ALASKA SEAFOOD AT FOODSERVICE 2022

(refresh of 2019 study)

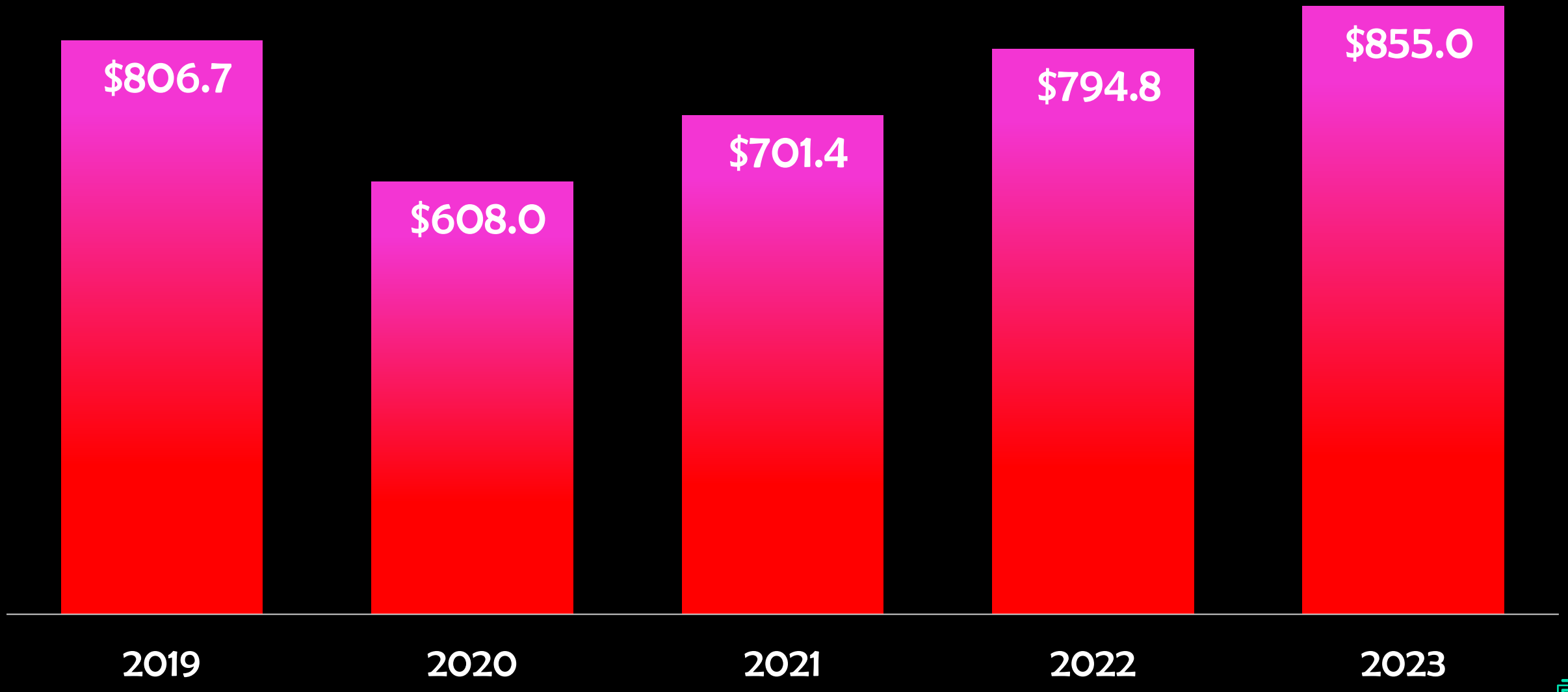
Customstudies | DATASSENTIAL

THE STATE OF FOODSERVICE

DATASSENTIAL

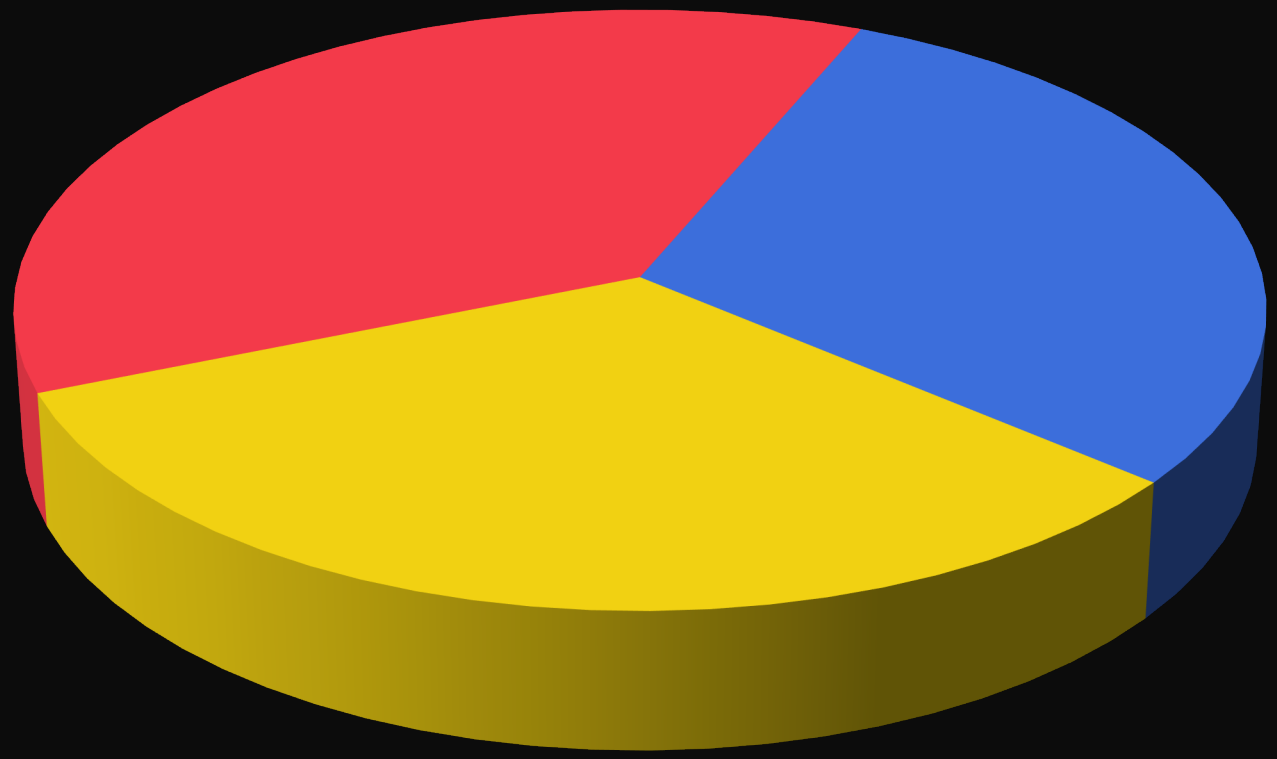
Consumer Spend.

prepared food & non-alcoholic beverages (in billions)

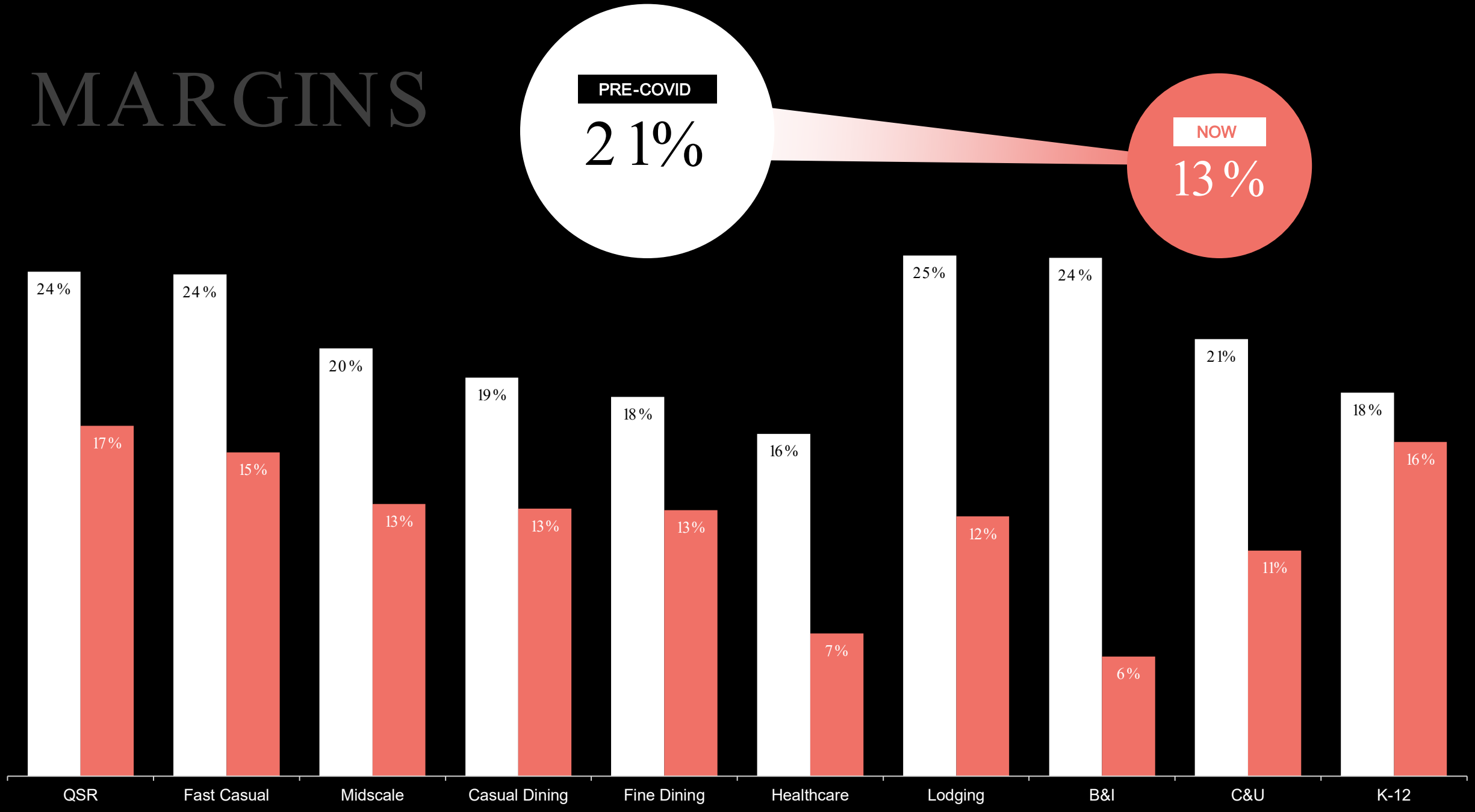


New restaurant introductions and limited-time offers have nearly returned to pre-COVID levels.

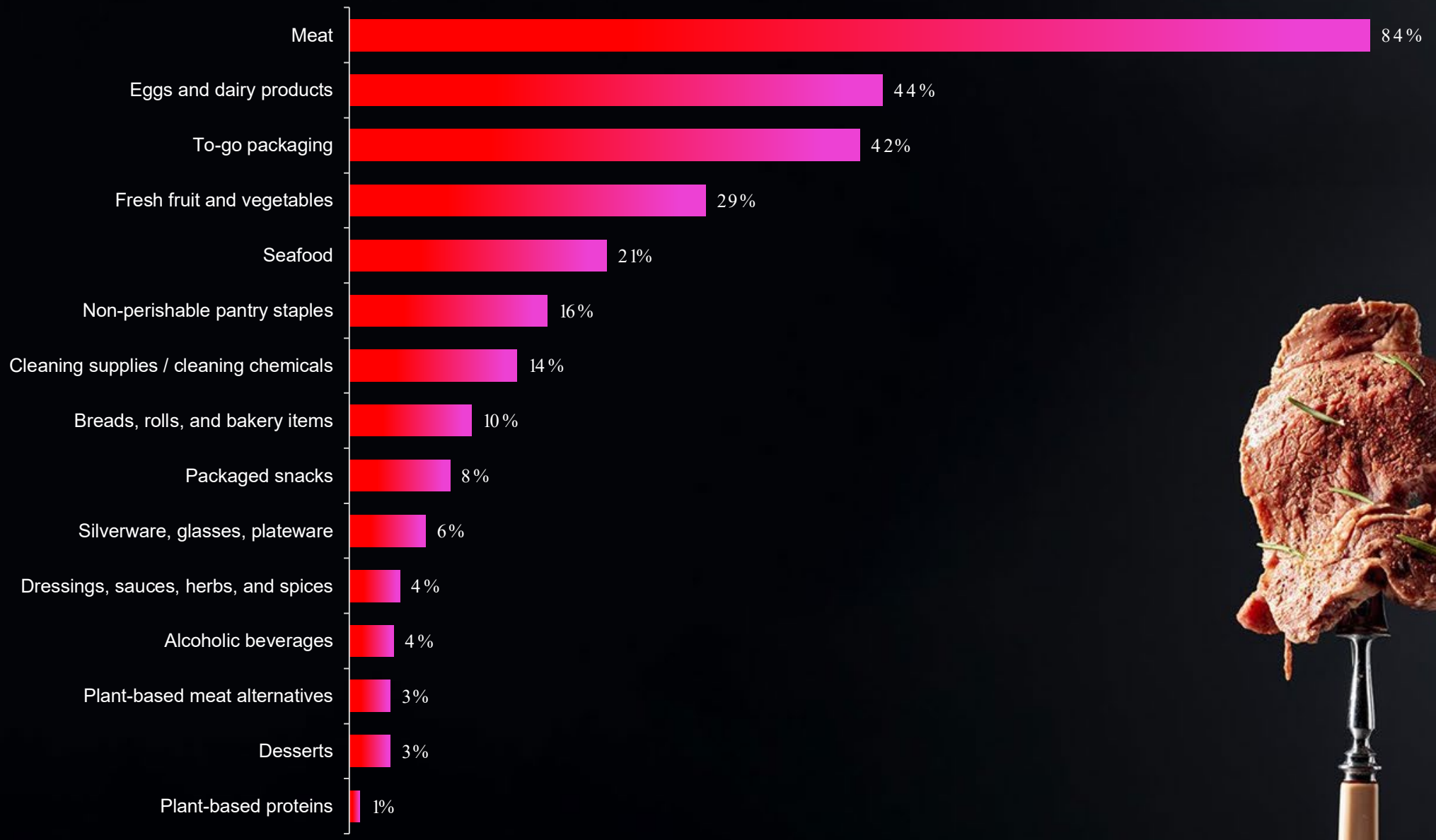
Greatest Operator Challenge.

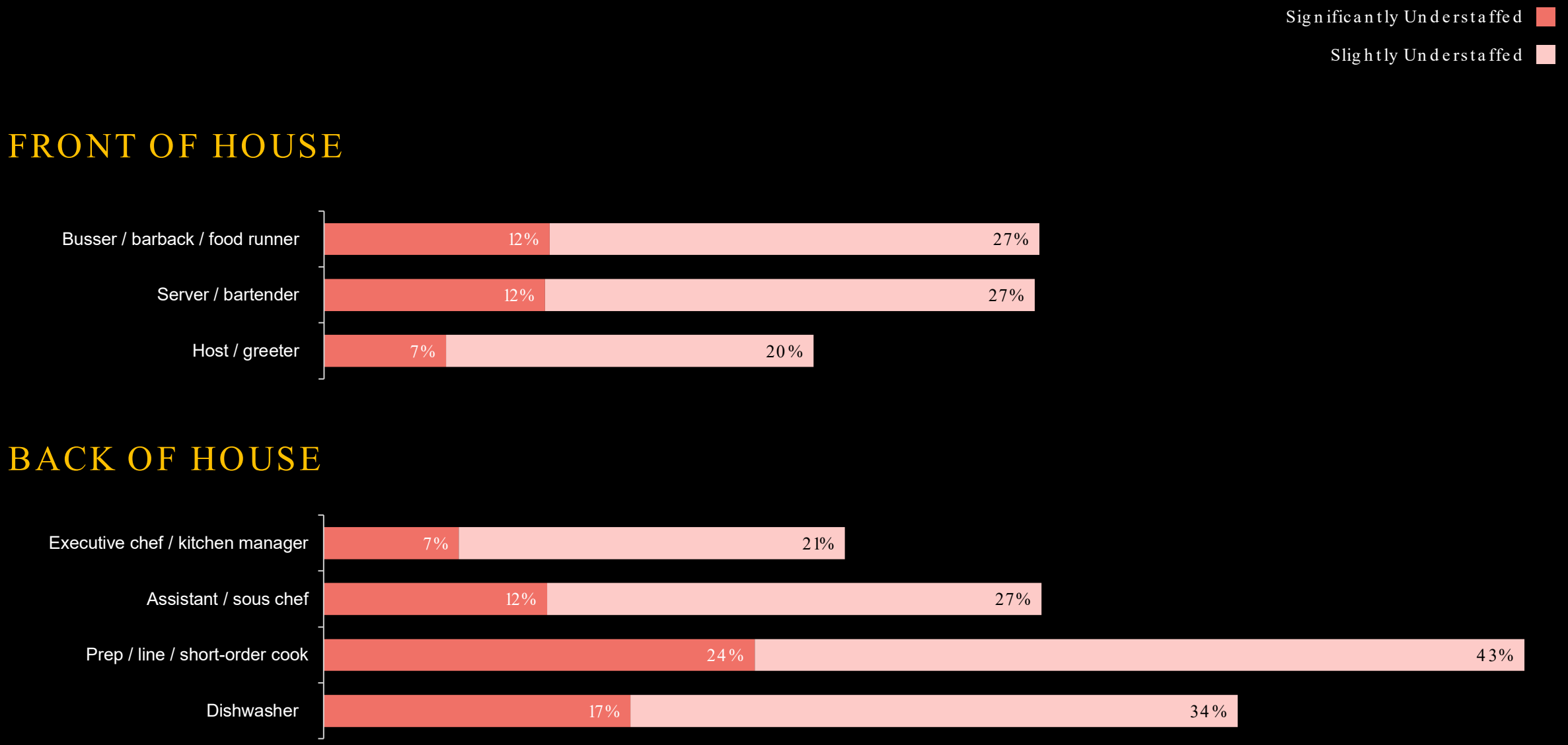


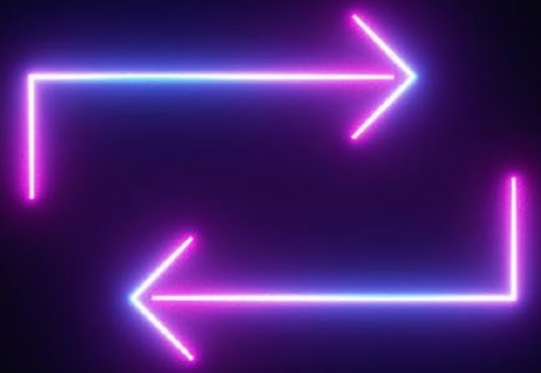
MARGINS


PRE-COVID
21%
NOW
13%
24%
17%
24%
15%
20%
13%
19%
13%
18%
13%
16%
7%
25%
12%
24%
6%
21%
11%
18%
16%
QSR
Fast Casual
Midscale
Casual Dining
Fine Dining
Healthcare
Lodging
B&I
C&U
K-12

“WHICH CATEGORIES ARE CURRENTLY SHOWING THE MOST INFLATION?”




