

ALASKA SEAFOOD AT FOODSERVICE



this **study**

// fielded 8.2019

OBJECTIVES

- ✓ Gather detail on seafood consumption habits and preferences in QSR, fast casual, and casual dining restaurants.
- ✓ Determine where consumers are interested in seeing more seafood dishes on the menu.
- ✓ Understand consumer perceptions of seafood from Alaska and gauge the lift in consumer interest in a dish if it is made with Alaska seafood.
- ✓ Investigate consumers' approach to plant-based protein in restaurants, and whether consumers are choosing plant-based protein over seafood.

METHOD

- ✓ Online 18-minute survey of **1000 consumers**
 - ✓ All consumers were required to be weekly visitors of QSR, fast casual, or casual dining restaurants.

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what we **learned**

1

Health is a key lever to pull for increasing seafood consumption.

Consumers' desire to reduce meat consumption is a key selling point to increase seafood consumption. Highlight Alaska seafood's health profile in marketing and advertising to persuade consumers to choose seafood. Consumers prefer seafood over plant-based protein, which supports shifting more of operators' menu to seafood.

2

There is opportunity to expand seafood offerings at quick service and fast casual.

While seafood is more commonly ordered at casual dining restaurants, consumers are interested in seeing more seafood entrées and appetizers at LSRs. Look for opportunities to adapt what's currently offered in casual dining to limited service restaurants, benefiting potential for volume growth and consumer demand. Compared to the rest of the population, Gen Z is more likely to visit QSR; tailoring limited service options to their tastes could help keep that generation interested in seafood as well.

3

In-store signage and other on-premise touchpoints are essential to influencing consumers at the time of ordering.

Ordering seafood tends to be an impulsive decision so focus efforts on impacting consumer choice at the time of their decision.

4

Leverage the Alaska brand in menu names or descriptions wherever possible.

Alaska is not only the most appealing origin for seafood at restaurants, it also cues healthy and fresh seafood. Consumers want to know where their seafood comes from so mentioning "Alaska" as the origin makes the dish more appealing. Adding the Alaska Seafood logo reinforces positive perceptions about the restaurant and the dish but mentioning "Alaska" is nearly as effective.

5

Indicating seafood is "wild-caught" on menus is favored by consumers and reinforces the perception that the seafood it is healthy & fresh.

Half of consumers prefer wild-caught seafood because they believe being in a natural environment produces healthier and better tasting seafood. Mentioning "wild-caught" in a description helps to mitigate any concerns about seafood not being fresh, which is one of the barriers to ordering seafood AFH.

6

Gen Z is a prime target for seafood.

The Gen Z generation eats seafood AFH more than other generations, and they are also more flexitarian and more tuned in to environmental issues surrounding seafood. Consider focusing communication efforts on sustainability and health benefits to keep these consumers interested in seafood and to sway them to choose seafood over plant-based protein.



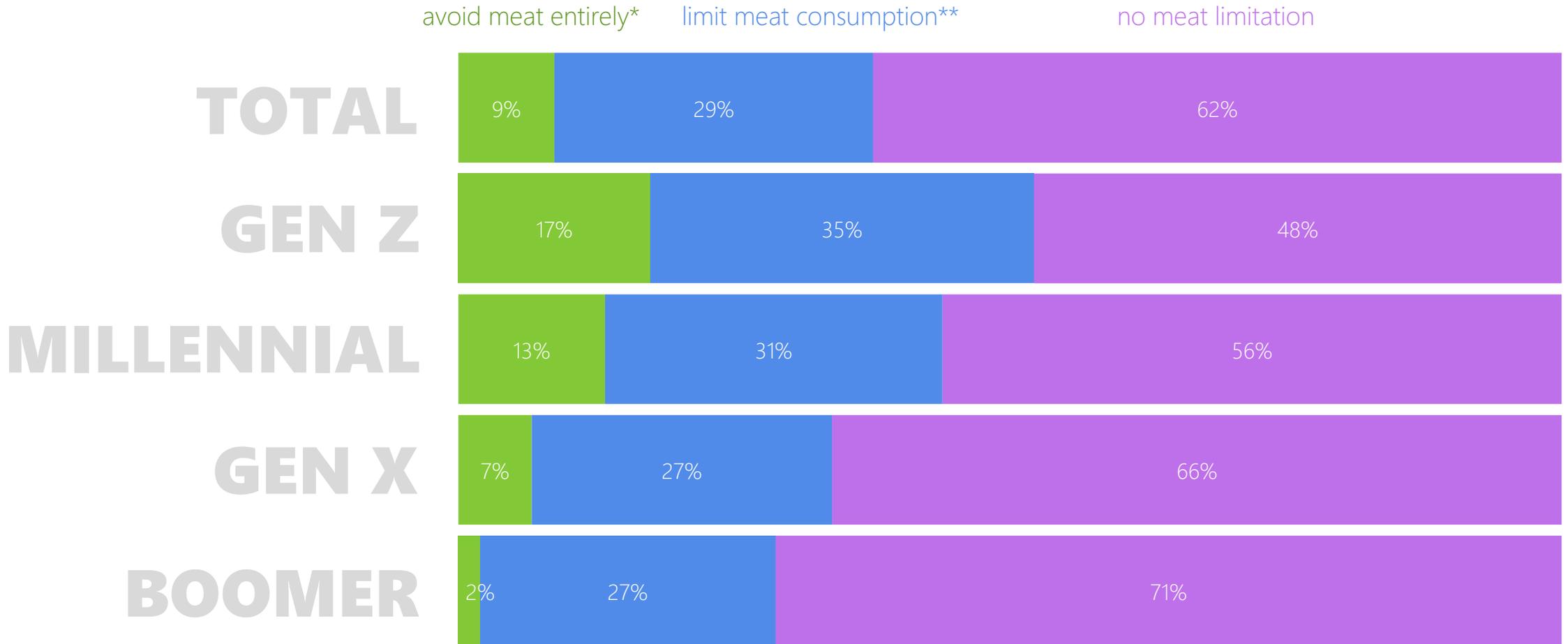


protein consumption

Over a third of consumers follow a diet that limits or avoids meat consumption.

« The degree to which consumers limit or avoid meat varies greatly by generation; younger generations limit or avoid meat more so than older generations.

APPROACH TO MEAT LIMITATION

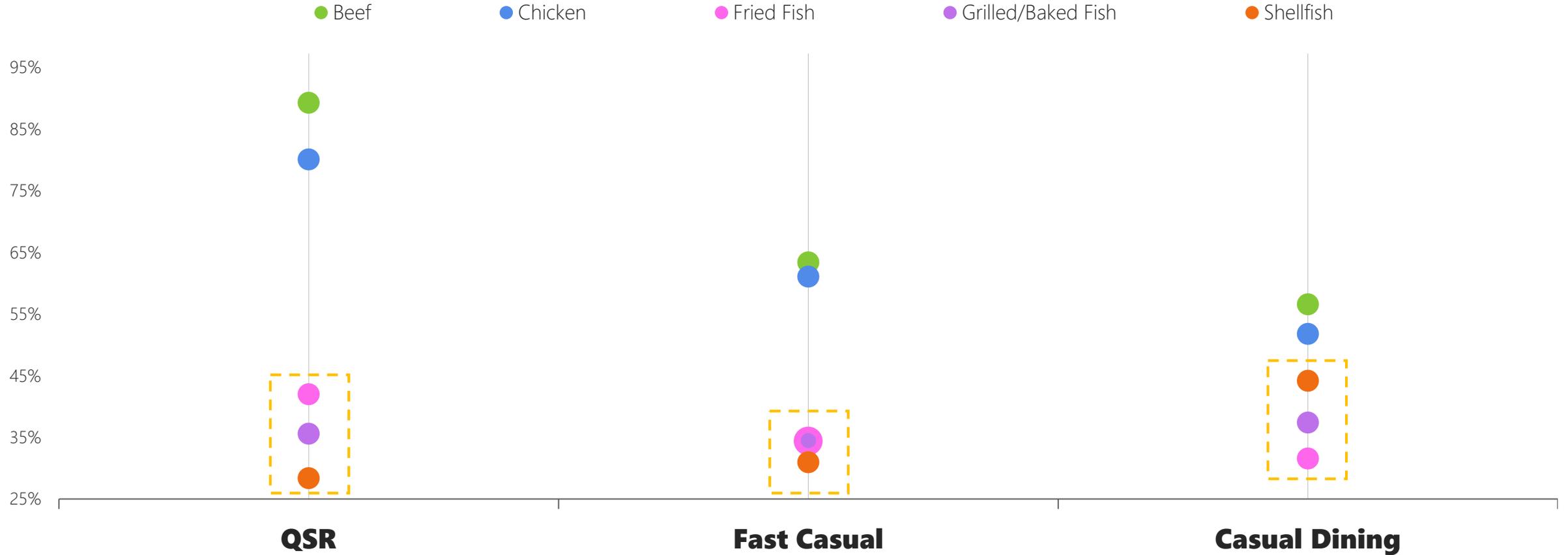


*vegetarians and vegans; **flexitarians and pescatarians

Seafood is eaten less frequently than beef or chicken at chain restaurants each month, especially at QSRs.

- « Shellfish like shrimp, crab, or lobster is more frequently consumed at casual dining restaurants than at QSRs or fast casual restaurants.
- « Fried fish is a more popular choice than grilled/baked fish or shellfish at QSRs.

MONTHLY CONSUMPTION OF PROTEINS AT DIFFERENT CHAIN RESTAURANTS

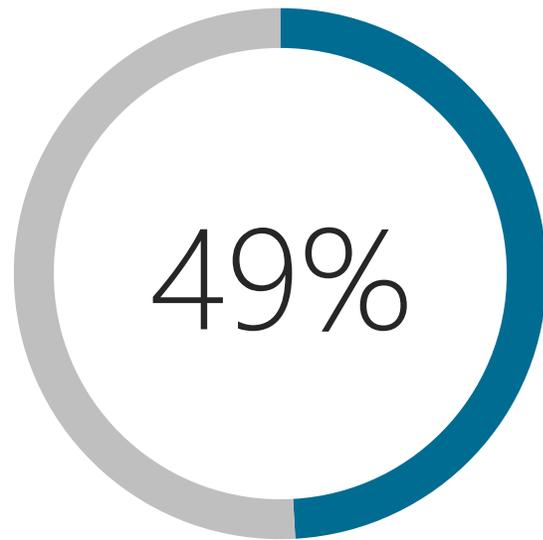


Seafood is more commonly ordered at casual dining restaurants than QSRs or fast casuals.

« Seafood is menued at fewer fast casual restaurants than QSRs or casuals, so it is not surprising to see lower monthly ordering percentages.

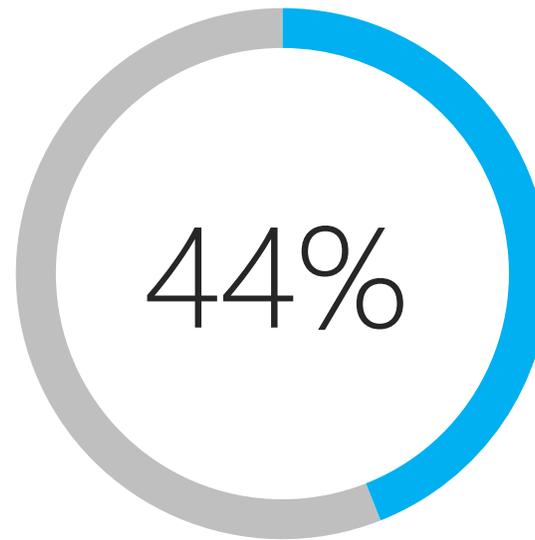
MONTHLY CONSUMPTION OF SEAFOOD AT DIFFERENT CHAIN RESTAURANTS

QSR



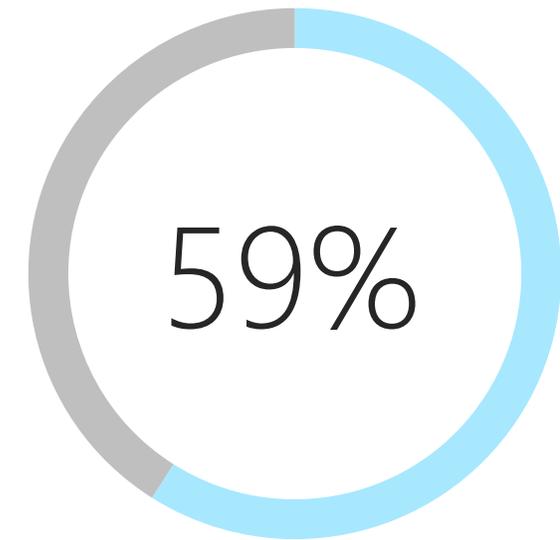
eat seafood at QSR restaurants in a typical month

FAST CASUAL



eat seafood at fast casual restaurants in a typical month

CASUAL DINING

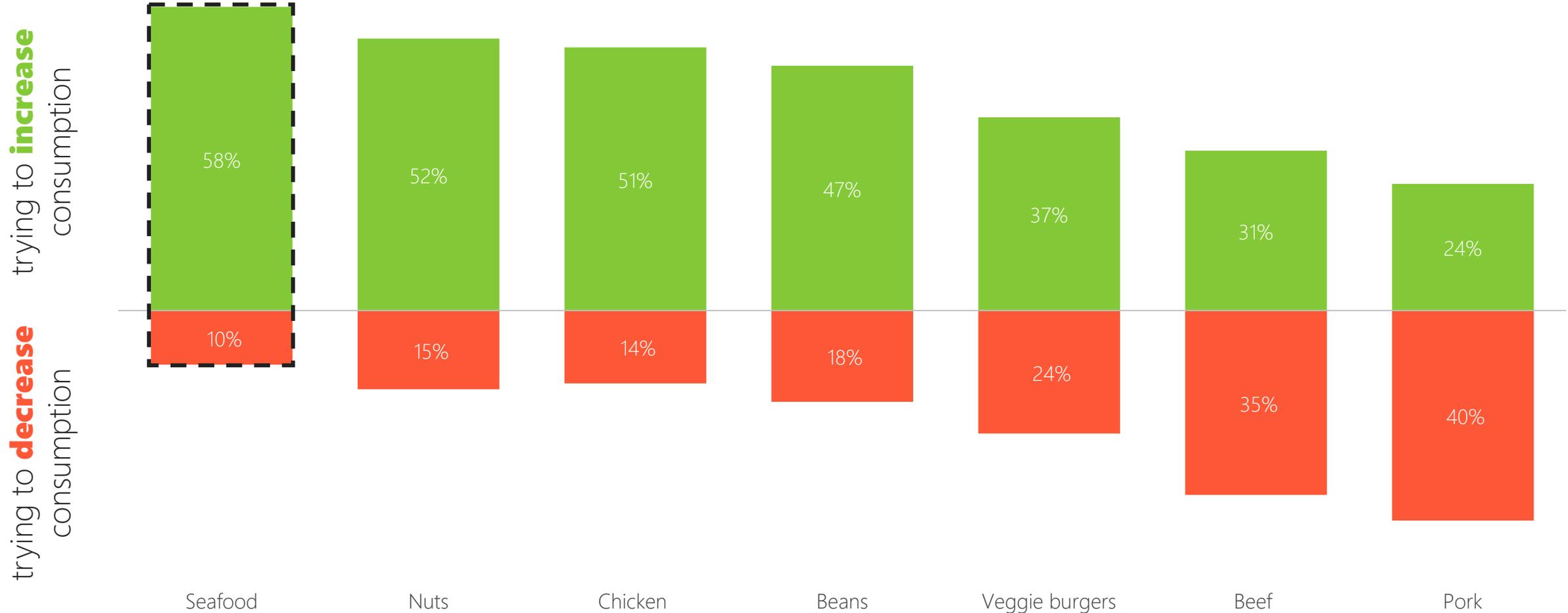


eat seafood at casual dining restaurants in a typical month

Increasing seafood consumption is more desirable than any other protein.

« More consumers are trying to decrease their red meat consumption than increase it.

DESIRED CHANGE IN CONSUMPTION BY PROTEIN TYPE



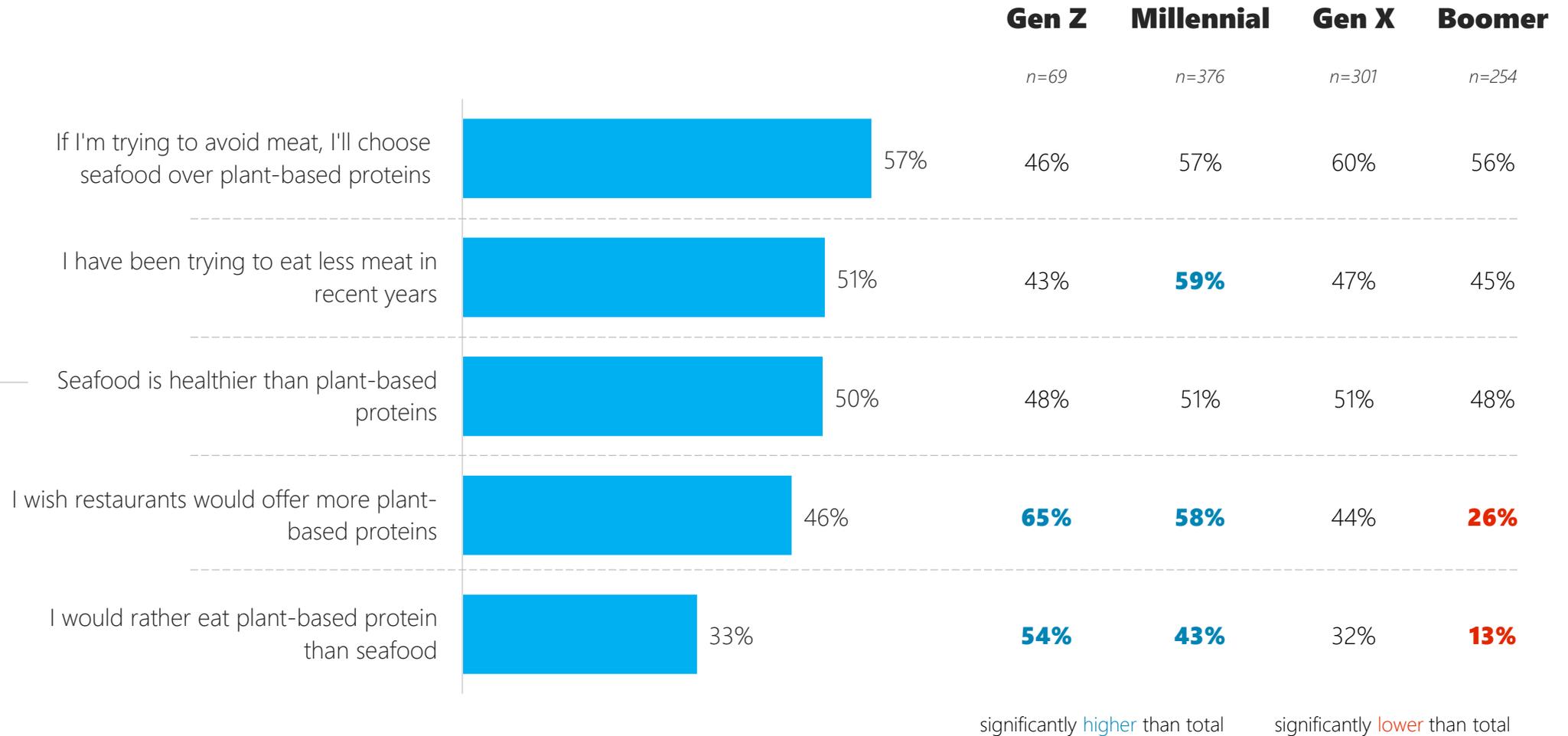
Seafood is generally more appealing than plant-based protein because seafood is perceived to be healthier.

