Not all seafood is created equally. On menus across the world, seafood is measured up by the region from which it is sourced, how it is raised, its freshness, price, and parts. And one thing we are seeing more of is the demand for sustainable seafood from consumers and chefs alike.

Still, the United States per capita consumption of seafood, as reported by the USDA, is extremely low compared to land-based animal proteins. Based on 2014 data, U.S. per capita consumption of beef was 54.1 pounds, chicken at 84.6 pounds, and seafood at only 14.6 pounds. Considering the nutritional and environmental benefits of seafood, it’s a wonder this number isn’t higher. Perhaps this stems from a lack of education and an increase in media scares. Fear not, we aim to provide you with the facts throughout this report.

How are we consuming seafood today? What components of the seafood industry are consumers most attracted to and/or worried about? How do these factors translate to making decisions about visiting a restaurant? And what are the top regions and species that the majority of U.S. diners are gravitating toward?

According to Foodable Labs, over the past six months, 6.8M conversations on social media mentioned seafood in a positive light in relation to restaurant menus. That’s a lot of unprovoked talk about seafood on menus, so it’s apparent that this topic is something people greatly care about. Additionally, in the past six months, 391,254 conversations on social media revolved around seafood sourcing, a topic we will dive into — no pun intended — more a bit later in this report. From this type of unstructured data tracking, we were able to determine and analyze trends, creating a narrative around seafood sentiment, or preference, and behaviors of consumers and chefs. Hopefully, the analyzed data in this report will not only help to raise awareness on this topic, but also will help you to make better decisions for your restaurant business.

In this report, brought to you by the Alaska Seafood Marketing Institute (ASMI) and Foodable Labs, we will delve into granular, proprietary data from the Restaurant Social Media Index (RSMI) on top sourcing regions, top seafood species, consumer sentiment in relation to seafood on menus, and more. Also for this report, we will be referencing data that was tracked over the span of six months, from Sept. 1, 2015 to Feb. 29, 2016, of more than 141M U.S. social consumers across 17 social media platforms.
Foodable Labs, the data-based sector of the Foodable WebTV Network, works in partnership with DigitalCoCo, LLC and its proprietary Restaurant Social Media Index (RSMI). Fueling Foodable Labs content, the RSMI is the most comprehensive social media index with domain expertise for the restaurant and hospitality industry trade that tracks five main elements — influence, sentiment, engagement, location-based actions, and mobile — across 17 social media platforms. Currently, the RSMI tracks more than 215K restaurant industry keywords, over 21K restaurant brands, and more than 151M U.S. social restaurant consumers in over 500K locations, and continues to grow. (Learn more about how the index works here.)

Now, onto the data!
HOW DOES SEAFOOD PLAY INTO RESTAURANT SELECTION?

Considering the aforementioned 6.8M conversations on social media around the topic, it’s clear that consumers love menus with seafood on them. There are many reasons consumers select a restaurant, and it’s important for restaurant operators to be aware of what separates them from the competition. To reel this in a bit for the sake of the subject, Foodable Labs tracked the top five reasons why consumers select a restaurant for seafood on the menu.

The first is quality. Seafood is not cheap, so it makes sense that diners want good value if they’re going to spend the money. Also, have you ever had bad scallops that leave gritty sand in your teeth? Probably not the best bang for your buck — not to mention, it’s safe to say that the guest who ordered it will not be coming back for more. The No. 2 reason consumers select a restaurant for seafood on the menu is flavor. If the product is not flavorful, and therefore not enjoyable, what’s the point?

Coming in at No. 3 is source. Nowadays, with consumers becoming more educated and knowledgable about where their food comes from, transparency is key. And with so much information available on the internet, quality of the source can be researched in no time. Awareness of where a restaurant’s product comes from can either deter or enhance a guest’s decision to visit your establishment.
Referral by a trusted source comes in at No. 4, assuming that if a restaurant menu is referred to a diner by a trusted source, that diner is probably more likely to actually go to said restaurant. As with Net Promotor Score (NPS), a measurement system used by some businesses, those who refer others to a brand or product are known as promoters, loyal enthusiasts who will keep buying and refer others, therefore fueling growth. Detractors are the opposite, and spread negative word-of-mouth about a business. But as long as your restaurant’s promoters outweigh the detractors, it’s more likely your business will succeed for a longer period of time.

