

A stylized illustration of a fish sandwich. The top bun is golden-brown with yellow seeds. Below it is a blue fish with a white eye and a dark blue fin. Underneath the fish is a red rectangular slice, likely representing a tomato slice. Below that is a green wavy line representing lettuce. The bottom bun is also golden-brown. The entire sandwich is set against a dark blue background with a white wavy line at the top, suggesting water.

# The Alaska

# Fish Sandwich

CONSUMER RESEARCH RESULTS



A New Profit Opportunity

*Wild, Natural & Sustainable*

## Opportunity

Your customers are looking for new fish/seafood menu items. With consumer's desire to have more great tasting, healthy menu alternatives— look to profitable fish sandwiches to differentiate your menu.

▶ When it comes to fish sandwiches, consumers want “ALASKA SEAFOOD:”

Consumers:

- ▶ Expect and are willing to pay more for Alaska
- ▶ Choose Alaska over a non-descript fish sandwich by a 3-to-1 margin – source/origin on the menu description is important
- ▶ Want an Alaska fish sandwich offered as a permanent menu item
- ▶ Desire healthier preparation offerings and more upscale ingredients
- ▶ Want bundled pricing

Alaska seafood commands a premium price while providing the healthy halo consumers desire



# Methodology



As part of an ongoing effort to help operators understand consumer preferences about fish and seafood, the Alaska Seafood Marketing Institute (ASMI) conducted consumer research\* to determine what consumers want in a fish sandwich.

The study drew from 1,014 nationally representative consumers who frequent QSR, Fast Casual, or Casual Dining 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)

\* Research conducted in August 2013



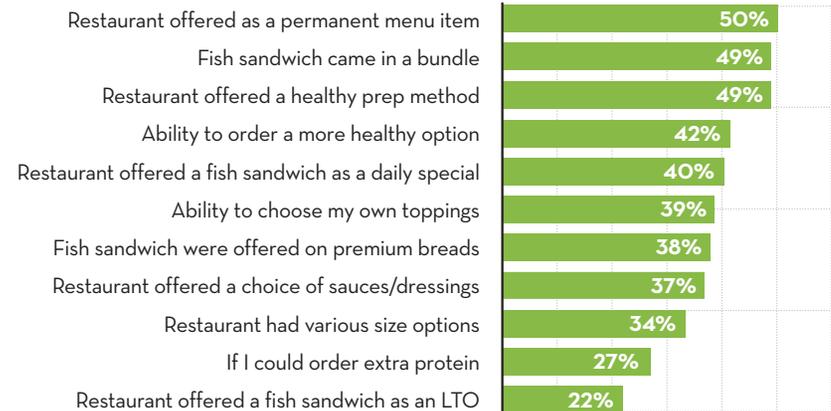
# Fish Sandwiches Provide an Opportunity for Growth

Traditionally, chain restaurants menu and promote fish sandwiches during the Lenten season. Yet, consumers of QSR and Fast Casual chains say the #1 reason they would order a fish sandwich is if it was offered as a permanent menu item.

Offer a fish sandwich everyday



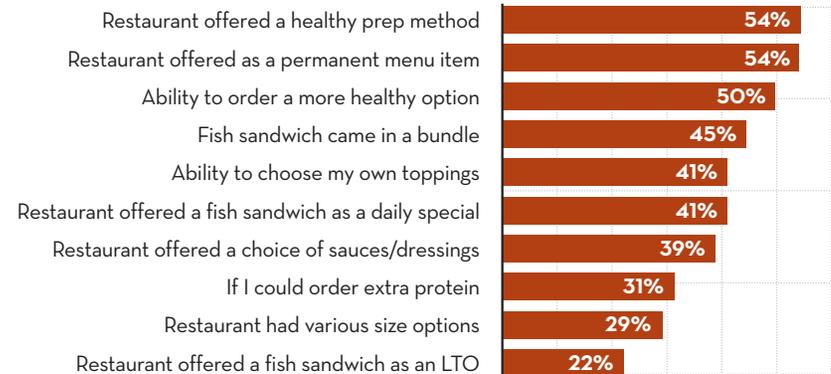
## TOP FISH SANDWICH PURCHASE DRIVERS: QSR CHAINS



What would influence you to order a fish sandwich from a QSR chain restaurant?