« Highlighting seafood's health benefits versus plant-based proteins will be key in marketing messaging, especially when targeting younger generations because they are more interested in plant-based proteins than seafood.

PLANT-BASED PROTEIN AND SEAFOOD

top 2 box, 5 pt. scale

Only 13% of consumers disagree with this statement; the rest aren't sure.

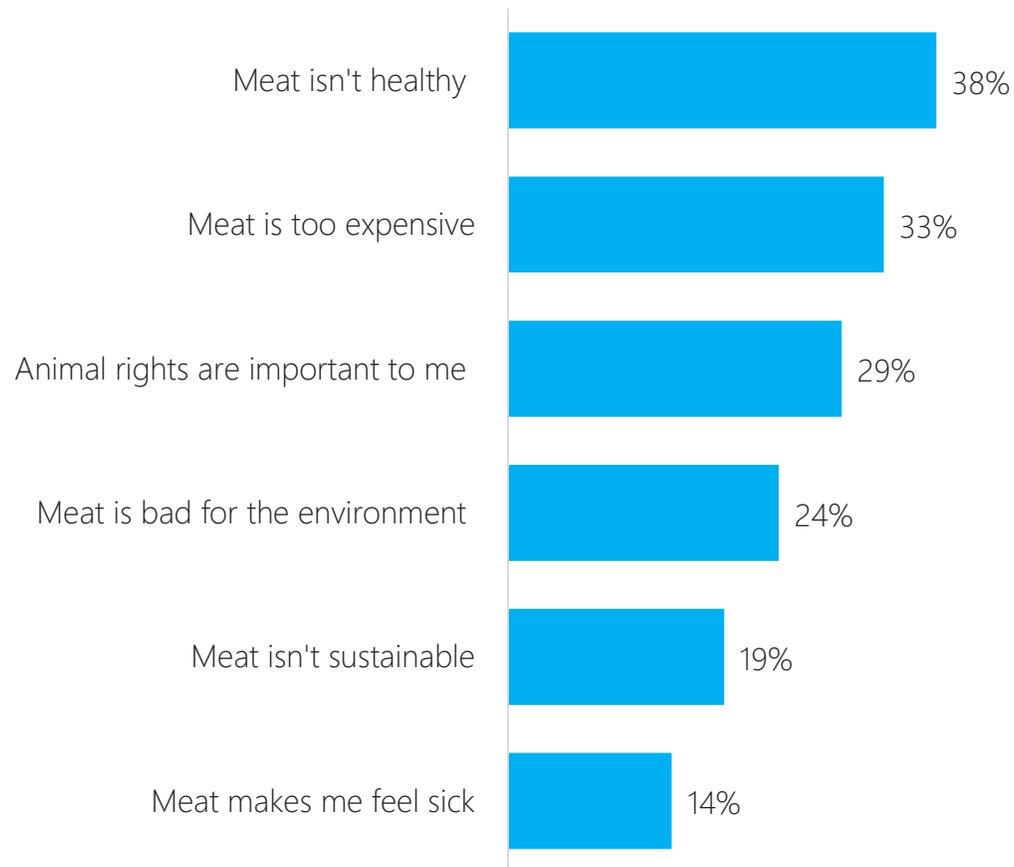


There's no one reason why consumers are limiting meat, but most are interested in replacing it with seafood and veggies.

« The most preferred way to reduce meat consumption is with seafood.
 « Gen Z are most likely to limit their meat consumption because of animal rights, and they are more interested in plant-based proteins as a replacement.

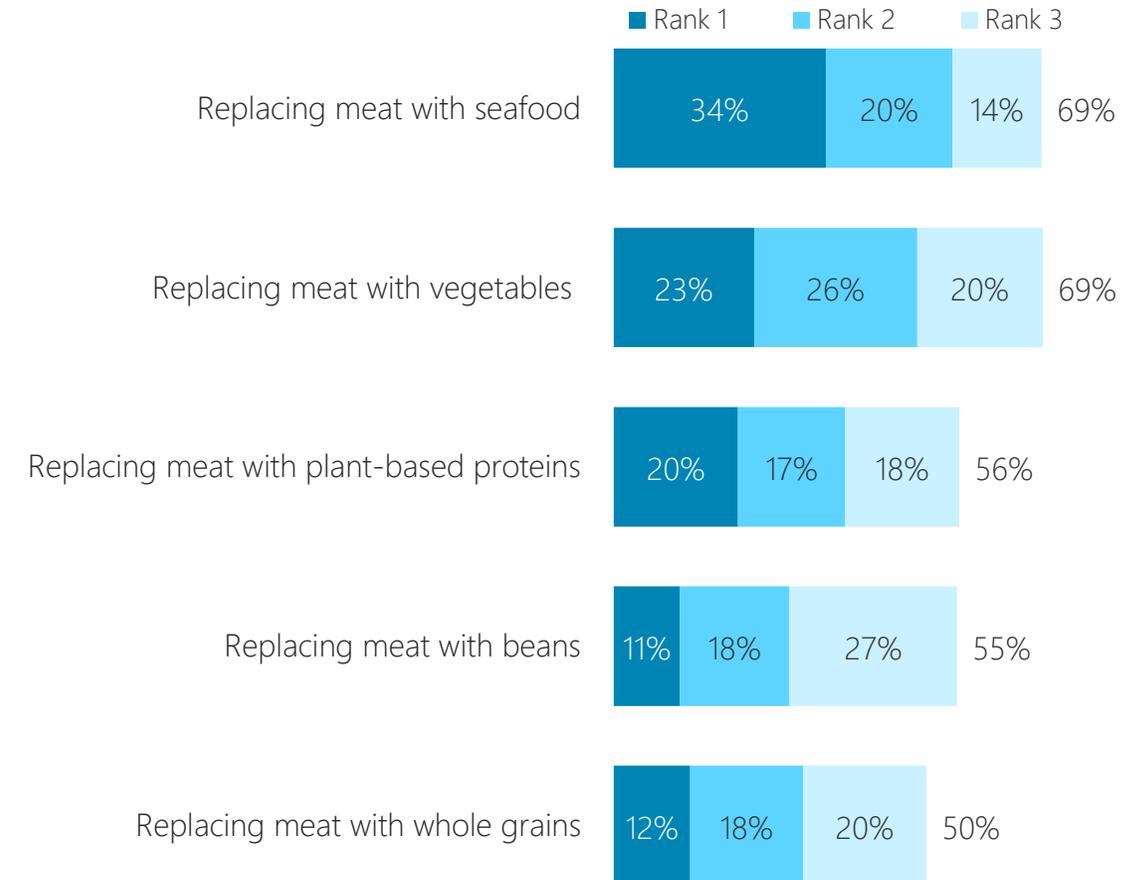
REASONS FOR LIMITING MEAT

among those who limit meat consumption



PREFERRED WAYS TO LIMIT MEAT

ranking; among those who limit meat consumption



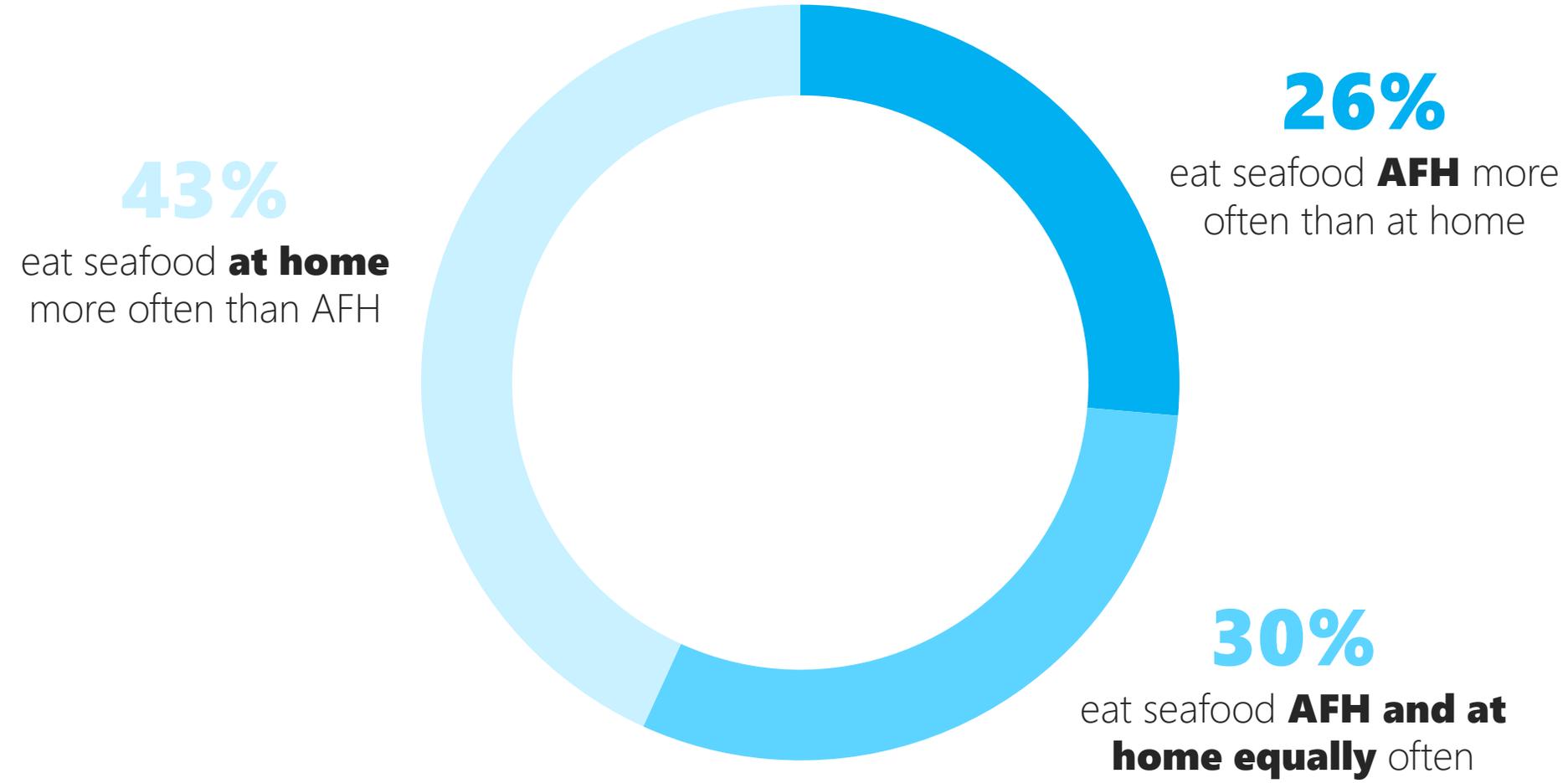


seafood consumption landscape

More consumers rely on the grocery store for seafood than restaurants.

« There is opportunity to shift consumers to eat more seafood away from home by offering a wider variety of fish species at restaurants and highlighting the origin of fish on menus.

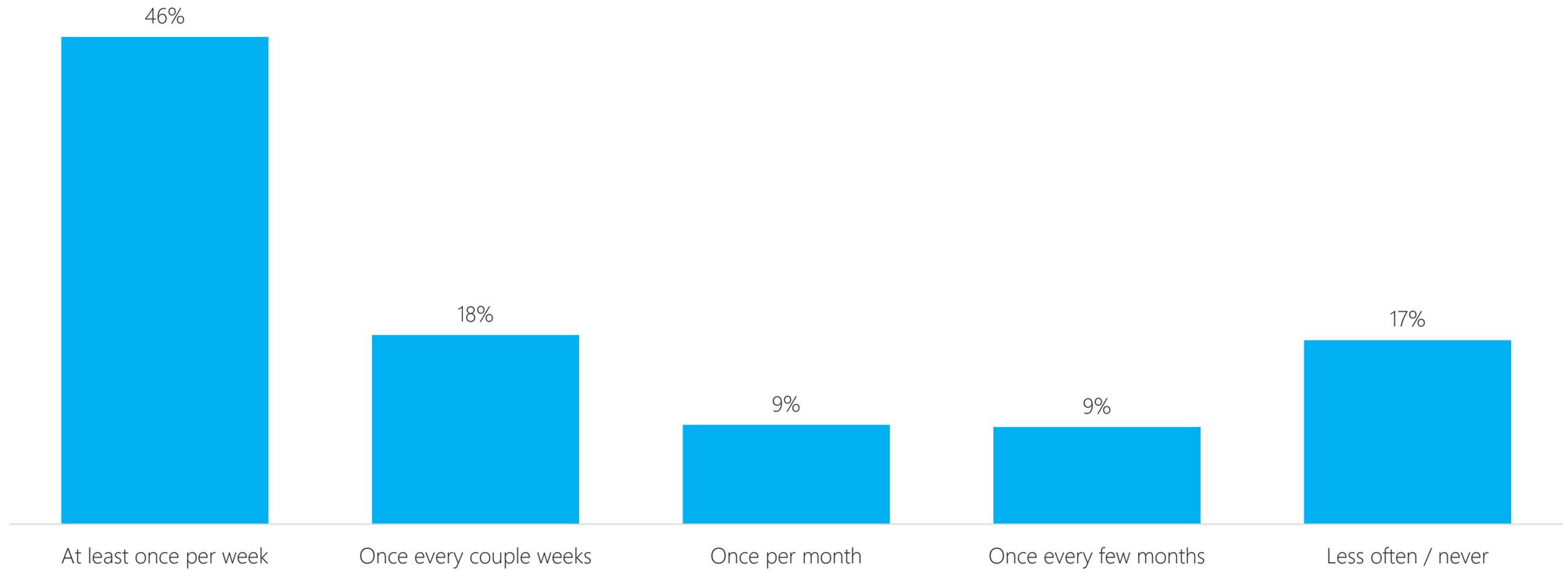
SEAFOOD CONSUMPTION: AWAY FROM HOME VS. AT HOME



Nearly half of consumers eat seafood at home at least weekly, and three in four eat seafood at least monthly.

« Millennials eat more seafood weekly at home than other consumers, and Boomers eat less.

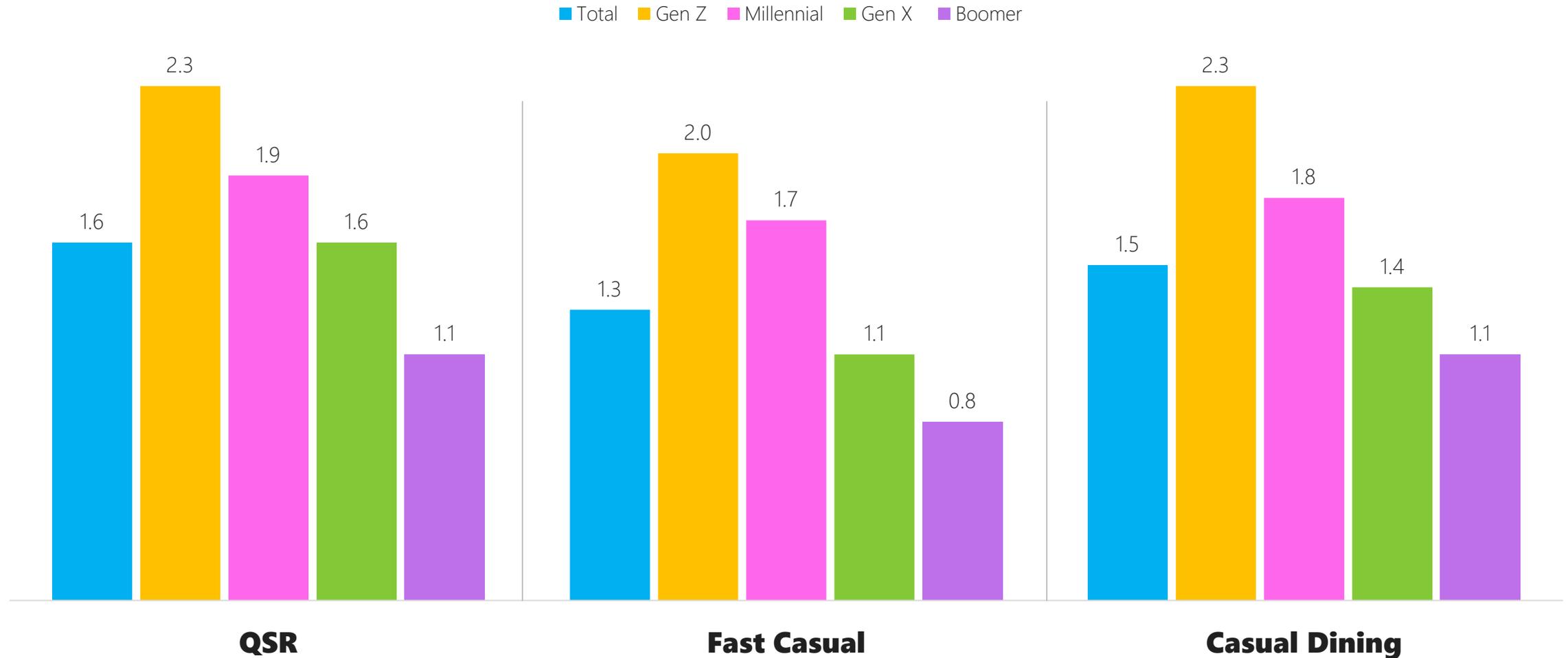
FREQUENCY OF EATING SEAFOOD AT HOME



Regardless of restaurant type, Gen Z consumers eat the most seafood away from home, typically two times each month.

« Consumption is similar across all restaurant segments, but seafood is a slightly less-frequent choice at fast casual restaurants for all generations.