Significantly Understaffed
Slightly Understaffed
FRONT OF HOUSE
Busser / barback / food runner
12%
27%
Server / bartender
12%
27%
Host / greeter
7%
20%
BACK OF HOUSE
Executive chef / kitchen manager
7%
21%
Assistant / sous chef
12%
27%
Prep / line / short-order cook
24%
43%
Dishwasher
17%
34%



Operators' purchasing patterns currently are in flux

77%

have switched products in reaction to current challenges with supply chain, labor, and inflation

HOW OPERATORS ARE REACTING TO THE CURRENT ENVIRONMENT

shifting to value tier products

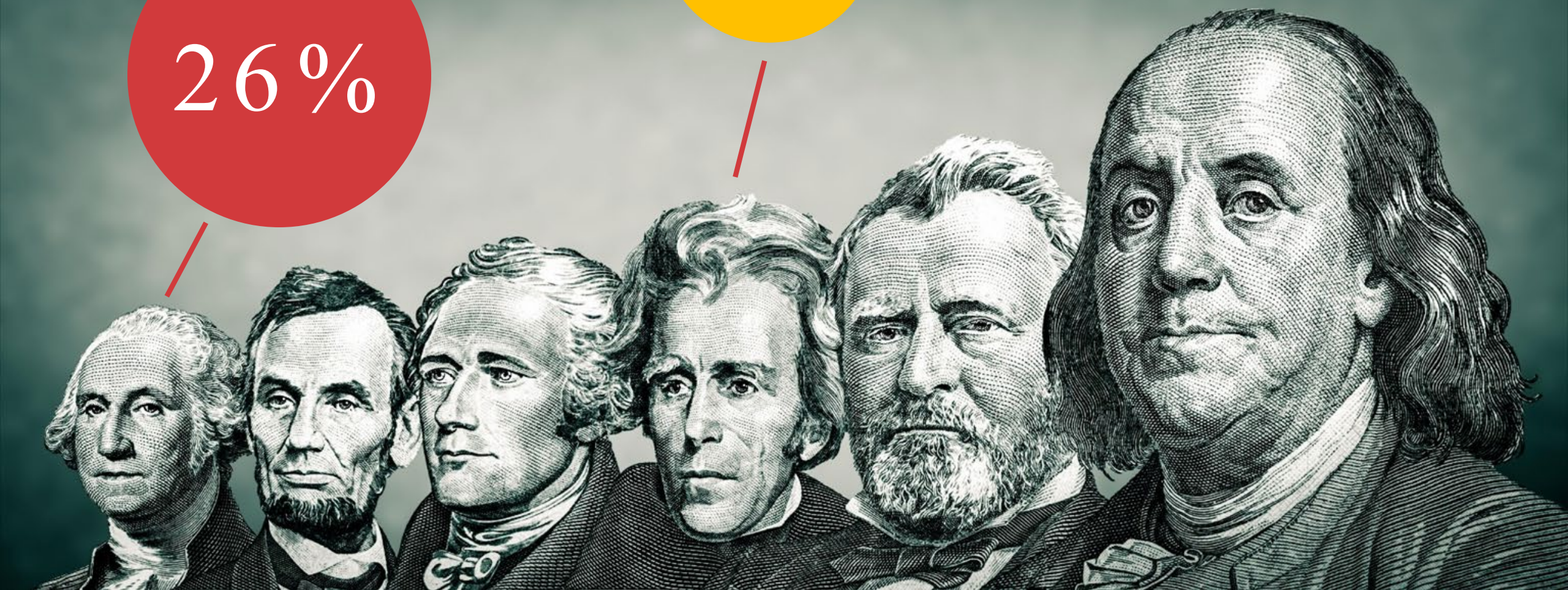
26 %

shifting to mid tier products

17 %

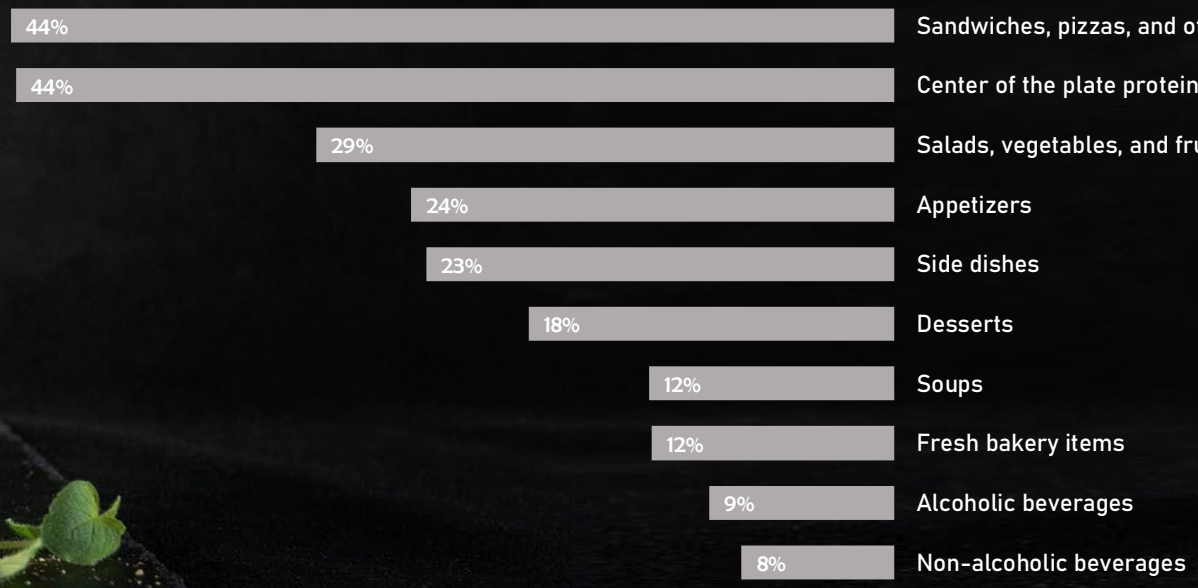
shifting to premium products

6 %

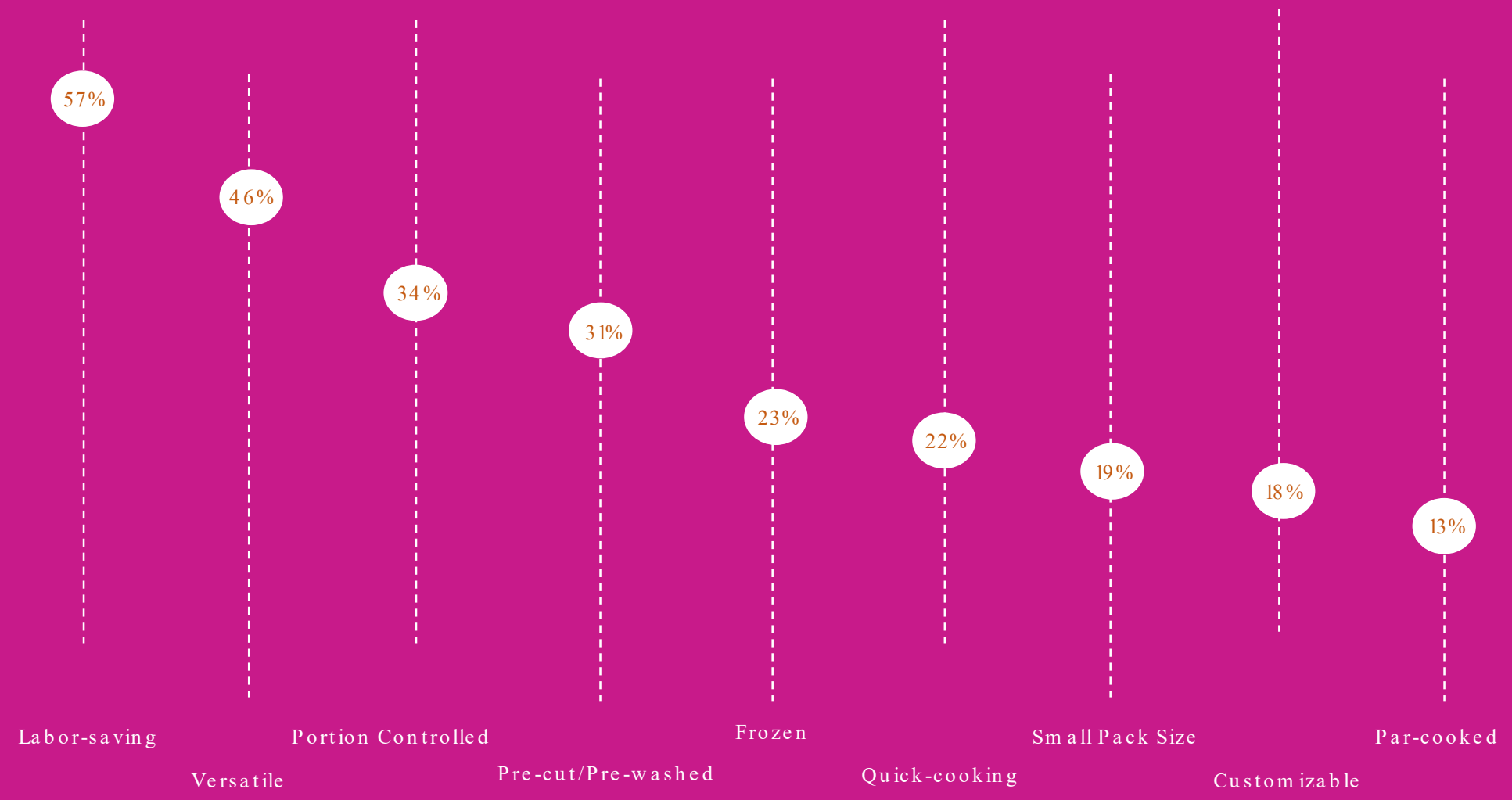


Operators look first to entrees for future menu innovation.

In which of the following categories are you likely to focus your innovation efforts?



In the short term, operators will naturally look first to products that can save time, money, and especially labor.



this study

OBJECTIVES

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

// fielded july 2022

METHOD

- ✓ Online survey of 1,000 consumers who…
  - ✓ eat at foodservice 1+ times a week
  - ✓ eat fish or shellfish at home or away from home 2+ times a month (updated 2022)
  - ✓ *note: 2019 survey data was down-based to match 2022 respondent qualifications so will not match the 2019 report.*
  - ✓ *significant differences versus 2019 are noted with ↑↓*

seafood overview & consumption habits / preferences

FOODSERVICE SEGMENTS

MenuTrends

limited service (LSR)

QSR
counter service
focus: speed and value
check avg: <$8

FAST CASUAL
counter service
focus: customization and quality ingredients
check avg: >$8

ONSITE
cafeterias
C&U
B&I

full service (FSR)

CASUAL
waiter service
focus: shared plates and bar menus
serves alcohol
check avg: $12-20

FINE DINE
high-end wait service
focus: chef-driven menu
serves alcohol
check avg: >$30

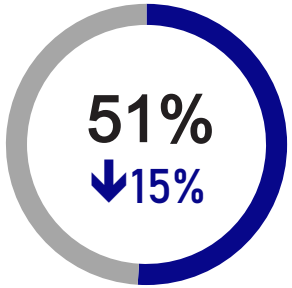
Casual and fine dining restaurants are the best venues for seafood and where consumers are most likely to order it.

- However, seafood consumption at QSR, fast casual, and casual dining is down vs. 2019.

MONTHLY CONSUMPTION OF SEAFOOD AT DIFFERENT LOCATIONS

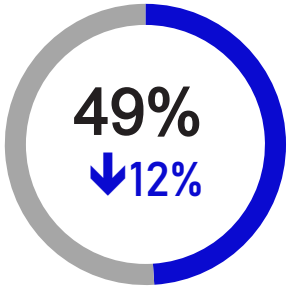
among those who dine at each location at least once every couple of months

QSR



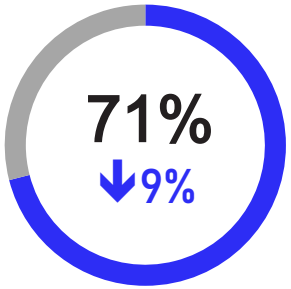
eat seafood at QSR chains in a typical month

FAST CASUAL



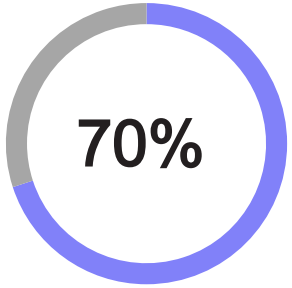
eat seafood at fast casual chains in a typical month

CASUAL DINING



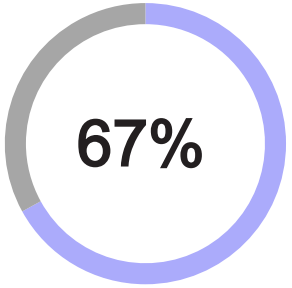
eat seafood at casual dining chains in a typical month

FINE DINING*



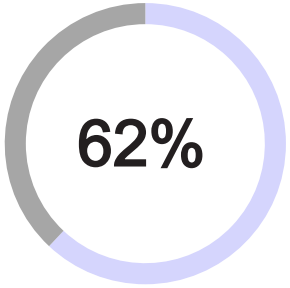
eat seafood at fine dining restaurants in a typical month

C&U*



eat seafood at C&U cafeterias in a typical month

B&I*



eat seafood at B&I cafeterias in a typical month

**not asked in 2019*

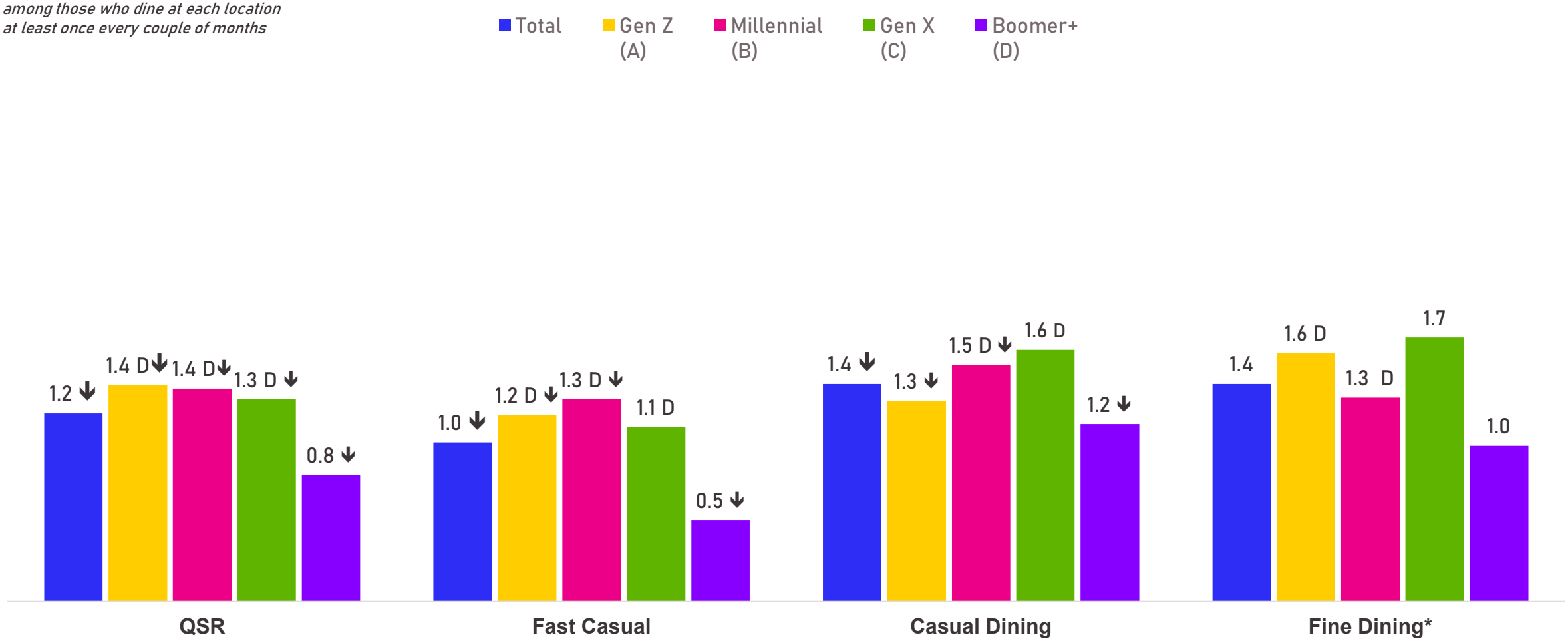
↑↓ = significantly higher / lower than 2019

A4: In a typical month, how many times do you eat any type of fish, shellfish, or seafood at the following types of restaurants or cafeterias? Numeric free text. (n=980 | 946 | 904 | 668 | 256 | 288)

Boomers lag other generations in their restaurant seafood consumption.

NUMBER OF MONTHLY OCCASIONS EATING SEAFOOD AT **RESTAURANTS**

among those who dine at each location at least once every couple of months



*not asked in 2019

↑↓ = significantly higher / lower than 2019

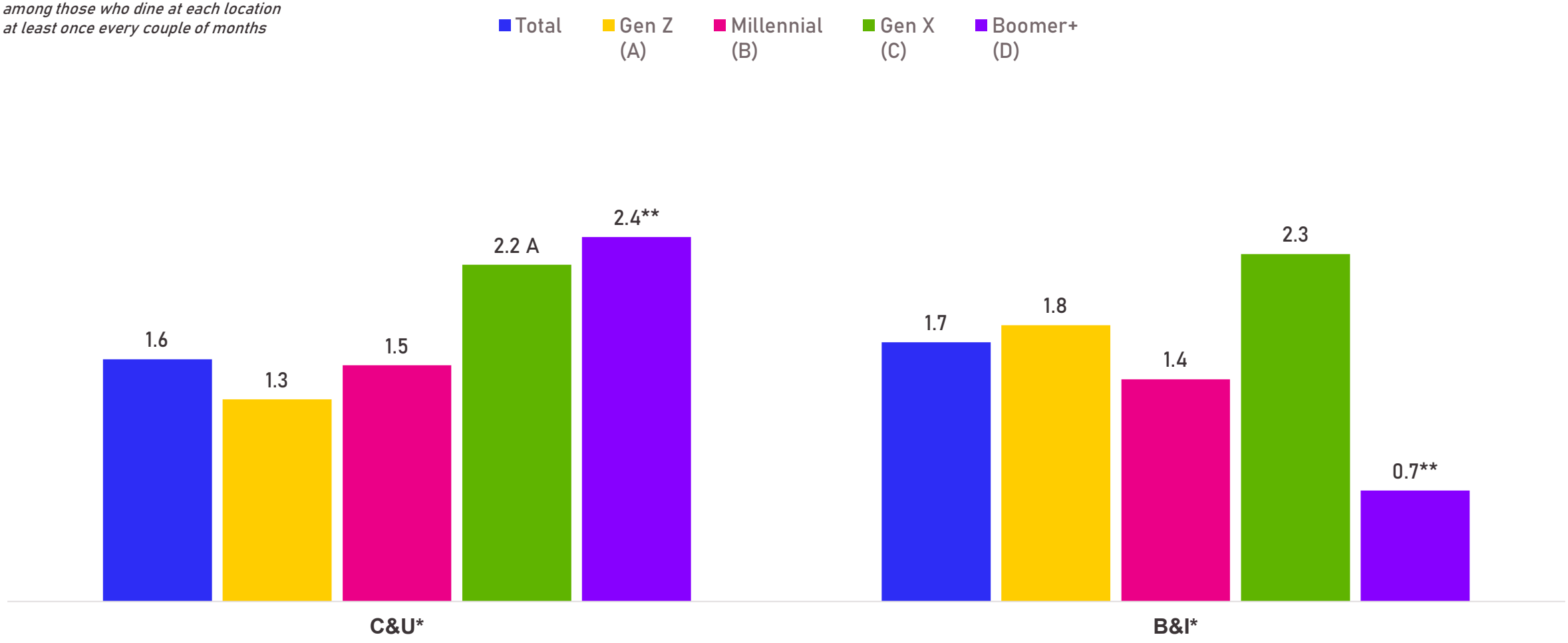
A4: In a typical month, how many times do you eat any type of fish, shellfish, or seafood at the following types of restaurants or cafeterias? Numeric free text. (n=*varies*)

Gen X cafeteria -goers are a target for seafood offerings.

- The small number of boomers who visit C&U cafeterias also eat seafood there frequently.

NUMBER OF MONTHLY OCCASIONS EATING SEAFOOD AT CAFETERIAS

among those who dine at each location at least once every couple of months



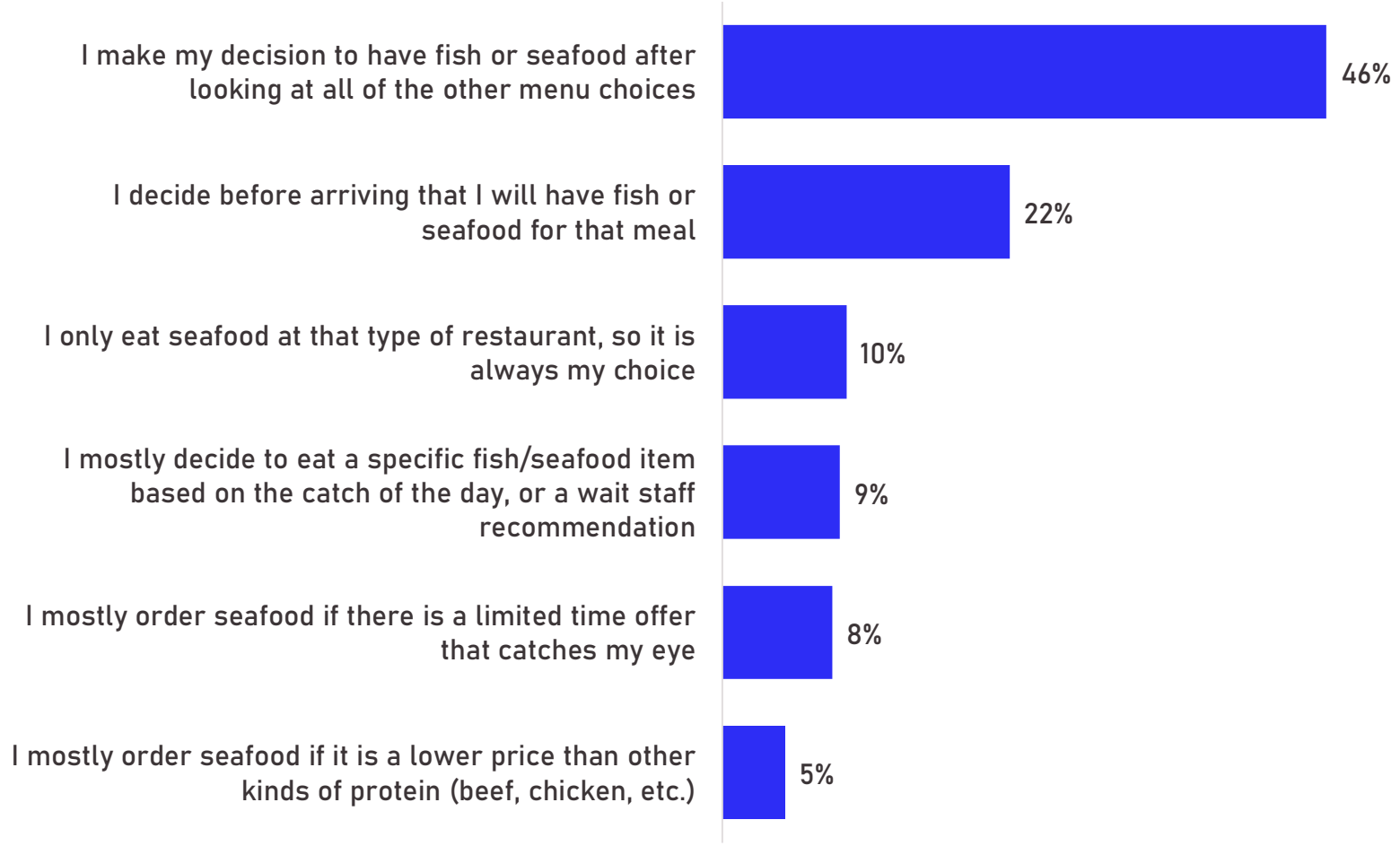
**not asked in 2019*

***base size <30; results should be considered directional*

A4: In a typical month, how many times do you eat any type of fish, shellfish, or seafood at the following types of restaurants or cafeterias? Numeric free text. (n=*varies*)

Many consumers make their ordering decision while browsing the menu, so ensure that seafood items stand out.