Source: Datacentralis 2013

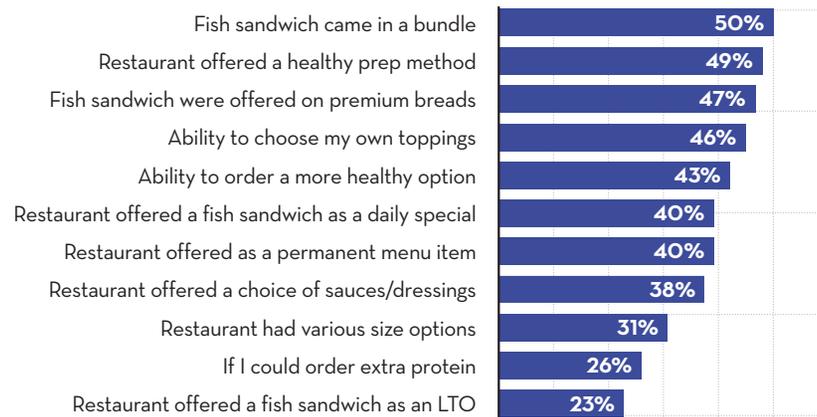
## TOP FISH SANDWICH PURCHASE DRIVERS: FAST CASUAL CHAINS



What would influence you to order a fish sandwich from a Fast Casual chain restaurant?

Source: Datacentralis 2013

## TOP FISH SANDWICH PURCHASE DRIVERS: CASUAL DINING CHAINS



Source: Datacentral 2013

What would influence you to order a fish sandwich from a Casual chain restaurant?

**Bundle it!**

Consumers expect bundling at QSR. Surprisingly, bundling a fish sandwich at Casual restaurants ranks higher as a purchase driver. It's something consumers don't typically see at Casual restaurants.

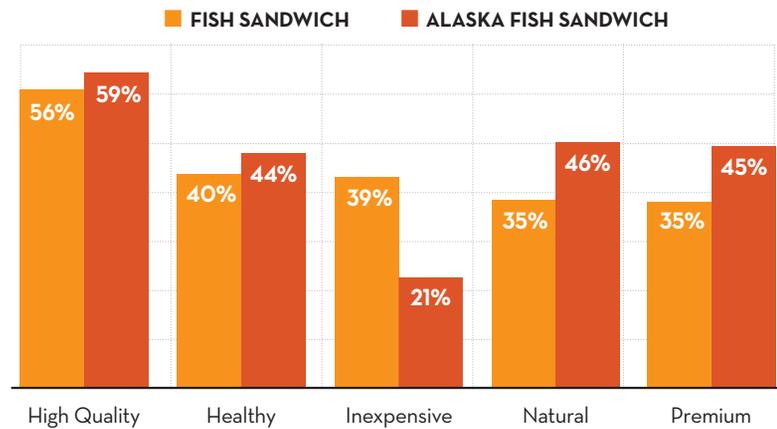


# Alaska Seafood Branding Makes a Positive Difference

The word "Alaska" has a positive overall impact, particularly in consumers' quality, health, and price expectations for fish sandwiches. Most consumers would order a fish sandwich if the ASMI logo appeared on the menu...and they would expect and be willing to pay more for that sandwich. This presents a great opportunity for operators to menu Alaska fish sandwiches while commanding a premium.



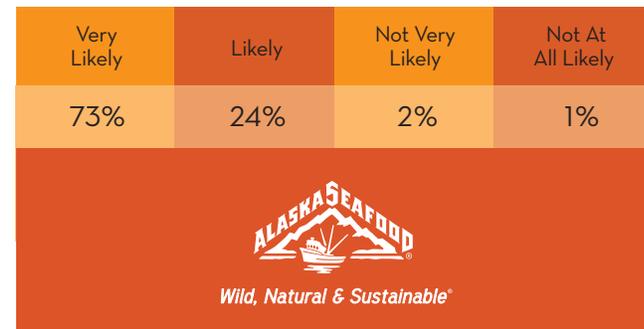
## "ALASKA" BRANDING POSITIVELY IMPACTS CONSUMERS' QUALITY, HEALTH, NATURAL AND PREMIUM EXPECTATIONS



Source: Datassentials 2013

Which of the following would you expect from a fish sandwich vs. an Alaska fish sandwich on the menu at a chain restaurant?

## 97% OF CONSUMERS ARE MORE LIKELY TO ORDER A FISH SANDWICH WHEN THE ALASKA SEAFOOD LOGO IS ON THE MENU



Source: Datassentials 2013

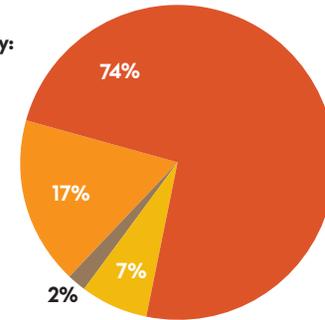
How much more likely would you be to purchase a fish sandwich from a chain restaurant if this logo appeared on the menu?



**91% OF CONSUMERS WOULD PAY MORE FOR AN ALASKA SEAFOOD SANDWICH**

Expect to pay / be willing to pay:

- MUCH MORE
- SLIGHTLY MORE
- SLIGHTLY LESS
- MUCH LESS



Source: Dataassentials 2013

If a chain restaurant used Alaska Seafood in their fish sandwich offerings, would you...?

