Menu
Alaska
CONSUMER RESEARCH
RESULTS 2013

A Clear Preference for
Wild, Natural & Sustainable
Alaska Seafood
Objective

Determine how consumers make decisions about ordering fish and seafood at Quick Service and Casual Dining Restaurant chains.

Methodology

This new research, completed in 2013, is an initiative from the Alaska Seafood Marketing Institute to provide consumer-driven data, information and insights about foodservice customers. This is part of an ongoing effort to help drive volume by understanding consumers likes and dislikes about fish and seafood and their ordering behavior.

The study drew from 1020 consumers from across the country, ranging in gender and ages from 18-64. These consumers frequent Quick Service Restaurant (QSR) or Casual Dining Restaurant Chains at least one time per week.

Datassential, a research firm with one of the largest chain and independent restaurant menu databases, conducted the research and compiled the menu data. 
www.datassential.com
21% of consumers are eating more fish/seafood at chain restaurants.

Taste, health concerns, and an increase in variety are the leading drivers behind increased fish/seafood consumption at chain restaurants.
- 50% say more chains are serving good tasting fish/seafood
- 48% say they are trying to eat less beef, chicken and/or pork
- 41% say there’s more fish/seafood variety offered at chain restaurants

Consumers are choosing healthier preparation methods for fish/seafood.
- Top 2 cooking methods: Grilled 55%, Baked 36%

There is a real opportunity to menu more fish and seafood options.
- At QSR chains, only 15% are completely satisfied with fish/seafood menu options
- At Casual Dining chains, only 29% are completely satisfied

The menu drives consumers’ decision-making process for fish and seafood.
- 57% of QSR customers and 52% of Casual Dining customers make a decision to order fish/seafood after looking at the menu
- 21% of Casual Dining customers make their fish/seafood decision based on the “catch of the day” or waitstaff recommendation

Unaided, consumers cite Alaska as the #1 source of great seafood.
- “Alaska” is the #2 most commonly specified brand on U.S. menus

Consumers are much more likely to order fish/seafood when “Alaska” is included in the description.

Not only is the Alaska Seafood logo powerful, it changes consumers’ perception of the entire restaurant.
- “The restaurant cares about the quality of food”
- “The restaurant is a good place to get seafood”
- “The restaurant cares about the environment”
Most consumers typically know what they are going to order before they arrive at a restaurant. This is not the case for fish/seafood, which presents a great opportunity for operators to incorporate more robust menu descriptors and in-store POS.

How do you typically make your choice to eat fish or seafood at a chain restaurant?
Consumers are eating fish/seafood both at restaurants and at home

How often do you eat fish or seafood at home compared to eating it at restaurants?

Taste, health concerns and greater variety drive increased fish/seafood consumption

Please select the reasons you are eating more fish/seafood at chain restaurants than you did 2 years ago.

There’s room for improving selection of fish/seafood offerings – especially at fast food

Overall, how satisfied are you with the selection of fish/seafood at the following types of chain restaurants?
Consumers are choosing more healthy descriptors when ordering fish/seafood dishes at chain restaurants.

Menu data shows that “fried” is the typical cooking method for seafood, however restaurant customers are selecting healthier options more often. Operators may want to menu fish/seafood items that align with their customers' desire for healthier preparations.

Find recipes at wildalaskaflavor.com
What types of dishes would you like to see at Fast Food restaurants?

- Greater variety of fish/seafood overall: 14%
- Entrées with fish/seafood: 11%
- Entrées with chicken: 9%
- Sandwiches with chicken: 9%
- Salads with chicken: 9%
- Sandwiches with fish/seafood: 9%
- Fish/seafood appetizers and soups: 8%
- Salads with fish/seafood: 7%
- Chicken breakfast items: 6%
- Entrées with beef: 6%
- Sandwiches with beef: 5%
- Beef breakfast items: 4%
- Salads with beef: 3%
- Fish/seafood breakfast items: 3%

What types of dishes would you like to see at Casual Dining restaurants?

- Greater variety of fish/seafood overall: 15%
- Entrées with fish/seafood: 13%
- Fish/seafood appetizers and soups: 9%
- Entrées with chicken: 8%
- Salads with chicken: 8%
- Sandwiches with chicken: 7%
- Sandwiches with fish/seafood: 7%
- Salads with fish/seafood: 7%
- Entrées with beef: 6%
- Chicken breakfast items: 5%
- Sandwiches with beef: 5%
- Beef breakfast items: 3%
- Fish/seafood breakfast items: 3%
- Salads with beef: 3%

Source: Datassentials 2013
FISH & SEAFOOD Preferences

Consumers prefer wild fish/seafood to farmed by a 3-to-1 margin

If given the choice, would you prefer to eat wild fish/seafood or farm-raised fish/seafood?

