



MENU ALASKA 2011

Consumer Research Results:

A Clear Preference for
Wild, Natural & Sustainable
Alaska Seafood



Wild, Natural & Sustainable



TOPLINE SUMMARY

Consumer Trends & Seafood Preferences

This new research, completed in 2011, is an initiative from the Alaska Seafood Marketing Institute to provide consumer-driven data, information and insights about foodservice chain customers. This is part of an ongoing effort to help drive volume through consultative menu support and operator guest knowledge.

The study drew from 1,200 consumers from across the country, ranging in gender and ages from 18-64. These consumers frequent quick-service restaurants (QSR) or casual chain restaurants at least 5 times per month and eat seafood at such locations at least 3 times per month.

Datassential, one of the largest chain and independent restaurant menu databases, compiled much of the menu data.



KEY FINDINGS:

CONSUMPTION:

- ▶ 55% of consumers eat fish and seafood because they “Like the way it tastes.” However, health reasons are a close second, with 47% reporting that they eat fish/seafood because it’s “Good for me.”
- ▶ 43% of consumers reported that health is the main reason for eating more fish/seafood than two years ago.
- ▶ “High Quality” and “Taste” are the top two reasons consumers select fish/seafood at a chain restaurant.

CONSUMERS WANT MORE:

- ▶ When it comes to demand at QSR, 73% of consumers would like to see a greater variety of fish/seafood items on the menu.
- ▶ 60% would like QSRs to offer more salads with fish/seafood.
- ▶ 64% of consumers would eat at a casual restaurant more often if the casual restaurants offered more grilled fish/seafood sandwiches.
- ▶ 65% of consumers said they would order more fish/seafood if they had the option of choosing their side dishes. 60% would order more seafood if casual restaurants offered them a choice of sauces for fish/seafood.

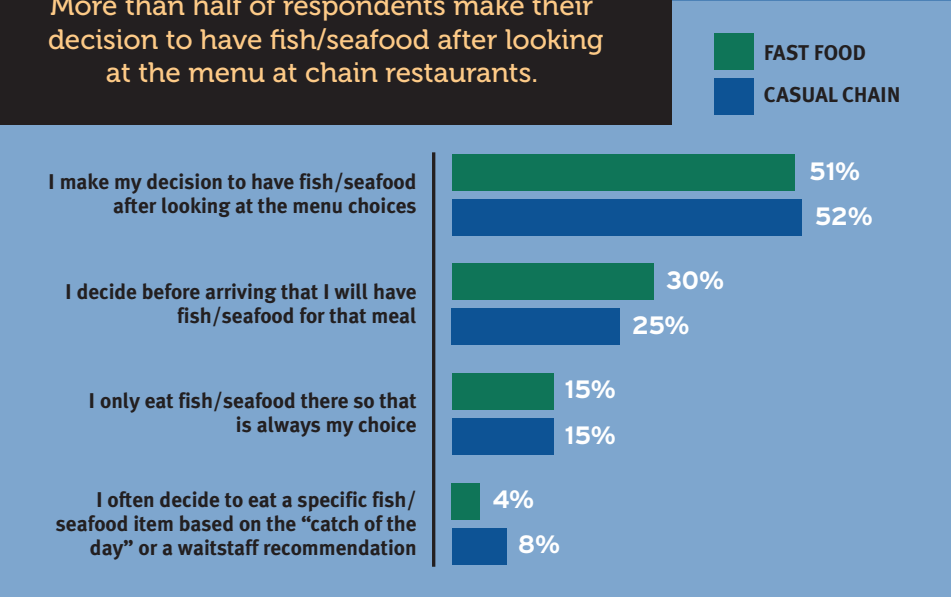
ALASKA:

- ▶ The Alaska brand remains strong. 70% reported that seeing the word “Alaska” on a menu would positively affect their likelihood of ordering a dish using Alaska fish/seafood.
- ▶ 68% reported that seeing an Alaska Seafood logo on a menu would increase their likelihood of ordering an Alaska fish/seafood item.