And last but not least, coming in at No. 5, is availability. When you select a restaurant for seafood on the menu, you want to ensure that the dish your heart is set on is even an option. A lot of things can affect availability, including distribution channels, supply and demand, and even just how many diners ordered that dish before you arrived at the restaurant. While these factors can’t always be controlled, diners want consistent reliability.

**Top 5 reasons consumers select a restaurant for seafood on the menu:**

1. **Quality**
2. **Flavor**
3. **Source**
4. **Trusted Referral**
5. **Availability**

More Baby Boomers are affected by the last component — availability — than any other generation. In fact, 43.1 percent of 55- to 64-year-olds state that seafood availability is a deciding factor in their restaurant selection.
Percentage of consumers in each age group who state seafood availability is a deciding factor in restaurant selection:

- 55-64: 43.1%
- 35-44: 41.2%
- 18-34: 39.5%
- 45-54: 31.7%
Above, we just reviewed the top five reasons consumers select a restaurant for seafood on the menu. But which of these components drive the most consumer sentiment, or preference, when making seafood choices? Based on 211,702 social media mentions, seafood quality sentiment ranked No. 1, just as it did for restaurant selection. But this is where it switches up: At No. 2 is seafood source sentiment, followed by seafood value sentiment, seafood flavor sentiment, and seafood consistency sentiment, respectively.

**Top 5 sentiment factors in seafood:**

- #1 QUALITY
- #2 SOURCE
- #3 VALUE
- #4 FLAVOR
- #5 CONSISTENCY

*Based on 211,702 mentions on social media*
Think about your favorite chef-driven restaurant. What types of cuisine are normally found on that menu? According to a large percentage of social consumers we tracked for this data, not enough seafood is offered on chef-driven menus.

Breaking down the data by generational demographics, the majority of this sentiment comes, again, from those in the 55- to 64-year-old bracket.

Consumers who expect chefs to offer more seafood on menus:
This is interesting insight, and a sentiment into which we wanted to dig a bit deeper. So, we consulted our Foodable Top 25 lists in cities known for its seafood that were in completely different regions. For the sake of narrowing down the analysis, we focused specifically on Boston, Seattle, and Miami.

While a majority of the Top 10 restaurants in Boston (February 2016 ranking) do pay homage on their menus to traditional oysters and locally sourced clams, most do not otherwise have a broad selection of seafood. Of course, to be fair, a few of the concepts on the list are based around seafood completely, as would be expected (here’s looking at you, Loyal Nine and Select Oyster Bar). In Seattle, a city with a plethora of fresh seafood, and where sustainable seafood is basically expected, while a few of the Top 10 restaurants (December 2015 ranking) do specialize in seafood, it seems more common that a majority of restaurants in Seattle are utilizing seafood in innovative ways on menus where it’s not always the main focus. This makes sense considering the status of the aforementioned expectation of sustainable seafood in the Pacific Northwest. (Side note: The Carlile Room [click for video] is a great example of a concept — run by chef/restaurateur Tom Douglas — that’s bringing new light to sustainable seafood in Seattle.) “Sustainability and utilization is all a part of the lexicon in today’s restaurants,” says chef Tom Douglas. “In Seattle, you don’t just say, ‘I have salmon on the menu.’ You have to say what species of salmon, where it was caught, how it was caught, is it sustainable, and you have to have that conversation with every guest through your menu and through your intelligent waitstaff, and then the chef has to buy properly.”

Perhaps surprising to some, the current menus filed for Miami’s Top 10 restaurants (January 2016 list) had more seafood on them
than we would have imagined. Concepts like Azul and Lure Fishbar are on the heavier side of showcasing seafood on the menu.

Of course, this spur-of-the-moment analysis does not get into the crux of consumer sentiment since the measurement of sentiment is based purely on perception and opinion over a given period of time. And with that being said, we by no way choose to diminish the unstructured data by breaking it down with structured observance, though it’s interesting to connect the dots in such a way to make sense of it all.

While each chef has their own reasons as to not offer a larger selection of seafood on their menu(s), pricing, sourcing, storage, and staying on-brand with their vision all come into play as possibilities.
Generally speaking, and not focused solely on chef-driven menus, consumers demand seafood on more menus. The majority of these consumers — at least, of the ones tracked — are early-age Millennials at 31.8 percent. Check out the full breakdown by demographics below.

