

# Menu

# Alaska

CONSUMER RESEARCH  
RESULTS **2013**

A Clear Preference for  
Wild, Natural & Sustainable  
Alaska Seafood



*Wild, Natural & Sustainable*

## 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](http://www.datassential.com)



# KEY FINDINGS

## Fish & Seafood Consumption

- ▶ 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%

## Consumers Want More Fish/Seafood Variety

- ▶ 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

the MENU OPPORTUNITY

## The Alaska Brand

- ▶ 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"



# for FISH & SEAFOOD

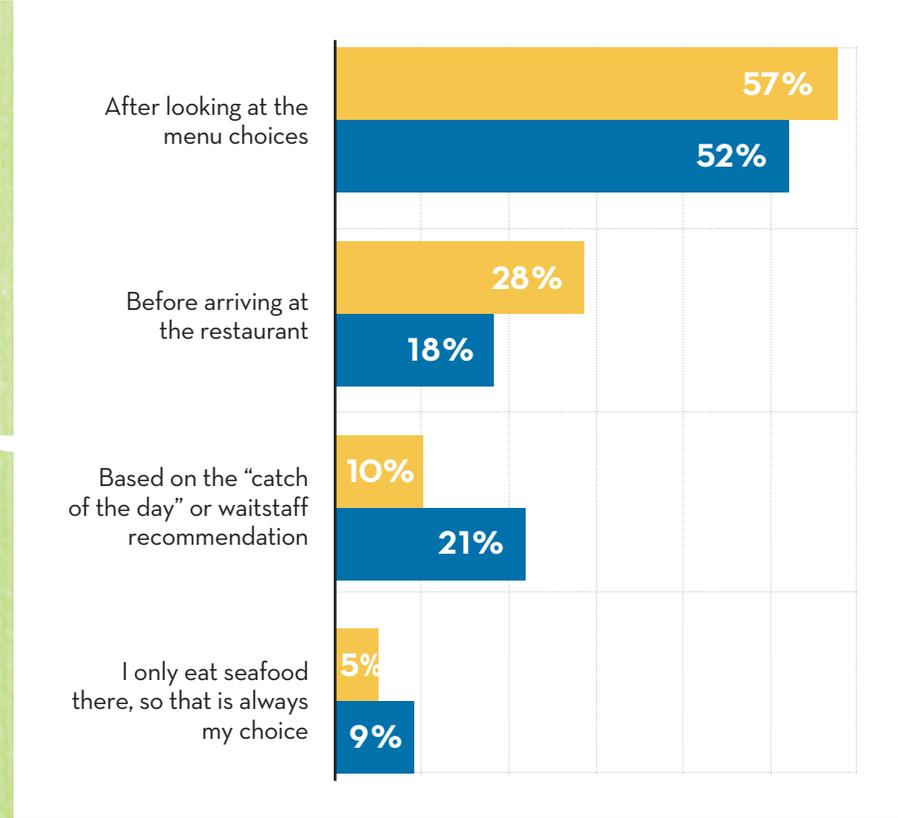


Most consumers typically know what they are going to order before they arrive at a restaurant. This is not the case for fish/seafood, which presents a great opportunity for operators to incorporate more robust menu descriptors and in-store POS.