51% Prefer Wild
16% Prefer Farmed
34% No Preference

Millennials have higher preference for wild than other age groups

Under 25 25 to 34 35 to 44 45 to 54 55 to 64 65 and up
Prefer Wild
Prefer Farmed
No Preference

 Consumers who eat fish more at restaurants than at home prefer wild

Eat more fish at home
Eat about the same
Eat more fish at restaurants

Prefer Wild
Prefer Farmed
No Preference

Top 10 types of seafood consumers would like to see more of on the menu

<table>
<thead>
<tr>
<th>Top 10 Types</th>
<th>Fast Food Top 10</th>
<th>Fast Casual Top 10</th>
<th>Casual Top 10</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shrimp</td>
<td>57%</td>
<td>52%</td>
<td>54%</td>
</tr>
<tr>
<td>Salmon</td>
<td>42%</td>
<td>44%</td>
<td>48%</td>
</tr>
<tr>
<td>Tuna</td>
<td>37%</td>
<td>39%</td>
<td>46%</td>
</tr>
<tr>
<td>Crab</td>
<td>37%</td>
<td>38%</td>
<td>45%</td>
</tr>
<tr>
<td>Tilapia</td>
<td>33%</td>
<td>35%</td>
<td>37%</td>
</tr>
<tr>
<td>Lobster</td>
<td>32%</td>
<td>34%</td>
<td>36%</td>
</tr>
<tr>
<td>Cod</td>
<td>31%</td>
<td>30%</td>
<td>37%</td>
</tr>
<tr>
<td>Catfish</td>
<td>28%</td>
<td>28%</td>
<td>32%</td>
</tr>
<tr>
<td>Fried fish</td>
<td>26%</td>
<td>28%</td>
<td>31%</td>
</tr>
<tr>
<td>Smoked salmon</td>
<td>25%</td>
<td>22%</td>
<td>29%</td>
</tr>
</tbody>
</table>

Source: Datassentials 2013
Recall that consumers are choosing “grilled” and “baked” more often when ordering fish/seafood items, indicating a healthy halo in consumers’ perceptions of seafood. Operators can capitalize on this by menuing more seafood using healthier cooking methods.

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**Taste is the leading driver behind preference for wild fish/seafood**

<table>
<thead>
<tr>
<th>Preference</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Taste</td>
<td>26%</td>
</tr>
<tr>
<td>Natural</td>
<td>19%</td>
</tr>
<tr>
<td>No chemicals/hormones</td>
<td>16%</td>
</tr>
<tr>
<td>Healthy</td>
<td>14%</td>
</tr>
<tr>
<td>Fresh</td>
<td>12%</td>
</tr>
<tr>
<td>Not penned/living in waste</td>
<td>5%</td>
</tr>
<tr>
<td>Traditional diet/food supply</td>
<td>4%</td>
</tr>
<tr>
<td>Safe</td>
<td>4%</td>
</tr>
<tr>
<td>Quality</td>
<td>3%</td>
</tr>
<tr>
<td>Organic</td>
<td>3%</td>
</tr>
<tr>
<td>Not GMO</td>
<td>2%</td>
</tr>
<tr>
<td>Negative connotation with “farmed”</td>
<td>2%</td>
</tr>
<tr>
<td>Poor reputation for farmed</td>
<td>2%</td>
</tr>
<tr>
<td>More nutrients</td>
<td>2%</td>
</tr>
<tr>
<td>Trustworthy</td>
<td>2%</td>
</tr>
<tr>
<td>Environmentally friendly</td>
<td>1%</td>
</tr>
<tr>
<td>Sustainable</td>
<td>1%</td>
</tr>
<tr>
<td>Unique</td>
<td>&lt;1%</td>
</tr>
<tr>
<td>Support fishermen</td>
<td>&lt;1%</td>
</tr>
<tr>
<td>Size</td>
<td>&lt;1%</td>
</tr>
<tr>
<td>Love wild</td>
<td>&lt;1%</td>
</tr>
<tr>
<td>Delicious</td>
<td>&lt;1%</td>
</tr>
<tr>
<td>Flaky</td>
<td>&lt;1%</td>
</tr>
<tr>
<td>Variety</td>
<td>&lt;1%</td>
</tr>
</tbody>
</table>

**Taste drives fish/seafood consumption, but health perceptions are a strong driver for over 4-in-10 consumers**

<table>
<thead>
<tr>
<th>Preference</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Like the taste</td>
<td>49%</td>
</tr>
<tr>
<td>Would eat more if affordable</td>
<td>44%</td>
</tr>
<tr>
<td>Try to eat healthy whenever I can</td>
<td>42%</td>
</tr>
<tr>
<td>Eat it because it’s good for me</td>
<td>41%</td>
</tr>
<tr>
<td>Like to try new foods</td>
<td>40%</td>
</tr>
<tr>
<td>Wish QSR would offer more variety</td>
<td>37%</td>
</tr>
<tr>
<td>Would order more if source was known</td>
<td>35%</td>
</tr>
<tr>
<td>Eat more fish/seafood than I used to</td>
<td>30%</td>
</tr>
<tr>
<td>Prefer to eat organic</td>
<td>30%</td>
</tr>
<tr>
<td>I am an adventurous eater</td>
<td>29%</td>
</tr>
<tr>
<td>Trust the restaurant to select varieties I like</td>
<td>22%</td>
</tr>
<tr>
<td>Don’t care to know about seafood I eat</td>
<td>12%</td>
</tr>
</tbody>
</table>

Percentage of consumers that agree with these statements.