MENU TRENDS

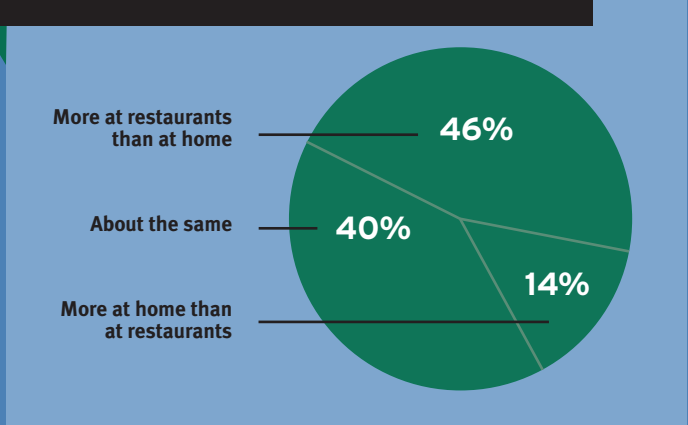
More than half of respondents make their decision to have fish/seafood after looking at the menu at chain restaurants.



How do you typically make your choice to eat fish or seafood at a fast food or casual chain restaurant?

Source: Alaska Seafood Consumer Insight Research 2011

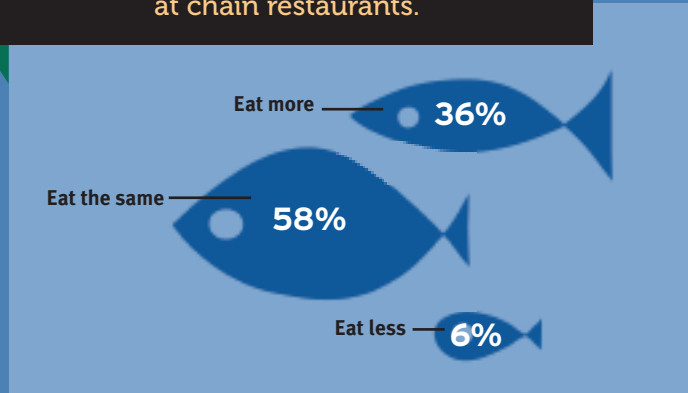
People eat fish/seafood at restaurants more often than at home.



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

Source: Alaska Seafood Consumer Insight Research 2011

A steady increase in consumption at chain restaurants.

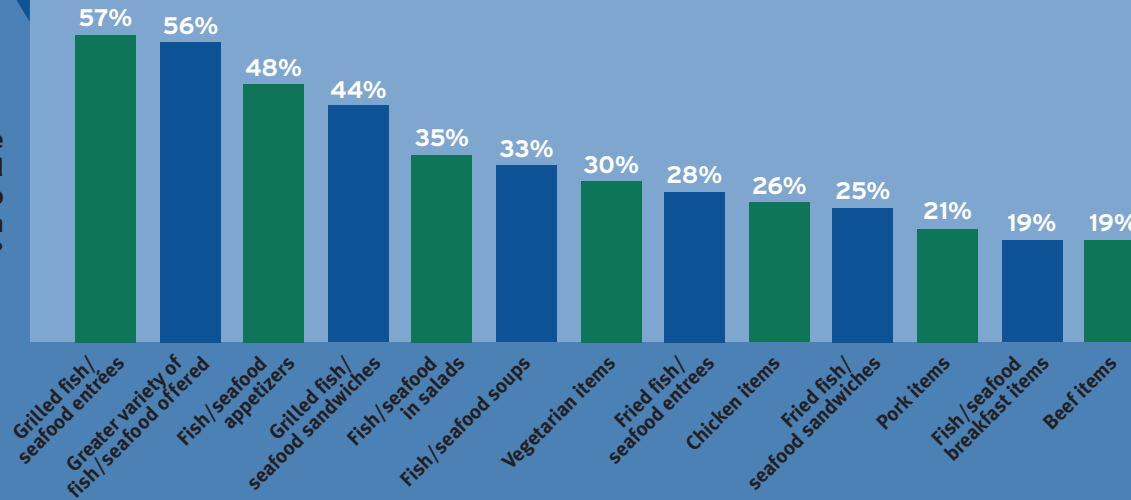


Do you eat more, the same or less fish/seafood than you did at chain restaurants compared to 2 years ago?

Source: Alaska Seafood Consumer Insight Research 2011

Consumers want more grilled seafood and a greater variety of seafood.

Which of the following would you like to see more of on menus?