## MOST CONSUMERS CHOOSE FISH/SEAFOOD AFTER ARRIVING AT THE RESTAURANT

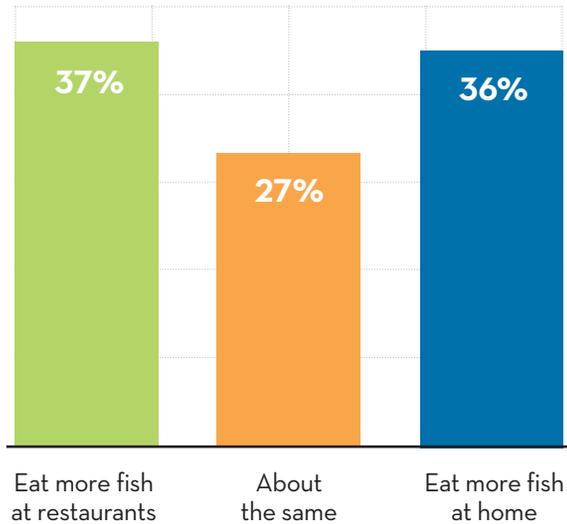
QSR  
CASUAL DINING



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

Source: Datassentials 2013

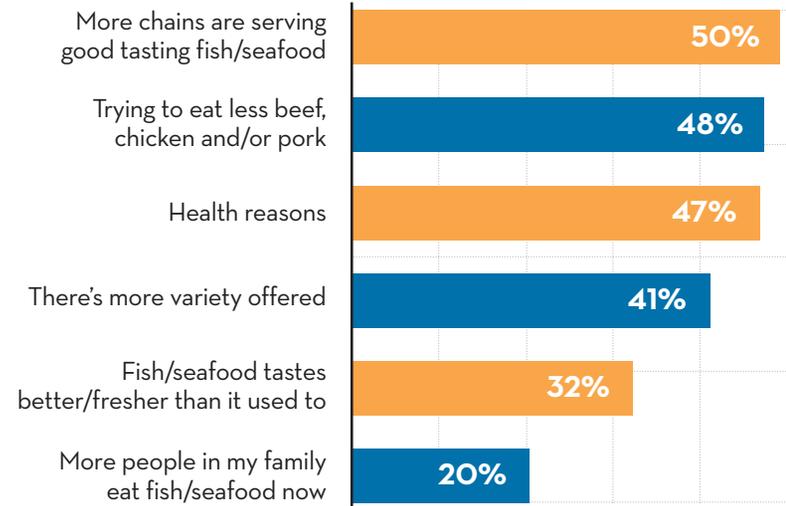
**CONSUMERS ARE EATING FISH/SEAFOOD BOTH AT RESTAURANTS AND AT HOME**



Source: Datassentials 2013

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

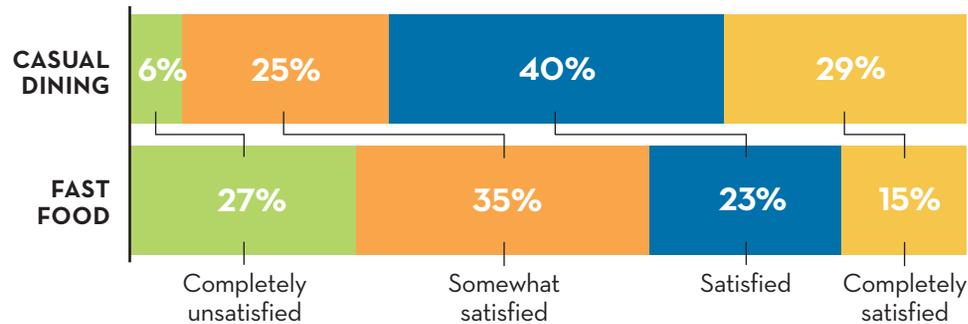
**TASTE, HEALTH CONCERNS AND GREATER VARIETY DRIVE INCREASED FISH/SEAFOOD CONSUMPTION**



Source: Datassentials 2013

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**



Source: Datassentials 2013

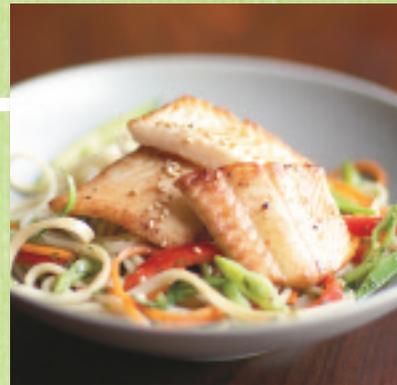
Overall, how satisfied are you with the selection of fish/seafood at the following types of chain restaurants?