NUMBER OF MONTHLY OCCASIONS EATING SEAFOOD AT CHAIN RESTAURANTS

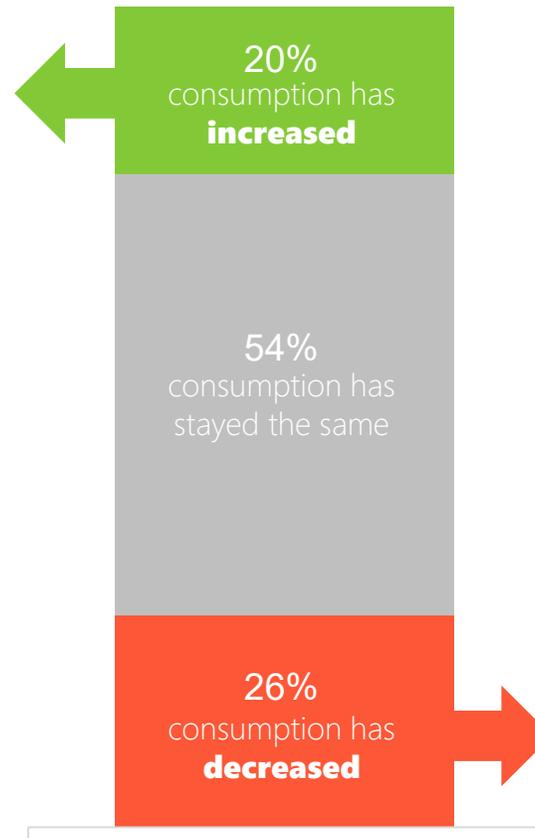
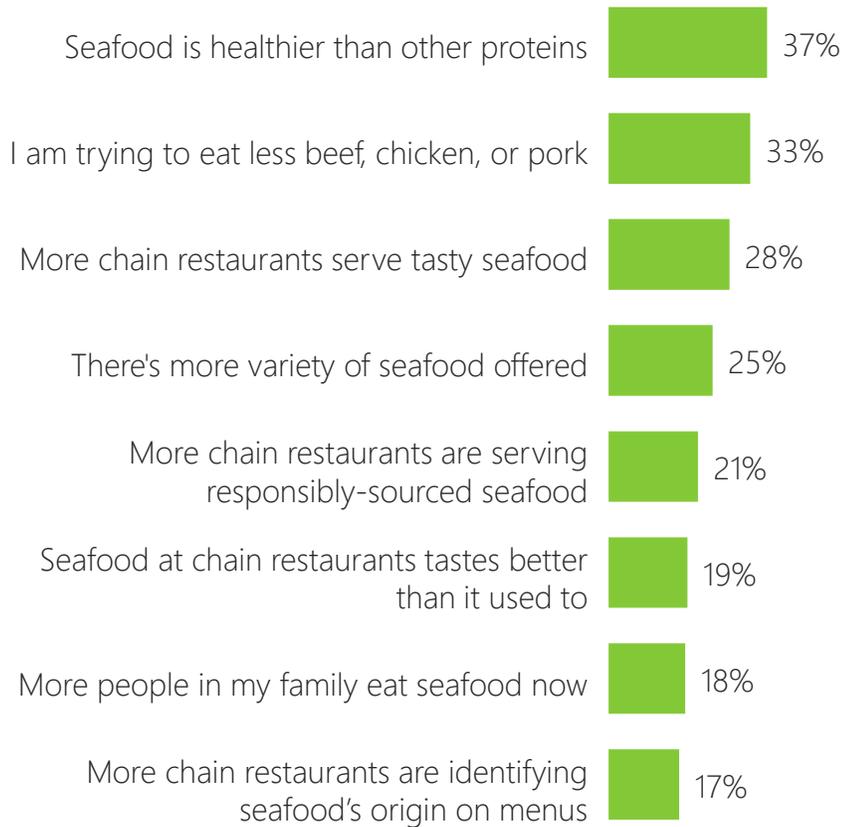


Like overall seafood consumption, the increase in seafood consumption is driven by a desire for healthy protein.

- « Freshness is a top reason for not ordering as much seafood AFH; using menu descriptions could help to cue seafood freshness (e.g. wild caught).
- « Taste preferences indicate there's an opportunity for more mild flavored seafood to be offered in foodservice.

CHANGE IN AFH SEAFOOD CONSUMPTION IN PAST TWO YEARS

Why has consumption **increased**?



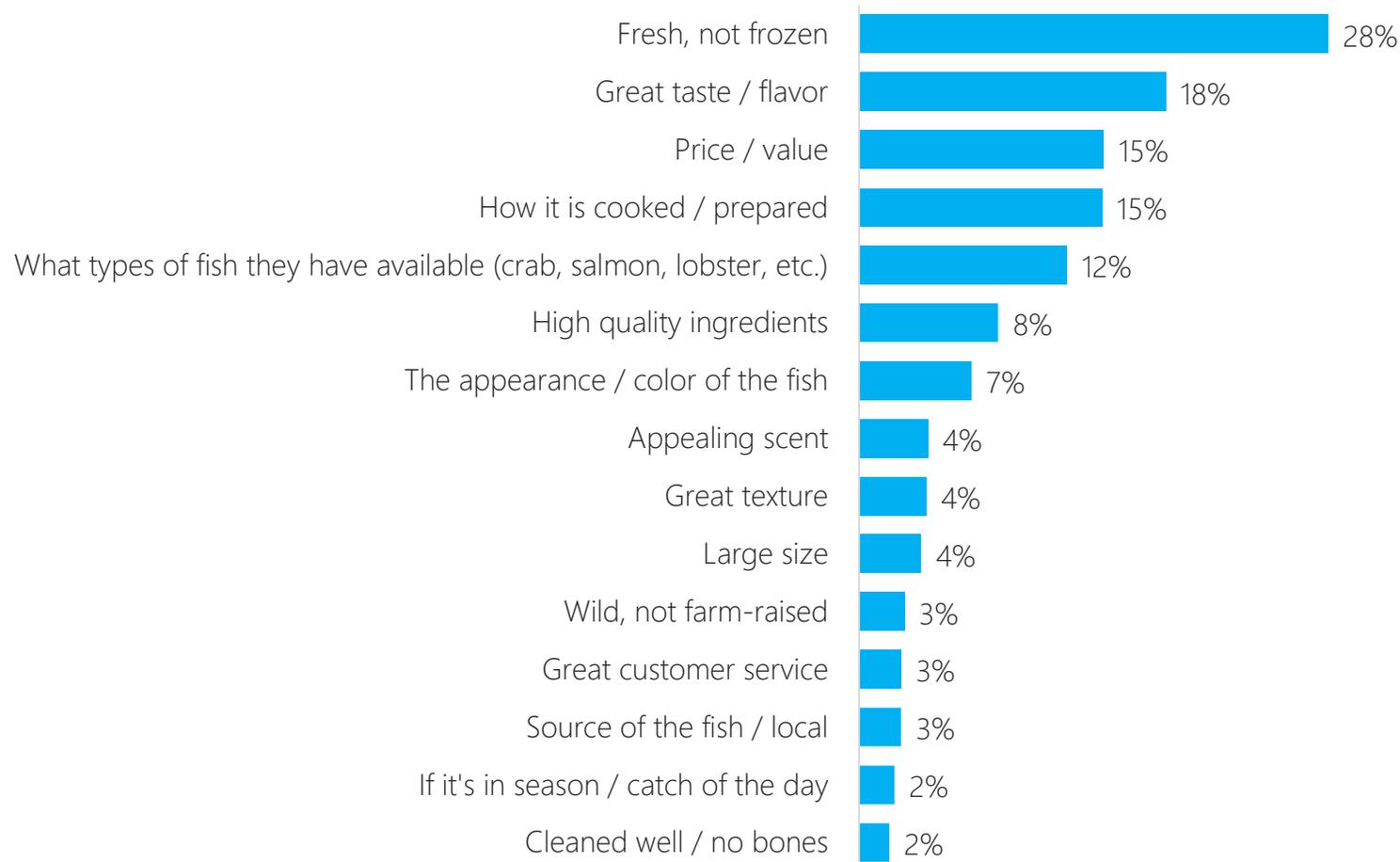
Why has consumption **decreased**?



Frozen seafood is perceived to be of lower quality than fresh seafood.

« Aside from freshness, high quality seafood also needs to have a great taste, a good value for the money, and be cooked and prepared well.

INDICATORS OF HIGH-QUALITY SEAFOOD AT CHAIN RESTAURANTS (UNAIDED)



"Flavor of the food should be high quality, how it's cooked, the texture and tenderness of the food, how it smells and the presentation."

"The most important is the quality of the fish if it's fresh or not."

"I am looking for fish that is fresh and just caught the following day. I want it to be seasoned well and cooked to how I like it."

"Wild caught seafood. More prestigious options such as halibut & lobster instead of tilapia & bay shrimp. Perceived value is also important. Portion size and quality are important as well."

"If it looks fresh, tastes fresh and is fresh."

"When looking for high quality seafood, I look for fresh tasting seafood that can be served grilled or broiled and not fried to cover up how old the seafood is."

"I'm looking for the source of the fish, type of fish, and that the fish is cooked properly."

seafood attitudes & preferences

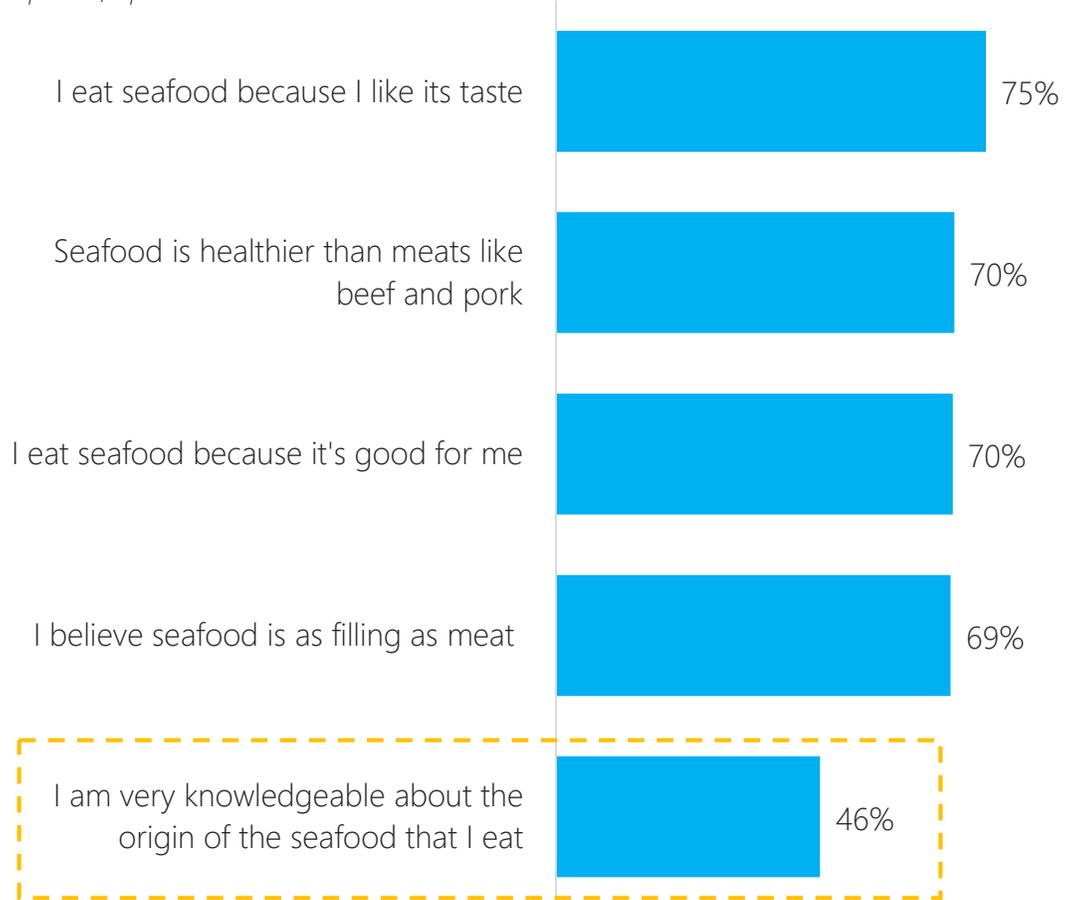


Few consumers feel very knowledgeable about the origin of the seafood they eat, yet it would be ordered more often if they knew its origin.

« This interest in origin is beneficial for ASMI to promote including Alaska origin on menus.

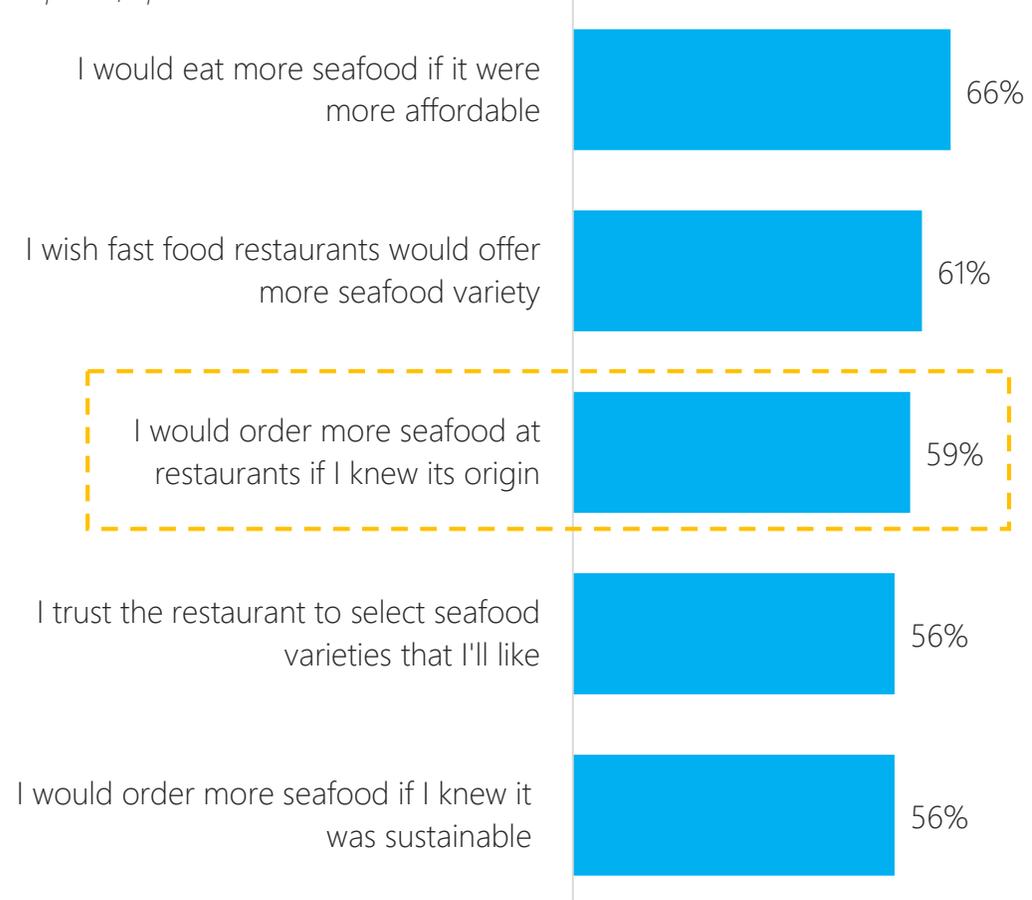
SEAFOOD ATTITUDES

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SEAFOOD DESIRES AFH

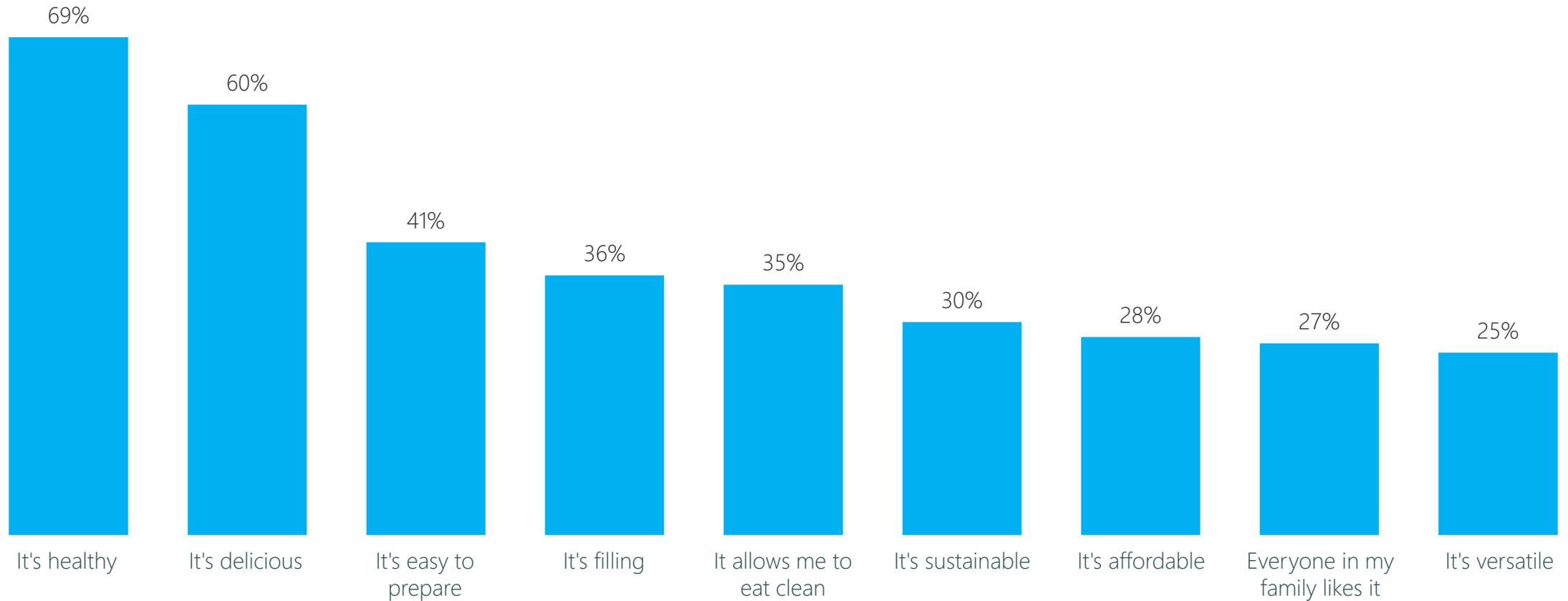
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Though consumers view seafood as healthy and delicious, lack of versatility may be hindering more frequent consumption.

« Seafood is also a protein that not everyone in the family might like, and just one-third think it's easy to prepare so it may not be worth making it more often.