SEAFOOD ORDERING STRATEGY*



question was split into 3 questions in 2019

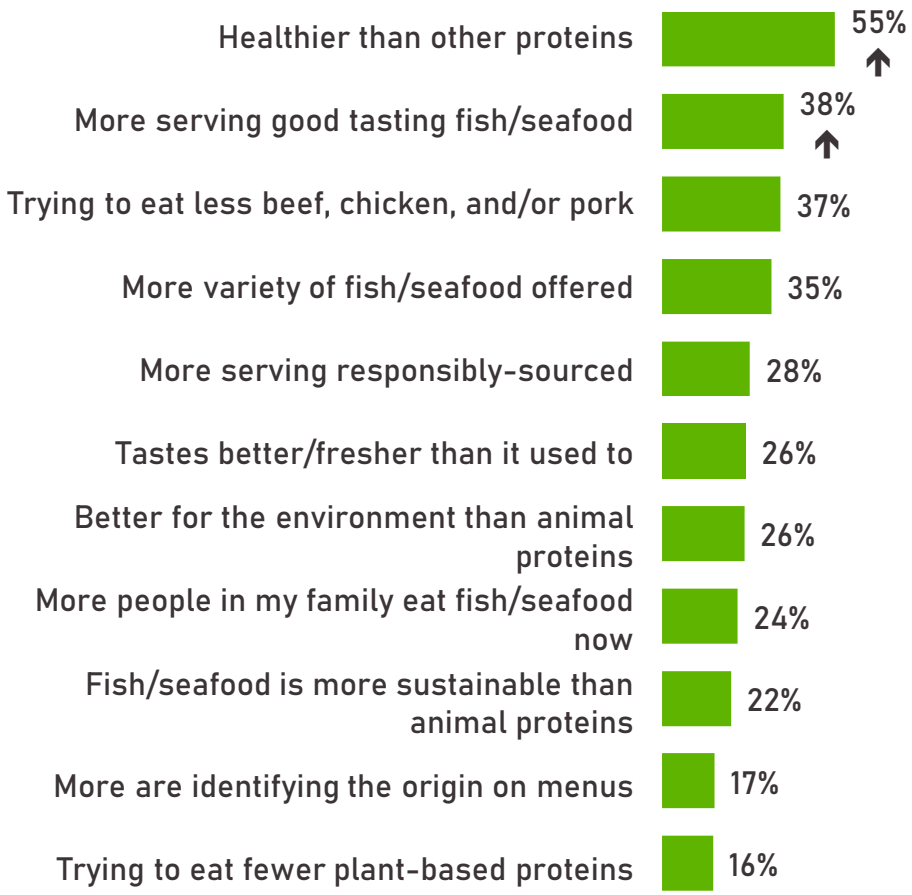
B2: How do you typically make your choice to eat fish or seafood from a restaurant or cafeteria? Please think about your choices when eating from restaurants (fast food chains, fast casual chains, casual chains, fine dining) and college and corporate cafeterias. (n=1000)

AFH seafood consumption can be boosted with an emphasis on health benefits and improved taste.

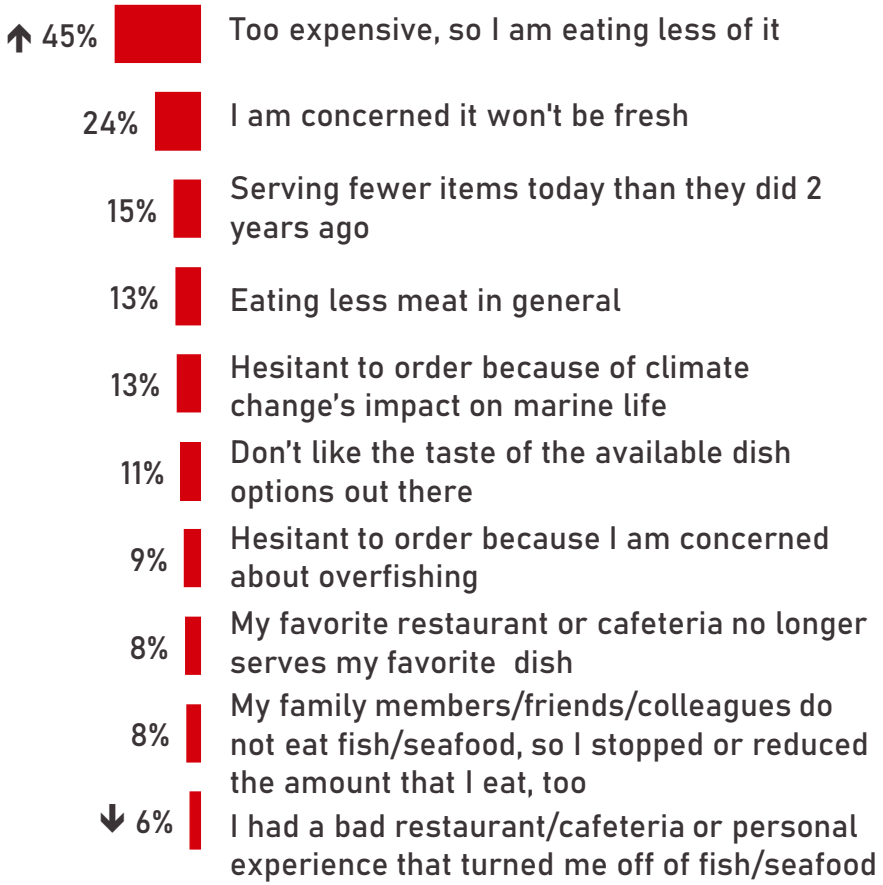
- Cost concerns (likely due to inflation) are the biggest reason why consumers decreased their seafood consumption.

CHANGE IN AFH SEAFOOD CONSUMPTION IN PAST TWO YEARS

Why has consumption increased?



Why has consumption decreased?



↑↓ = significantly higher / lower than 2019

B4: Do you eat more, the same amount, or less fish/seafood than you did from RESTAURANTS AND CAFETERIAS compared to 2 years ago? (n=1000) B5: Why are you eating more fish/seafood from restaurants and cafeterias today than you did 2 years ago? Select all that apply. (n=235) B6: Why are you eating less fish/seafood from restaurants and cafeterias today than you did 2 years ago? Select all that apply. (n=166)

Up-and-coming paired flavors with seafood incorporate many Asian and Eastern Asian sauces and spices like sweet soy, togarashi, curry sauces and powder, as well as Thai basil.

TOP SAUCES AND FLAVORS

TOP ranked by penetration	PENETRATION	1-YEAR GROWTH	4-YEAR GROWTH	TRENDING ranked by 4-year growth	PENETRATION	1-YEAR GROWTH	4-YEAR GROWTH
Garlic	48.0%	-5%	-7%	Sweet Soy	2.0%	+10%	+41%
Lemon	34.1%	-2%	-11%	Togarashi	1.4%	+4%	+36%
Butter	26.3%	-3%	-8%	Spicy Mayo	4.4%	+7%	+28%
Cilantro	22.7%	-	-2%	Sweet Chili Sauce	3.4%	-5%	+25%
Wine	20.9%	-4%	-14%	Yellow Curry	1.4%	+18%	+25%
Red Sauce	19.5%	-4%	-11%	Chipotle Aioli	2.4%	+8%	+24%
Jalapeno Pepper	19.2%	-12%	-13%	Chimichurri	2.2%	-3%	+23%
Mayo	19.1%	-5%	-8%	Eel Sauce	3.4%	+6%	+20%
Tartar	18.9%	-3%	-4%	Soy Glaze	1.1%	+3%	+19%
Basil	18.2%	-12%	-19%	Chili Flakes	1.2%	-7%	+19%
Ginger	17.1%	-1%	-6%	Curry Paste	1.1%	+18%	+17%
Vinaigrette	16.9%	-7%	-19%	Serrano Pepper	2.6%	+5%	+14%
Sesame	16.5%	-3%	-5%	Thai Basil	1.7%	+13%	+13%
Lime	16.0%	-3%	-3%	Curry Powder	1.0%	+16%	+12%
Salsa	15.7%	+1%	-8%	Coconut Curry	1.6%	+5%	+12%

MenuTrends YE SEP'22, PENETRATION: Of restaurants offering fish or seafood entrees, % that offer...

seafood away-from-home

QSR SEAFOOD

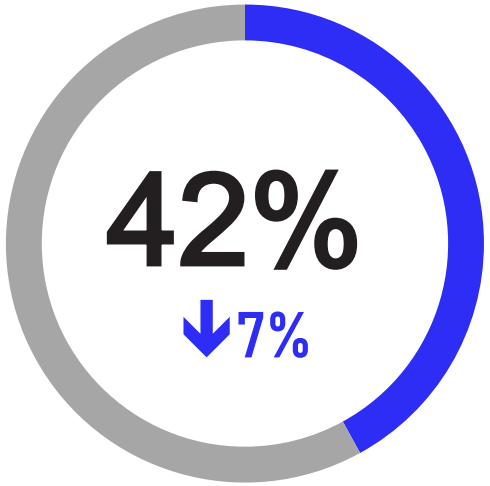
Satisfaction with QSR seafood offerings has declined since 2019, as has consumption of many seafood types.

QSR – SATISFACTION WITH SEAFOOD OFFERING & TYPES OF SEAFOOD EATEN

among those who dine at QSR chains at least once per week

SATISFACTION WITH SEAFOOD OFFERING

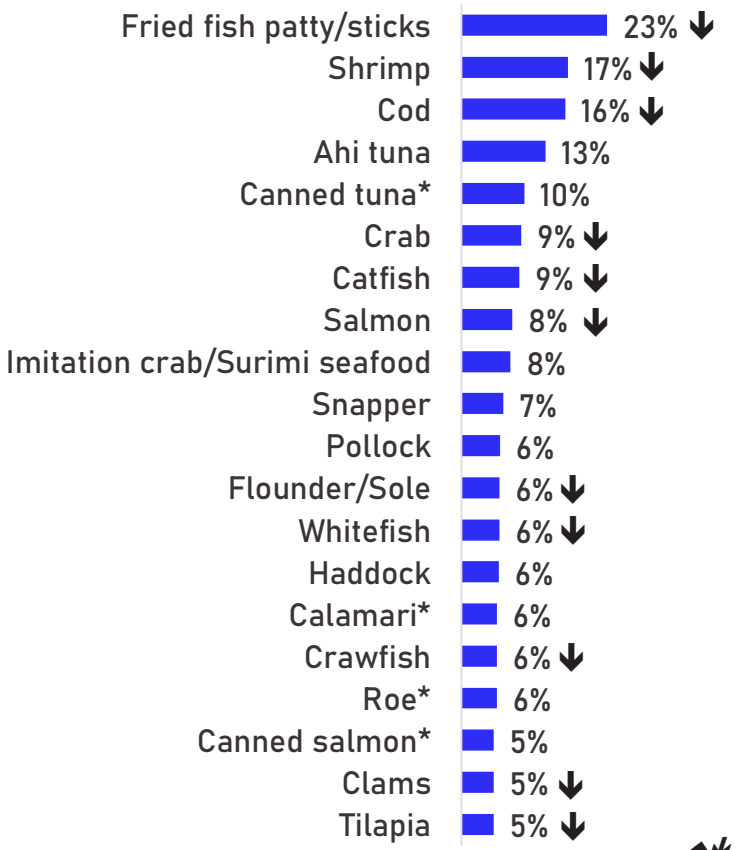
(top 2 box, 5-pt. scale)



are satisfied with current QSR seafood offerings

SEAFOOD EATEN AT QSRs

(top 20 responses)



↑↓ = significantly higher / lower than 2019
** not asked in 2019*

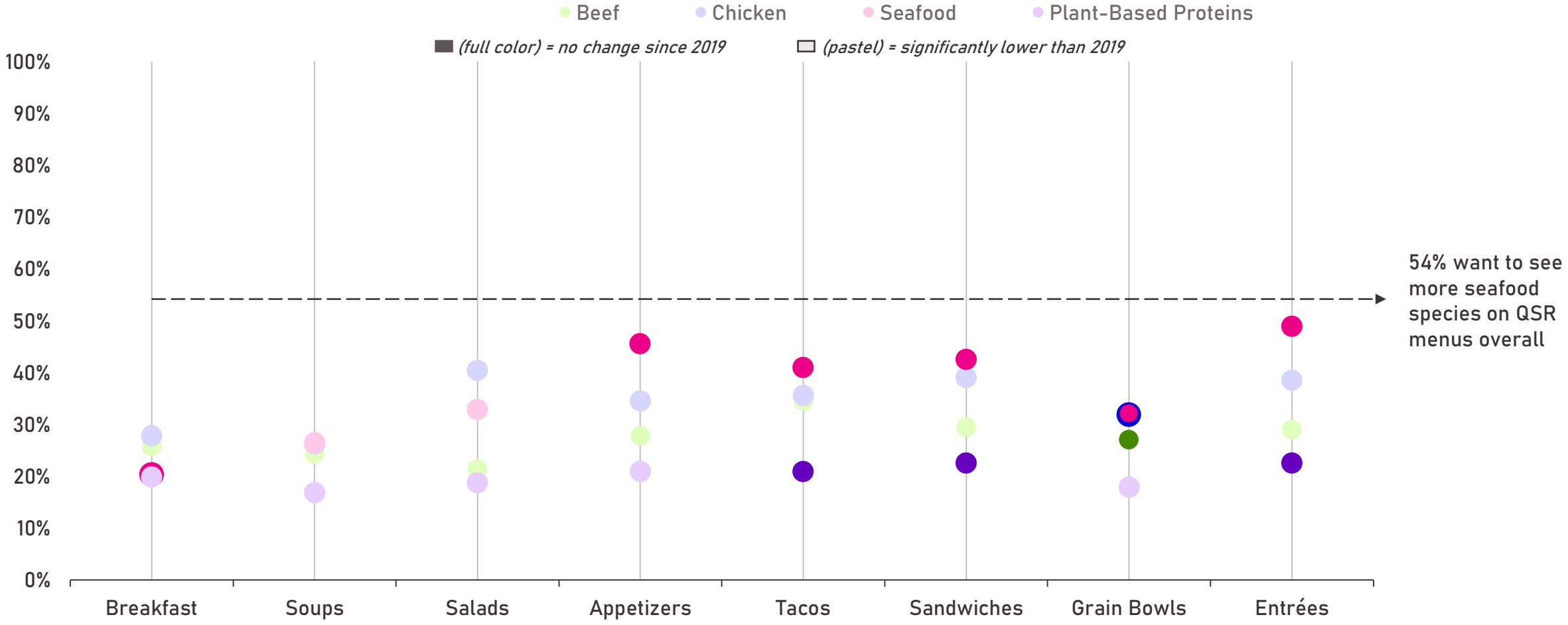
C1: Overall, how satisfied are you with the selection of fish/seafood at the following types of restaurants and cafeterias? (n=870) B1: Which types of fish/seafood have you eaten in the past 6 months from the following restaurants or cafeterias? [FAST FOOD chain restaurant (such as McDonald's, White Castle, Burger King, Taco Bell, etc.)] (n=870)

QSR consumers show continued demand for all seafood items except soups and salads.

- Plant-based protein is of interest for tacos, sandwiches, and entrées.

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

among those who dine at QSR chains at least once per week



C2: When you are at [TRADITIONAL FAST FOOD CHAIN restaurants (such as McDonald's, White Castle, Burger King, Taco Bell, etc.)], would you like to see MORE of that kind of dish on menus, LESS of that kind of dish on menus, or are you SATISFIED with the availability of that kind of dish on menus? (n=374)

FAST CASUAL SEAFOOD

Fast casuals primarily sell shrimp and have seen a decrease in satisfaction since 2019.

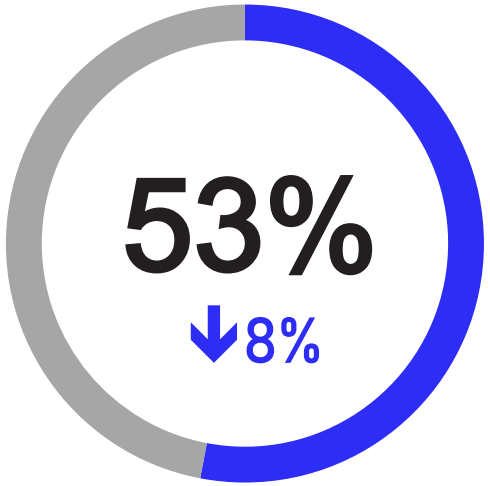
- However, imitation crab and several species of fish are on the rise.

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

among those who dine at fast casual chains at least once per week

SATISFACTION WITH SEAFOOD OFFERING

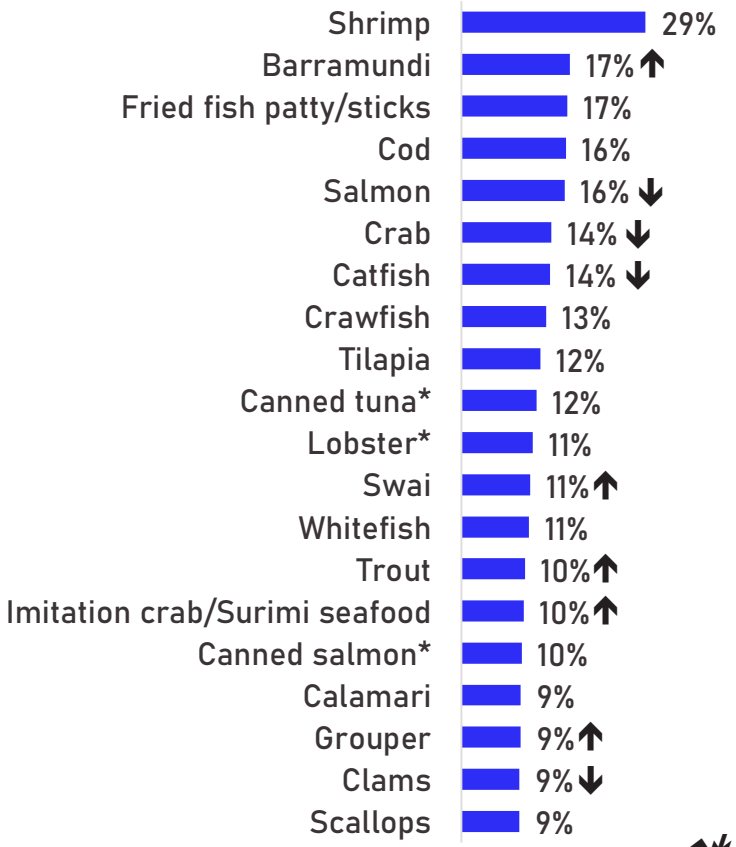
(top 2 box, 5-pt. scale)



are satisfied with current fast casual seafood offerings

SEAFOOD EATEN AT FAST CASUALS

(top 20 responses)



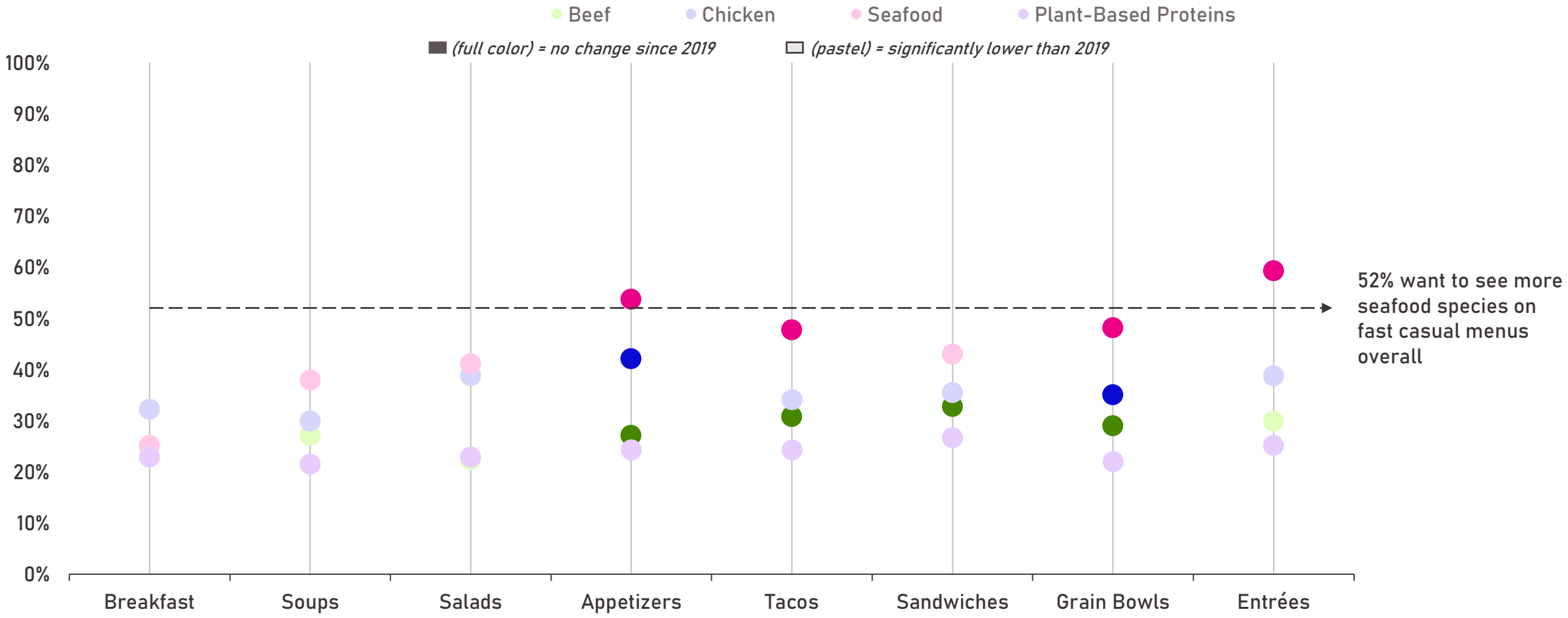
↑↓ = significantly higher / lower than 2019
** not asked in 2019*

C1: Overall, how satisfied are you with the selection of fish/seafood at the following types of restaurants and cafeterias? (n=482) B1: Which types of fish/seafood have you eaten in the past 6 months from the following restaurants or cafeterias? [FAST CASUAL chain restaurant (such as Panera, Chipotle, Five Guys, etc.)] (n=482)

Appetizers, tacos, grain bowls, and entrées are good vehicles for seafood at fast casuals.