**CONSUMERS ARE MUCH MORE LIKELY TO ORDER A FISH SANDWICH WITH AN "ALASKA" DESCRIPTOR**

Grilled Alaska salmon sandwich	79%	21%	Grilled salmon sandwich
Premium Alaska fish sandwich	72%	28%	Fish sandwich
Alaska fish sandwich	71%	29%	Fish sandwich
Fried cod sandwich	65%	35%	Fried fish sandwich
Alaska salmon tacos	64%	36%	Atlantic salmon tacos
Grilled wild Alaska salmon sandwich	63%	37%	Grilled farm-raised salmon sandwich
Fried Alaska pollock sandwich	61%	39%	Fried fish sandwich
Fried Alaska cod sandwich	57%	43%	Fried Atlantic cod sandwich
Alaska fish sandwich	51%	49%	Premium fish sandwich

Source: Dataassentials 2013

**Alaska seafood helps you price it right**

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

# Build a Signature Upscale “Healthy” Fried Fish Sandwich by Changing the Sauce and a Few Specialty Ingredients

Consumers tell us that an Alaska fish sandwich is perceived as healthier. By menuing a fried fish sandwich as “Alaska,” the fried sandwich benefits from Alaska’s healthy halo. SEE PAGE 6 CHART  
Operators can easily transform a typical fried fish sandwich with a few simple twists.



## CONSUMERS ARE WILLING TO PAY MORE FOR UPSCALE INGREDIENTS

	QSR	FAST CASUAL	CASUAL
Completely willing	35%	38%	32%
Somewhat willing	47%	44%	45%
Somewhat unwilling	14%	13%	17%
Completely unwilling	3%	5%	6%

Source: Datassentials 2013

How willing are you to pay more for upscale ingredients on a fish sandwich at a chain restaurant?

## MANY OPTIONS TO ADD SAUCES/SEASONING BEYOND TRADITIONAL TARTAR AND MAYO

SAUCES & SEASONINGS	QSR	FAST CASUAL	CASUAL	SAUCES & SEASONINGS	QSR	FAST CASUAL	CASUAL
Tartar sauce	47%	41%	40%	Mustard	12%	15%	11%
Lemon pepper	31%	36%	30%	Yogurt-dill sauce	12%	12%	9%
Mayonnaise	27%	31%	29%	Jerk spices	11%	12%	11%
Teriyaki	19%	19%	16%	Lobster sauce	11%	14%	16%
Chipotle sauce	18%	21%	21%	Thousand island	11%	13%	13%
Ranch	18%	17%	21%	Curry	11%	10%	8%
BBQ sauce	18%	14%	21%	Remoulade	10%	7%	7%
Blackened spices	17%	17%	14%	Ginger sauce	9%	14%	10%
Flavored mustard	16%	14%	16%	Sriracha	9%	9%	7%
Aioli	16%	18%	16%	Pesto	8%	9%	9%
Sweet chili sauce	15%	15%	13%	Fruit spreads	8%	9%	6%
Sweet n sour	14%	14%	10%	Wasabi	8%	10%	7%
Cocktail sauce	14%	17%	14%	Chutney	7%	5%	4%
Sesame sauce	14%	13%	13%				

Source: Datassentials 2013

What types of sauces/seasonings would you like to have on your ideal fish sandwich from a chain restaurant?



Go to [WWW.WILDALASKAFLAVOR.COM](http://WWW.WILDALASKAFLAVOR.COM) for fish sandwich recipe ideas

**MANY OPTIONS TO ADD TOPPINGS  
BEYOND TRADITIONAL LETTUCE AND TOMATO**

TOPPINGS	QSR	FAST CASUAL	CASUAL	TOPPINGS	QSR	FAST CASUAL	CASUAL
Traditional lettuce	42%	41%	39%	Salsa	20%	20%	15%
Tomato	41%	40%	43%	Raw onion	20%	20%	19%
Specialty lettuce	28%	28%	31%	Sun-dried tomato	19%	14%	15%
Red onion	28%	32%	20%	Cucumber	19%	21%	21%
Grilled onion	26%	28%	27%	Bell peppers	19%	20%	18%
Avocado	24%	26%	28%	Mushrooms	18%	19%	19%
Grilled vegetables	23%	27%	24%	Hot peppers	15%	18%	12%
Spinach	22%	20%	19%	Olives/tapenade	13%	14%	15%
Pickles	22%	22%	20%	Pepperoncini	10%	12%	11%
Coleslaw	21%	21%	18%	None/prefer plain	8%	10%	8%

Source: Datassentials 2013

What types of toppings would you like to have on your ideal fish sandwich from a chain restaurant?