**Consumer demographics on seafood menu demand:**

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<th>Age Group</th>
<th>Demand Percentage</th>
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<tbody>
<tr>
<td>18-24</td>
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<tr>
<td>35-44</td>
<td>22.7%</td>
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<td>12.4%</td>
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<td>11.2%</td>
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Let’s make this even more interesting and take it a step further. We now know which age demographics most demand more seafood on menus, but where exactly are these consumers based? In which cities are consumers most vocalizing this need?

Top 10 Trending Restaurant Consumer “Hot Zones” for Seafood Menu Item Demand

Based on more than 10K mentions in social media on consumer demand over the past six months
For this report, we are focusing only on regions in the United States. Each region, of course, specializes in different species of seafood. And again, sourcing is hugely important to consumers today. According to the Alaska Seafood Marketing Institute’s 2015 annual report, the seafood industry brought in more than $130M in revenue for state and local governments in 2014. Helping to scientifically monitor sustainable seafood practices in the most efficient ways possible are U.S. fisheries, big business in which the United States is a global leader. These fisheries are regionally managed and they strictly enforce what’s known as the 10 national standards of sustainability, which goes into depth on things like allocations, cost and benefits, and communities, to ensure that fishing areas are not being harvested in an inefficient or unprofessional manner.

Below, based on Foodable Labs data, we break down the top five sourcing regions in the U.S. Our findings show that Alaska seafood is currently the top sourcing region, based on 127,409 tracked social media mentions. Respectively following regions include the Gulf Coast, Florida, the Pacific, and Puget Sound.
Top 5 sourcing regions:

#1 ALASKA SEAFOOD

According to the Alaska Seafood Marketing Institute, “Alaska has served as a model of fisheries management around the globe.” Since 1959, Alaska remains the lone state in the nation with a constitutional mandate stipulating all fish be utilized, developed, and maintained on the sustain yield principle. Several organizations at the state, federal, and international level work together to set sustainable fishery management methods that uphold Alaska’s high standards of responsible fisheries management. In terms of species, Alaska is known for its five species of salmon (Coho, Keta, King, Pink, and Sockeye); varieties of shellfish (King, Dungeness, and Snow crab, Weathervane scallops, and prawns/shrimp); and various species of whitefish (Alaska pollock, cod, black cod/sablefish, halibut, rockfish, sole/flounder, and surimi seafood).
#2 GULF COAST SEAFOOD

The Gulf Coast is essentially comprised of five states: Texas, Louisiana, Mississippi, Alabama, and Florida. According to the Gulf Coast Seafood website, this region produces roughly 70 percent of the nation’s oysters and domestic shrimp, and is a leading producer when it comes to both hard- and soft-shell blue crabs. Aside from crabs and shrimp, Gulf Coast species include oysters and several varieties of fish, including black drum, mahi-mahi, flounder, grouper, mackerel, mullet, snapper, swordfish, and tuna.

#3 FLORIDA SEAFOOD

Segmented for the sake of this report as its own region outside of the Gulf Coast region seen above, Florida seafood is more expansive than just the Gulf because of its Atlantic coast. From Key West all the way up the coast, Florida’s seafood selection is not only vast in size, but its weather conditions allow for more availability throughout the seasons. Unlike in the northeast, lobsters on Florida menus — if sourced locally — are most likely spiny lobsters, which have no claws (unlike the Maine variety). You don’t have to go far in Florida to find something on the menu with conch, dolphin (mahi mahi), snapper, or grouper. Other species from this region include, but are not limited to, shrimp, mullet, king mackerel, oysters, stone crab, and swordfish.
The Pacific region typically accounts for the ocean waters off Washington, Oregon, and California, as per the Pacific Fishery Management Council. According to a West Coast fisheries management fact sheet, dated back to 2009, there are several rules to ensure conservation of fish stocks, including the designation of concerning habitat areas in order to protect sensitive bottom habitats. According to the West Coast Seafood Processors Association (WCSPA), the WCSPA was the first seafood industry group in the United States “to endorse and implement the United States Fisheries Industry Principles for Responsible Fisheries, which was developed by a steering committee representing fishermen, processors, aquaculture producers, and seafood buyers from all parts of the U.S.” Species out of the Pacific include various types of bass, rockfish, seabass, skate, surfperch, and many more.