Source: Alaska Seafood Consumer Insight Research 2011

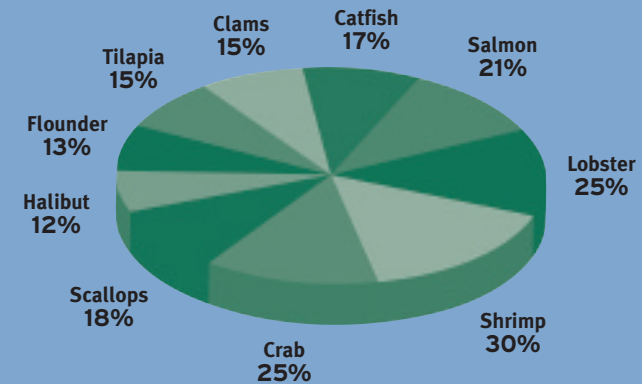
Health and increased availability drive the increased seafood consumption.

Health reasons	43%
More chains serve good tasting fish/seafood	42%
Trying to eat less beef, chicken, pork	38%
There's more variety of fish/seafood offered	29%
Fish/seafood tastes better/fresher than it used to	29%
More people in my family eat it now	9%
Other	4%

Source: Alaska Seafood Consumer Insight Research 2011

Why consumers are eating more fish/seafood at chain restaurants than they did two years ago.

Consumers top 10 responses of type of seafood they'd like to see more of on the menu.



Source: Alaska Seafood Consumer Insight Research 2011

What types of seafood would you like to see more of on casual chain restaurant menus?

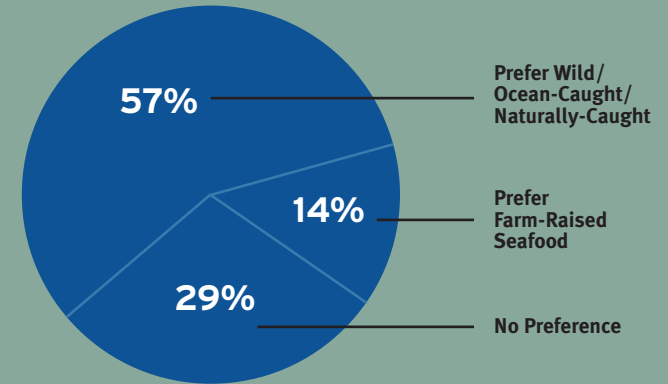
What consumers want from fast food vs. casual restaurants when it comes to seafood.

AT FAST FOOD RESTAURANTS:		AT CASUAL RESTAURANTS:	
I would like to see a greater variety of fish/seafood items on the menu	73%	If offered more grilled fish/seafood sandwiches, I'd eat at casual restaurants more at lunch time	64%
Eating salads with fish/seafood would be a good way to eat healthy	71%	If offered a choice of side dishes to go with my fish/seafood, I'd order fish/seafood more	65%
I would like to see more salads with fish/seafood on the menu	60%	If offered a choice of sauces for my fish/seafood, I'd order it more	60%
If the menu offered more fish/seafood, I'd eat less chicken or beef	64%		
A grilled fish sandwich should be offered even if it costs me \$1.50-\$2.00 more	63%		

Source: Alaska Seafood Consumer Insight Research 2011

Percentage of consumers who agree with these statements.

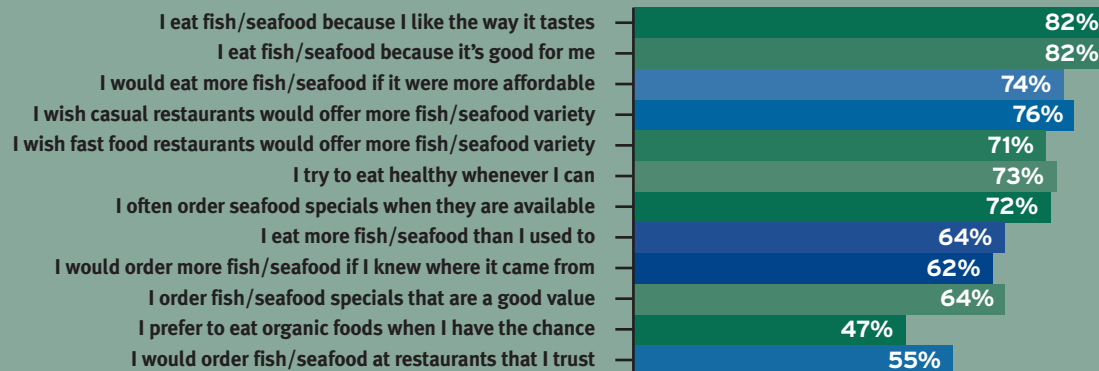
The majority of diners prefer to eat wild, ocean-caught seafood.