**MANY OPTIONS TO ADD CHEESE BEYOND TRADITIONAL AMERICAN, CHEDDAR AND SWISS\***

CHEESE	QSR	FAST CASUAL	CASUAL	CHEESE	QSR	FAST CASUAL	CASUAL
Cheddar	28%	27%	26%	Goat cheese	10%	7%	7%
American	28%	30%	23%	Muenster	10%	10%	6%
Swiss	26%	22%	23%	Asiago	10%	12%	11%
White cheddar	23%	19%	21%	Feta	9%	10%	10%
Mozzarella	23%	24%	28%	Gouda	9%	11%	9%
Pepper Jack	23%	22%	21%	Bleu	7%	6%	8%
Provolone	20%	20%	20%	Havarti	7%	10%	7%
Monterey Jack	17%	20%	16%	Brie	5%	7%	5%
Parmesan	14%	18%	14%	None	23%	21%	23%
Aged cheddar	13%	13%	11%				

\*Over 1/5 of consumers would rather not have any cheese—coinciding with the perceived healthiness of fish sandwiches and the desire for healthier options.

Source: Datassentials 2013

What types of cheese would you like to have on your ideal fish sandwich from a chain restaurant?

**MANY OPTIONS FOR BREAD**

BREAD TYPE	QSR	FAST CASUAL	CASUAL	BREAD TYPE	QSR	FAST CASUAL	CASUAL
Artisan roll	40%	38%	37%	Crusty bread	34%	31%	31%
Traditional bun	38%	40%	36%	Hoagie	22%	22%	24%
Wrap	34%	34%	28%	Non-bread option	19%	18%	17%

Source: Datassentials 2013

What types of bread would you like to have on your ideal fish sandwich from a chain restaurant?



# Go GRILLED Fish Sandwiches

The fried fish sandwich is highly profitable, but grilled fish sandwiches present a new opportunity for operators.

"Healthy prep method" is one of the top purchase drivers in all segments –  
 #1 in Fast Casual,  
 #2 in Casual, #3 in QSR

SEE PAGE 3&4 CHARTS

"More healthy option" is also highly rated in all segments –  
 #3 in Fast Casual,  
 #4 in QSR, #5 in Casual

SEE PAGE 3 CHART



## GRILLED IS #1 PREFERRED PREP METHOD ACROSS ALL SEGMENTS

PREP METHOD	QSR	FAST CASUAL	CASUAL
<b>Grilled/BBQ</b>	<b>45%</b>	<b>43%</b>	<b>45%</b>
Deep-fried	40%	37%	36%
Baked	38%	43%	37%
Pan-fried	30%	39%	34%
Steamed	23%	23%	16%

Source: Datassentials 2013

What types of fish sandwich preparation method do you prefer from a chain restaurant?

## PREFERRED DESCRIPTORS IDEAL FISH SANDWICH BY SEGMENT

	QSR	FAST CASUAL	CASUAL
Source included in menu description	76%	73%	76%
Shorter menu description	24%	27%	24%
Healthy	69%	70%	69%
Indulgent	31%	30%	31%
Grilled	61%	68%	64%
Fried	39%	32%	36%

Source: Datassentials 2013

Thinking of your ideal fish sandwich from a chain restaurant, which descriptors would you be more likely to choose?

# FISH Tacos are on The Move

**“HEALTHY FISH TACO” AND “FOR VARIETY”  
ARE THE LEADING PURCHASE DRIVERS  
ACROSS ALL SEGMENTS**

FISH TACO PURCHASE DRIVERS	QSR	FAST CASUAL	CASUAL
Restaurant offered a healthy fish taco option	49%	46%	37%
For variety/would be a welcome change to a regular sandwich	47%	52%	51%
Ability to choose my own toppings	44%	42%	41%
Ability to order a more healthy option	42%	46%	43%
Restaurant offered a fish taco as a permanent menu item	42%	38%	43%
Choose between fried vs. non-fried prep methods	42%	48%	42%
To try something new	41%	46%	50%
Order the fish tacos in a bundle	39%	36%	46%
If I could choose between flour or corn tortillas	37%	37%	34%
Restaurant offered a fish taco as a daily special	37%	34%	37%
Restaurant offered a choice of sauces/dressings	36%	38%	40%
Restaurant had various size options	28%	30%	31%
If I could order extra protein	27%	25%	30%

**What would influence you to order a fish taco from a chain restaurant?**

Source: Datassentials 2013



**Consumers prefer grilled over fried fish in tacos 61% to 39%**

**“Alaska salmon taco” is strongly preferred over “Atlantic salmon taco”**

SEE PAGE 6 CHART

## Available Resources

### from the Alaska Seafood Marketing Institute

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 trend 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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