**CONSUMERS ARE CHOOSING MORE HEALTHY DESCRIPTORS WHEN ORDERING FISH/SEAFOOD DISHES AT CHAIN RESTAURANTS**



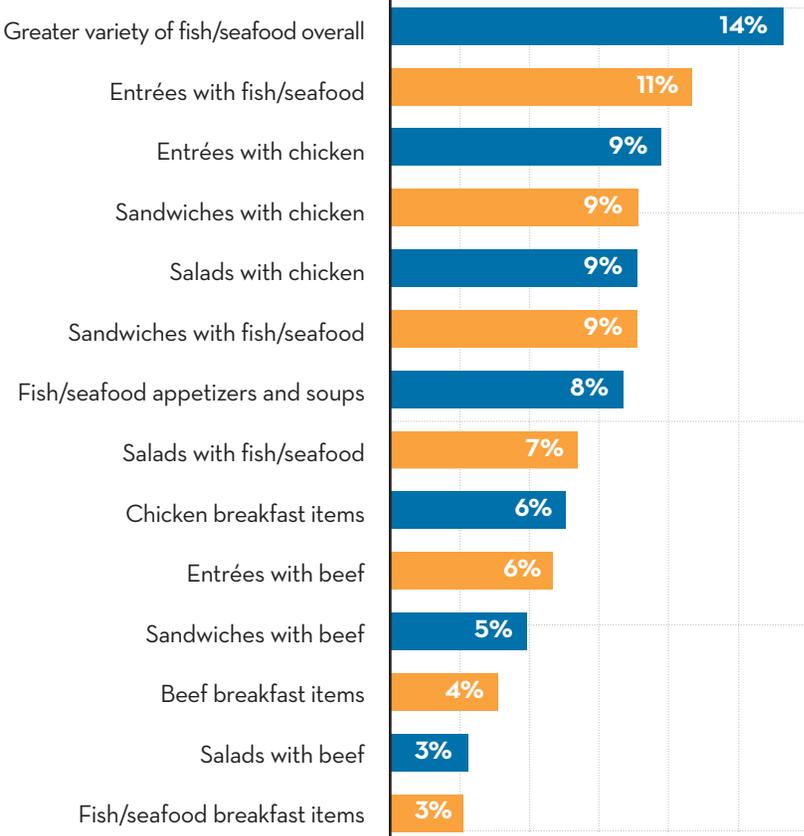
Menu data shows that “fried” is the typical cooking method for seafood, however restaurant customers are selecting healthier options more often. Operators may want to menu fish/seafood items that align with their customers’ desire for healthier preparations.

Find recipes at [wildalaskaflavor.com](http://wildalaskaflavor.com)