Located in the Pacific Northwest, Puget Sound is an inlet of the Pacific Ocean along the northwest coast of Washington. While Puget Sound is part of the Pacific, we separated them in the data to get a more granular scope. According to the Washington Department of Fish & Wildlife, a wide variety of species can be found in the Puget Sound waters near the shore. Some of the most common are salmon, Pacific herring, rockfish, Pacific Staghorn Sculpin, flounders, and crabs. The area’s array of marine life can be credited to its diverse conditions: saltwater bays, islands, and peninsulas carved by prehistoric glaciers, notes NOAA Fisheries.
“As chefs, we really try to use every part of the fish,” Seattle chef and restaurateur Tom Douglas told Foodable. “Because it’s really, at this point in the world, it’s the only affordable way to use — whether it’s a whole cow or a whole salmon, you have to use every part of it in order for you to get to an affordable price point on your menu.”

Foodable Labs data from the past six months shows that there have been more than 321,405 social media conversations by chefs and operators on the topic of seafood menu items. When it boils down to regions mentioned by chefs, the top five were New England seafood, Alaska seafood, Pacific seafood, Australian seafood, and seafood from the Gulf Coast, respectively.

Top 5 seafood regions mentioned by chefs:

#1 NEW ENGLAND SEAFOOD

For Maine lobster alone, many associate New England with seafood. New England clam chowdah, anyone? (Fun fact: If you’re from Rhode Island or have watched an episode of “Family Guy,” do know that Quahog is not an actual place, but another name for a hard-shell clam.) In this region, soft- and hard-shell

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clams are vastly popular, and one of the most popular caught fish in New England is fresh haddock.

#2 ALASKA SEAFOOD

#3 PACIFIC SEAFOOD

#4 AUSTRALIAN SEAFOOD

According to the Australian Marine Conservation Society, Australia has the third largest marine territory behind the United States and France. The continent borders the Pacific Ocean, the Indian Ocean, and the Southern Ocean, making its marine life extremely diverse. Currently, species that are not overfished and are known as the “better choice,” as noted in Australia’s Mini Sustainable Seafood Guide, include Australian salmon, crabs, Goldband Snapper, prawns, Blue Mussel, Southern Calamari, and more. According to an article on news.com.au, state governments are starting to get more onboard now than ever before. The Western Australia government has even committed $14.5M “to allow fisheries in the state to be assessed against MSC (Marine Stewardship Council) standards.” The MSC label means that the seafood can be traced back through the supply chain to a certified fishery.

#5 GULF COAST SEAFOOD
Based on seafood menu items alone, Foodable Labs found the top concepts considered most loved by consumers. This data set is based on the volume of positive sentiment in relation to seafood menu items they mentioned on social media. The list below shows that consumers mentioned seafood items from these concepts more than other brands.

**Most loved brands by seafood menu items:**

**#1 Bonefish Grill**

Known for its wood-grilled fish, Bonefish Grill, with locations all throughout the country, offers a wide range of fish, from Chilean sea bass to rainbow trout to Atlantic salmon.

**#2 Joe’s Crab Shack**

Joe’s Crab Shack offers plenty of seafood selections on its menu, including six shrimp dishes, seven crab offerings, eight different seafood steampots, and a list of appetizers that include garlicky mussels, New England clam chowder, crab nachos, and clam strips, plus more.
This seafood and steak restaurant leans more on the pricy side, but for good reason. Because of ongoing shipments to ensure seafood is fresh, different locations offer a slight variation on the menu. Offerings include, but are not limited to, an oyster bar, sesame crusted albacore tuna, mako shark, blue marlin, Atlantic swordfish, wild Alaska halibut, an array of local seafood selections, and plenty more.

Just like McCormick & Schmick’s, Legal Sea Foods’ menu is dependent on location and supply. As a sample menu, we chose the Warwick, Rhode Island, location, which features a seemingly endless roster of seafood on the menu. Clam cakes, crab cakes, steamers, stuffies, lobster bisque, mussels, stuffed lobster, salmon, baked scrod, North Atlantic sea scallops... the gang’s all here.

Popcorn shrimp, shrimp cocktail, shrimp mac & cheese, cajun shrimp... it’s safe to say Bubba Gump Shrimp Co. lives up to its name, and that’s only touching on the menu’s appetizers.

