CONSUMERS PREFER ALASKA SEAFOOD ON THE MENU BY A WIDE MARGIN

Adding 'wild' within the menu description of Alaska seafood increases its appeal even more!

Preferred Seafood Menu Item Name at Chain Restaurants



'ALASKA' DRIVES PURCHASE

7 OUT OF 10 CONSUMERS
ARE MORE LIKELY TO ORDER AN
ALASKA POLLOCK SANDWICH
VS. A POLLOCK SANDWICH



64%

OF CONSUMERS

ARE MORE LIKELY TO ORDER
SEAFOOD WHEN THEY SEE THE
ALASKA SEAFOOD LOGO

61% BELIEVE ALASKA
SEAFOOD LOGO =



Sustainable Sourcing



Available Resources

The Alaska Seafood Marketing Institute (ASMI) has the tools and resources to make it easy for you to build successful promotions and add customer appeal to your menu.

- CHEF AND WAITSTAFF TRAINING
- EDUCATIONAL MATERIALS
- RECIPES
- CONSUMER TRENDS DATA
- TRAINING IN THE SELECTION, HANDLING AND USES OF ALL VARIETIES OF WILD ALASKA SEAFOOD
- MENU CONCEPT DEVELOPMENT
- TURNKEY PROMOTIONS
- PHOTOGRAPHS, VIDEOS AND ARTWORK TO CUSTOMIZE YOUR NEEDS
- READY ACCESS TO SEAFOOD MARKETING CONSULTANTS
- DIRECTORY OF ALASKA SEAFOOD SUPPLIERS
- SOCIAL MEDIA SUPPORT



RESEARCH METHODOLOGY

Conducted by Datassential in 2019, this online study drew from 1,000 nationally representative consumers. All consumers were required to be weekly visitors of QSR, fast casual, or casual dining restaurants. Additional seafood trend information was pulled from Datassential's Menu Trends and FLAVOR tracking tools.



FOR MORE INFORMATION:

Please contact us at 800-478-2903 or visit www.alaskaseafood.org/foodservice

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