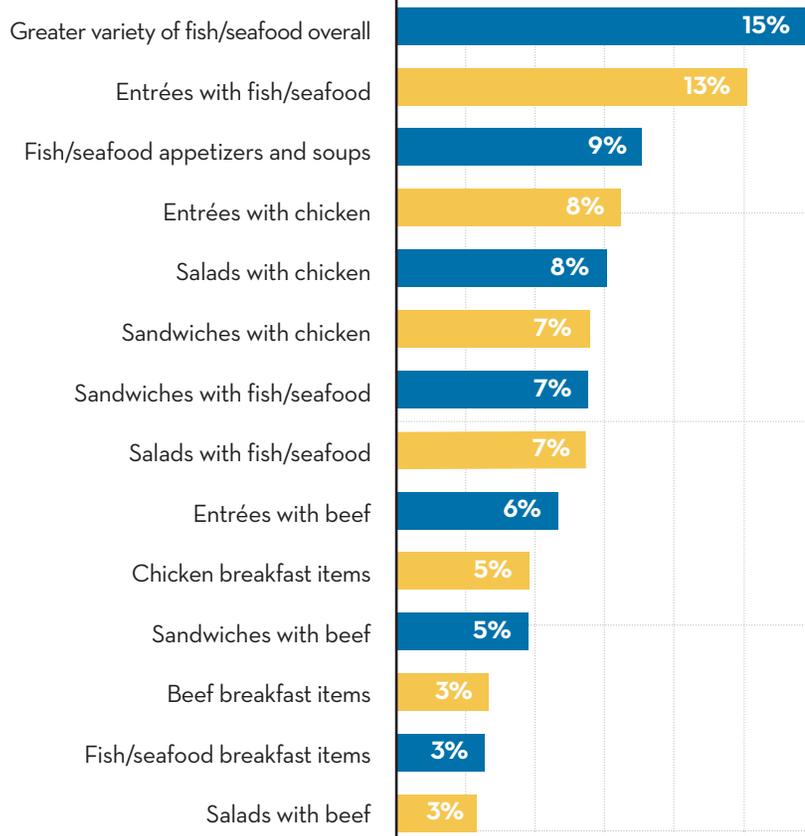


**ITEMS CONSUMERS WOULD LIKE TO SEE MORE OF ON QSR CHAIN MENUS**



Source: Datassentials 2013

**ITEMS CONSUMERS WOULD LIKE TO SEE MORE OF ON CASUAL DINING CHAIN MENUS**



Source: Datassentials 2013

**What types of dishes would you like to see at Fast Food restaurants?**

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



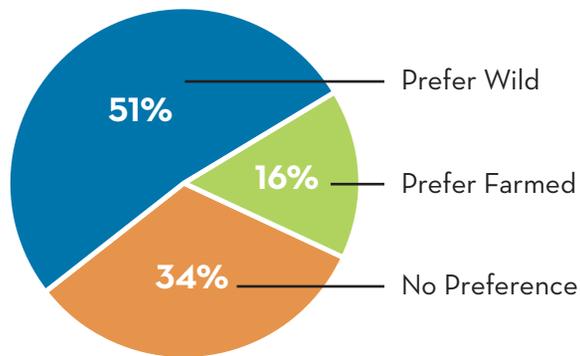
### TOP 10 TYPES OF SEAFOOD CONSUMERS WOULD LIKE TO SEE MORE OF ON THE MENU

FAST FOOD TOP 10		FAST CASUAL TOP 10		CASUAL TOP 10	
Shrimp	57%	Shrimp	52%	Shrimp	54%
Salmon	42%	Salmon	44%	Crab	48%
Crab	37%	Tuna	39%	Salmon	46%
Tuna	37%	Crab	38%	Lobster	45%
Tilapia	33%	Tilapia	35%	Smoked salmon	37%
Lobster	32%	Lobster	34%	Tuna	36%
Cod	31%	Smoked salmon	30%	Tilapia	35%
Catfish	28%	Cod	28%	Catfish	32%
Fried fish patty/sticks	26%	Catfish	28%	Cod	31%
Smoked salmon	25%	Whitefish	22%	Mahi Mahi	29%

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

Source: Datassentials 2013

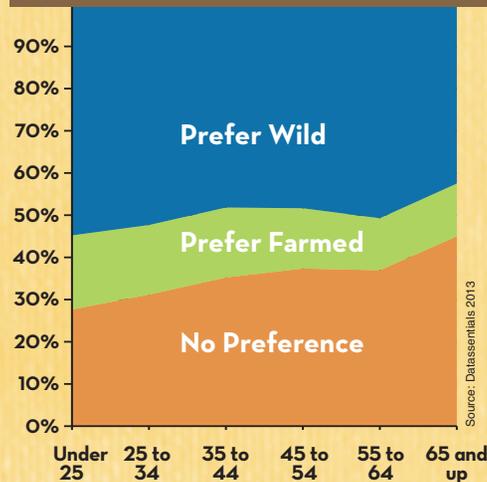
### CONSUMERS PREFER WILD FISH/SEAFOOD TO FARMED BY A 3-TO-1 MARGIN



Source: Datassentials 2013

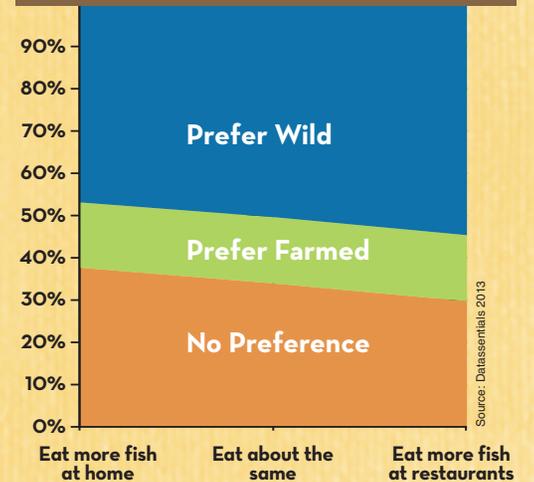
If given the choice, would you prefer to eat wild fish/seafood or farm-raised fish/seafood?