Source: Alaska Seafood Consumer Insight Research 2011

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

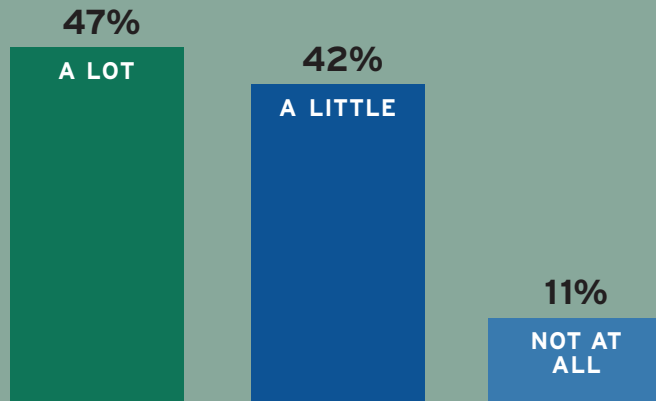
"Taste" and "It's good for me" drive consumer seafood selections.



Source: Alaska Seafood Consumer Insight Research 2011

Percentage of consumers who agree with these statements.

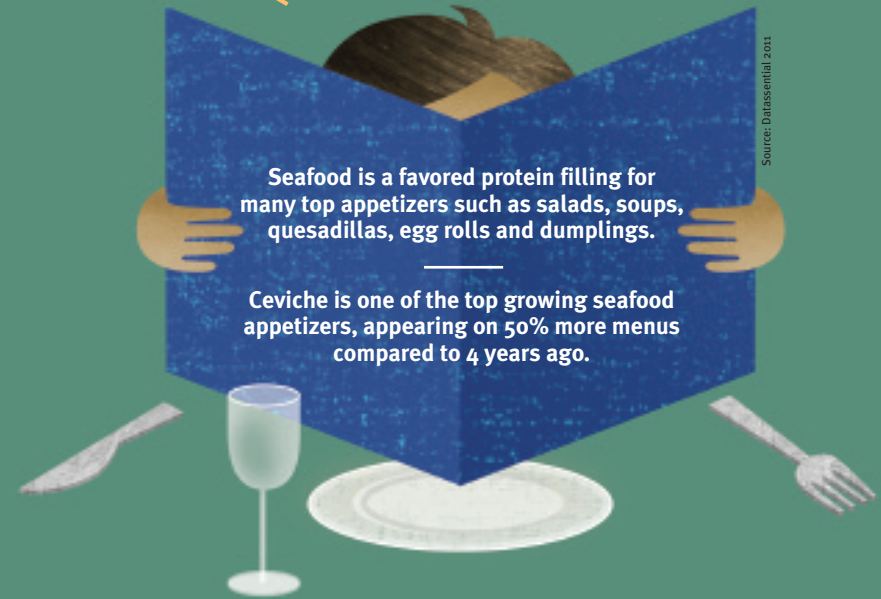
89% of consumers care if the seafood they order at a restaurant comes from a sustainable source.



When eating fish or seafood at any restaurant, how much does it matter to you if the product is from a sustainable source?

Source: Alaska Seafood Consumer Insight Research 2011

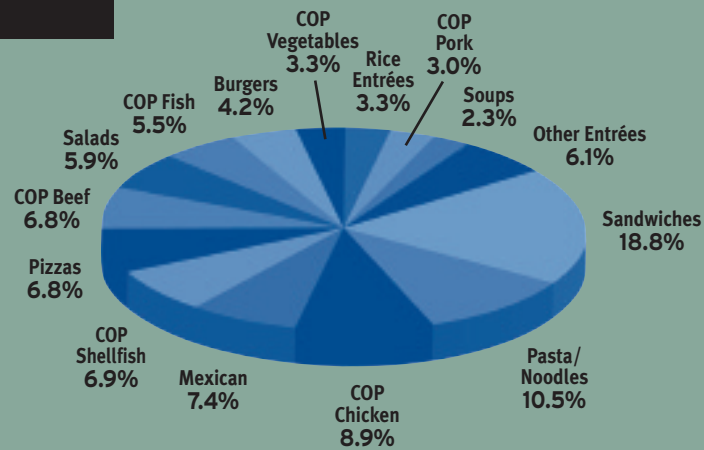
MENU OPPORTUNITIES



Source: Datassential 2011

Distribution of entrée item types for seafood.