BENEFITS OF EATING SEAFOOD

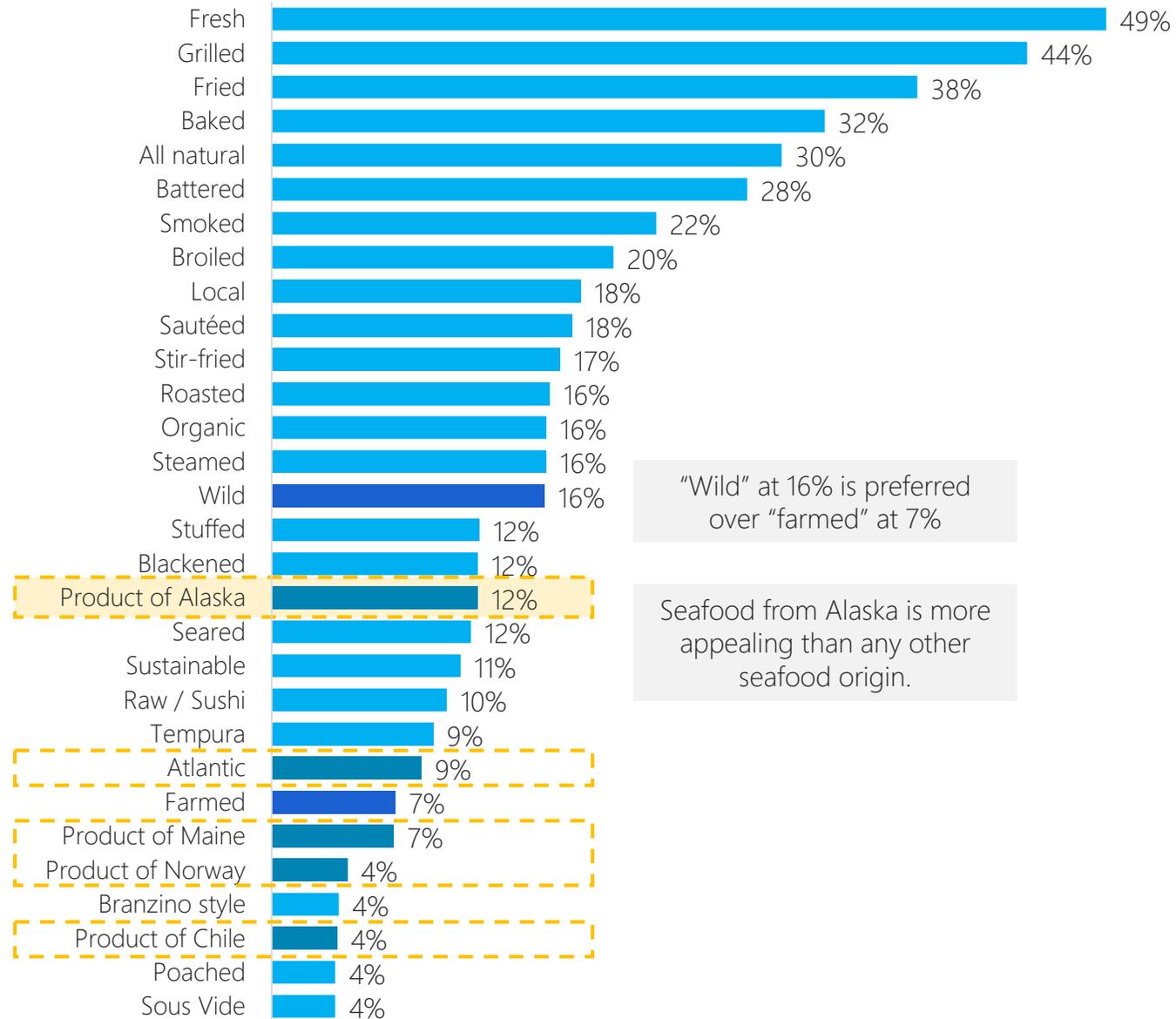


Popular prep methods, such as grilled and fried, are appealing at chain restaurants, and above all, consumers want to know that their seafood is fresh.

- « Consumers are more interested in knowing their seafood is wild-caught than knowing its origin specifically.
- « Seafood from Alaska is more appealing than from other regions like the Atlantic, Maine, Norway, or Chile,
- « Sustainability is still only important to a niche audience.

MOST APPEALING SEAFOOD DISH DESCRIPTORS

ranked in top five most appealing descriptors



“Wild” at 16% is preferred over “farmed” at 7%

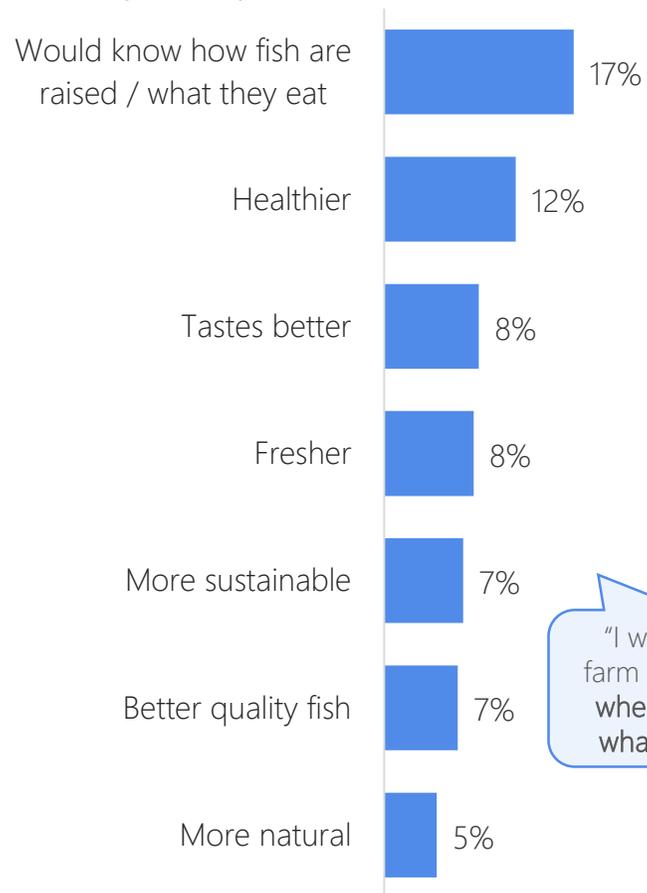
Seafood from Alaska is more appealing than any other seafood origin.

Wild-caught seafood is preferred because it's perceived to taste better, be healthier and more natural.

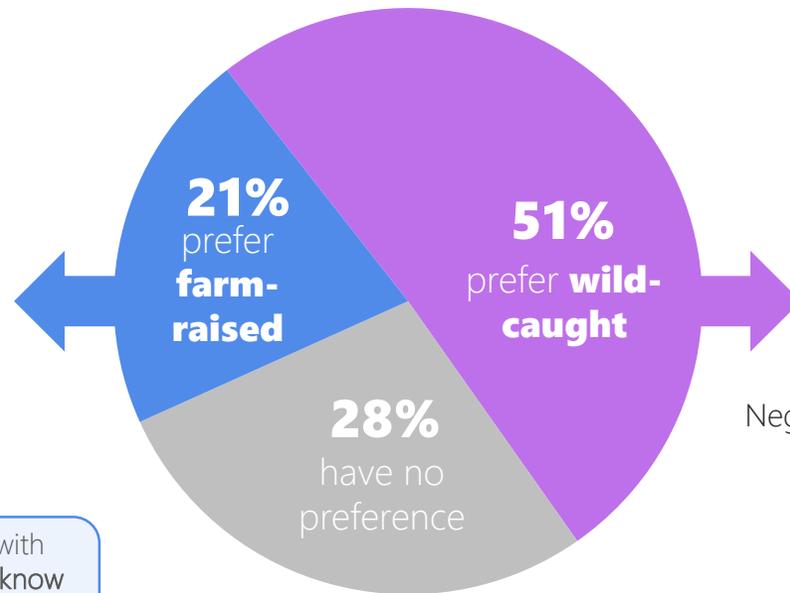
« Consumers who prefer farm-raised like that they would know what the fish is eating and how it is raised in a controlled environment.

SEAFOOD PREFERENCE: FARM-RAISED VS. WILD-CAUGHT

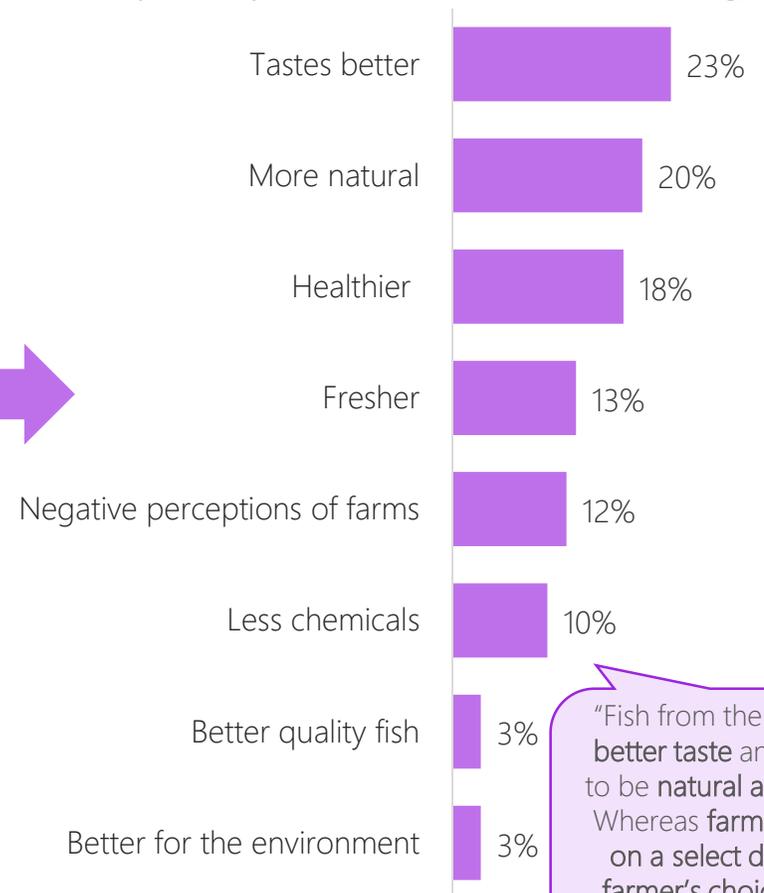
Why do you prefer **farm-raised**?



"I would think with farm raised you know where it's been and what it's been fed."



Why do you prefer **wild-caught**?



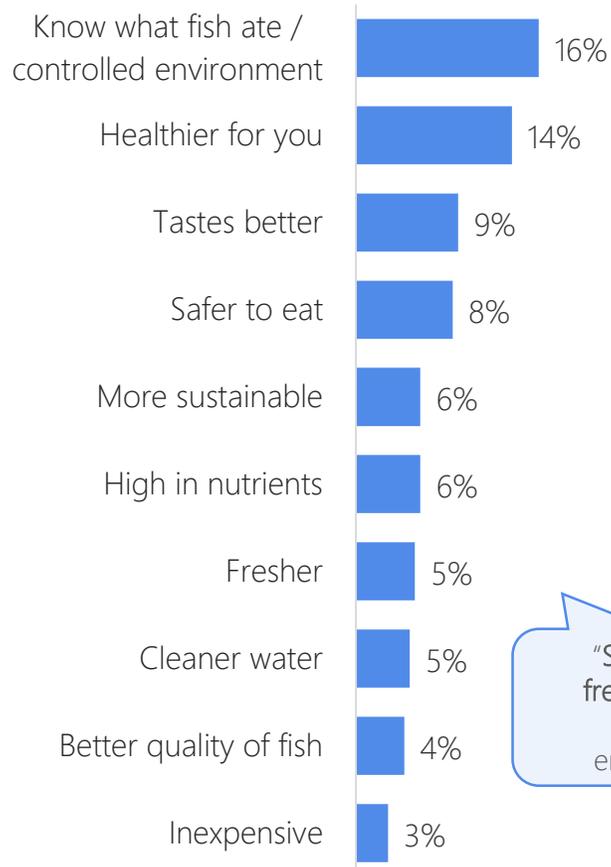
"Fish from the wild has a better taste and is going to be natural as intended. Whereas farmed fish are on a select diet of the farmer's choice and it's not natural."

A key benefit of wild-caught is thought to be healthier and tastier, while using less chemicals.

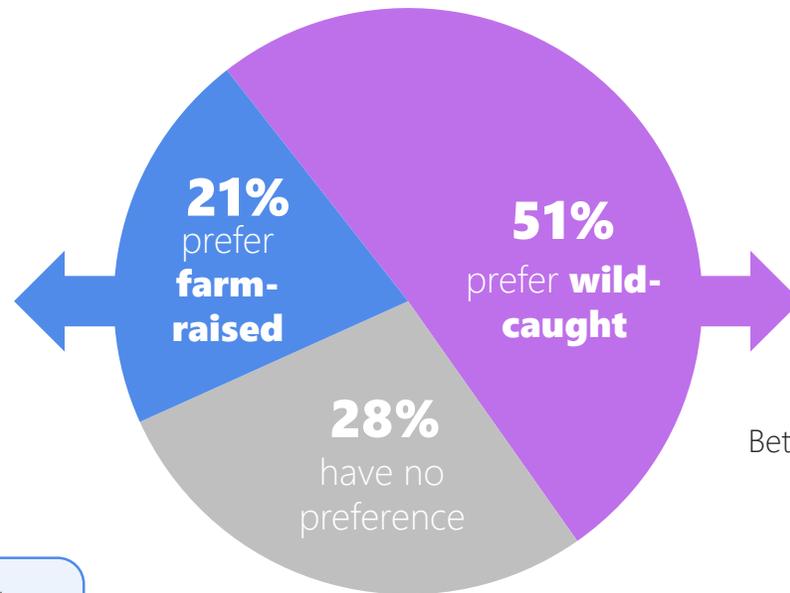
« Proponents of farm-raised fish believe this method is beneficial for its controlled environments where you know what farmers are feeding the fish.

BENEFITS OF FARM-RAISED VS. WILD-CAUGHT SEAFOOD

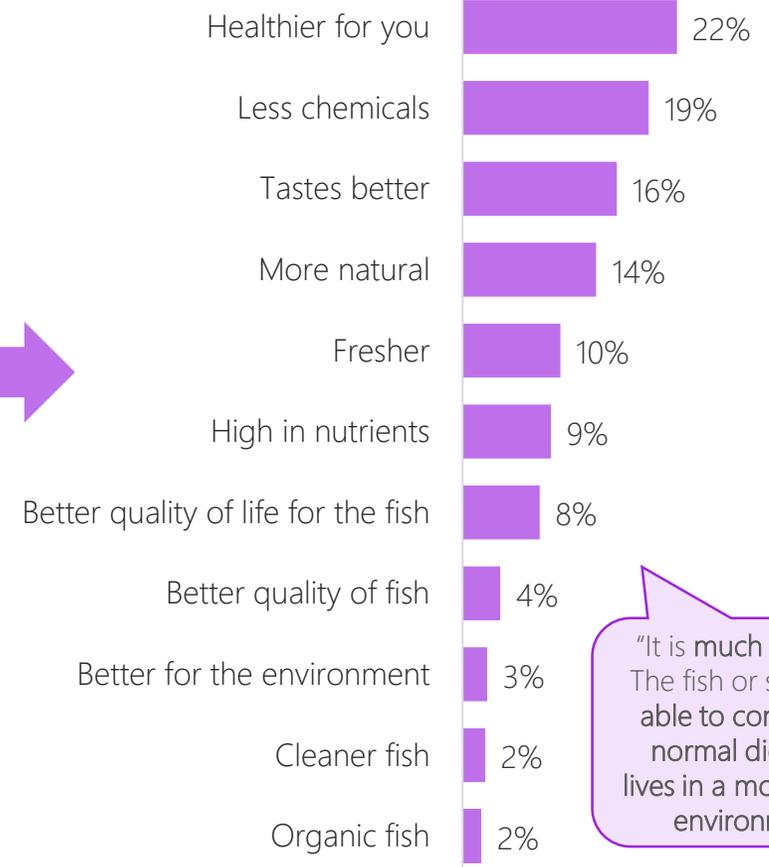
What are the benefits of **farm-raised**?



"Sustainability, freshness, more controlled environment."



What are the benefits of **wild caught**?



"It is much healthier. The fish or seafood is able to consume its normal diet and it lives in a more pristine environment."

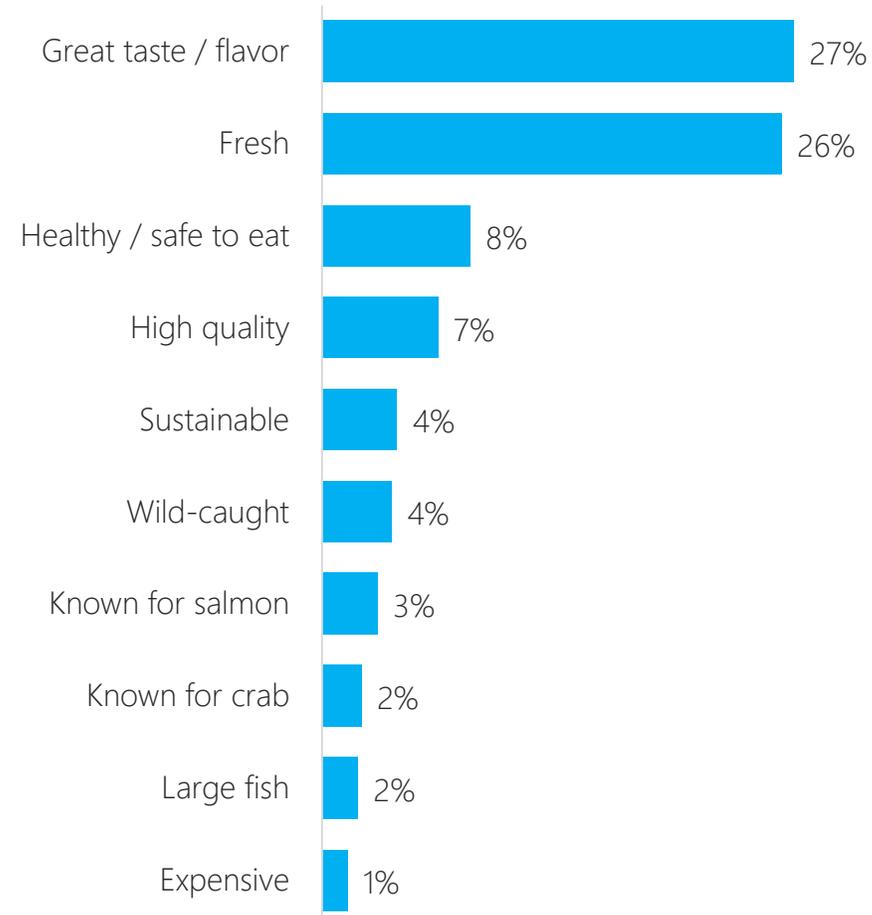
menuing Alaska seafood



Seafood from Alaska has very positive perceptions and is known for its great taste and freshness.

« Due to Alaska's cold waters, many consumers also find the seafood from Alaska to be safer and less polluted than seafood other regions.

IMPRESSIONS OF SEAFOOD FROM ALASKA (UNAIDED)



"Alaska is just an overall cleaner place, so it makes me think and believe that **their fish is cleaner and fresher** and because they **care about their fish.**"

"I feel it is **wild, natural, safe**, a very good business that Alaskans take pride in & are **serious about quality** & not **abusing the catch limits**, etc. The **taste is excellent**. I **trust the Alaskan fishing industry** as a whole."