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

among those who dine at fast casual chains at least once per week



C2: When you are at [FAST CASUAL CHAIN restaurants (such as Panera, Chipotle, Five Guys, etc.)], would you like to see MORE of that kind of dish on menus, LESS of that kind of dish on menus, or are you SATISFIED with the availability of that kind of dish on menus? (n=214)

CASUAL DINING SEAFOOD

Satisfaction with casual dining offerings has experienced some attrition but remains strong.

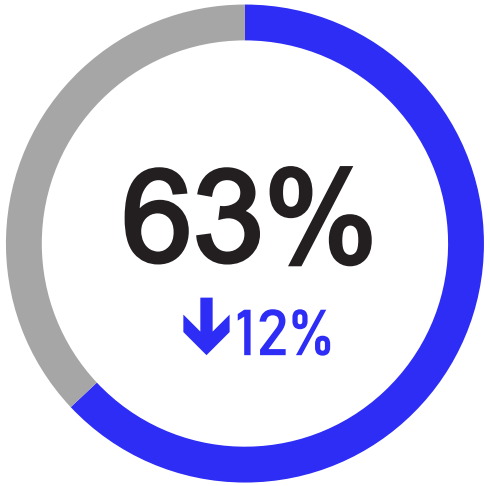
- Unlike LSRs, consumers are eating a wider variety of fish and seafood at casual dining.

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

among those who dine at casual dining chains at least once per week

SATISFACTION WITH SEAFOOD OFFERING

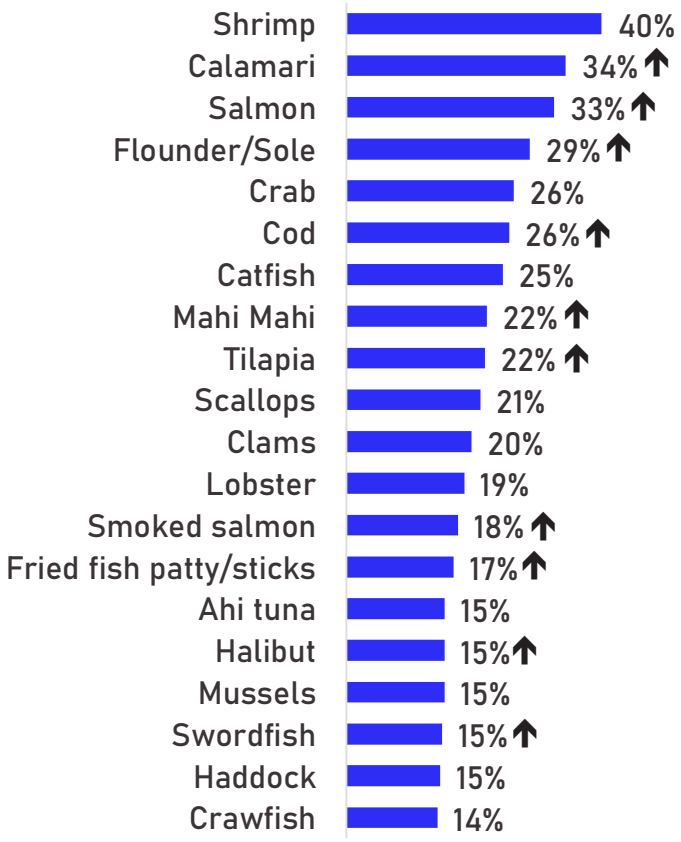
(top 2 box, 5-pt. scale)



are satisfied with current casual dining seafood offerings

SEAFOOD EATEN AT CASUAL DINING

(top 20 responses)



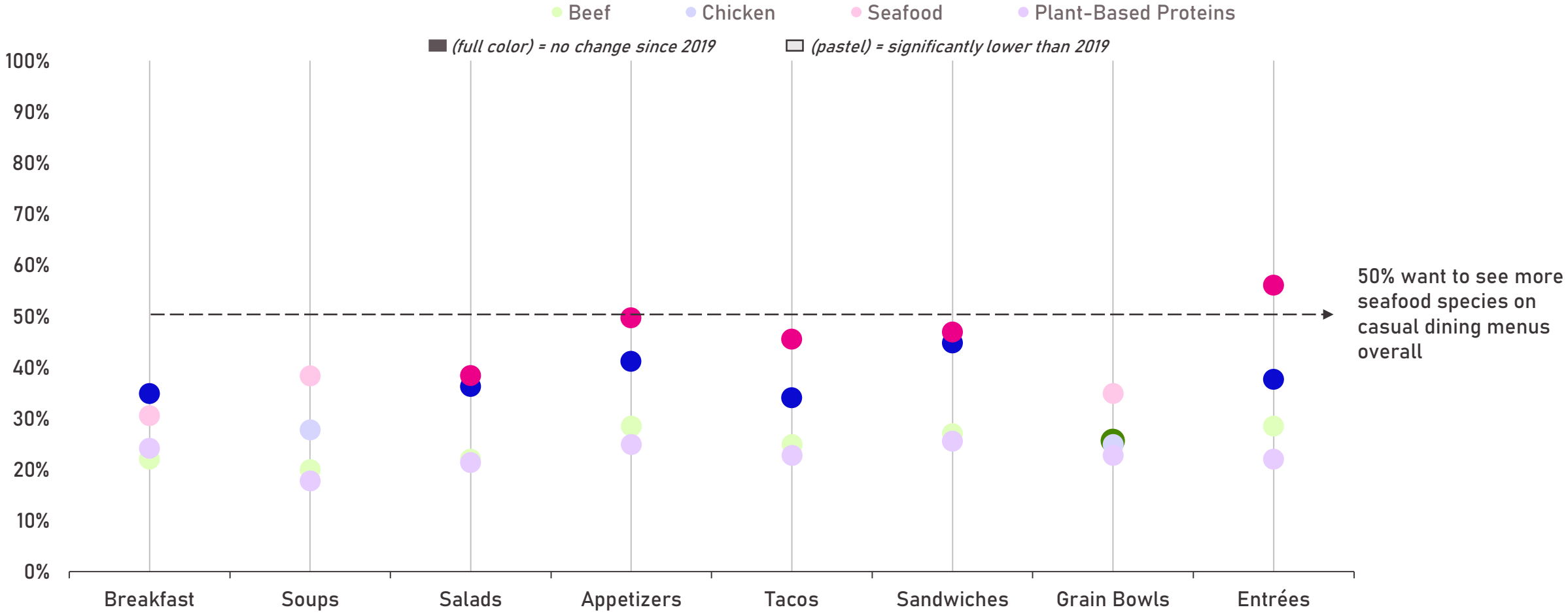
↑↓ = significantly higher / lower than 2019

C1: Overall, how satisfied are you with the selection of fish/seafood at the following types of restaurants and cafeterias? (n=286) B1: Which types of fish/seafood have you eaten in the past 6 months from the following restaurants or cafeterias? [CASUAL DINING chain restaurant (such as Applebee's, TGI Fridays, Chili's, Olive Garden, PF Chang's, etc.)] (n=286)

At casual dining, chicken and seafood items have been most successful at retaining interest since 2019.

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

among those who dine at casual dining chains at least once per week



C2: When you are at [CASUAL DINING CHAIN restaurants (such as Applebee's, TGI Fridays, Chili's, Olive Garden, PF Chang's, etc.)], would you like to see MORE of that kind of dish on menus, LESS of that kind of dish on menus, or are you SATISFIED with the availability of that kind of dish on menus? (n=141)

FINE DINING SEAFOOD

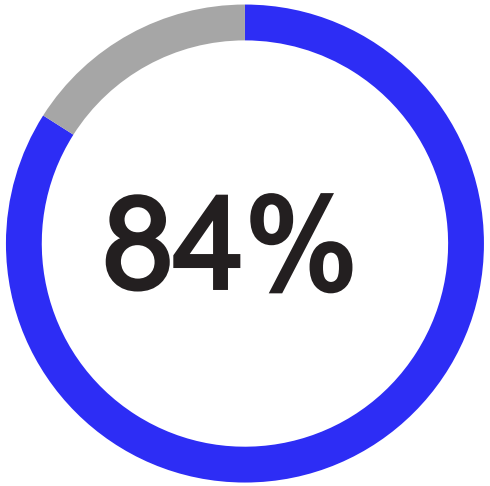
Fine dining boasts the highest seafood satisfaction of all tested segments.

FINE DINING* – SATISFACTION WITH SEAFOOD OFFERING & TYPES OF SEAFOOD EATEN

among those who dine at fine dining restaurants at least once per week

SATISFACTION WITH SEAFOOD OFFERING

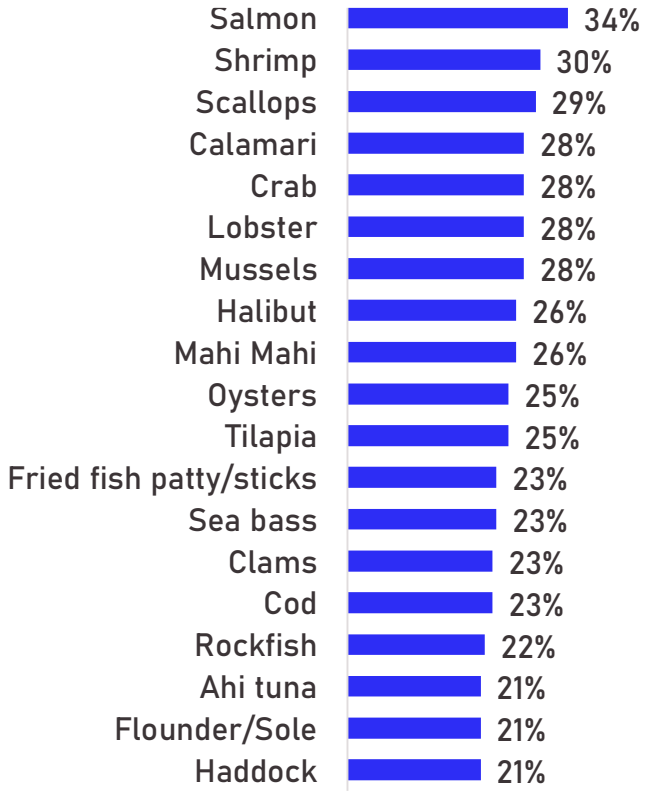
(top 2 box, 5-pt. scale)



are satisfied with current fine dining seafood offerings

SEAFOOD EATEN AT FINE DINING

(top 20 responses)



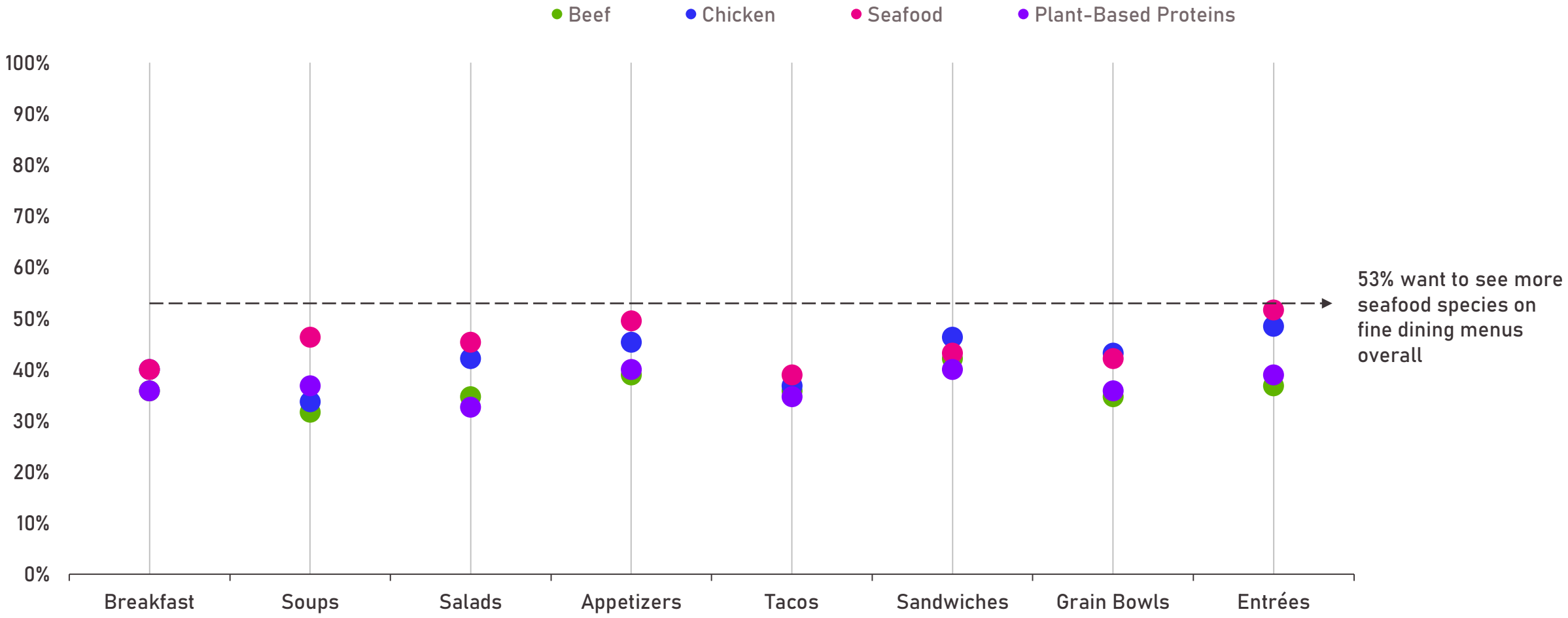
*not asked in 2019

C1: Overall, how satisfied are you with the selection of fish/seafood at the following types of restaurants and cafeterias? (n=163) B1: Which types of fish/seafood have you eaten in the past 6 months from the following restaurants or cafeterias? [FINE DINING restaurant (average entrée prices are more than $25)] (n=163)

Seafood is a natural fit for fine dining, as it's the top protein type consumers want to see more of.

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

among those who dine at fine dining restaurants at least once per week



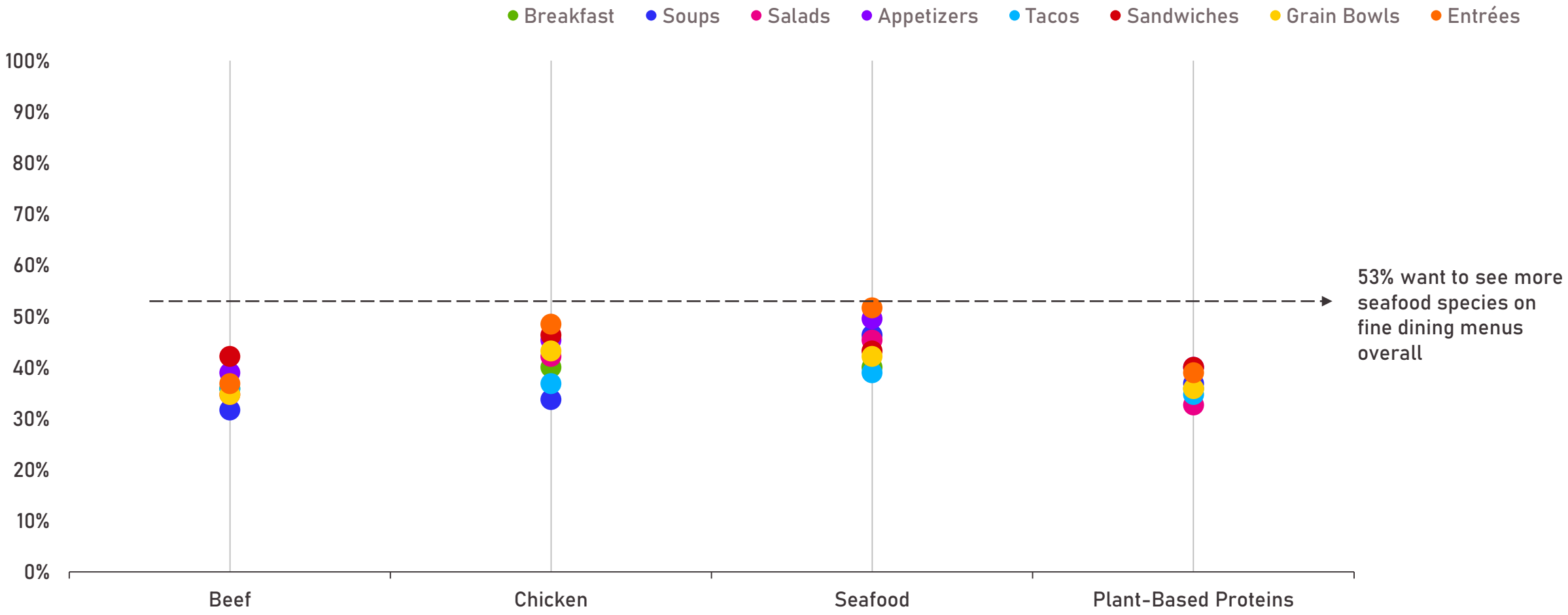
**not asked in 2019*

C2: When you are at [FINE DINING restaurants (average entrée prices are more than $25)], would you like to see MORE of that kind of dish on menus, LESS of that kind of dish on menus, or are you SATISFIED with the availability of that kind of dish on menus? (n=95)

Consider ways to market seafood in not only upscale entrées, but also appetizers for fine dining.

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

among those who dine at fine dining restaurants at least once per week



*not asked in 2019

C2: When you are at [FINE DINING restaurants (average entrée prices are more than $25)], would you like to see MORE of that kind of dish on menus, LESS of that kind of dish on menus, or are you SATISFIED with the availability of that kind of dish on menus? (n=95)

C&U SEAFOOD

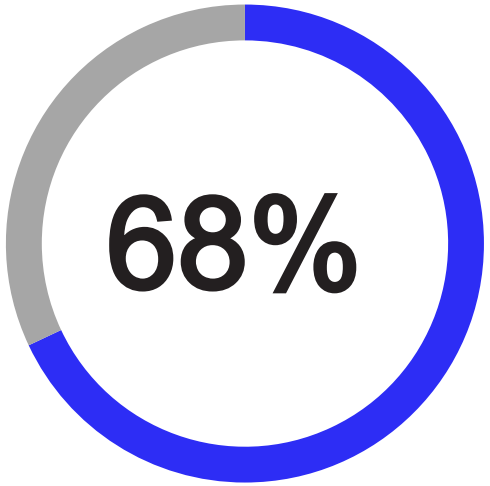
C&U seafood satisfaction is strong, and canned tuna is a common offering, followed by catfish and cod.