- ▶ Sandwiches account for the largest share of entrée items with 19% distribution.
- ▶ Center-of-plate (COP) shellfish, with a 7% distribution share, is menued more than favorites like pizza and COP beef.
- ▶ With 5% share of all entrées, COP fish is menued slightly less than its counterpart COP shellfish. COP fish accounts for the same share of entrées as salads and has greater share than burgers, rice dishes and COP pork.



Source: Datassential 2011

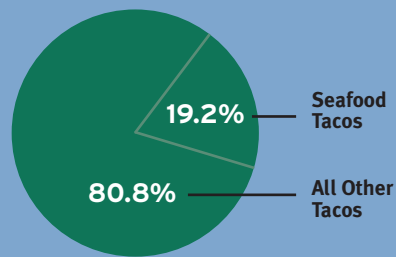
SEAFOOD TACOS

A Menu Opportunity



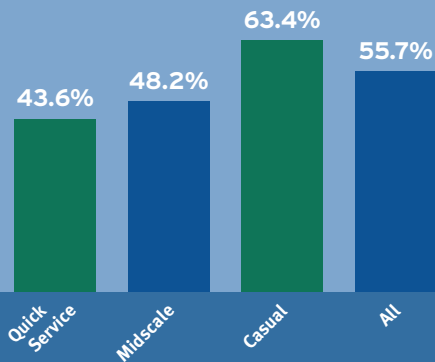
- ▶ Over half, or 56% of restaurants offering a taco, menu seafood tacos.
- ▶ Seafood tacos are most prevalent among casual dining where penetration tops 60% among those restaurants serving a taco.
- ▶ Seafood tacos account for nearly a fifth, or 19%, of all tacos menued.

Percentage share of seafood tacos among all tacos menued.



Source: Datassential 2011

Penetration of seafood tacos by segment.



Source: Datassential 2011

ANATOMY OF SEAFOOD TACOS

SAUCES/FLAVORS	PENETRATION	CARRIER	PENETRATION	CHEESE	PENETRATION
SALSA	32.6%	TORTILLA	53.6%	CHEESE	26.7%
PICO DE GALLO	28.5%	CORN TORTILLA	36.8%	JACK CHEESE	5.3%
CILANTRO	22.5%	FLOUR TORTILLA	26.0%	CHEDDAR	4.8%
CHIPOTLE	19.8%	SOFT SHELL/TORTILLA	25.1%	COTIJA	2.1%
LIME	14.9%			MONTEREY	2.3%
BAJA	14.0%	INGREDIENTS	PENETRATION	MONTEREY JACK	2.3%
AVOCADO	12.4%	CABBAGE	39.8%	SHREDDED CHEESE	1.4%
GUACAMOLE	10.8%	RICE	34.9%	QUESO FRESCO	1.4%
SOUR CREAM	7.8%	BEAN	32.2%	PREP	PENETRATION
MAYONNAISE	6.4%	LETTUCE	22.5%	GRILLED	36.1%
MANGO	6.2%	TOMATO	20.0%	FRIED	21.4%
DRESSING	5.5%	CHIPOTLE	19.8%	BATTERED	11.7%
TARTAR	5.5%	ONION	17.2%	SAUTÉED	9.9%
CHIPOTLE SAUCE	5.3%	BLACK BEANS	15.9%	BLACKENED	6.2%
SALSA FRESCA	4.8%	SHREDDED CABBAGE	9.9%	MARINATED	5.7%
WHITE SAUCE	4.6%	PEPPER	6.9%	ROASTED	5.7%
RANCH	4.4%	VEGETABLE	4.4%	BEER BATTERED	5.5%
GARLIC	3.9%	CHILE	4.4%	BREADED	5.5%
AIOLI	3.9%	RED CABBAGE	3.7%	SEASONED	4.4%
PINEAPPLE	3.0%	REFRIED BEANS	3.4%	DICED	4.1%
CHIPOTLE MAYO	3.0%	MEXICAN RICE	3.2%	DEEP FRIED	3.7%
				SEARED	2.3%