"I always think that Alaska seafood is **better quality because of the cold waters**, the species of fish / seafood which is harvested, and the **flavor of that seafood.**"

"The **best seafood comes from Alaska**. The ocean is **cleaner** and the **wildlife is abundant.**"

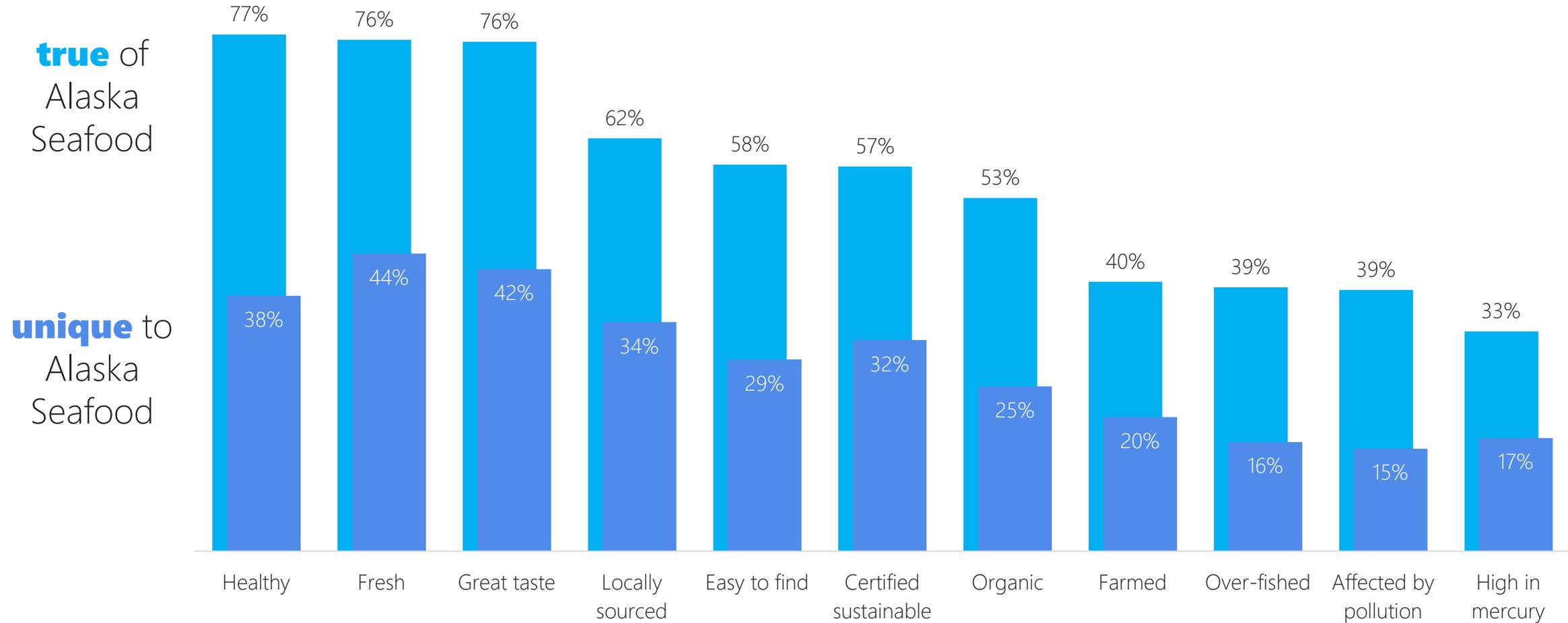
"Filled with a bountiful array of wild fish and shellfish such as king crab, scallops, shrimp, halibut and salmon, to name a few. **Quality is unparalleled**, with **wholesome and highly nutritious meat** that boasts a **rich and natural flavor**, making it some of **the finest fish in the world.**"

"It's a lot **more fresh than other brands**, as well as the **prices are more reasonable** than some other brands. Alaska seafood **seems to also be healthier** than other brands."

Mentioning Alaska on menus tells consumers the dish is fresh, high quality, and great tasting.

« More negative descriptors, such as being high in mercury, overfished, or affected by pollution, are less associated with fish and seafood from Alaska.

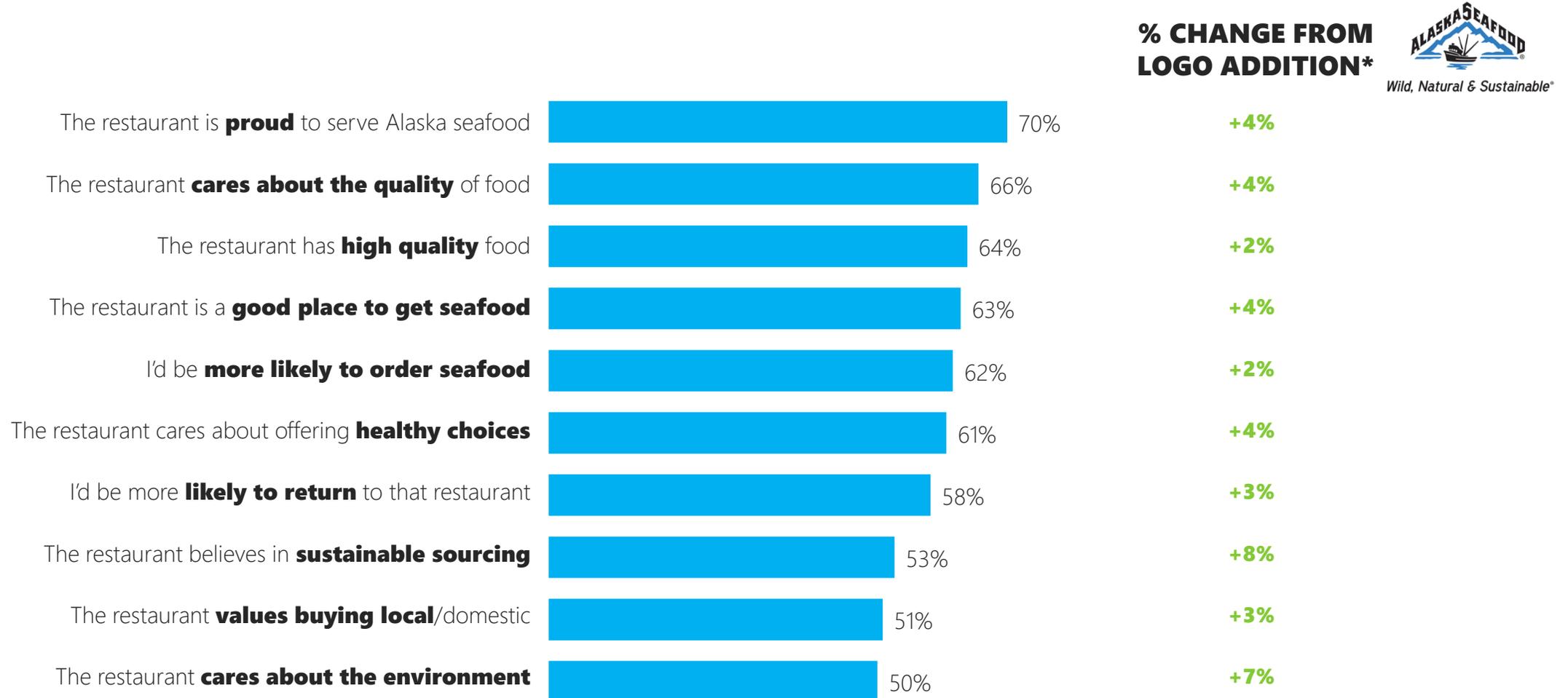
ALASKA SEAFOOD ASSOCIATIONS



Mentioning "Alaska seafood" on restaurant menus drives home that the restaurant cares about serving the best seafood.

- « Just mentioning "Alaska" is nearly as effective as including the Alaska Seafood logo.
- « The addition of the Alaska Seafood logo has the strongest impact on a restaurant being associated with sustainable sourcing and care for the environment.

IMPACT OF ALASKA SEAFOOD ON RESTAURANT PERCEPTIONS



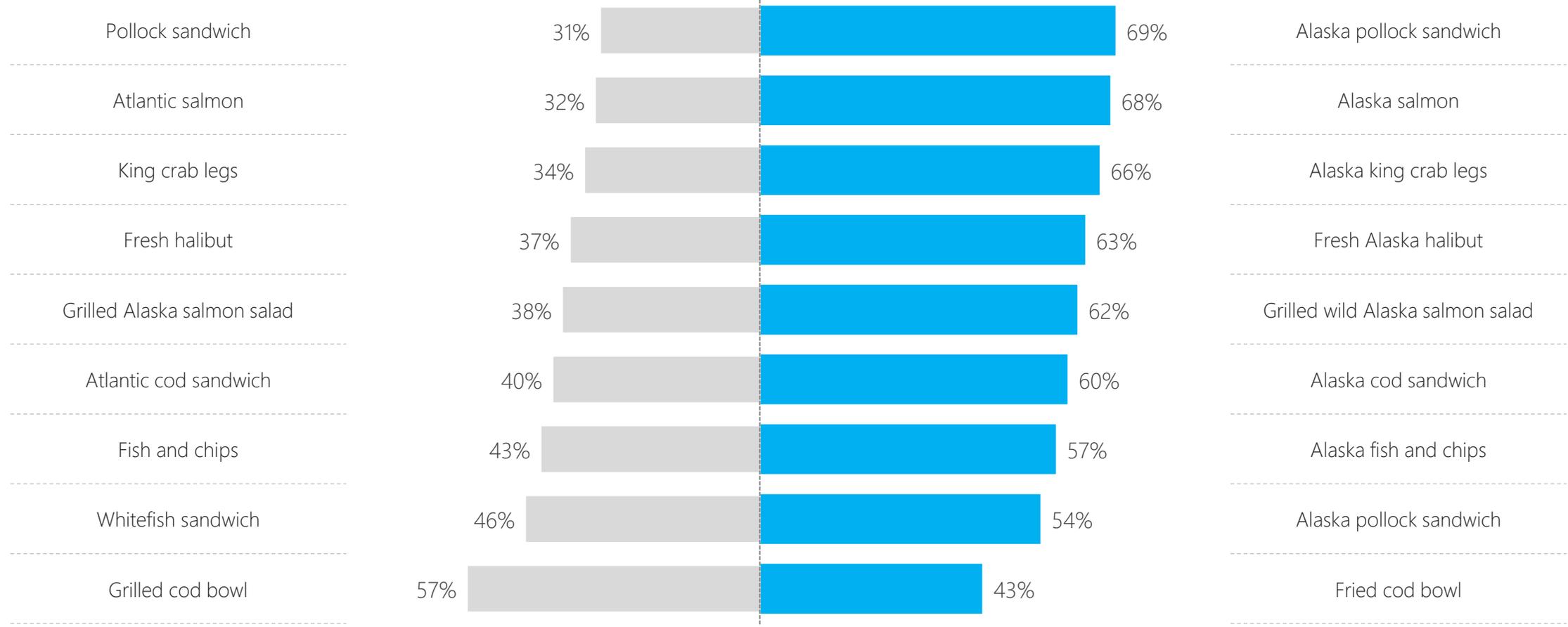
*Consumers were asked the extent to which they agree with each statement with and without the Alaska Seafood logo. Data in this column represents a **percentage point** increase (for example, 70% jumps to 74% after the logo is shown).

Consumers prefer seafood that specifies its origin on menus, and "Alaska" or "wild" descriptors are favored.

« Adding "wild" within the menu description of Alaska seafood increases its appeal.
 « In most cases, consumers are one and a half to two times more likely to order seafood when "Alaska" is present in the name of the dish.

PREFERRED SEAFOOD MENU ITEM NAME AT CHAIN RESTAURANTS

do you prefer...

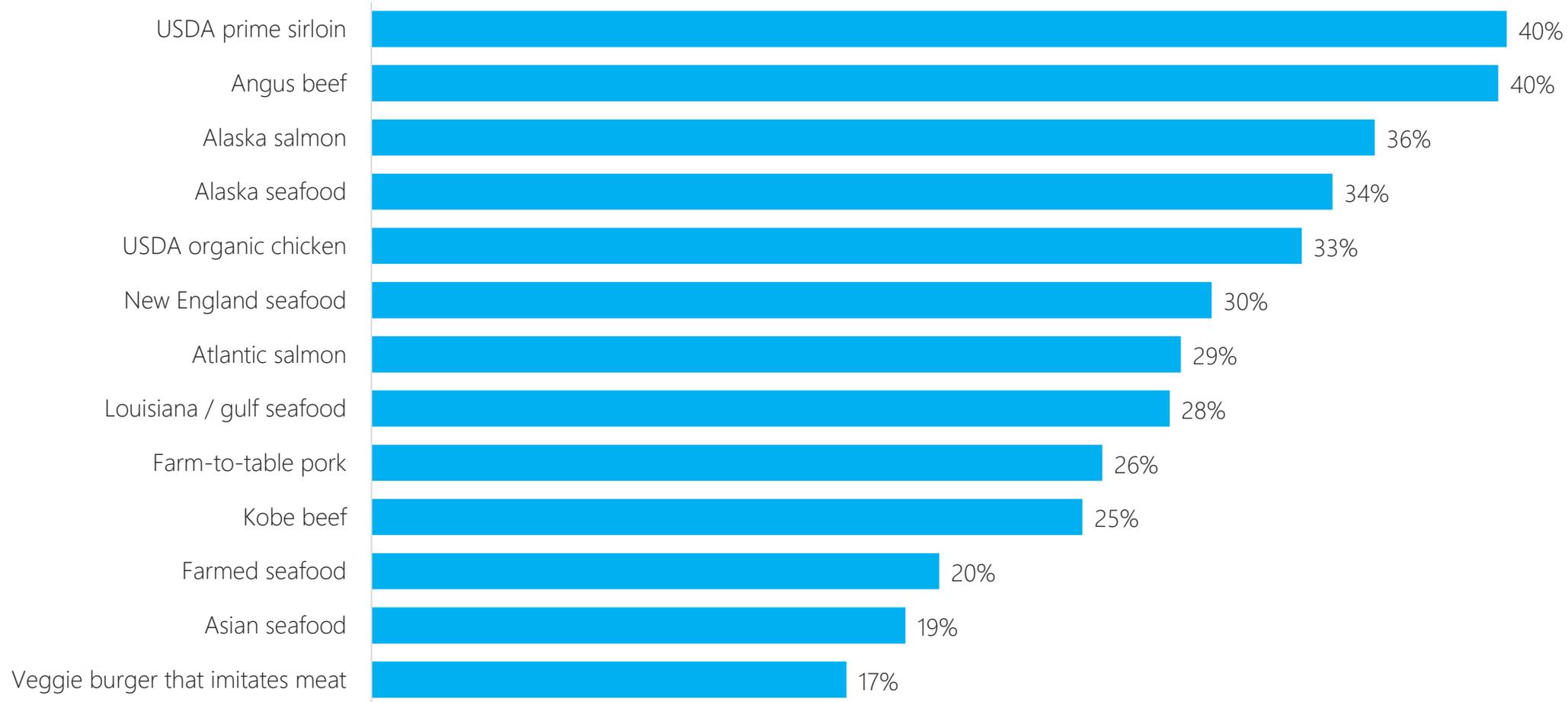


Alaska salmon and seafood hold higher regard than any other region, reinforcing its superior positioning.

« USDA prime sirloin and Angus beef have a slight advantage over Alaska salmon and seafood, likely due to broader familiarity.

LIKELIHOOD TO RECOMMEND DIFFERENT PROTEINS

top 2 box, 11 pt. scale



seafood perceptions at QSRs

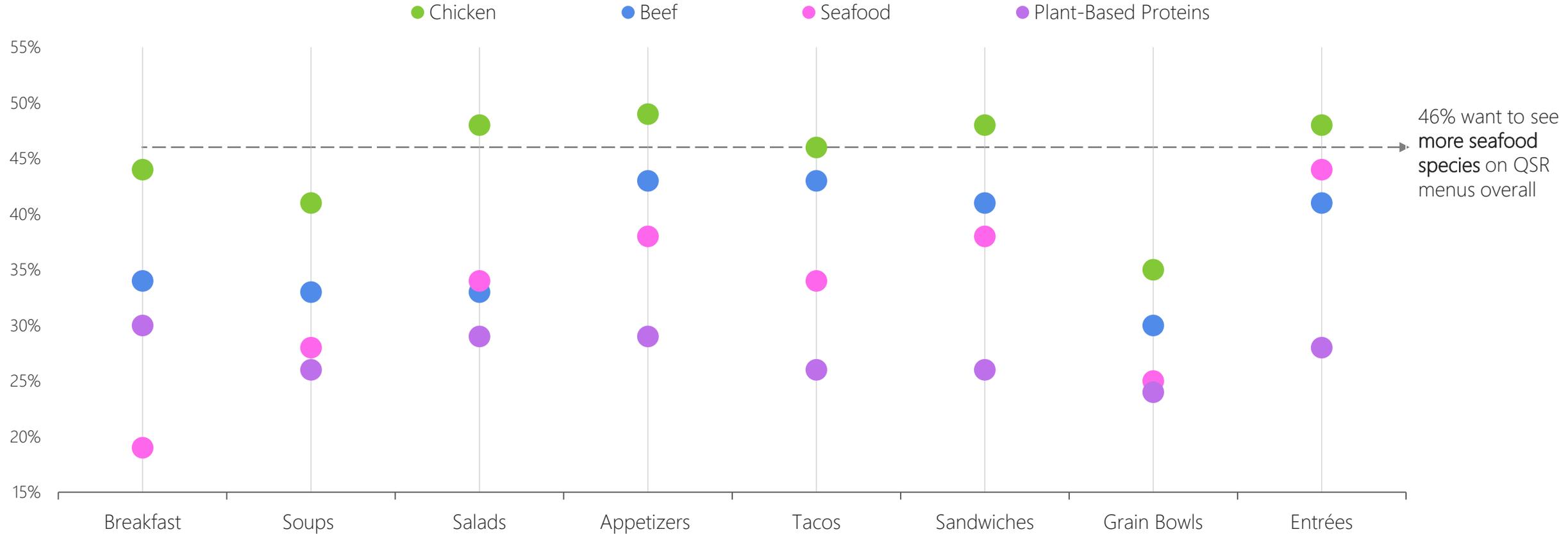


Seafood is a close second to chicken when it comes to wanting more entrées at QSRs, while seafood in breakfast dishes is not appealing.

« Almost half of consumers would like to see more seafood variety on QSR menus, yet chicken is the top protein that consumers would like to see more of across dish types.

QSR – DISHES CONSUMERS WANT TO SEE MORE OF *BY DISH TYPE*

among those who dine at QSRs weekly or more often



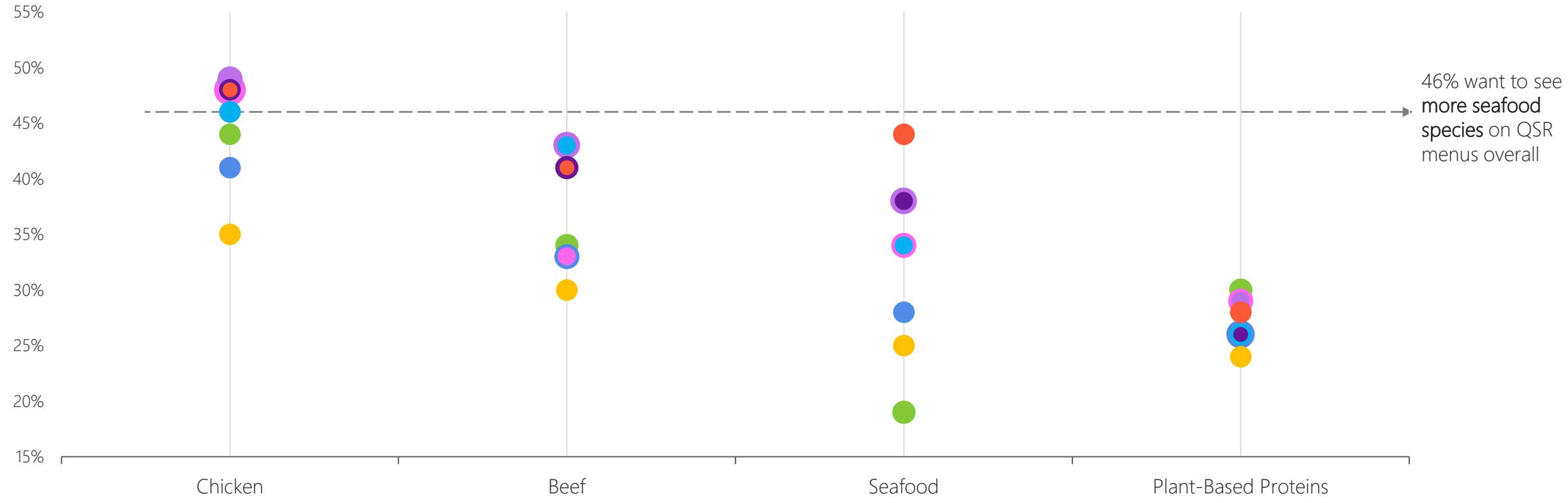
Consumers would like to have more seafood entrées on QSR menus, along with seafood appetizers and sandwiches.