C&U* – SATISFACTION WITH SEAFOOD OFFERING & TYPES OF SEAFOOD EATEN

among those who dine at C&U cafeterias at least once per week

SATISFACTION WITH SEAFOOD OFFERING

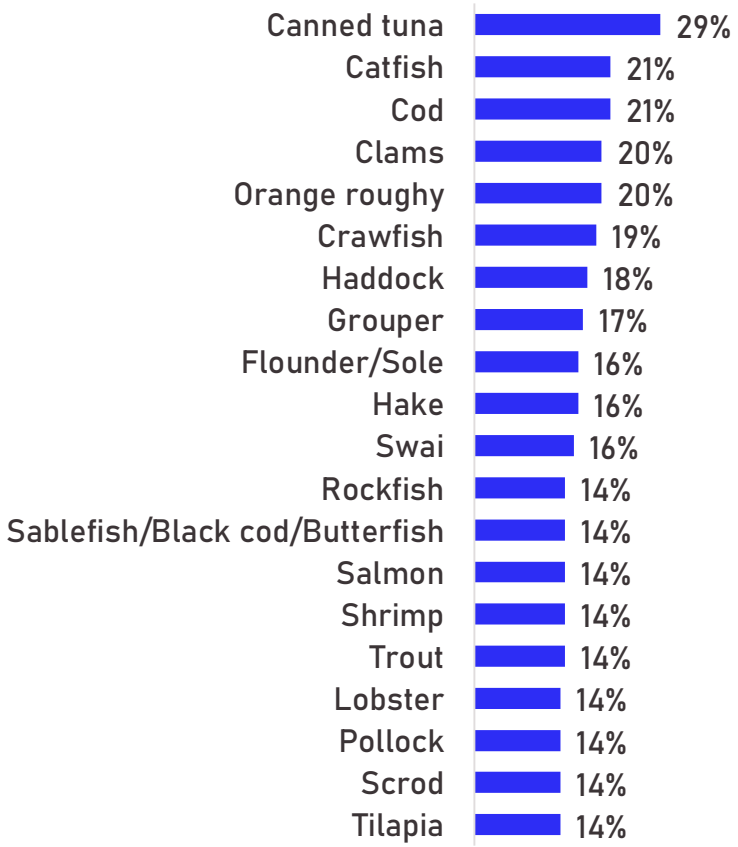
(top 2 box, 5-pt. scale)



are satisfied with current C&U seafood offerings

SEAFOOD EATEN AT C&Us

(top 20 responses)



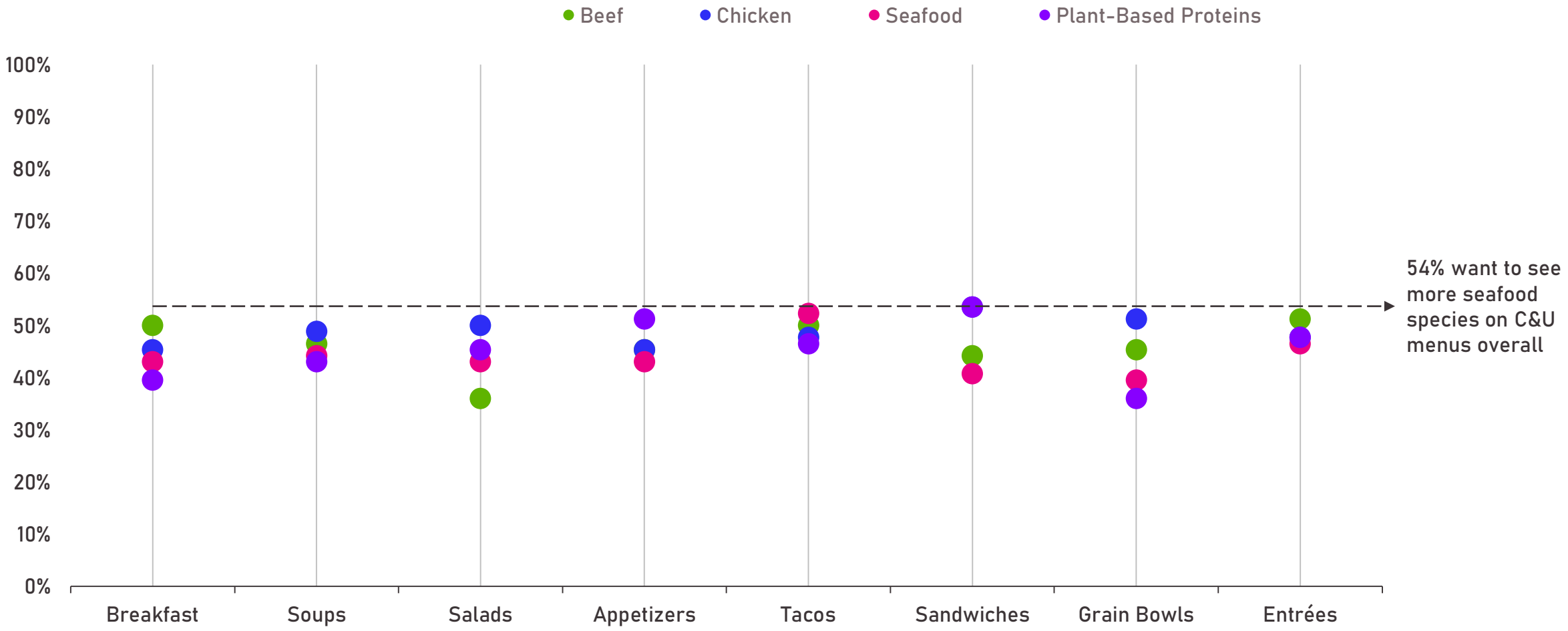
*not asked in 2019

C1: Overall, how satisfied are you with the selection of fish/seafood at the following types of restaurants and cafeterias? (n=141) B1: Which types of fish/seafood have you eaten in the past 6 months from the following restaurants or cafeterias? [COLLEGE / UNIVERSITY CAFETERIA] (n=141)

Perhaps since it tends to be in a cafeteria setting, plant -based protein at C&Us is at times a more attractive option than seafood.

C&U* – DISHES CONSUMERS WANT TO SEE MORE OF *BY DISH TYPE*

among those who dine at C&U cafeterias at least once per week



**not asked in 2019*

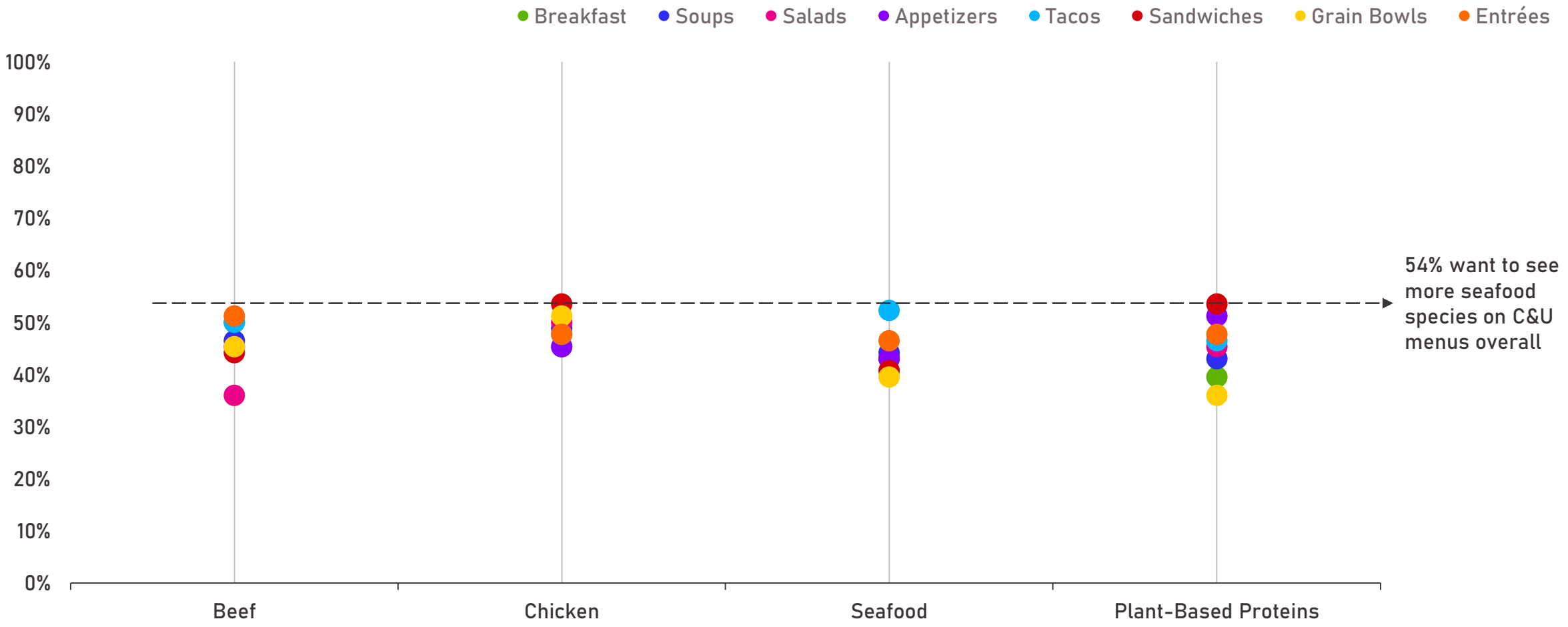
C2: When you are at [COLLEGE / UNIVERSITY CAFETERIAS (on-campus cafeterias / dining halls for students and faculty)], would you like to see MORE of that kind of dish on menus, LESS of that kind of dish on menus, or are you SATISFIED with the availability of that kind of dish on menus? (n=86)

Patrons' age may explain why C&U cafeteria -goers are more likely to crave seafood tacos than entrées.

- Plant-based proteins fit well in sandwiches and appetizers.

C&U* – DISHES CONSUMERS WANT TO SEE MORE OF *BY PROTEIN TYPE*

among those who dine at C&U cafeterias at least once per week



*not asked in 2019

C2: When you are at [COLLEGE / UNIVERSITY CAFETERIAS (on-campus cafeterias / dining halls for students and faculty)], would you like to see MORE of that kind of dish on menus, LESS of that kind of dish on menus, or are you SATISFIED with the availability of that kind of dish on menus? (n=86)

B&I SEAFOOD

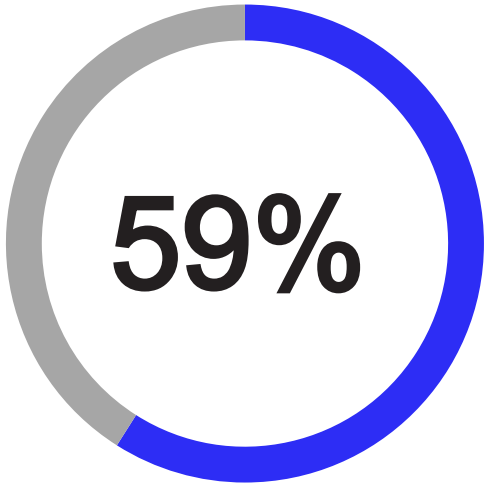
Like C&U visitors, B&I cafeteria -goers often purchase catfish.

B&I* – SATISFACTION WITH SEAFOOD OFFERING & TYPES OF SEAFOOD EATEN

among those who dine at B&I cafeterias at least once per week

SATISFACTION WITH SEAFOOD OFFERING

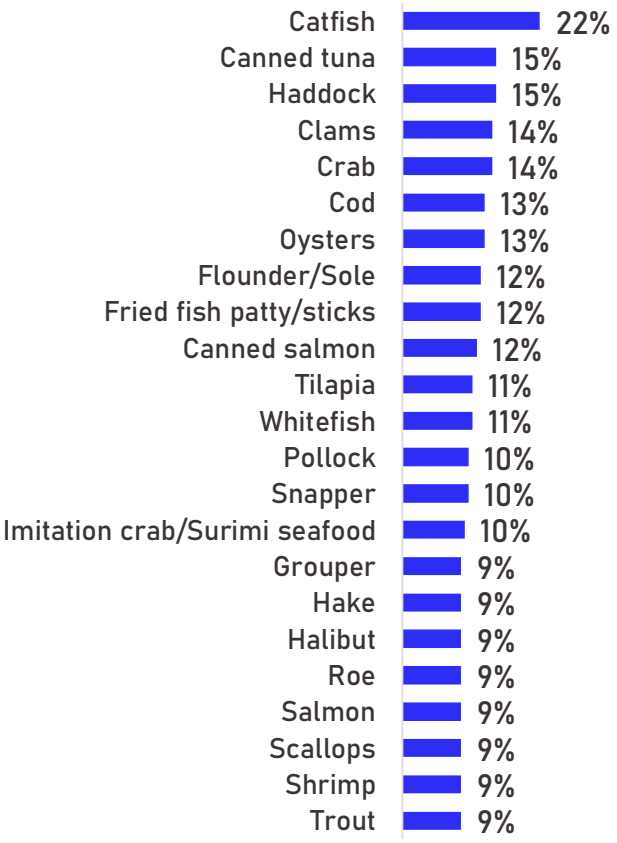
(top 2 box, 5-pt. scale)



are satisfied with current B&I seafood offerings

SEAFOOD EATEN AT B&Is

(top 20 responses; 23 shown due to tie)



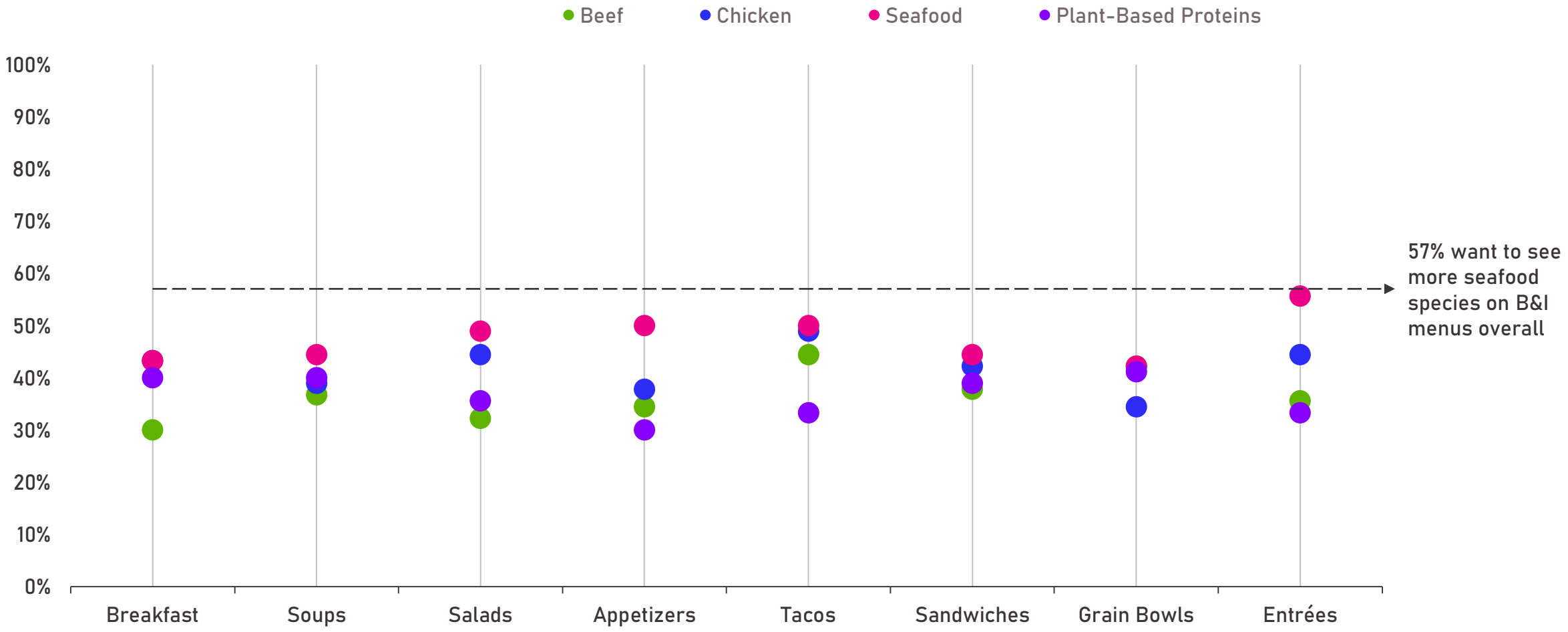
**not asked in 2019*

C1: Overall, how satisfied are you with the selection of fish/seafood at the following types of restaurants and cafeterias? (n=163) B1: Which types of fish/seafood have you eaten in the past 6 months from the following restaurants or cafeterias? [CORPORATE / OFFICE CAFETERIA] (n=163)

B&I cafeteria patrons would like to see more seafood options for all dish types.

B&I* – DISHES CONSUMERS WANT TO SEE MORE OF *BY DISH TYPE*

among those who dine at B&I cafeterias at least once per week



**not asked in 2019*

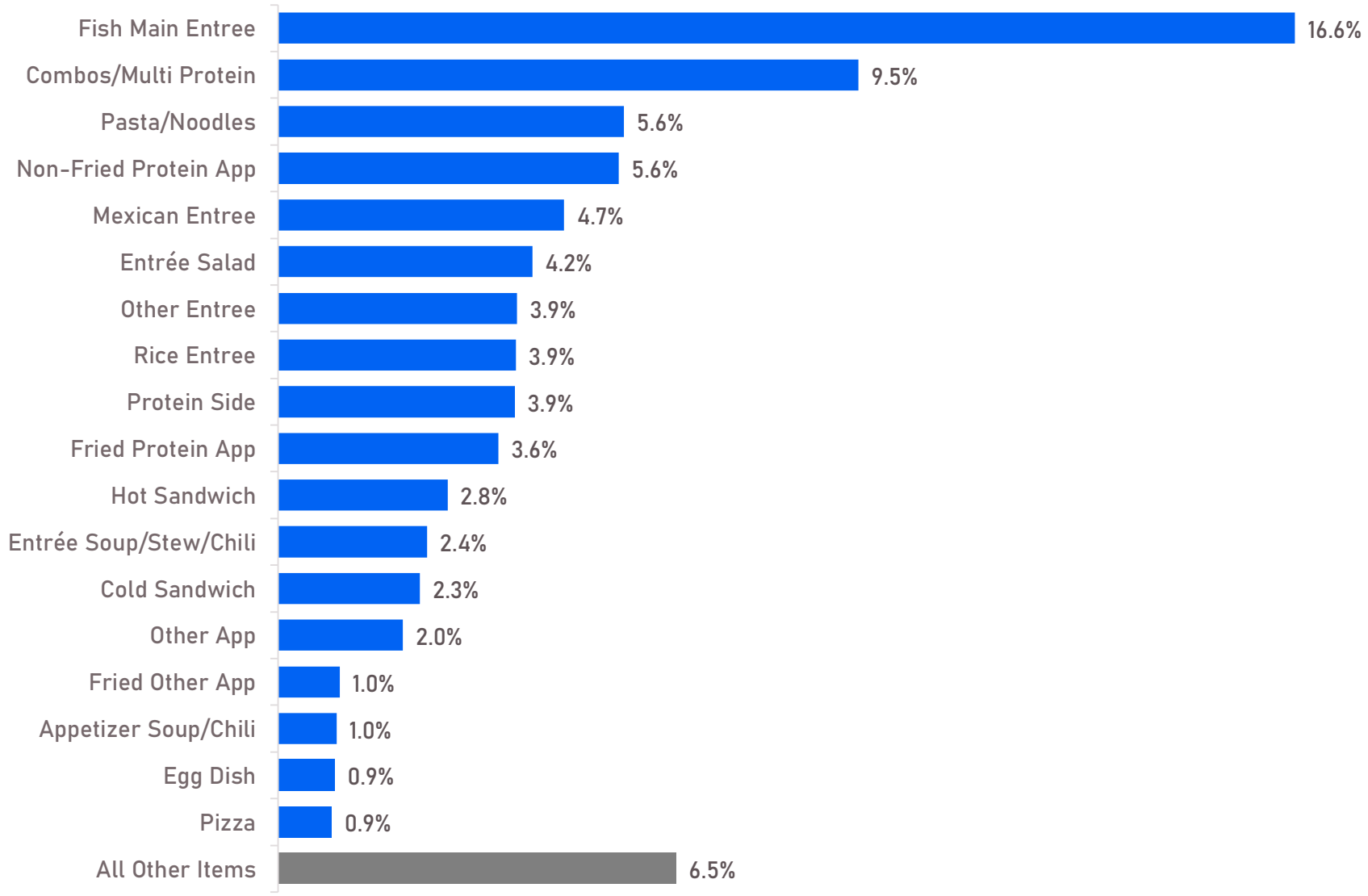
C2: When you are at [CORPORATE / OFFICE CAFETERIAS (cafeterias / dining halls for employees in an office building)], would you like to see MORE of that kind of dish on menus, LESS of that kind of dish on menus, or are you SATISFIED with the availability of that kind of dish on menus? (n=90)

seafood dishes on menus

SEAFOOD

Incidence distribution by item type

Seafood is most commonly menued as the highlight of an entrée but is also actively menued on multiprotein plates like surf and turf, or within pastas like shrimp scampi.