Based on 21,359 menu keyword terms mentioned in the past six months
According to 2014 data by U.S. commercial landings, on the disposition of U.S. domestic landings, not surprisingly, the majority of seafood product caught from U.S. fisheries were used for humans, with 79.8 percent used for fresh or frozen human food, 2 percent used for canned human food, and just 0.7 percent going toward cured human food. (The remaining percentages were used for animal food.) Now, let’s fast-forward to today’s data from Foodable Labs.

Based on 289,378 social media mentions in the past six months, New England cod has been the most talked about seafood species. New England cod, also known as Atlantic cod, has long been known as the region’s traditional “food fish.” But due to environmental shifts and overfishing, the species started to fade in the early ’90s, reports Wired, and Atlantic cod never really bounced back. Another part of the problem is warmer water in this region, brought on by climate change. Earlier this year, The Providence Journal reported on a new trend in which some locals are focusing on marketing more of what’s known as “trash fish,” species that have generally lacked market appeal or economic value.

Following closely behind at No. 2 is Alaska crab, with Chilean sea bass at No. 3, followed by Alaska salmon and Gulf shrimp at No. 4 and No. 5, respectively.
Top 5 mentioned seafood species:

Top 5 seafood species by sentiment:

Rather than mentions alone, when it comes to consumer sentiment — in this case, which seafood species consumers show most love for — things change up a bit, with Alaska salmon taking first place, followed by Maine lobster, Alaska crab, Gulf shrimp, and New England oysters.

There are a variety of Alaska salmon species, including king, sockeye, coho, pink, and keta. The flavor of Alaska salmon is dependent on that individual fish’s fat content, which is determined by the genetic make-up of the species and on its spawning cycle, according to the Alaska Seafood Marketing Institute. Adding to Alaska salmon’s unparalleled flavor is the area’s pure environmental factors: icy, clean waters and ample natural food. And did you know that Alaska produces almost all of commercial landings of wild salmon in the U.S. (more than 95 percent)?

Based on 289,378 mentions on social media

Based on seafood mentions as most loved by restaurant consumers over the past six months
SUSTAINABLE SEAFOOD

Sustainability in food sourcing is more important today than ever. To be more specific, sustainable seafood, as defined by Wikipedia, is “seafood that is either caught or farmed in ways that consider the long-term vitality of harvested species and well-being of the oceans, as well as the livelihoods of fisheries-dependent communities.”

“Today, the U.S. has essentially eliminated overfishing, with only 9 percent of stocks now fished at rates higher than would produce long-term maximum yield,” says Ray Hilborn, a professor at the University of Washington’s School of Aquatic Fishery Sciences and the 2016 winner of the World Council of Fisheries Societies’ International Fisheries Science Prize. “In a report released this month by the Monterey Bay Aquarium’s Seafood Watch, 98 percent of U.S. fisheries received a ‘Best’ or ‘Good’ rating, with only 2 percent on the ‘Avoid’ list. While 17 percent of stocks are still considered ‘overfished,’ most of these are on the road to recovery. And in New England, bottom fish stocks have made a spectacular recovery, having increased six-fold since the mid-1990s.”

He continues, “Technically speaking, some stocks will always be ‘overfished’ — fish stocks fluctuate naturally and the managers can only control what they harvest— but the U.S. management system, using scientific advice, is designed to take such
fluctuations into account, and will completely stop harvesting when stocks reach low levels. Consumers and retailers should buy U.S.-caught fish with confidence that the fishery is managed through an open, transparent, and sustainable process."

The practice of farming for fish is known as aquaculture, and today, according to the Monterey Bay Aquarium Seafood Watch, half of the seafood we eat in the U.S. is farmed in order to meet the demands of a growing global population. Here’s something to consider: According to triplepundit.com, the world’s population grows at 1.7 percent each year while fish production grows at 3.2 percent each year.
How does this all translate more directly to the world of restaurants? Of course, regional commercial fisheries are at the root of the source in supplying these products, but also more partnerships are popping up as the matter becomes more crucial. Very recently, in March 2016, The Daily Freeman News reported that the Culinary Institute of America is working with the Monterey Bay Aquarium Seafood Watch program “to source as much sustainable seafood as possible.” Helping to educate culinary students on the importance of selecting sustainable seafood is one way the industry will help future chefs implement that. In fact, the Culinary Institute of America offers a freshman-level course dedicated to seafood identification, fabrication, and utilization. Recently added to the roster are classes on aquaculture and commercial fishing. As they say, knowledge is power.