« Plant-based proteins are not yet a priority for consumers, and less than a third are looking for more plant-based protein items at QSRs.

QSR – DISHES CONSUMERS WANT TO SEE MORE OF *BY PROTEIN TYPE*

among those who dine at QSRs weekly or more often

● Breakfast ● Soups ● Salads ● Appetizers ● Tacos ● Sandwiches ● Grain Bowls ● Entrées



Half of consumers are satisfied with current seafood offerings at QSRs.

« If more seafood species were added to QSR menus, satisfaction levels would likely increase from the half of consumers who are looking for more seafood variety at QSRs.

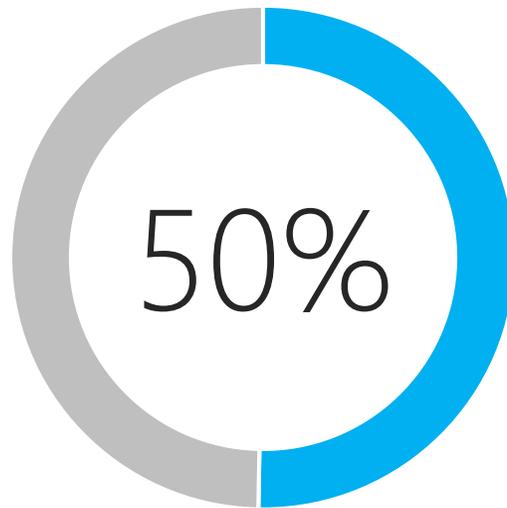
« Shrimp is very popular at QSRs, while only one in ten have pollock.

QSR – SATISFACTION WITH SEAFOOD OFFERING & TYPES OF SEAFOOD EATEN

among those who have had seafood at QSRs in past 6 months

SATISFACTION WITH SEAFOOD OFFERING

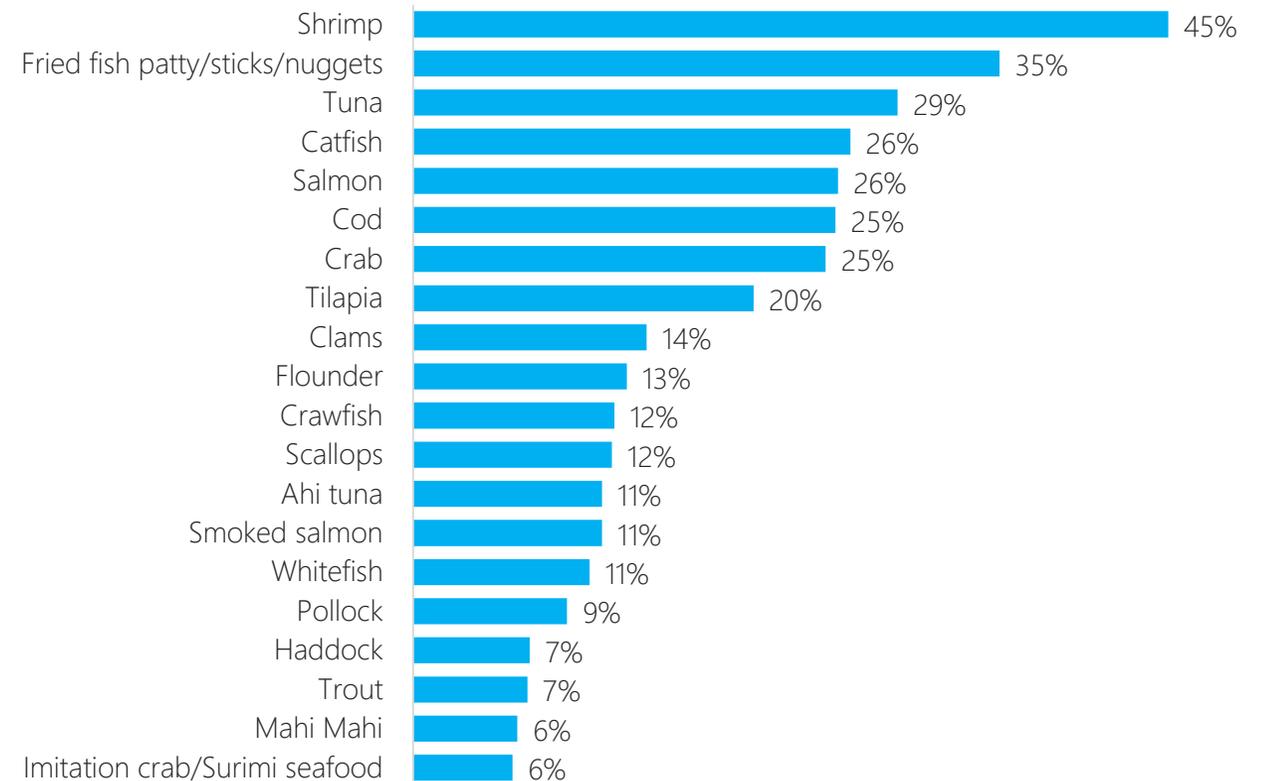
(top 2 box)



are satisfied with current QSR seafood offerings

SEAFOOD EATEN AT QSRs

(top 20 responses)

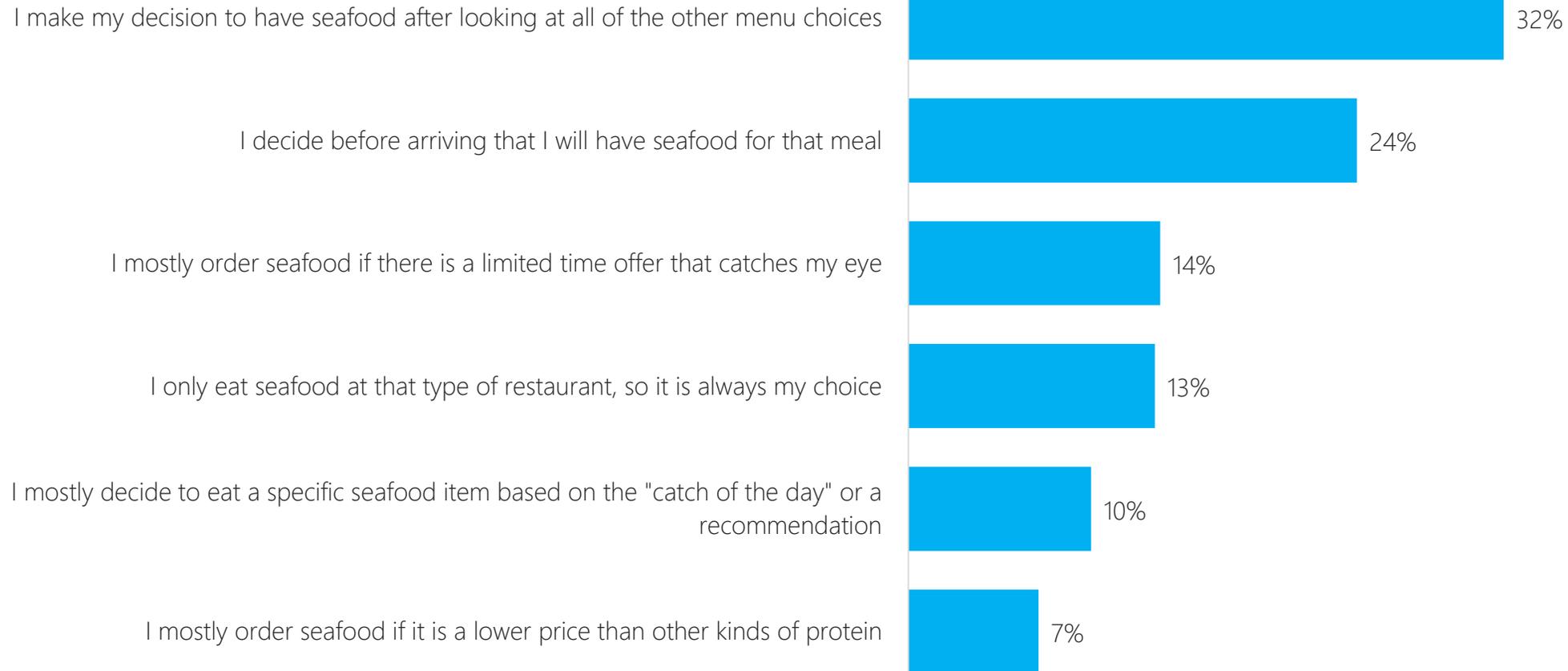


Most consumers decide to order seafood after reviewing other menu choices or before arriving at the QSR.

- « In-store marketing is critical given decisions are made at the time of ordering.
- « Staff recommendations and price points are not commonly part of consumers' decision-making process when ordering seafood at QSRs.

QSR – SEAFOOD ORDERING STRATEGY

among those who have had seafood at QSRs in past 6 months





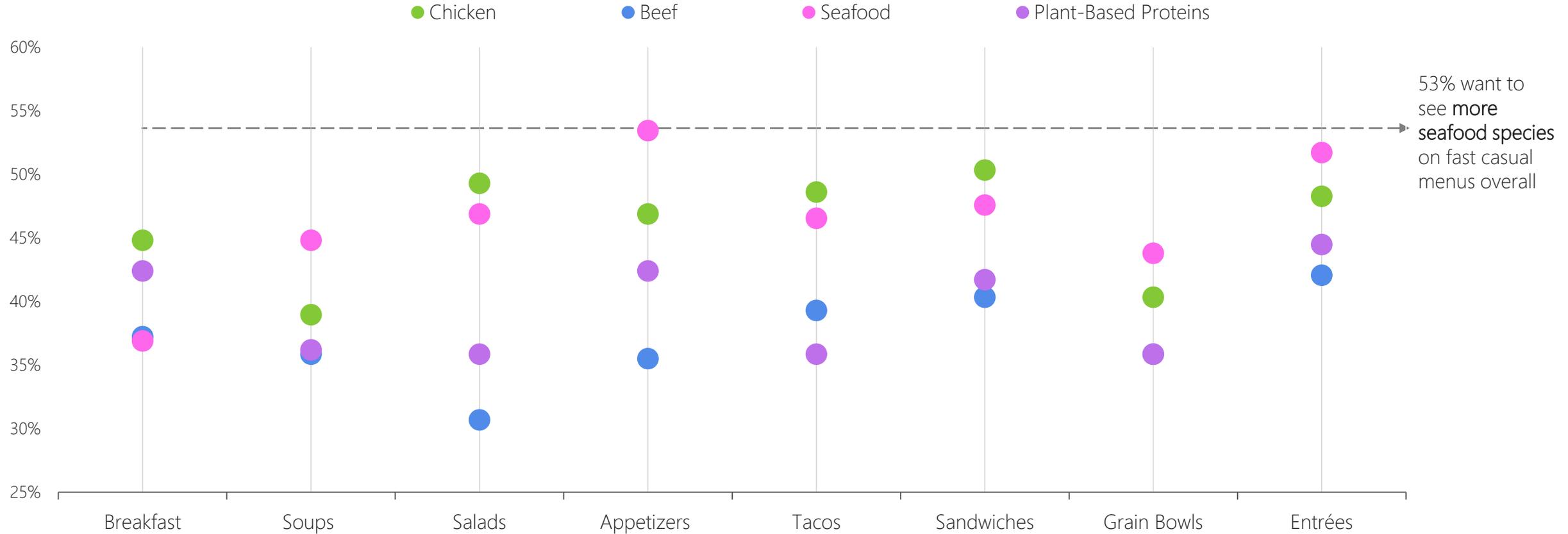
**seafood perceptions at
fast casual restaurants**

Half of consumers would like to see more seafood at fast casuals, especially in appetizers and entrées.

« As opposed to QSRs where chicken is the top protein consumers want to see more of, seafood is the top item that consumers would like to see more of at fast casual restaurants in the form of soups, appetizers, grain bowls, and entrées.

FAST CASUAL – DISHES CONSUMERS WANT TO SEE MORE OF *BY DISH TYPE*

among those who dine at fast casual restaurants weekly or more often



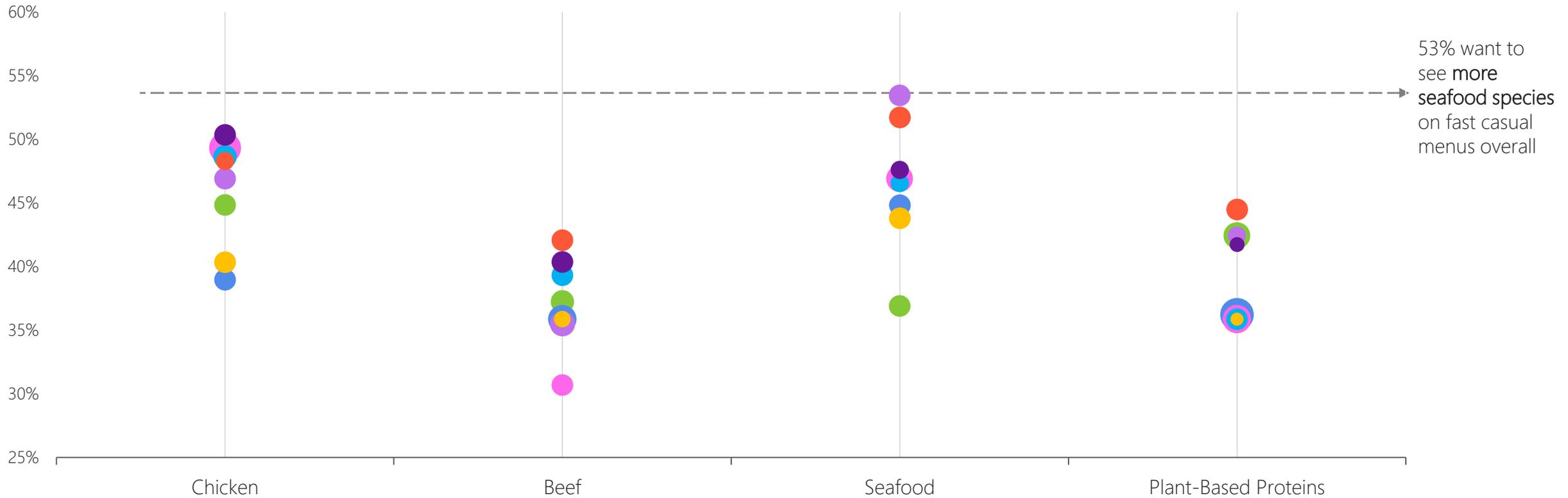
Consumers want to see more seafood at fast casual restaurants than beef and plant-based proteins.

« Breakfast is the only area where seafood isn't a good fit at fast casual restaurants.

FAST CASUAL – DISHES CONSUMERS WANT TO SEE MORE OF *BY PROTEIN TYPE*

among those who dine at fast casual restaurants weekly or more often

● Breakfast ● Soups ● Salads ● Appetizers ● Tacos ● Sandwiches ● Grain Bowls ● Entrées



Nearly two in three are satisfied with current seafood offerings at fast casual restaurants.

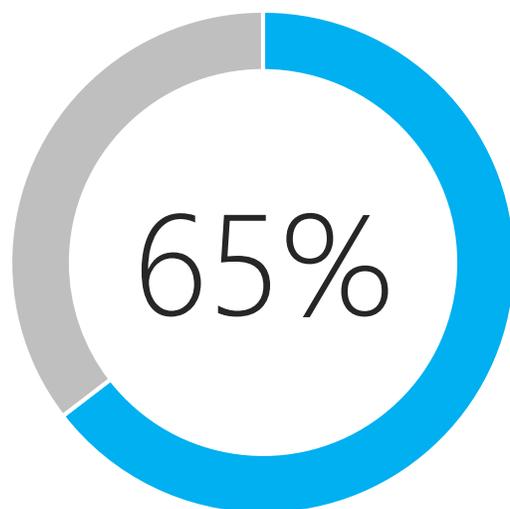
« Shrimp is the most common seafood eaten at fast casual restaurants, followed by crab, catfish, and salmon.