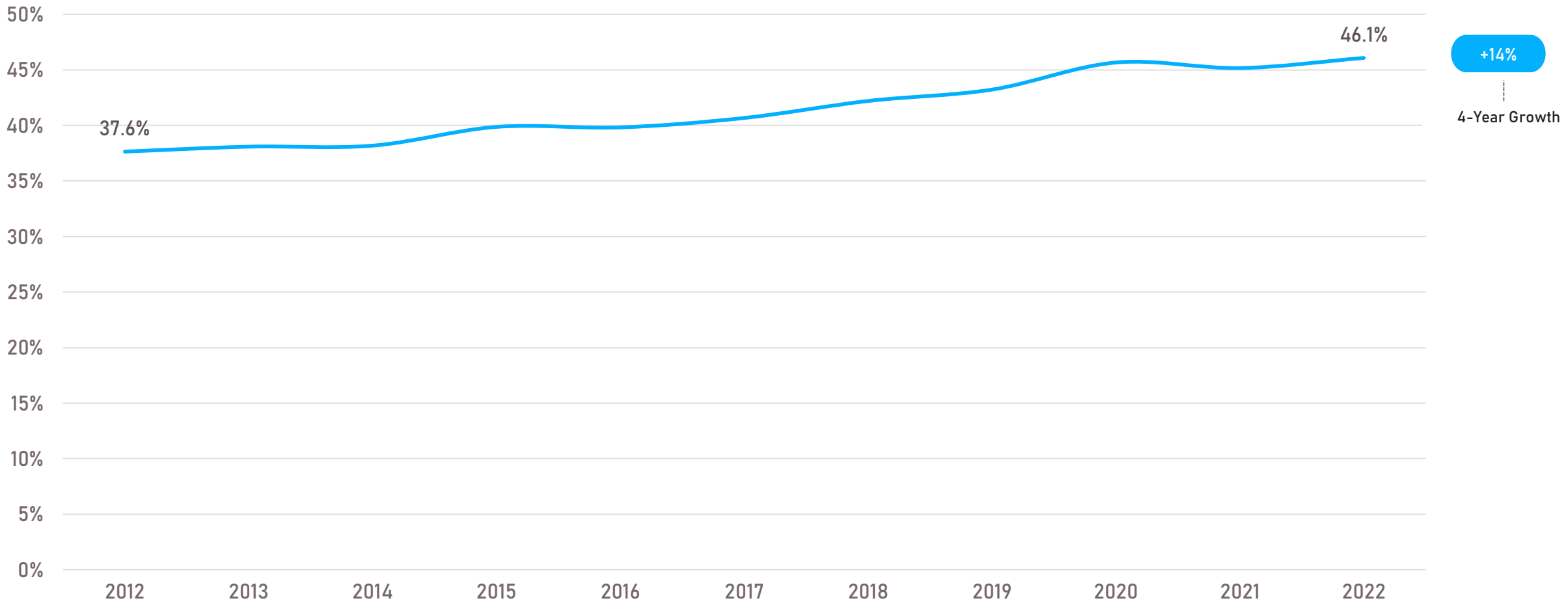
MenuTrends YE SEP'22, INCIDENCE DISTRIBUTION: Of restaurants serving seafood apps, entrees, sides, % that offer....

As an add -on to a dish, seafood has been experiencing rapid growth over the last decade.

- Seafood add-ons on menus have grown by nearly a quarter in the last ten years.

SEAFOOD ADD-ONS

penetration trend

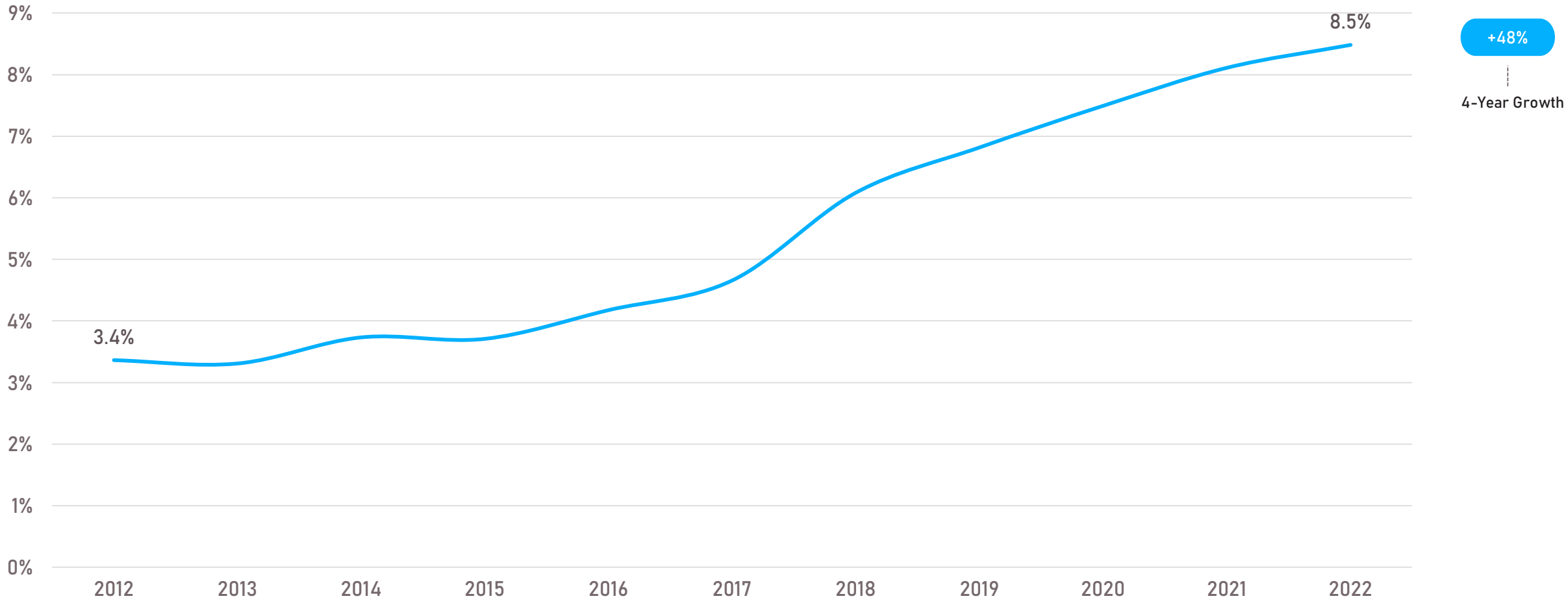


MenuTrends YE SEP'22, PENETRATION: Of restaurants serving protein sides, % that offer....

Bowls as a dish are on the rise – particularly with seafood and fish. These items have doubled on menus in the last ten years.

SEAFOOD IN BOWLS

penetration trend



MenuTrends YE SEP'22, PENETRATION: Of restaurants serving bowls, % that offer....

TOP SEAFOOD IN BOWLS

Shrimp and tuna offered in bowls are on the rise, and shrimp remains the most menued seafood item across a variety of dishes, including bowls.

	MENU PENETRATION	1-YEAR GROWTH	4-YEAR GROWTH
Shrimp	16.5%	+9%	+31%
Salmon	9.3%	-1%	+53%
Tuna	8.4%	+4%	+21%
Fish	4.6%	+15%	+27%
Ahi Tuna	3.0%	+11%	+53%
Crab	1.9%	-9%	-21%
Eel	1.1%	-10%	+3%
Clam	1.0%	-15%	-40%

MenuTrends YE SEP'22, PENETRATION: Of restaurants serving seafood apps, entrees, sides, % that offer....

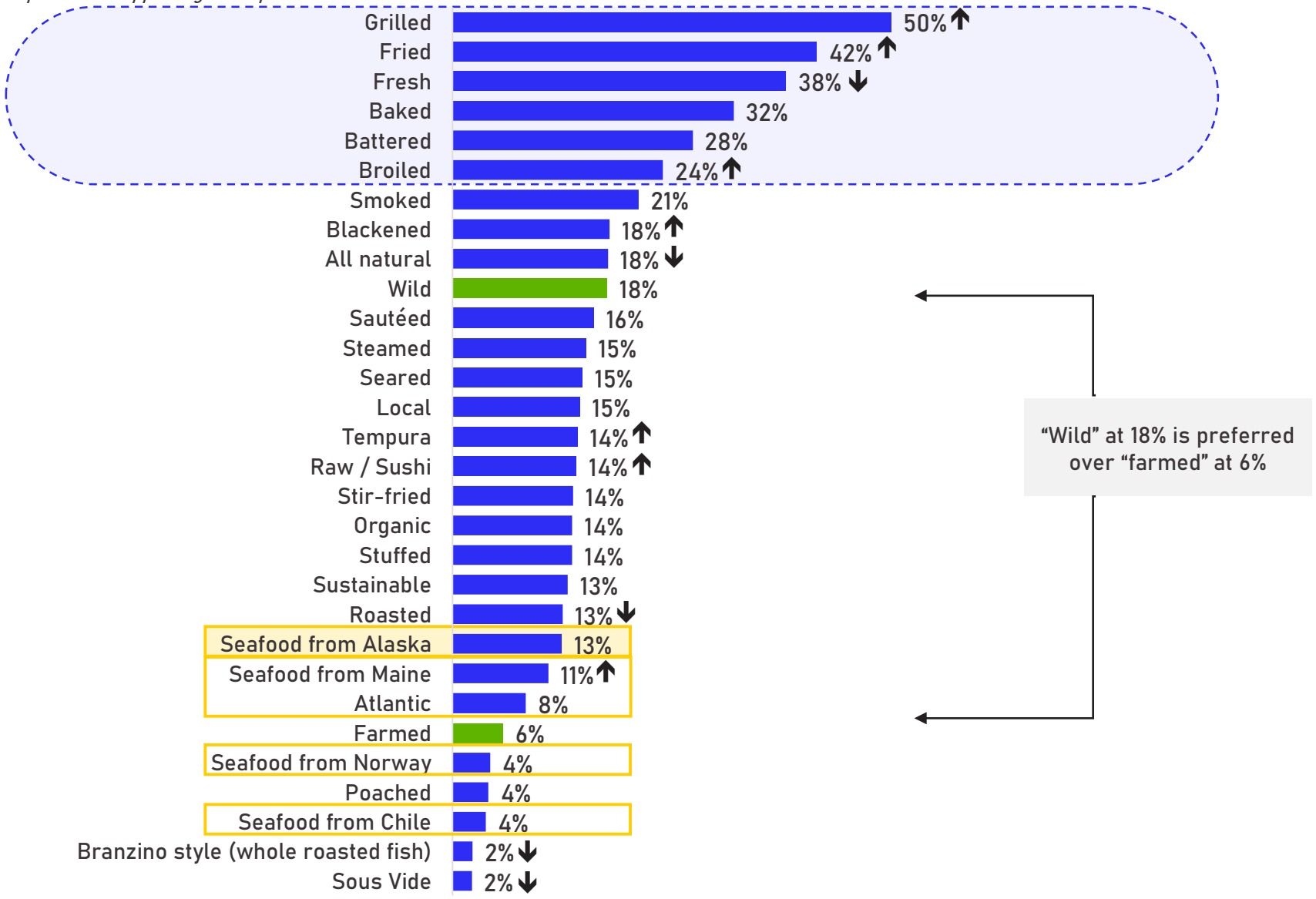
Basic seafood preparation methods like grilled, fried, and broiled should be highlighted on the menu, while all natural and/or fresh seafood is less of a concern.

Seafood from Alaska continues to hold the most appeal, although Maine seafood has caught up.

- The appeal of sustainability has remained flat since 2019.

MOST APPEALING SEAFOOD DISH AFH DESCRIPTORS

% ranked as top five most appealing descriptors



↑↓ = significantly higher / lower than 2019

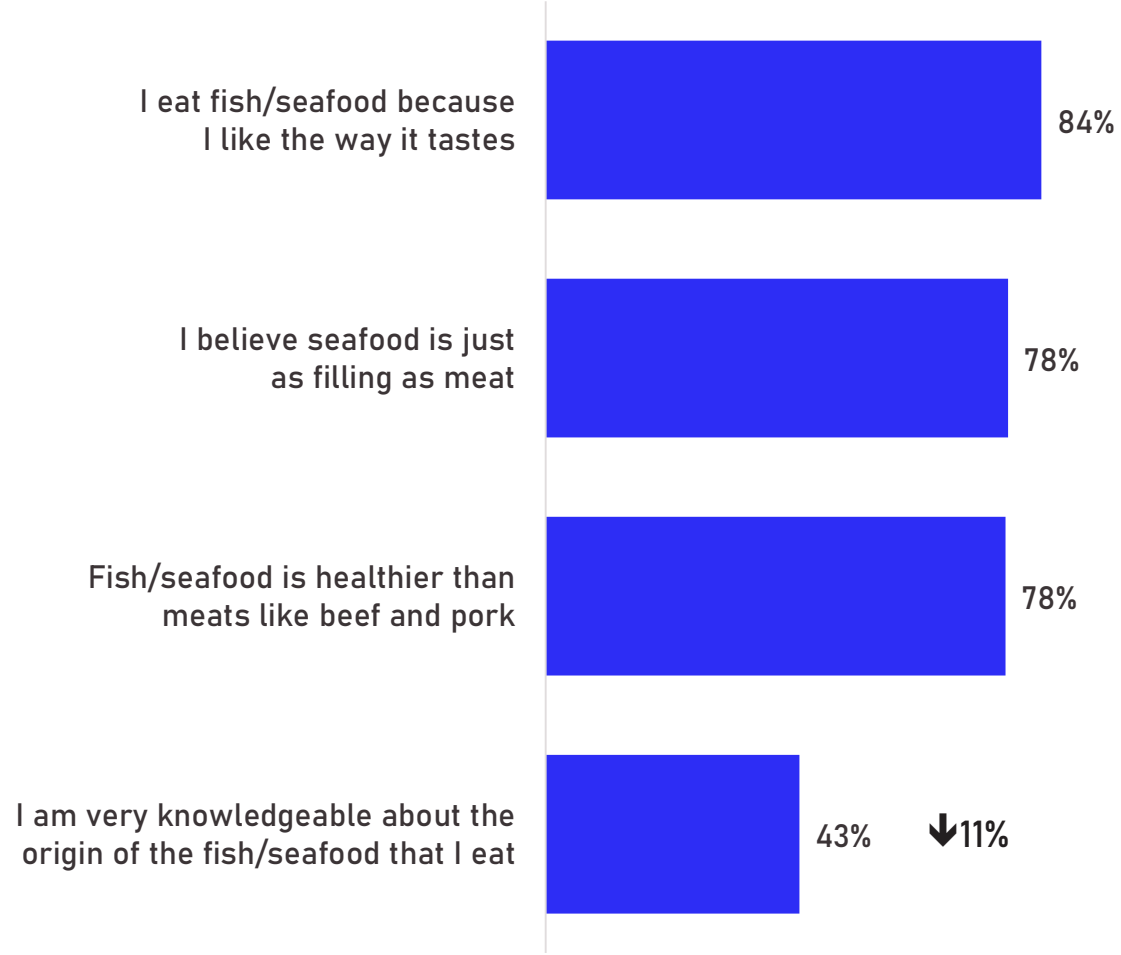
C3: When it comes to fish/seafood dishes in restaurants and cafeterias, which of the following descriptors/cooking methods do you find to be the most appealing? Please rank the top 5 most appealing factors to you. (n=1000)

Taste and affordability continue to reign supreme.

- On the other hand, interest in seafood origin has declined.

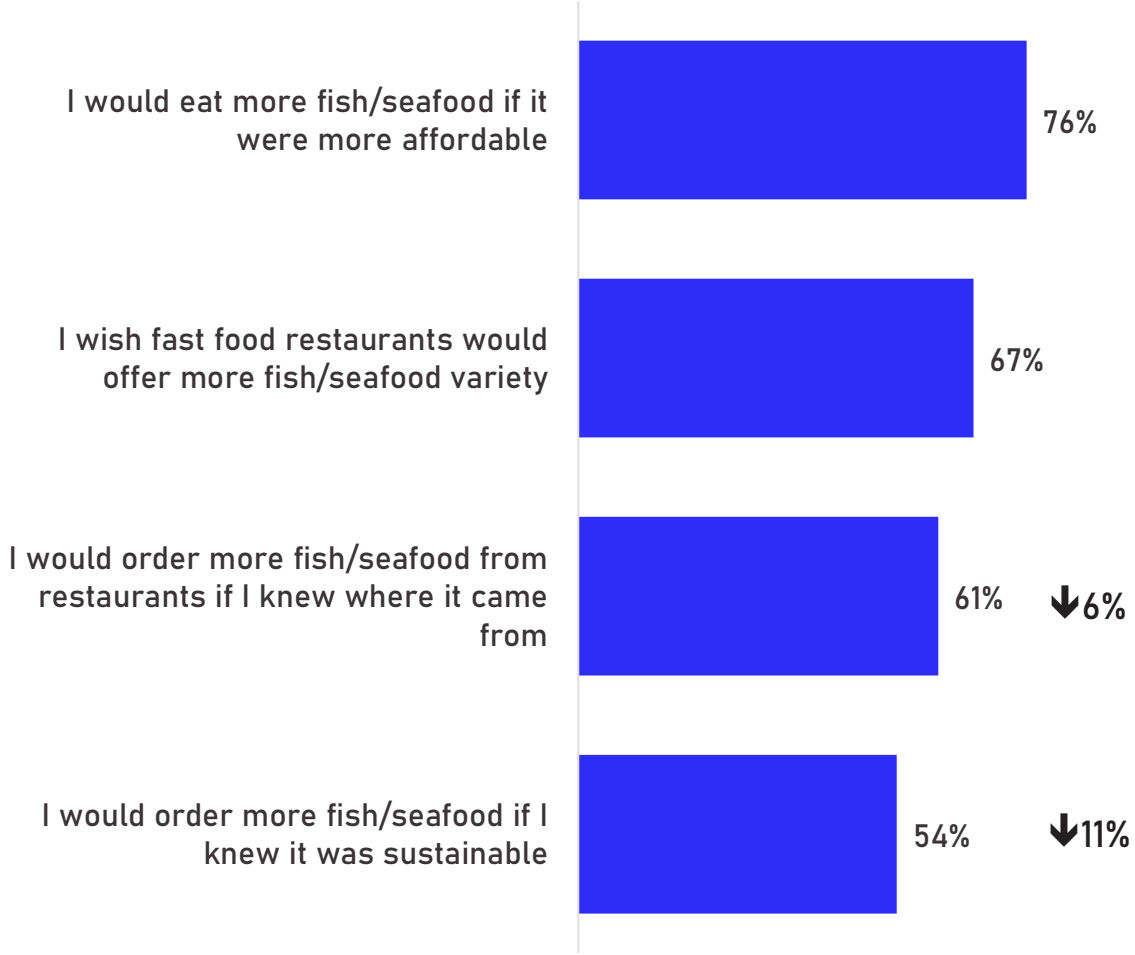
SEAFOOD ATTITUDES

% agree completely / somewhat, 5-pt. scale



SEAFOOD DESIRES AFH

% agree completely / somewhat, 5-pt. scale



↑↓ = significantly higher / lower than 2019

C4: Please rate your agreement with each of the following statements. (n=1000)

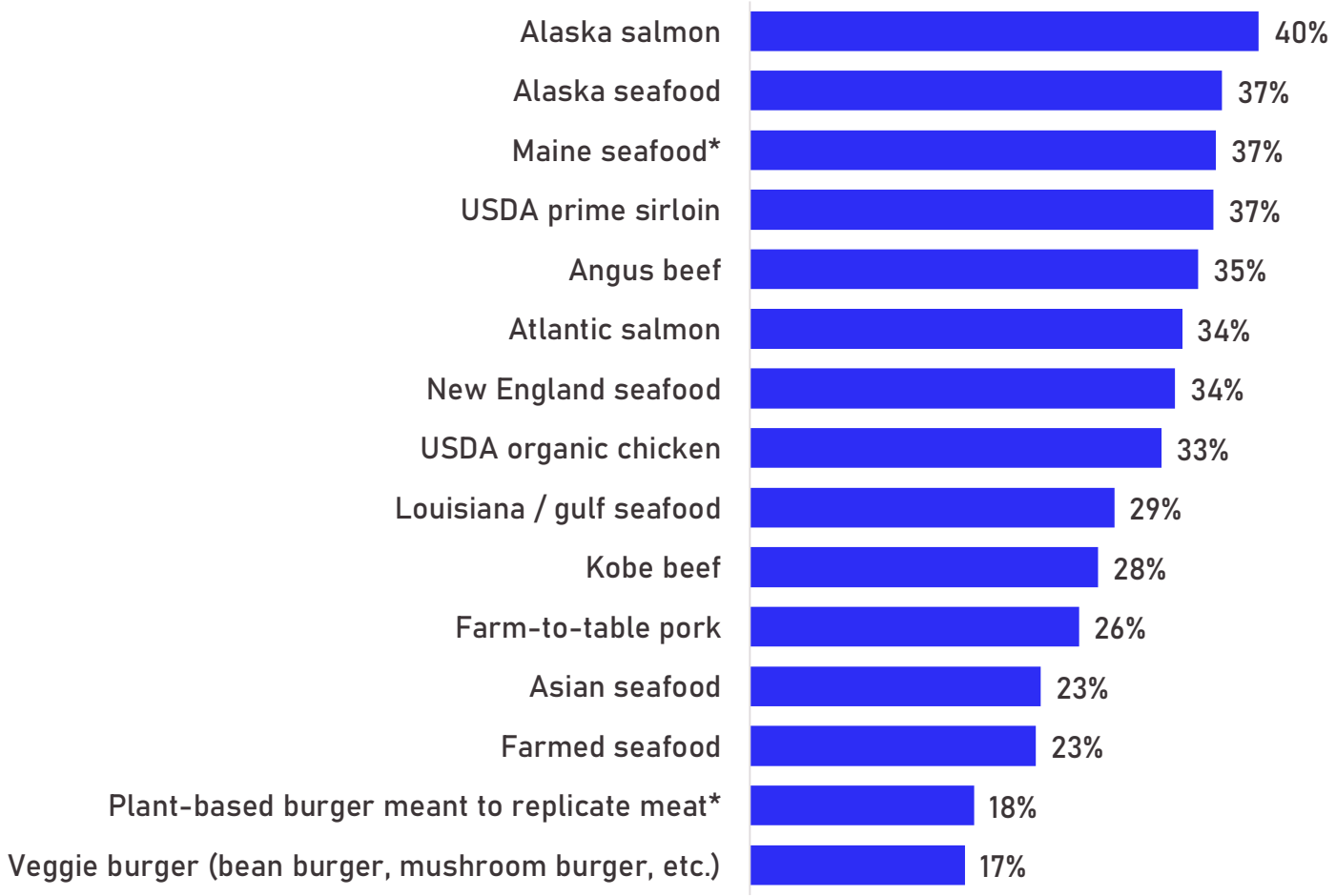
perceptions of Alaska seafood

Alaska salmon and seafood are the top protein types likely to garner a recommendation.