### MILLENNIALS HAVE HIGHER PREFERENCE FOR WILD THAN OTHER AGE GROUPS



Source: Datassentials 2013

### CONSUMERS WHO EAT FISH MORE AT RESTAURANTS THAN AT HOME PREFER WILD



Source: Datassentials 2013

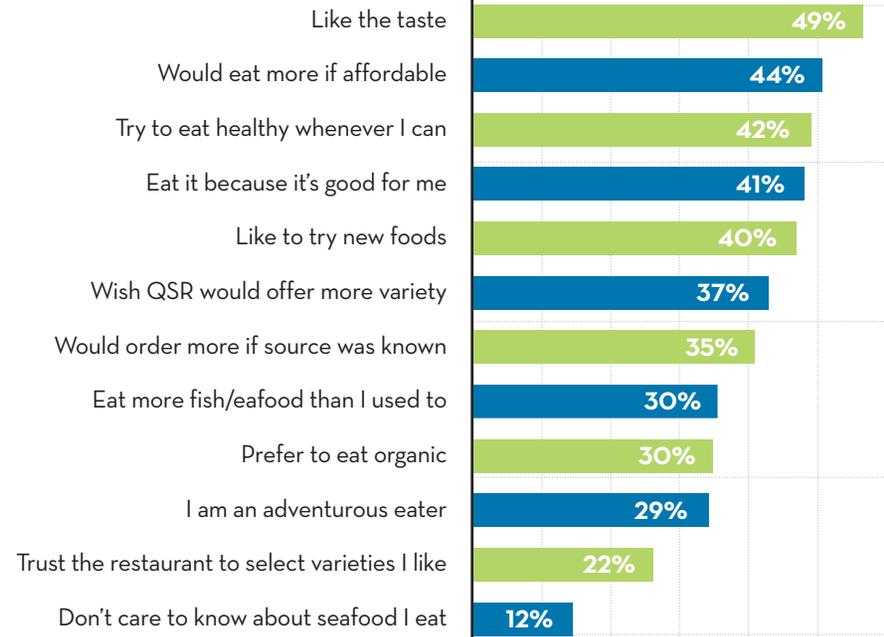
**TASTE IS THE LEADING DRIVER BEHIND PREFERENCE FOR WILD FISH/SEAFOOD**

Taste	26%
Natural	19%
No chemicals/hormones	16%
Healthy	14%
Fresh	12%
Not penned/living in waste	5%
Traditional diet/food supply	4%
Safe	4%
Quality	3%
Organic	3%
Not GMO	2%
Negative connotation with "farmed"	2%
Poor reputation for farmed	2%
More nutrients	2%
Trustworthy	2%
Environmentally friendly	1%
Sustainable	1%
Unique	<1%
Support fishermen	<1%
Size	<1%
Love wild	<1%
Delicious	<1%
Flaky	<1%
Variety	<1%

Source: Dataassessments 2013

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

**TASTE DRIVES FISH/SEAFOOD CONSUMPTION, BUT HEALTH PERCEPTIONS ARE A STRONG DRIVER FOR OVER 4-IN-10 CONSUMERS**



Source: Dataassessments 2013

**Percentage of consumers that agree with these statements.**



*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



Source: Datassentials 2013

**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%

Source: Datassentials 2013

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

**UNAIDED, CONSUMERS CITE ALASKA AS THE #1 SOURCE 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

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

**BOTH THE ALASKA SEAFOOD LOGO AND THE TERM "ALASKA" HAVE VERY POSITIVE EFFECTS ON CUSTOMERS' PERCEPTION OF THE ENTIRE RESTAURANT**