Source: Datassential 2011

ALASKA BRAND



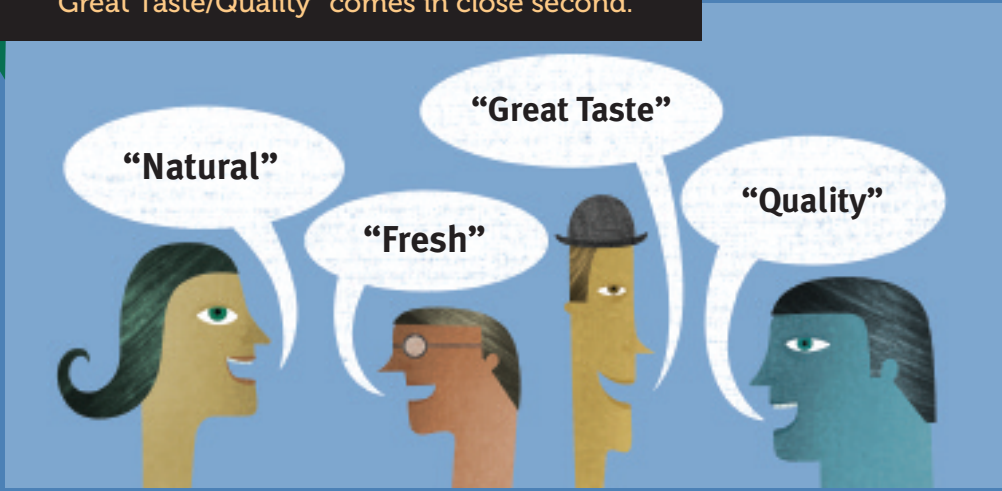
ALASKA BRAND



- ▶ Research shows the Alaska Seafood brand is a powerful tool to use on your menu. It motivates a sale and provides positive impressions about the restaurants that serve it.
- ▶ With all trends pointing to a growing interest in wild, natural and sustainable seafood choices, the Alaska Seafood brand helps you meet and exceed your customer's expectations. Check out these stats.

**Alaska Seafood
is the second
most commonly
specified brand
on U.S. menus.**

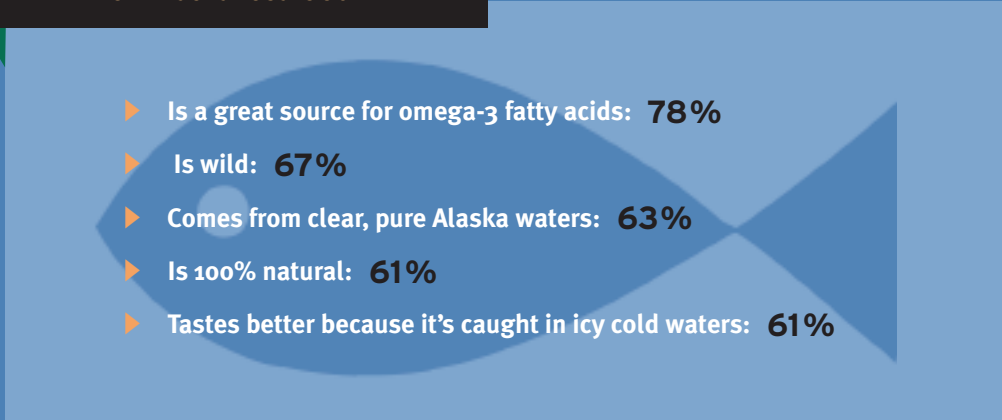
"Freshness" drives the impressions, but "Great Taste/Quality" comes in close second.



Source: Alaska Seafood Consumer Insight Research 2011

Consumers associate these descriptors with "Alaska"

Top 5 consumer perceptions of "Alaska" seafood.