- Likelihood to recommend each protein has not changed significantly since 2019.

LIKELIHOOD TO HIGHLY RECOMMEND DIFFERENT PROTEINS

% top 2 box, 11-pt. scale

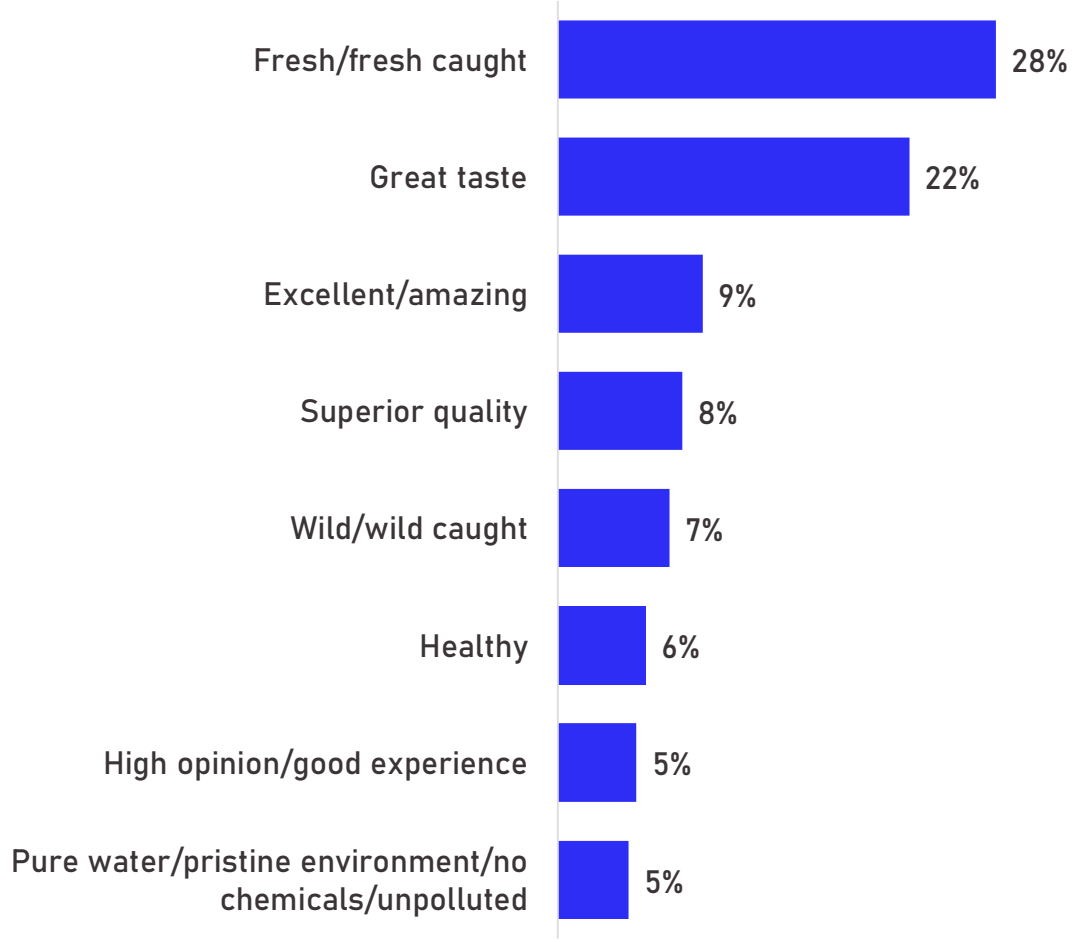


**not asked in 2019*

C5: How likely are you to recommend the following to a friend, family member, or colleague? (n=1000)

Communications should reinforce consumers' already strong perception that seafood from Alaska is fresh, great tasting, and high quality.

IMPRESSIONS OF SEAFOOD FROM ALASKA (UNAIDED)



"It tastes good and fresh, is sustainable, and is not overfished to keep the numbers growing."

"It is the freshest fish you can get in the USA."

"I heard that seafood from Alaska is more sustainable because it is caught and farmed well."

"It is generally healthier than seafood from other areas, but it tends to be more expensive. However, it is the only place to get really great quality king crab legs."

"Fish from Alaska are the healthiest and most nutritious you can find. Alaska Seafood also contains no artificial colouring, preservatives, pesticides or GMO."

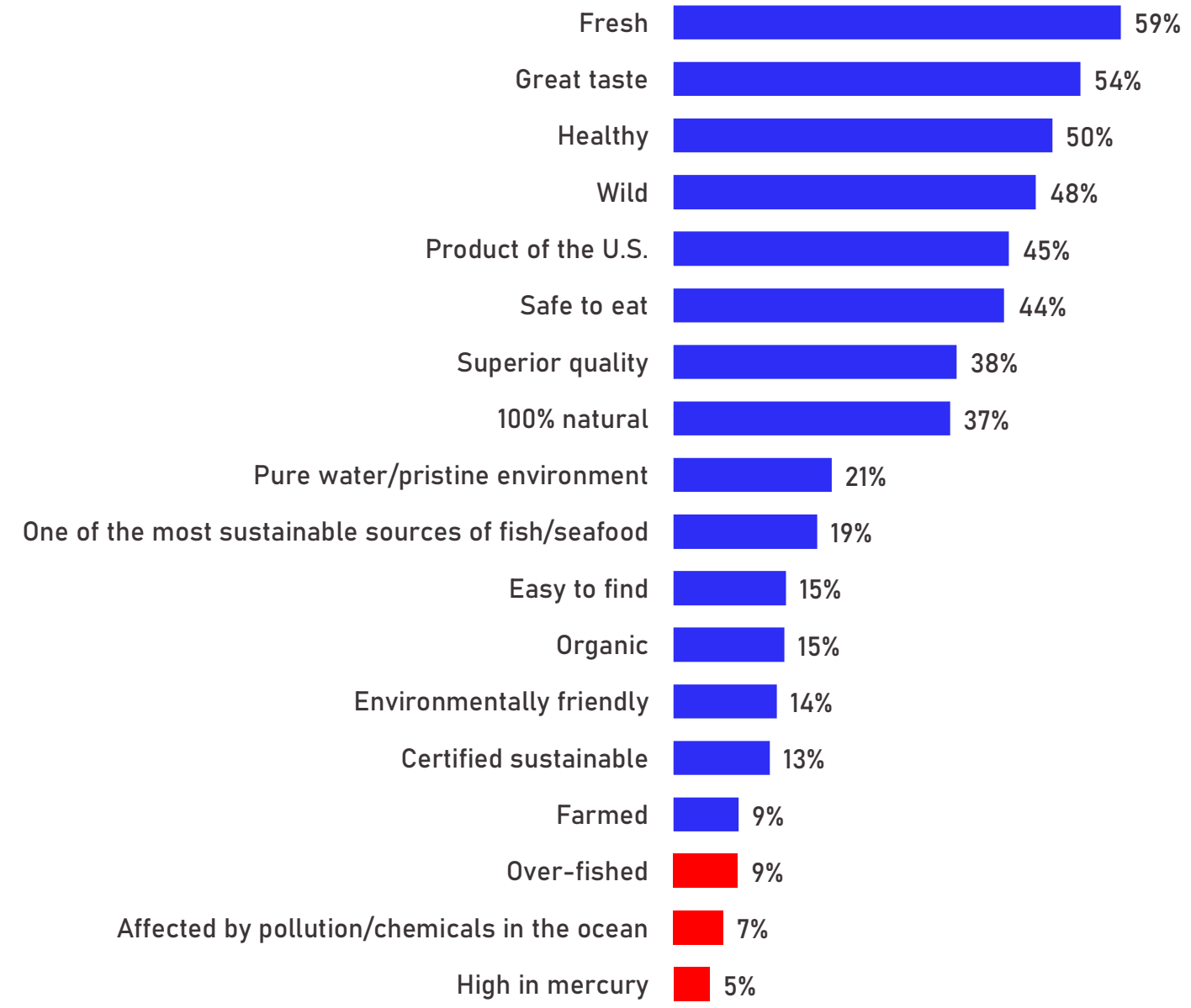
D1: What impressions, if any, do you have about fish/seafood from Alaska? Please be as detailed and specific as possible. (n=1000)

Capitalize on consumers' beliefs that Alaska seafood is fresh and wild, and a tasty and healthy meal once it reaches their plate.

- There are very few negative associations about Alaska seafood.

ALASKA SEAFOOD ASSOCIATIONS

% ranked as top 5



**not asked in 2019*

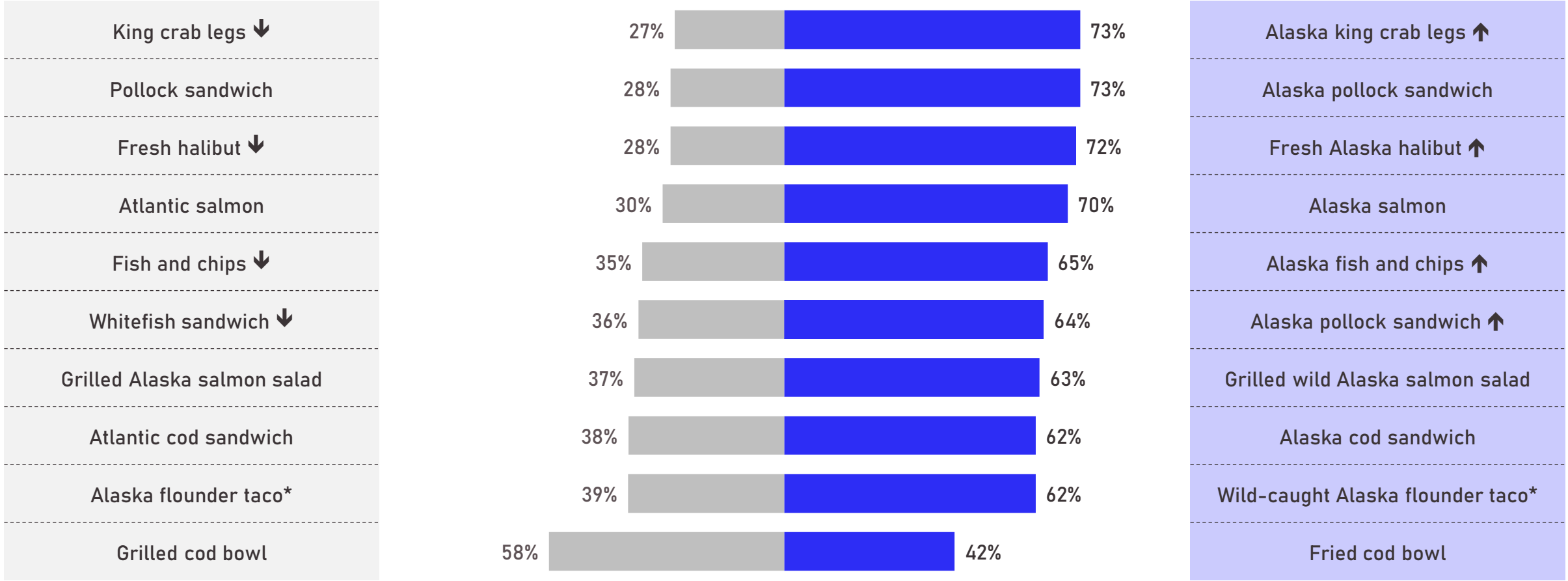
D2: Using the list below, we'd like you to rank the items that best describe ALASKA FISH/SEAFOOD. You may have learned about these issues from other people, TV, websites, or online blogs, or may just have a particular gut-feeling about them. Please rank the top 5 items that best describe ALASKA FISH/SEAFOOD. (n=1000)

Preference for Alaska seafood has grown since 2019 and is now preferred over 2-to-1.

- Specifying "wild Alaska" can be even more impactful.

PREFERRED SEAFOOD MENU ITEM NAME AT RESTAURANTS OR CAFETERIAS

do you prefer...



*Options not shown in 2019

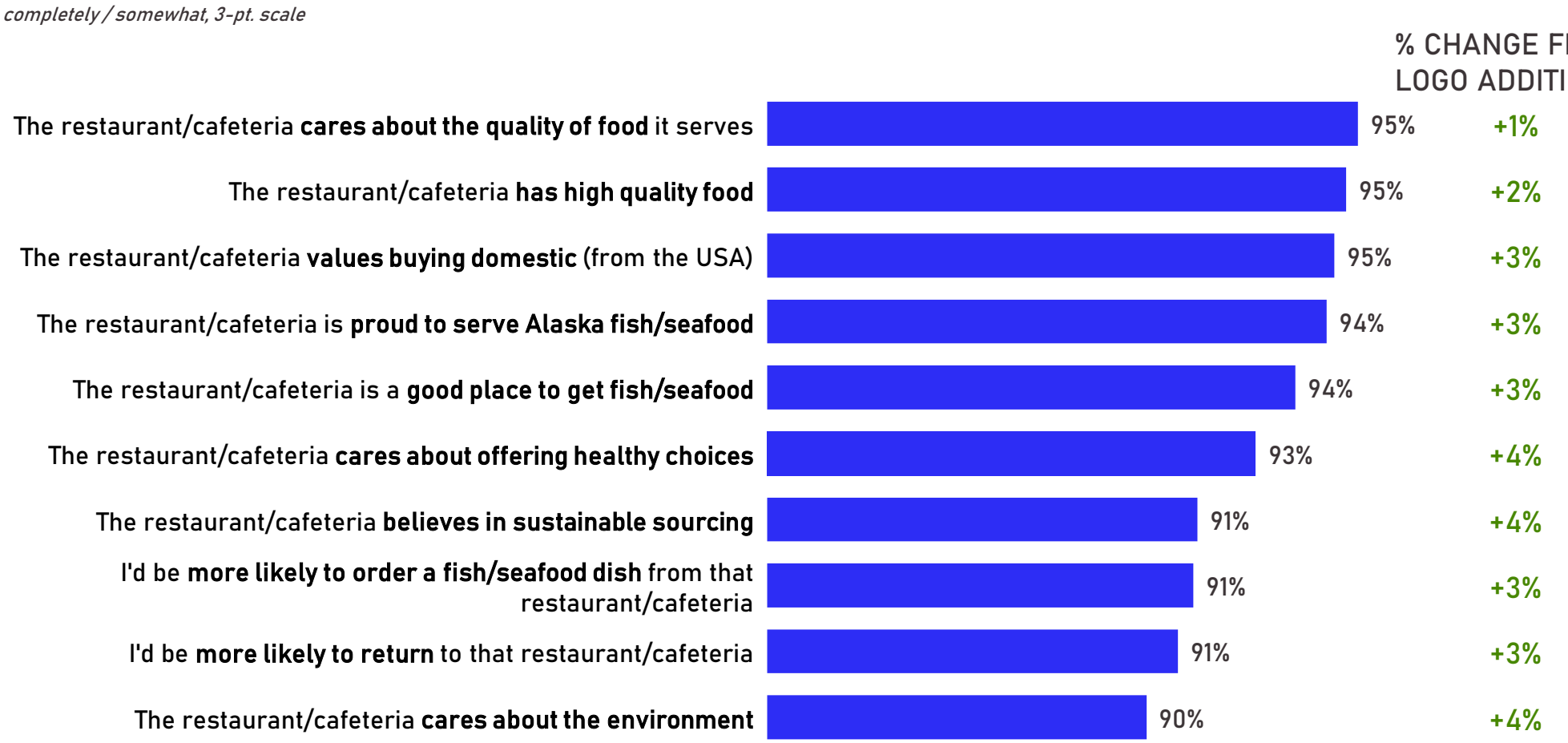
↑↓ = significantly higher / lower than 2019

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

Seeing the Alaska Seafood logo on the menu does lift perceptions.

IMPACT OF 'ALASKA' DESCRIPTION VS. ALASKA SEAFOOD LOGO ON RESTAURANT PERCEPTIONS

% agree completely / somewhat, 3-pt. scale



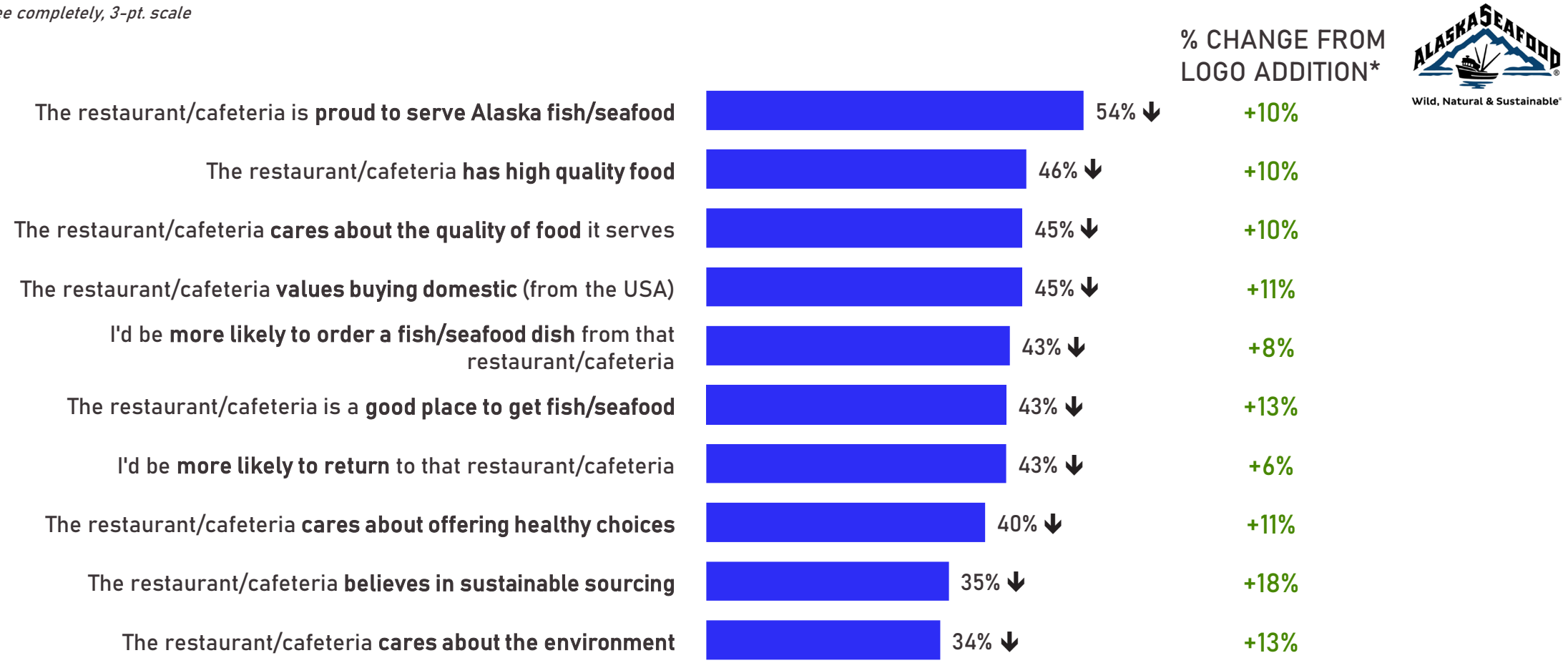
*Consumers were asked the extent to which they agree with each statement with and without the Alaska Seafood logo. Data in this column represents a percentage point increase (for example, 95% jumps to 96% after the logo is shown).

E2: If a restaurant or cafeteria used the word "Alaska" to describe the fish/seafood on its menu, would you believe that… (n=1000)
E3: If a restaurant or cafeteria had the Alaska Seafood logo on its menu, how much would you agree or disagree with the following statements about the restaurant? (n=1000)

Seeing the Alaska Seafood logo on the menu does lift perceptions.