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**Why consumers prefer to eat wild fish or seafood.**

*Source: Datassentials 2013*

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**OPPORTUNITY**

Recall that consumers are choosing “grilled” and “baked” more often when ordering fish/seafood items, indicating a healthy halo in consumers’ perceptions of seafood. Operators can capitalize on this by menuing more seafood using healthier cooking methods.
ALASKA BRAND
Perceptions

Consumers are more likely to recommend Alaska seafood than any other protein tested.

- Alaska seafood: 45%
- Alaska salmon: 43%
- USDA Prime sirloin: 38%
- Angus beef: 37%
- New England seafood: 33%
- USDA Organic chicken: 32%
- Atlantic salmon: 31%
- Louisiana/gulf seafood: 28%
- Kobe beef: 26%
- Farm-to-table pork: 24%
- Farmed seafood: 20%
- Asian seafood: 18%

How likely are you to recommend the following to a friend, family member or colleague?

Which US states or countries come to mind when you think of sources of great seafood?

Alaska: 45%
Maine: 35%
Florida: 19%
Louisiana/New Orleans: 16%
California/Los Angeles: 10%
Massachusetts/Boston: 8%
Washington: 7%
Japan: 6%
Maryland: 5%
Hawaii: 4%
Canada: 2%
Oregon: 2%
China: 2%
New England: 2%
Mississippi: 2%
Texas: 2%
New York: 2%

OTHER SOURCES CITED, 1% EACH:
Alabama, South Carolina, Virginia, New Jersey, North Carolina, USA, Gulf Coast, Spain, Rhode Island, Mexico, Chile, East Coast, Australia, Connecticut, Iceland, Michigan, Norway

Source: Datassentials 2013
If a restaurant had the Alaska Seafood logo or used the word “Alaska” to describe the fish/seafood on its menu, would you believe that...

<table>
<thead>
<tr>
<th>Top Descriptors</th>
<th>ASMI Logo</th>
<th>“Alaska”</th>
</tr>
</thead>
<tbody>
<tr>
<td>The restaurant is proud to serve Alaska seafood</td>
<td>84%</td>
<td>78%</td>
</tr>
<tr>
<td>The restaurant recommends Alaska seafood</td>
<td>81%</td>
<td>70%</td>
</tr>
<tr>
<td>The restaurant wants to make a good impression</td>
<td>78%</td>
<td>72%</td>
</tr>
<tr>
<td>The restaurant cares about quality of food</td>
<td>71%</td>
<td>66%</td>
</tr>
<tr>
<td>The restaurant is a good place to get seafood</td>
<td>70%</td>
<td>63%</td>
</tr>
<tr>
<td>I’d be more likely to order a seafood dish</td>
<td>66%</td>
<td>59%</td>
</tr>
<tr>
<td>The restaurant has high quality food</td>
<td>66%</td>
<td>62%</td>
</tr>
<tr>
<td>The restaurant cares about the environment</td>
<td>58%</td>
<td>39%</td>
</tr>
</tbody>
</table>

If consumers identified the fish/seafood as unique and true of Alaska, their perception of the entire restaurant was enhanced. The survey results show that using the Alaska Seafood logo or the term “Alaska” on a menu can have very positive effects on customers’ perception of the entire restaurant.
Consumers are much more likely to order a fish/seafood dish when “Alaska” is included in the menu description

As the research illustrates, consumers show a strong preference for Alaska Seafood. With consumers showing greater interest in seafood and looking for more sustainable seafood options, branding Alaska on your menu and in your promotions will boost sales and demonstrate your support for wild, natural and sustainable seafood.

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. With training opportunities and access to data, you will be equipped to provide your customers with the information they demand.

A few of the ways ASMI can help:
- Chef and waitstaff training
- Educational materials
- Recipes
- National and regional consumer trends data
- Training in the selection, handling and uses of all varieties of wild Alaska Seafood
- Menu concept development
- Turnkey promotions
- Photographs and artwork to customize your needs
- Ready access to seafood marketing consultants
- Directory of Alaska Seafood Suppliers
- Online marketing assistance

For more information, please contact us at 800-806-2497 or visit www.alaskaseafood.org and www.wildalaskaflavor.com