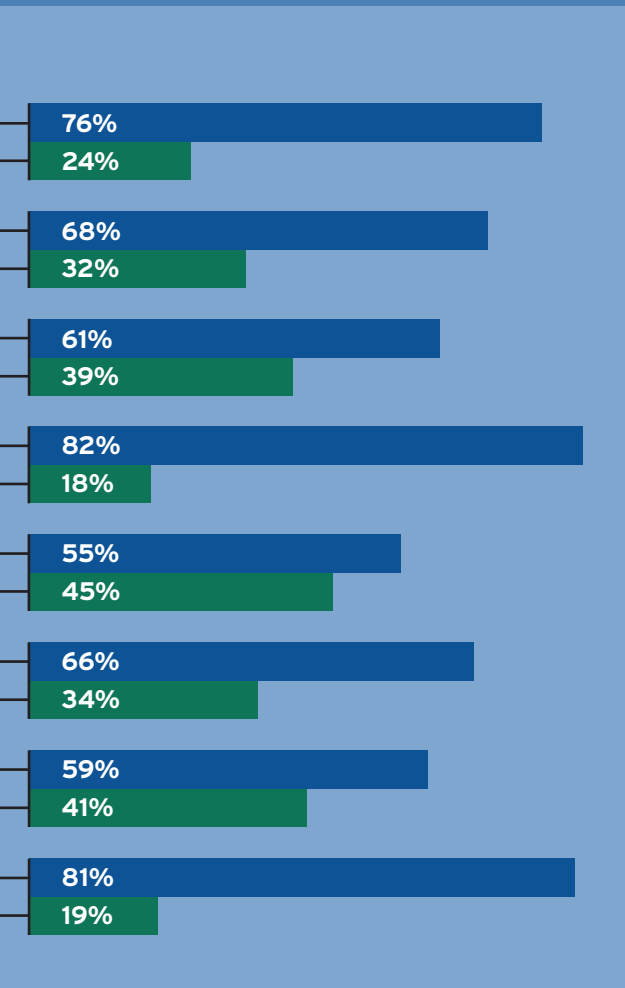


Source: Alaska Seafood Consumer Insight Research 2011

Percentage of consumers who agree with these statements.

Menu items referencing Alaska are more likely to be ordered.

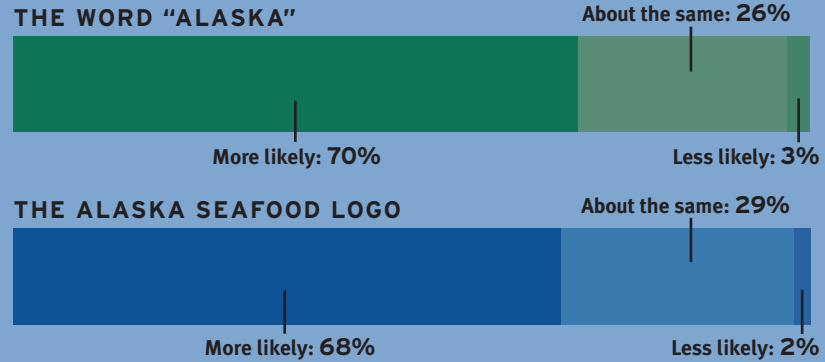
- Alaska Salmon _____
- Atlantic Salmon _____
- Fried Alaska Pollock Sandwich _____
- Fried Fish Sandwich _____
- Fried Cod Sandwich _____
- Fried Fish Sandwich _____
- All you can eat Alaska King Crab Legs _____
- All you can eat King Crab Legs _____
- Grilled Wild Alaska Salmon Salad _____
- Grilled Alaska Salmon Salad _____
- Fresh Alaska Halibut _____
- Fresh Halibut _____
- Alaska Fish and Chips _____
- Fish and Chips _____
- Wild Alaska Salmon _____
- Organic Salmon _____



Source: Alaska Seafood Consumer Insight Research 2011

For each of these pairs of menu items, please indicate which one you would be more likely to order in a chain restaurant.

The word "Alaska" or the Alaska Seafood logo on a menu increases the likelihood of ordering.



Source: Alaska Seafood Consumer Insight Research 2011

How would seeing the word "Alaska" or the Alaska Seafood logo on a menu affect your likelihood of ordering a dish with Alaska fish/seafood?

What serving Alaska seafood says about your restaurant.



The restaurant is proud to serve Alaska fish/seafood	81%
The restaurant recommends Alaska fish/seafood	79%
The restaurant wants to make a good impression on its customers	79%
The restaurant is a good place to get fish/seafood	76%
The restaurant has high quality food	77%
The restaurant cares about the quality of the food it serves	73%
The restaurant is eco-friendly	53%

Source: Alaska Seafood Consumer Insight Research 2011

Consumer impressions of a restaurant that has the Alaska Seafood logo on its menu.

AVAILABLE RESOURCES

From the Alaska Seafood Marketing Institute

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

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