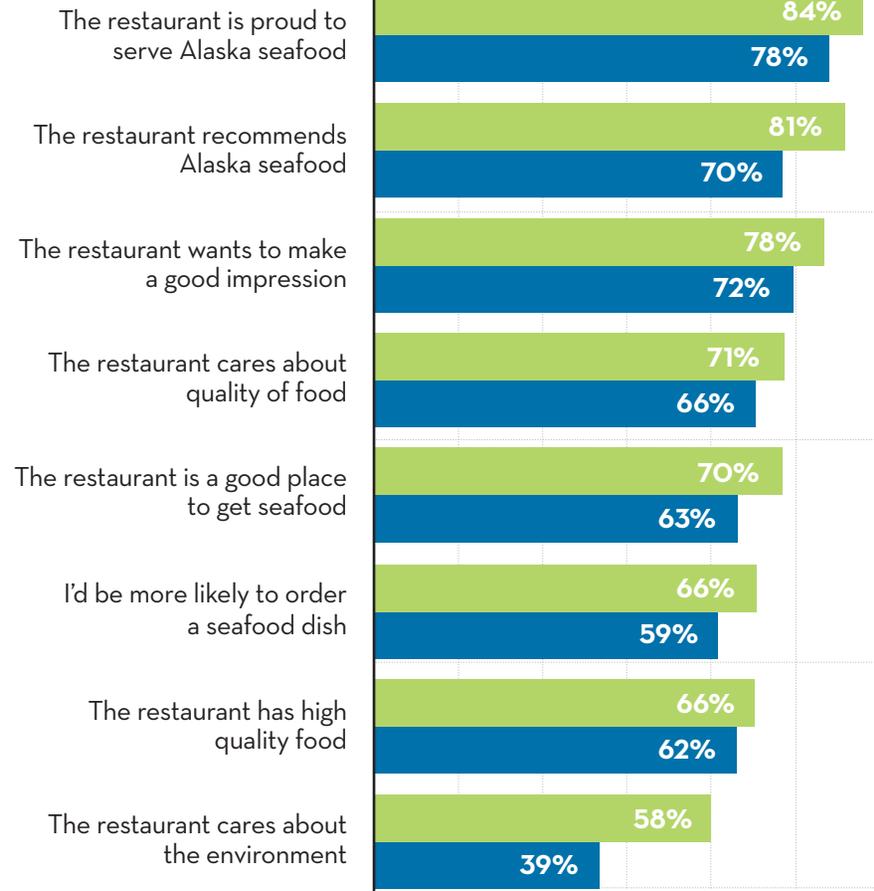
**TOP DESCRIPTORS OF FISH/SEAFOOD FROM ALASKA**



**TOP DESCRIPTORS CONSUMERS IDENTIFIED AS TRUE AND UNIQUE OF FISH/SEAFOOD FROM ALASKA**



Source: Datassentials 2013

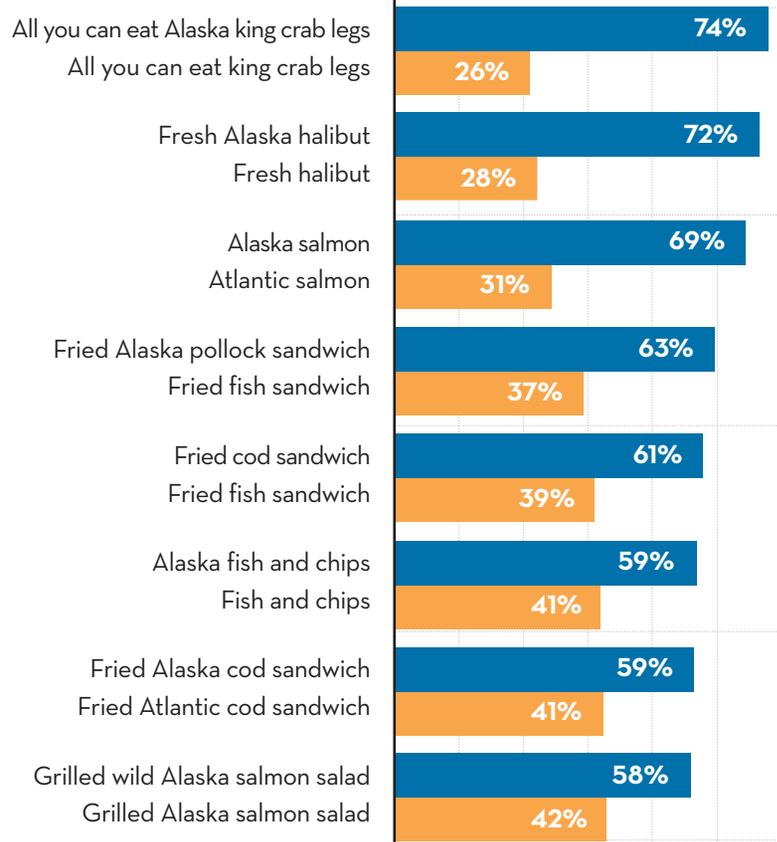


ASMI LOGO "ALASKA"

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...**

**CONSUMERS ARE MUCH MORE LIKELY TO ORDER A FISH/SEAFOOD DISH WHEN "ALASKA" IS INCLUDED IN THE MENU DESCRIPTION**



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



**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](http://www.alaskaseafood.org) and [www.wildalaskaflavor.com](http://www.wildalaskaflavor.com)

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