Another way restaurants are getting on board with the sustainable seafood cause is through a partnership with the Monterey Bay Aquarium Seafood Watch. Restaurants that choose to partner with the cause are basically agreeing to no longer serve items from the aquarium’s “avoid” list, which is broken down by state. It is also a promise by the restaurant to train their staff members accordingly and to help raise awareness in their communities. Some of the restaurant partners included on the list are Bistro Boudin Restaurant in San Francisco, Dig Inn
Seasonal Market locations in New York, and Jax Fish House & Oyster Bar in various locations. (As a bonus, sustainable seafood is now featured at university dining halls, like UMass Amherst, and also more retail grocery chains.)

At the end of the day, according to experts, the simplest thing an operator can do to make a positive impact is to buy American seafood and seafood from developed countries with strong fisheries management practices in place. Chefs and operators should stay away from countries that lack rigorous management laws.
According to Foodable Labs data, U.S. social consumers are now, more than ever, concerned about the topic of seafood sustainability. Sentiment scored over the past six months shows a year-over-year increase of 9.8 points, meaning that we compared this data — sentiment around the conversation of sustainable seafood — to that of the same time frame last year. In this data set ranging over the past six months, there were a total of 153,728 conversations on social media showing concern about the topic. We then broke down this data by demographic, also shown below. The majority of concern came from the Millennial generation, those in the 18 to 34 age group, at nearly 65 percent. Following were those in the 35- to 44-year-old group at just over 60 percent. The older the age group, the less of worry on the topic. However, with that being said, the numbers were still high at almost half.

Consumers concerned about seafood sustainability:

- 18-34: 64.5%
- 35-44: 60.1%
- 45-54: 49.3%
- 55-64: 44.7%

Measuring sentiment, based on a total of 153,728 conversations on social media around sustainable seafood conversations; ranked by highest to lowest percentage
PUTTING IT INTO PRACTICE

To ensure that the seafood you’re consuming or buying is sustainable, the Natural Resources Defense Council urges both foodservice operators and diners to buy American-caught seafood because the U.S. is stricter about its fishing and farming standards than many other countries. If your concept is aligned with providing sustainable seafood, it is also important to learn from your source how the product was caught. Different methods are better for protecting our oceans and other species. (Go to www.fishwatch.gov to learn more about U.S. fisheries and sustainable fisheries.)

From its omega-3 fatty acids to being packed with essential nutrients like zinc and potassium, fish and seafood in general has been proven to be more environmentally friendly than land-based animal proteins and, in many aspects, more nutritional.

Seafood is also better for the environment. Andy Sharpless, CEO of the environmental nonprofit OCEANA, notes in his book “The Perfect Protein” that fish are caught without fertilizer, pesticides, antibiotics, or freshwater. Compared to other protein alternatives, most fisheries generally have a low carbon footprint. This is also supported by Professor Ray Hilborn’s findings. According to an Eartheasy article, at the 2011 Seafood Summit in Vancouver, B.C., Hilborn said that, “compared with conventional livestock operations, ocean fisheries preserve many more ecosystem
components and functions, including species diversity. When it comes to choosing animal protein, it seems clear that wild seafood is a better choice than conventionally raised meat or poultry (or farmed seafood), for eco reasons as well as health-related ones."
ABOUT FOODABLE LABS
The data for this report is provided in partnership with DigitalCoCo, LLC and its proprietary Restaurant Social Media Index. Foodable Labs currently pulls from more than 35K restaurant and hospitality brands daily, over 220M global restaurant consumers engaged in social, more than 500K foodservice locations, and contains the world’s largest accumulated social data available on the foodservice and hospitality industry, with over 10B data points on food and beverage analyzed in 2015.

Make sure your restaurant is included in our analysis for the Top 50 Restaurants Report by submitting your restaurant at www.rsmindex.com/services/

Check out other Foodable Labs reports here, including Top Menu Trends of 2016, the Super Millennial report, Social Insights No. 5, and 2015 Restaurant Technology Guide.

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CREDITS

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