FAST CASUAL – SATISFACTION WITH SEAFOOD OFFERING & TYPES OF SEAFOOD EATEN

among those who have had seafood at fast casual restaurants in past 6 months

SATISFACTION WITH SEAFOOD OFFERING

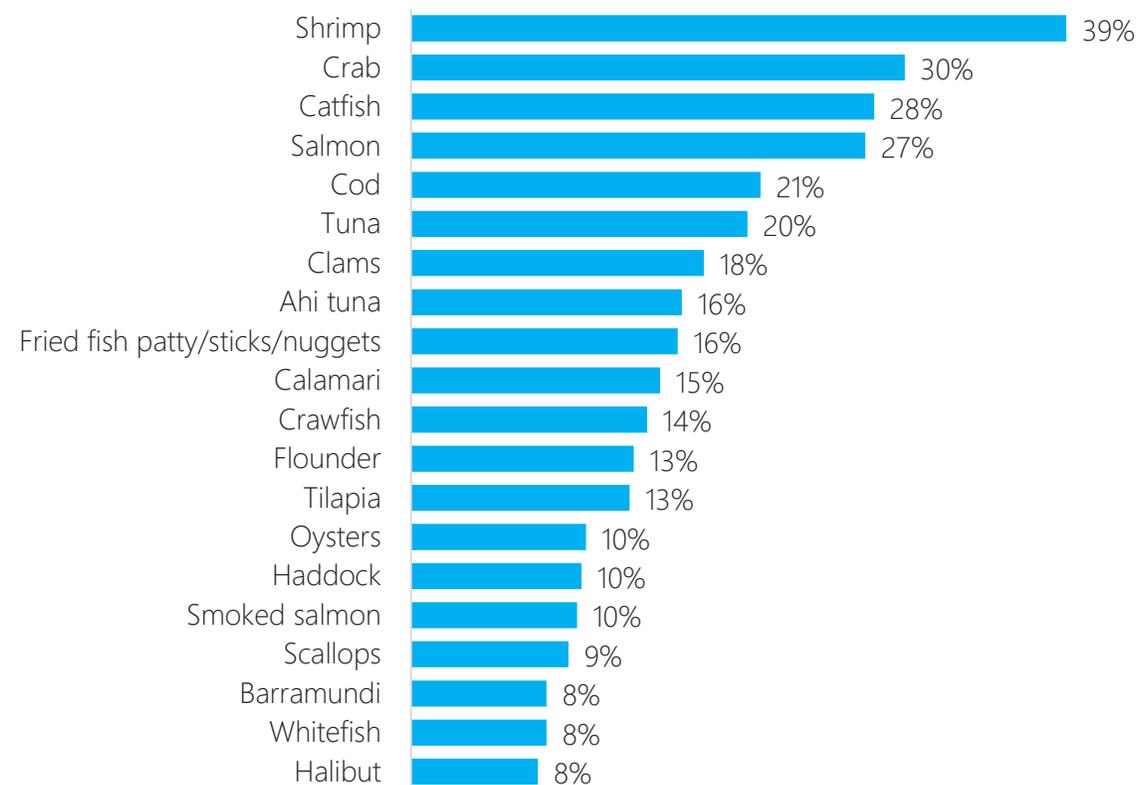
(top 2 box)



are satisfied with current fast casual restaurant seafood offerings

SEAFOOD EATEN AT FAST CASUAL RESTAURANTS

(top 20 responses)

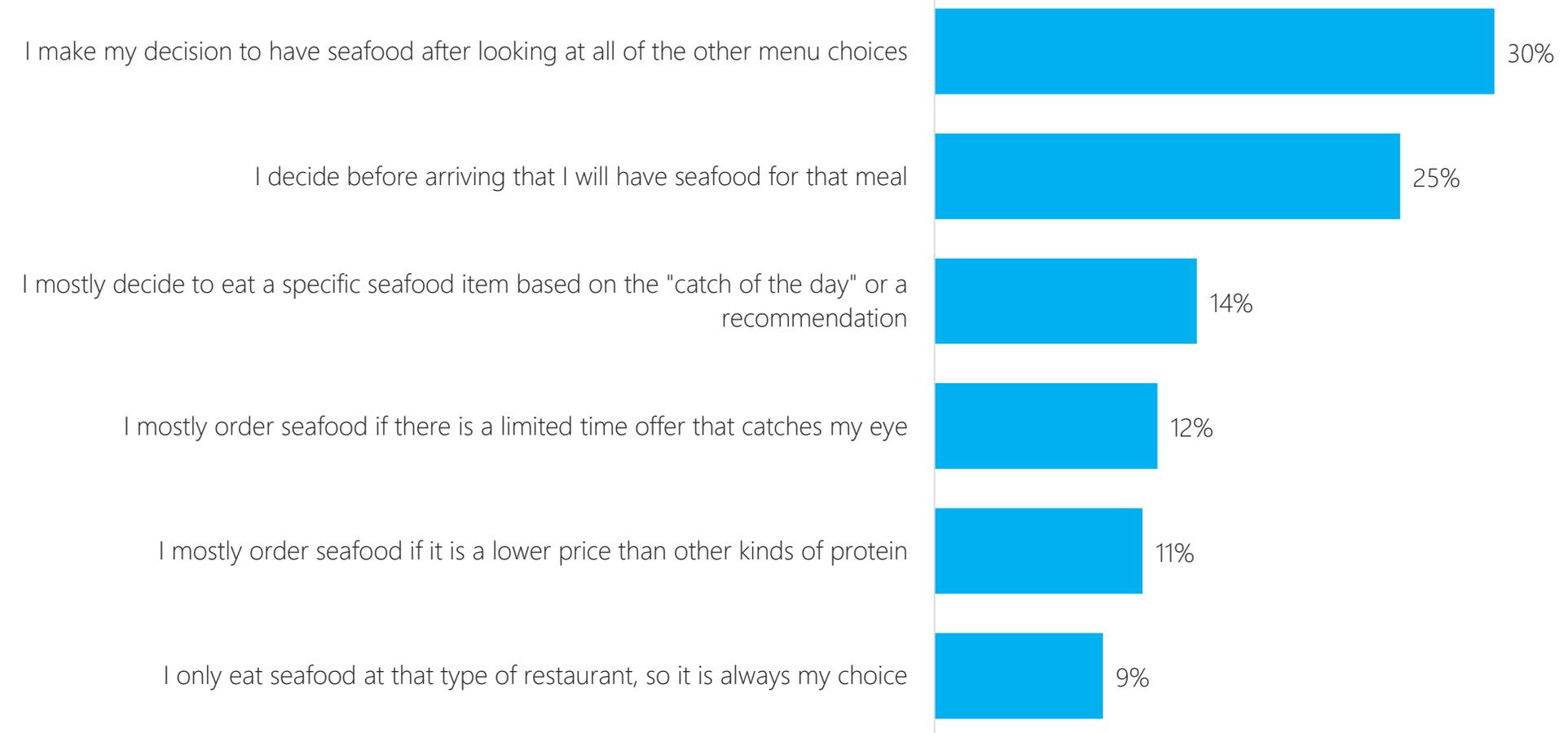


Similar to QSRs, most consumers decide to order seafood after reviewing other menu choices or before arriving at the fast casual restaurant.

« Deciding whether or not to order seafood at a fast casual restaurant is not impacted by price points, routine, LTOs, or staff recommendations.

FAST CASUAL – SEAFOOD ORDERING STRATEGY

among those who have had seafood at fast casual restaurants in past 6 months





**seafood perceptions at
casual dining restaurants**

Over half of consumers would like to see more seafood on casual dining menus in multiple dish types.

« Casual dining restaurants would benefit from offering more seafood in soups, salads, appetizers, tacos, grain bowls, and entrées.

CASUAL DINING – DISHES CONSUMERS WANT TO SEE MORE OF *BY DISH TYPE*

among those who dine at casual dining restaurants weekly or more often



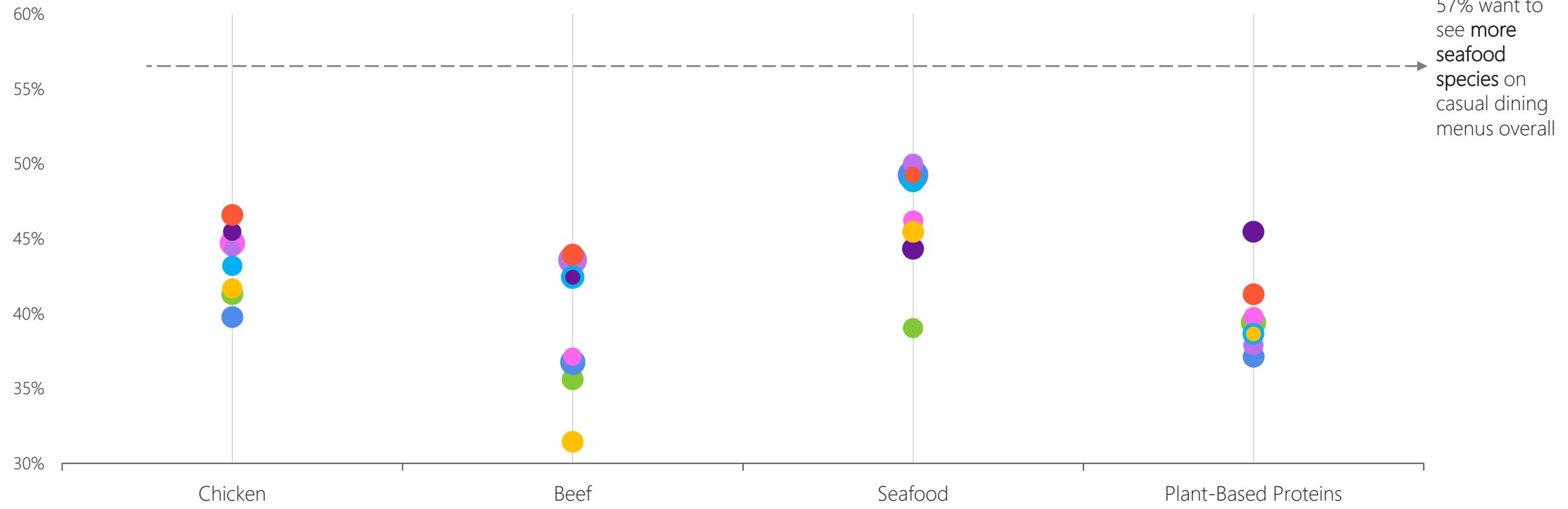
Aside from breakfast items, consumers would like to see more seafood items on casual dining menus than chicken, beef, or plant-based protein items.

« Beef items are of less interest than plant-based protein items in grain bowls, breakfast items, salads, and sandwiches at casual dining restaurants.

CASUAL DINING – DISHES CONSUMERS WANT TO SEE MORE OF *BY PROTEIN TYPE*

among those who dine at casual dining restaurants weekly or more often

● Breakfast ● Soups ● Salads ● Appetizers ● Tacos ● Sandwiches ● Grain Bowls ● Entrées



Three in four are satisfied with current seafood offerings at casual dining restaurants.

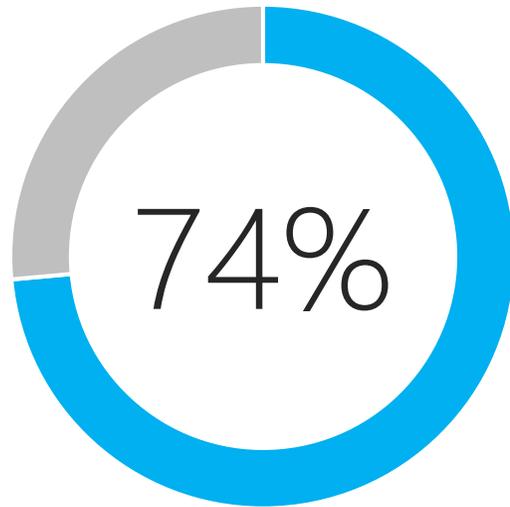
« Shrimp is the most common seafood eaten at casual dining restaurants, followed by catfish, crab, calamari, salmon, and lobster.

CASUAL DINING – SATISFACTION WITH SEAFOOD OFFERING & TYPES OF SEAFOOD EATEN

among those who have had seafood at casual dining restaurants in past 6 months

SATISFACTION WITH SEAFOOD OFFERING

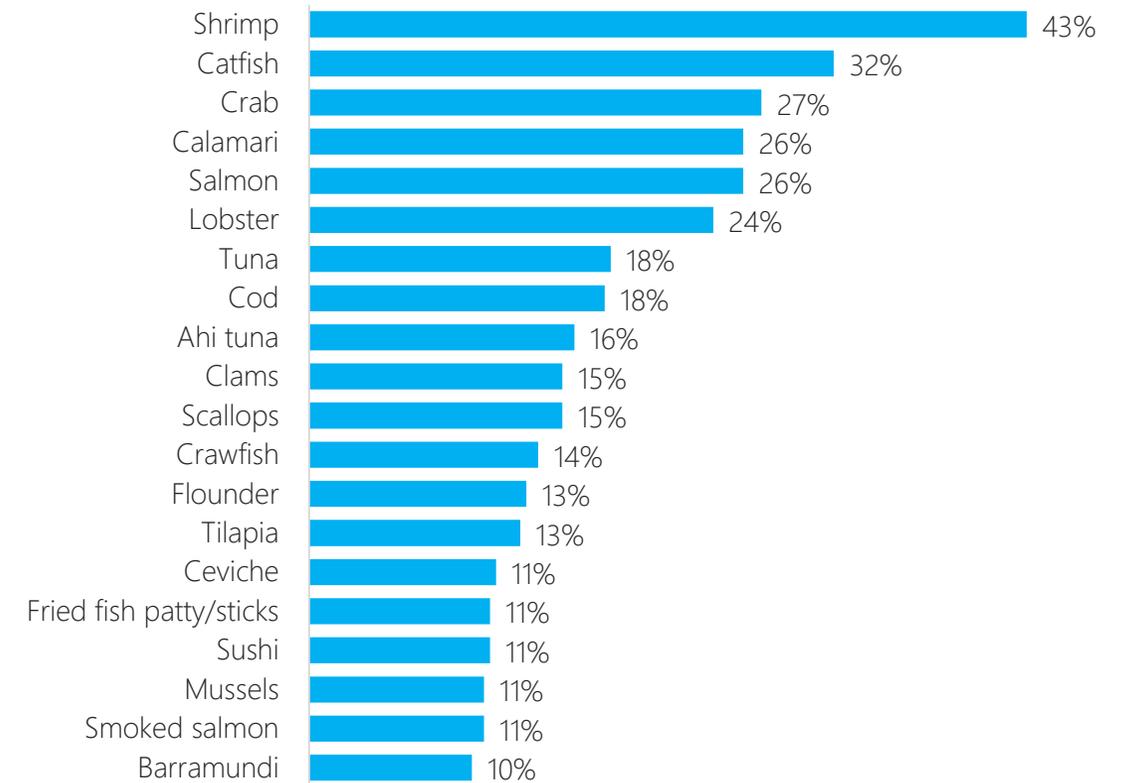
(top 2 box)



are satisfied with current casual dining restaurant seafood offerings

SEAFOOD EATEN AT CASUAL DINING RESTAURANTS

(top 20 responses)

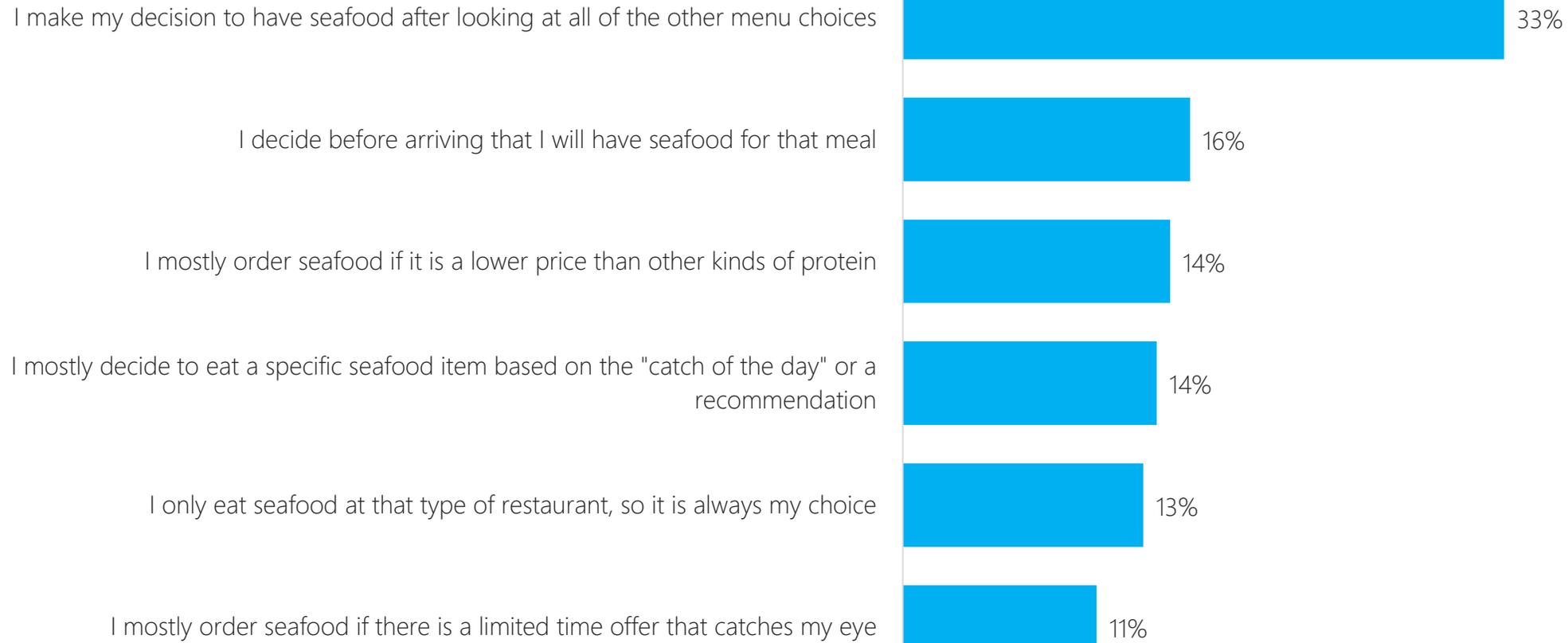


The decision to order seafood at casual dining restaurants is most often done after looking at all menu options.

« Compared to QSRs and fast casual restaurants, fewer consumers decide to have seafood before arriving at casual dining restaurants.

CASUAL DINING – SEAFOOD ORDERING STRATEGY

among those who have had seafood at casual dining restaurants in past 6 months

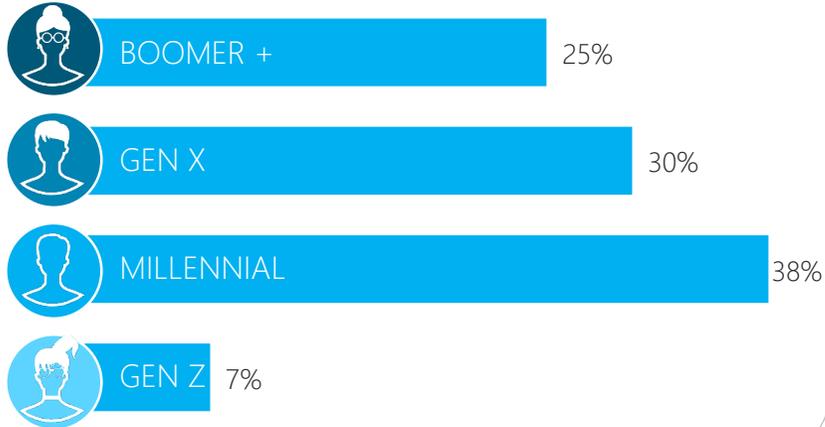


consumer profile

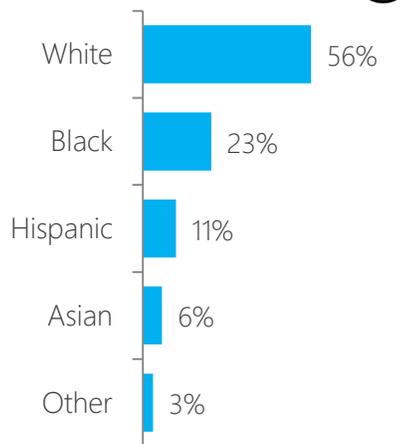


1000 CONSUMERS

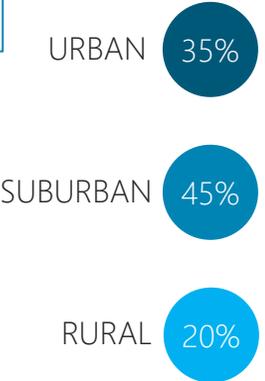
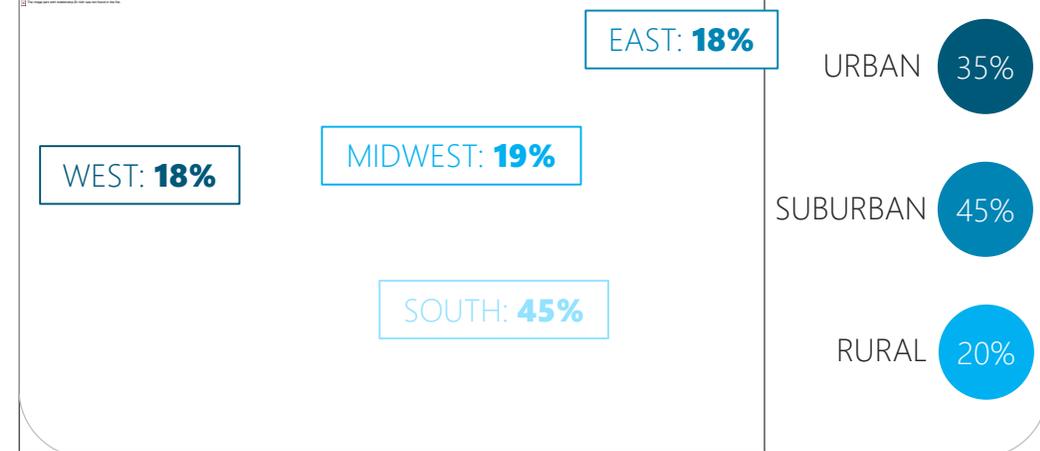
GENERATION



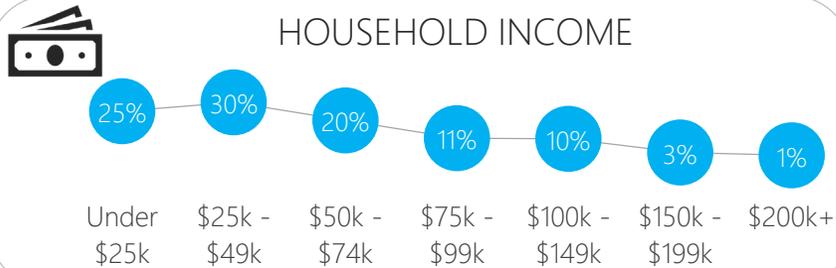
ETHNICITY



REGION



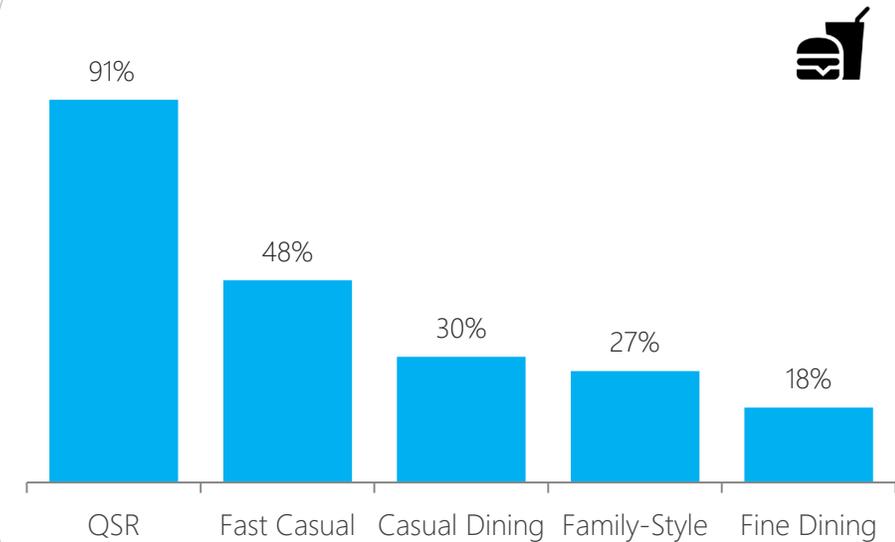
HOUSEHOLD INCOME



EMPLOYMENT



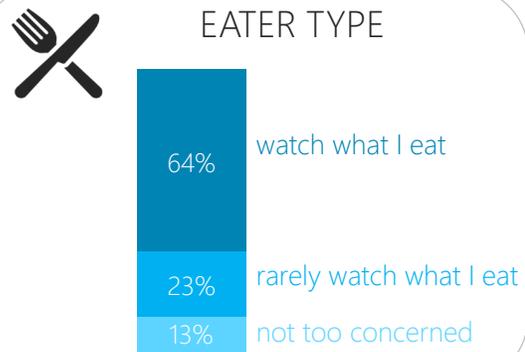
EAT AWAY FROM HOME ONCE PER WEEK AT...



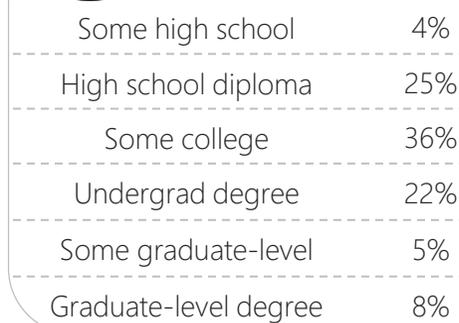
GENDER



EATER TYPE



EDUCATION





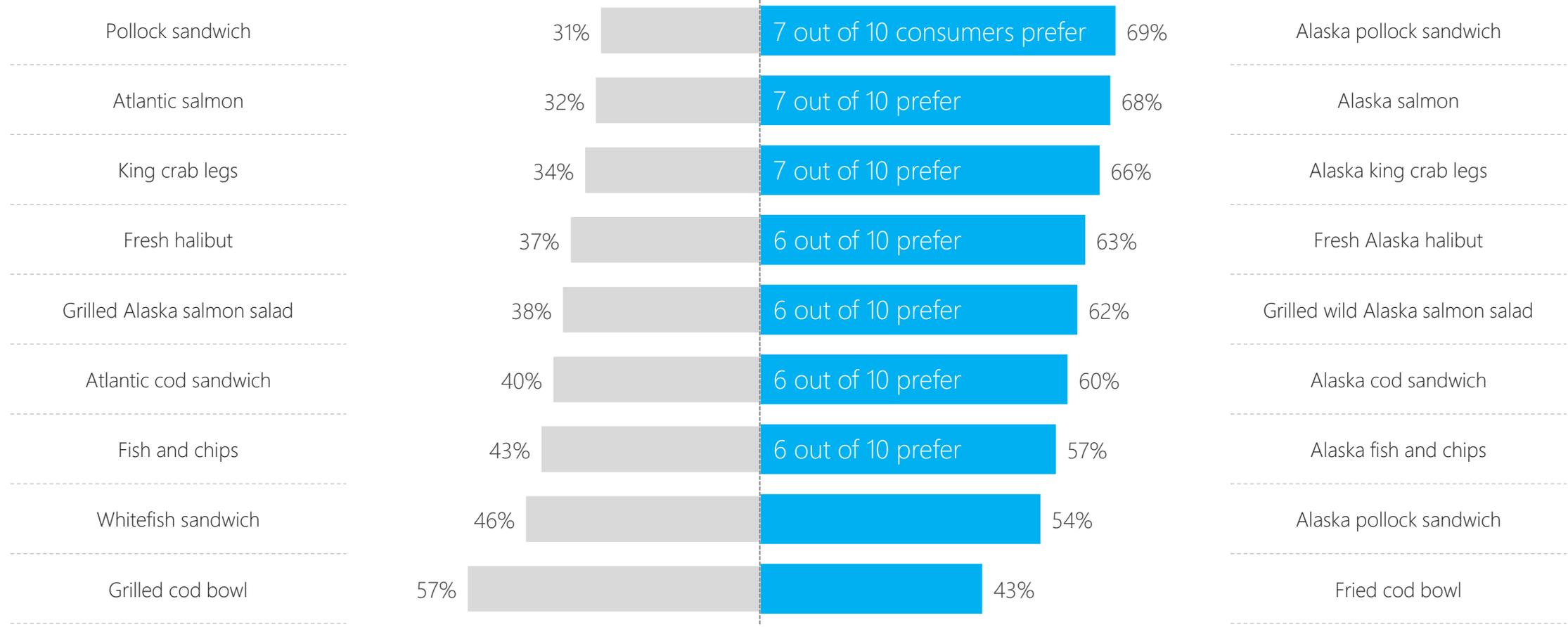
appendix

Consumers prefer seafood that specifies its origin on menus, and "Alaska" or "wild" descriptors are favored.

« Adding "wild" within the menu description of Alaska seafood increases its appeal.
 « In most cases, consumers are one and a half to two times more likely to order seafood when "Alaska" is present in the name of the dish.

PREFERRED SEAFOOD MENU ITEM NAME AT CHAIN RESTAURANTS

do you prefer...



E1: For each of the following pairs of menu items, please indicate which one you would be more likely to order at a chain restaurant. (n=1000)

NUMBER OF MONTHLY OCCASIONS EATING DIFFERENT PROTEINS AT CHAIN RESTAURANTS BY GENERATION

NUMBER OF MONTHLY OCCASIONS EATING DIFFERENT PROTEINS AT CHAIN RESTAURANTS BY GENERATION

	Total	Gen Z	Millennial	Gen X	Boomer
Beef - QSR	3.7	3.1	3.6	4.0	3.5
Beef - Fast Casual	1.6	1.5	1.8	1.8	1.0
Beef - Casual Dining	1.2	1.3	1.4	1.3	0.8
Chicken - QSR	2.7	2.9	3.0	3.0	1.8
Chicken - Fast Casual	1.5	1.8	1.9	1.6	0.9
Chicken - Casual Dining	1.1	1.2	1.3	1.2	0.7
Fried fish - QSR	1.1	1.5	1.2	1.2	0.8
Fried fish - Fast Casual	0.9	1.1	1.1	1.0	0.4
Fried fish - Casual Dining	0.8	1.2	0.9	0.8	0.3
Grilled/Baked Fish - QSR	0.9	1.2	1.2	1.0	0.4
Grilled/Baked Fish - Fast Casual	0.9	1.3	1.1	0.9	0.4
Grilled/Baked Fish - Casual Dining	0.9	0.9	1.1	1.1	0.4
Shellfish - QSR	0.8	1.1	1.1	0.9	0.2
Shellfish - Fast Casual	0.8	1.0	1.1	0.8	0.4
Shellfish - Casual Dining	1.0	1.0	1.2	1.1	0.6

TYPES OF SEAFOOD EATEN BY SEGMENT

(among those who have had seafood at each segment in past 6 months)

TYPES OF SEAFOOD EATEN (top 30 responses)

QSR		Fast Casual		Casual Dining	
Shrimp	45%	Shrimp	39%	Shrimp	43%
Fried fish patty/sticks	35%	Crab	30%	Catfish	32%
Tuna	29%	Catfish	28%	Crab	27%
Catfish	26%	Salmon	27%	Calamari	26%
Salmon	26%	Cod	21%	Salmon	26%
Cod	25%	Tuna	20%	Lobster	24%
Crab	25%	Clams	18%	Tuna	18%
Tilapia	20%	Ahi tuna	16%	Cod	18%
Clams	14%	Fried fish patty/sticks	16%	Ahi tuna	16%
Flounder	13%	Calamari	15%	Clams	15%
Crawfish	12%	Crawfish	14%	Scallops	15%
Scallops	12%	Flounder	13%	Crawfish	14%
Ahi tuna	11%	Tilapia	13%	Flounder	13%
Smoked salmon	11%	Oysters	10%	Tilapia	13%
Whitefish	11%	Haddock	10%	Ceviche	11%
Pollock	9%	Smoked salmon	10%	Fried fish patty/sticks	11%
Haddock	7%	Scallops	9%	Sushi	11%
Trout	7%	Barramundi	8%	Mussels	11%
Mahi Mahi	6%	Whitefish	8%	Smoked salmon	11%
Imitation crab/Surimi	6%	Halibut	8%	Barramundi	10%
Snapper	5%	Mahi Mahi	8%	Haddock	10%
Grouper	5%	Snapper	6%	Oysters	9%
Swai	3%	Pollock	6%	Snapper	9%
Sole	2%	Trout	6%	Whitefish	8%
Hake	2%	Grouper	6%	Mahi Mahi	8%
Scrod	1%	Scrod	4%	Swordfish	8%
		Sole	4%	Grouper	7%
		Imitation crab/Surimi	4%	Trout	7%
		Sablefish/Black cod	3%	Imitation crab/Surimi	6%
		Swai	3%	Sea bass	6%

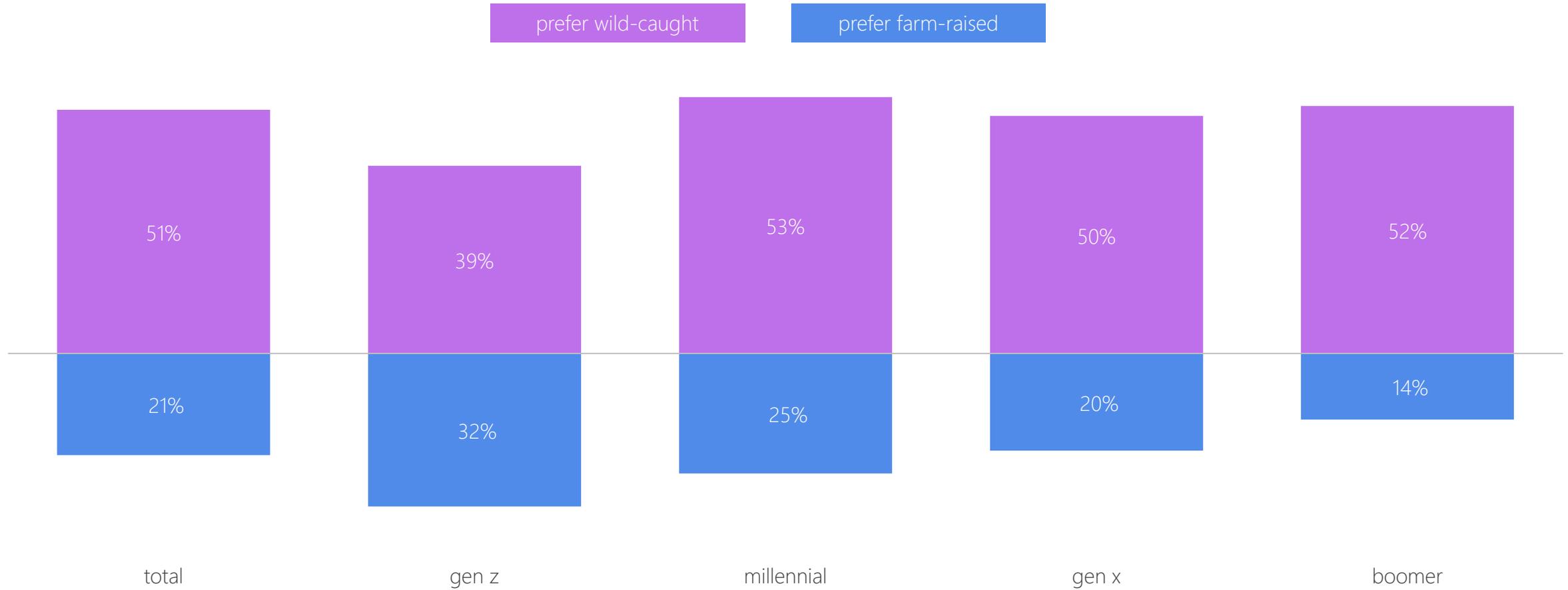
SEAFOOD ORDERING STRATEGY BY SEGMENT

(among those who have had seafood at each segment in past 6 months)

	SEAFOOD ORDERING STRATEGY		
	QSR	Fast Casual	Casual Dining
I make my decision to have seafood after looking at all other menu choices	32%	30%	33%
I decide before arriving that I will have seafood for that meal	24%	25%	16%
I mostly order seafood if there is a limited time offer that catches my eye	14%	12%	11%
I only eat seafood at that type of restaurant, so it is always my choice	13%	9%	13%
I mostly decide to eat a specific seafood item based on the "catch of the day" or a recommendation	10%	14%	14%
I mostly order seafood if it is a lower price than other kinds of protein	7%	11%	14%

FARM-RAISED VS. WILD-CAUGHT PREFERENCE BY GENERATION

SEAFOOD PREFERENCE: FARM-RAISED VS. WILD-CAUGHT BY GENERATION

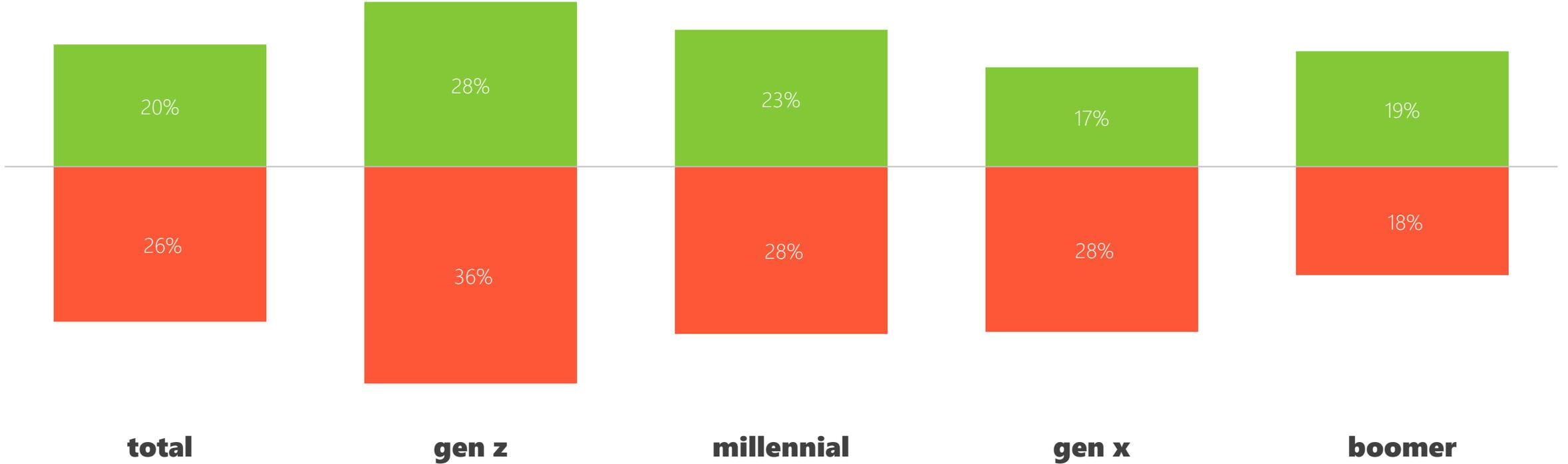


CHANGE IN PAST TWO YEAR SEAFOOD CONSUMPTION BY GENERATION

CHANGE IN AFH SEAFOOD CONSUMPTION IN PAST TWO YEARS BY GENERATION

consumption increased

consumption decreased



PROTEIN NET PROMOTER SCORES

NET PROMOTER SCORE: LIKELIHOOD TO RECOMMEND DIFFERENT PROTEINS

	Promoters <i>(score of 9 or 10 / very likely to recommend)</i>	Passives <i>(score of 7 or 8 / somewhat likely to recommend)</i>	Detractors <i>(score of 0 to 6 / not likely to recommend)</i>	Net Promoter Score <i>(promoters - detractors)</i>
USDA prime sirloin	40%	25%	35%	+6%
Angus beef	40%	24%	36%	+4%
Alaska salmon	36%	22%	43%	-7%
Alaska seafood	34%	25%	41%	-6%
USDA organic chicken	33%	25%	42%	-9%
New England seafood	30%	22%	48%	-18%
Atlantic salmon	29%	25%	47%	-18%
Louisiana / gulf seafood	28%	24%	48%	-20%
Farm-to-table pork	26%	20%	54%	-28%
Kobe beef	25%	19%	55%	-30%
Farmed seafood	20%	23%	57%	-37%
Asian seafood	19%	21%	60%	-41%
Veggie burger that imitates meat	17%	18%	65%	-49%