IMPACT OF 'ALASKA' DESCRIPTION VS. ALASKA SEAFOOD LOGO ON RESTAURANT PERCEPTIONS

% agree completely, 3-pt. scale



↑↓ = significantly higher / lower than 2019
Note: 2019 survey asked about restaurant only, rather than restaurant/cafeteria.

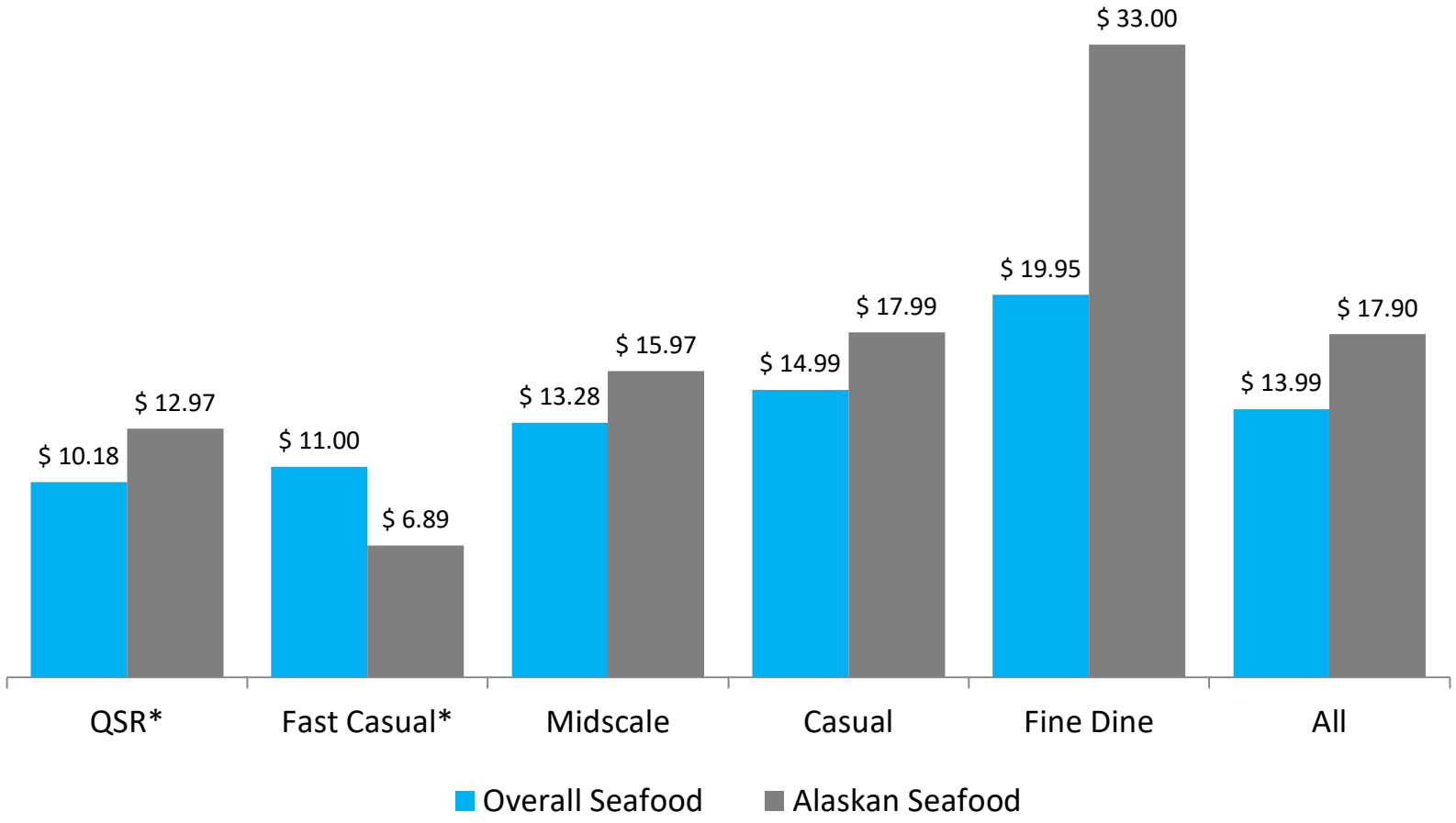
*Consumers were asked the extent to which they agree with each statement with and without the Alaska Seafood logo. Data in this column represents a percentage point increase (for example, 54% jumps to 64% after the logo is shown).

E2: If a restaurant or cafeteria used the word "Alaska" to describe the fish/seafood on its menu, would you believe that… (n=1000)
E3: If a restaurant or cafeteria had the Alaska Seafood logo on its menu, how much would you agree or disagree with the following statements about the restaurant? (n=1000)

Aside from fast casual operators, Alaska seafood has a much higher price point than that of overall seafood offered at restaurants.

ALASKA SEAFOOD

median price by segment



	Price Gap	% Increase
QSR*	$ 2.79	+27%
Fast Casual*	$ 4.11	-62%
Midscale	$ 2.69	+20%
Casual	$ 3.00	+20%
Fine Dining	$ 13.05	+65%
All	$ 25.64	+28%

price gap = Alaska seafood – Overall Seafood

% increase = (Alaska Seafood/Overall Seafood)-1

MenuTrends YE SEP'22, MEDIAN PRICE for Alaska seafood apps, entrées, and sides
*Indicates small sample size

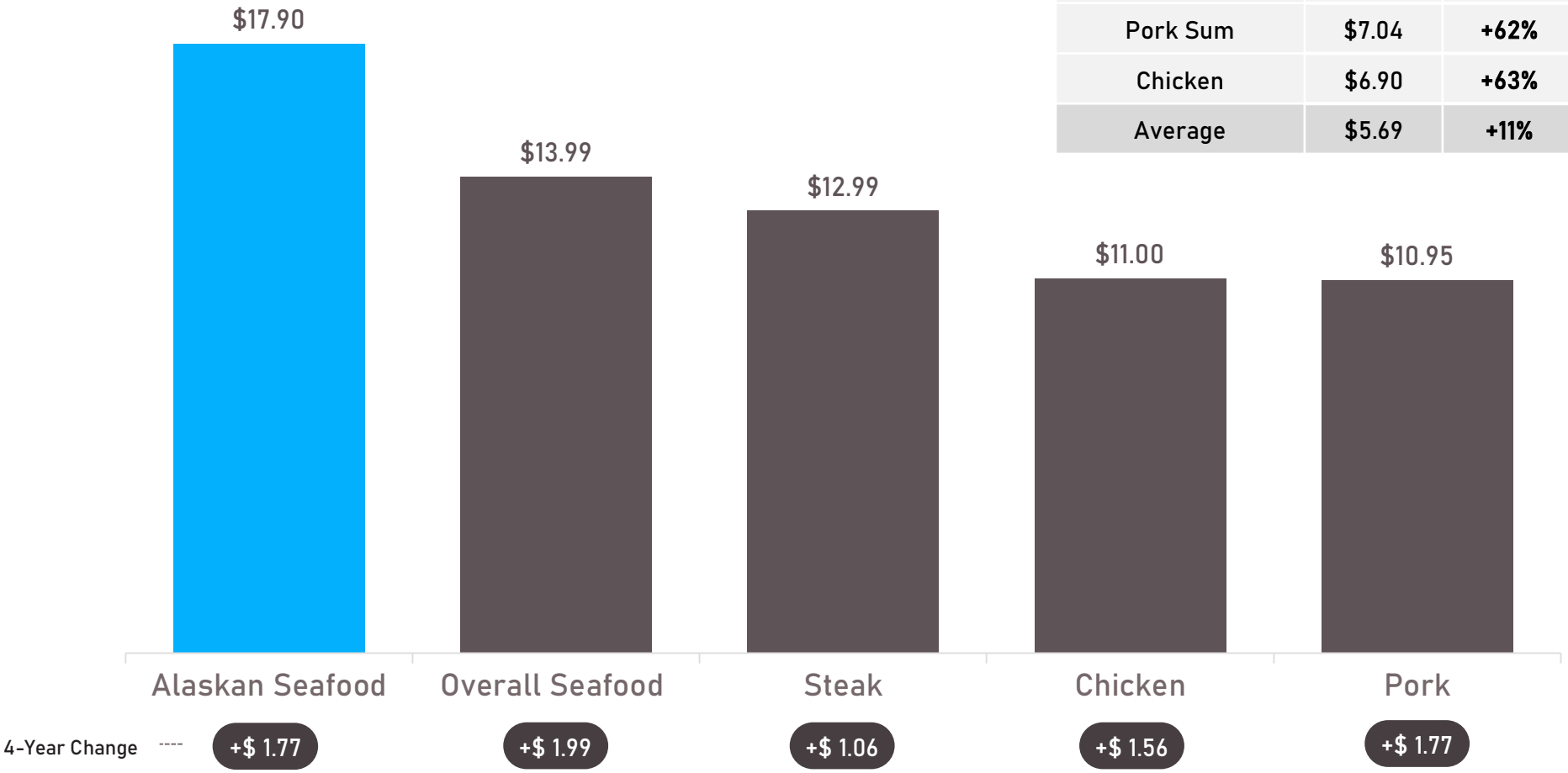
ALASKA SEAFOOD

median price

Alaska seafood commands a higher price point than pork, chicken, and all other seafood.

- All main protein types have experienced a price increase over the last four years.

	Price Gap	% Increase
Overall Seafood	$3.91	**+27%**
Steak	$4.91	-37%
Pork Sum	$7.04	**+62%**
Chicken	$6.90	**+63%**
Average	$5.69	**+11%**



MenuTrends YE SEP'22, MEDIAN PRICE for Alaska seafood apps, entrées, and sides

TOP BRANDS ON MENUS (excluding beverages)

Alaska Seafood is the 5th most commonly menued brand at restaurants.

- Candies, sauces, and plant-based meats make up most of the other top menued brands.

RANKED ON INCIDENCE

TOP ranked by incidence	INCIDENCE %	# of ITEMS
Oreo	0.1%	846
Certified Angus	0.1%	550
Beyond Meat	0.1%	471
San Marzano	0.1%	458
Nutella	0.1%	450
Impossible Foods	0.1%	427
Lays	0.1%	391
Reese's	0.1%	339
Alaska Seafood	0.0%	287
M&M	0.0%	235
Craisins	0.0%	234
Doritos	0.0%	227
Heath	0.0%	185
Tabasco	0.0%	178
Fritos	0.0%	168
A1	0.0%	154
Boursin	0.0%	136
Butterfinger	0.0%	135
Snickers	0.0%	130

RANKED ON PENETRATION

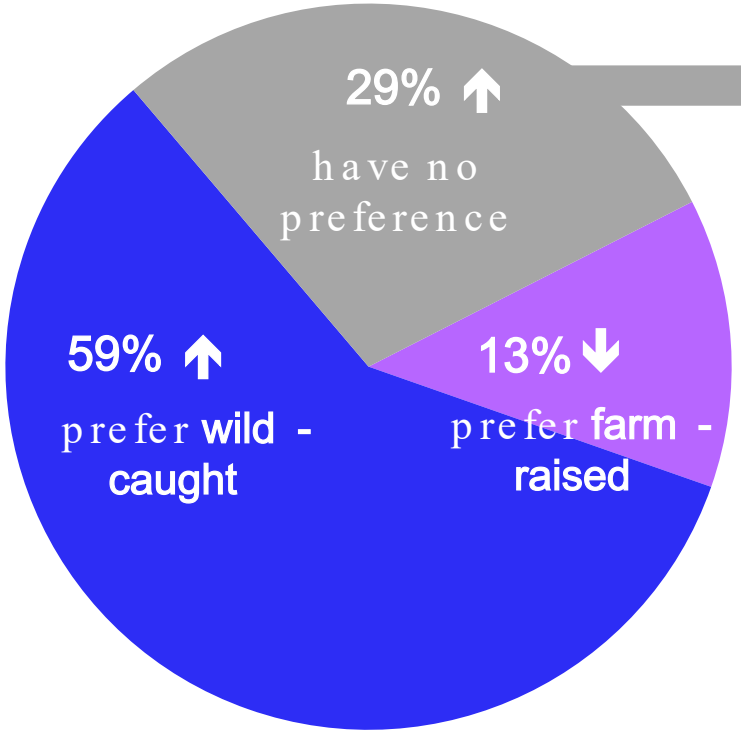
TOP ranked by penetration	PENETRATION %	# of RESTAURANTS
Oreo	8.1%	392
Nutella	5.3%	256
Beyond Meat	4.1%	200
Impossible Foods	3.3%	159
Alaska Seafood	3.2%	155
Certified Angus	3.0%	146
Reese's	2.9%	142
M&M	2.7%	129
Lays	2.5%	120
San Marzano	2.4%	117
Craisins	2.3%	112
Fritos	2.1%	103
Doritos	2.1%	103
Tabasco	1.7%	84
Kraft	1.6%	80
Hershey's	1.6%	78
Heath	1.6%	77
Nestle	1.6%	76
A1	1.4%	68

MenuTrends YE SEP'22, , INCIDENCE: of all dishes on apps/entrées/sides menus, % that feature that term… PENETRATION: of all restaurants serving apps/entrées/sides, % that offer at least one item noted as…

wild vs. farmed

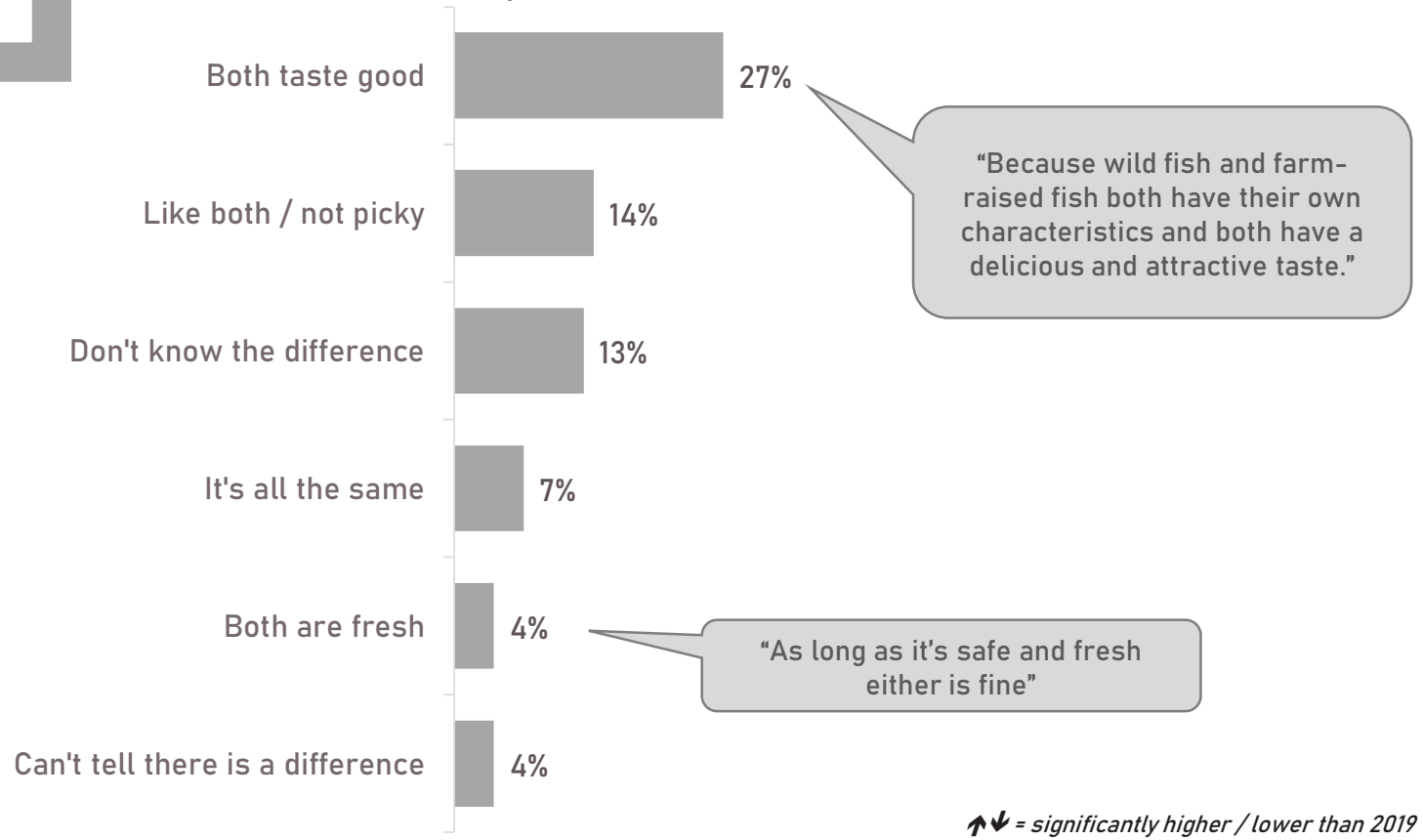
Wild-caught seafood is preferred overall, but most of the third with no preference feel farm-raised tastes the same.

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



Why do you have **no preference**?

Top 6 reasons



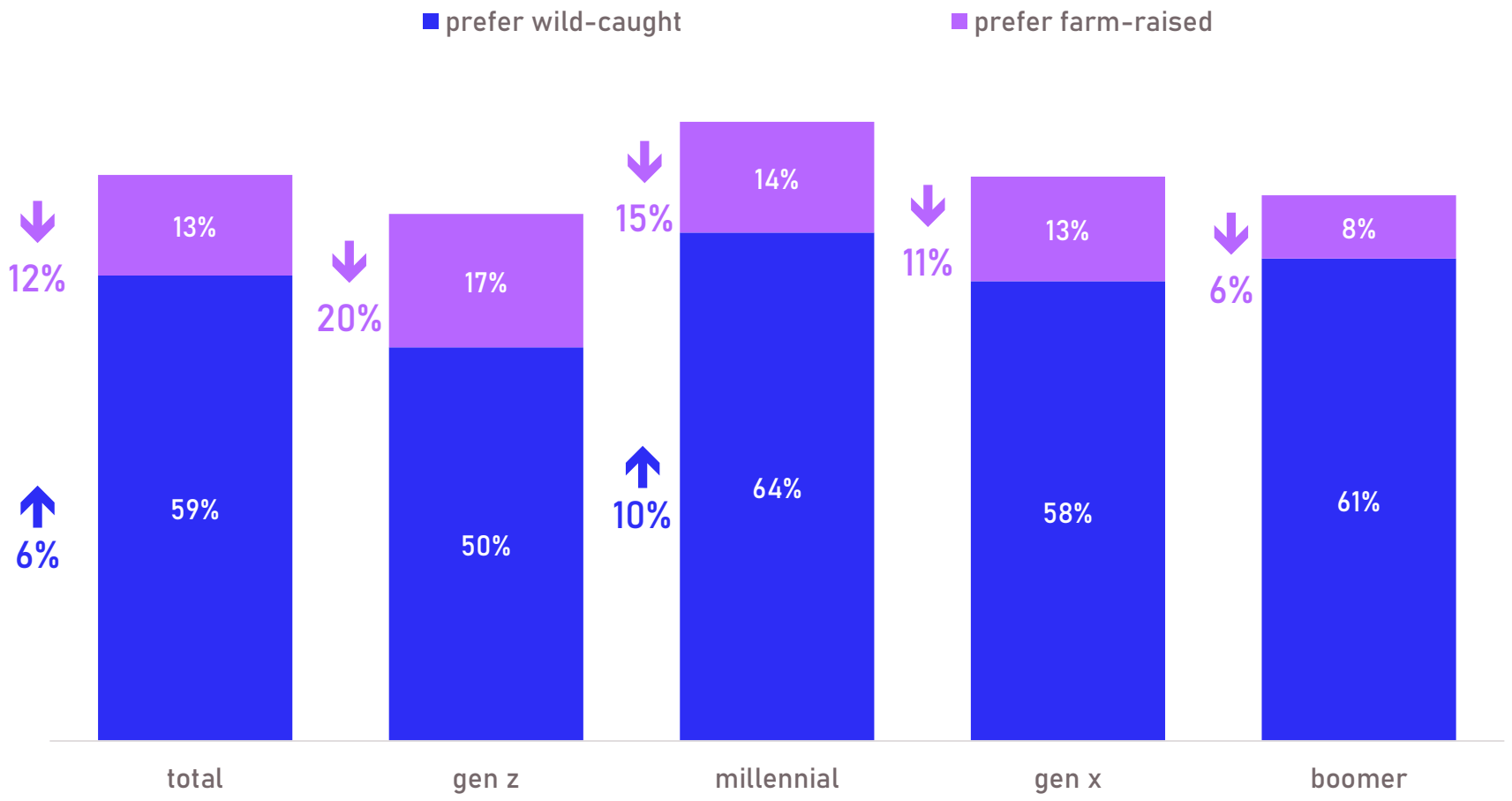
↑↓ = significantly higher / lower than 2019

F1: If given the choice, would you prefer to eat WILD fish/seafood OR FARM-RAISED fish/seafood. (n=1000) F2: Why don't you have a preference about eating WILD or FARM-RAISED fish/seafood? (n=285)

Wild -caught should be the focus when possible, likely because wild is seen as more sustainable.

- Farm-raised, on the other hand, should be down-played as its appeal has declined over the past 3 years.

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

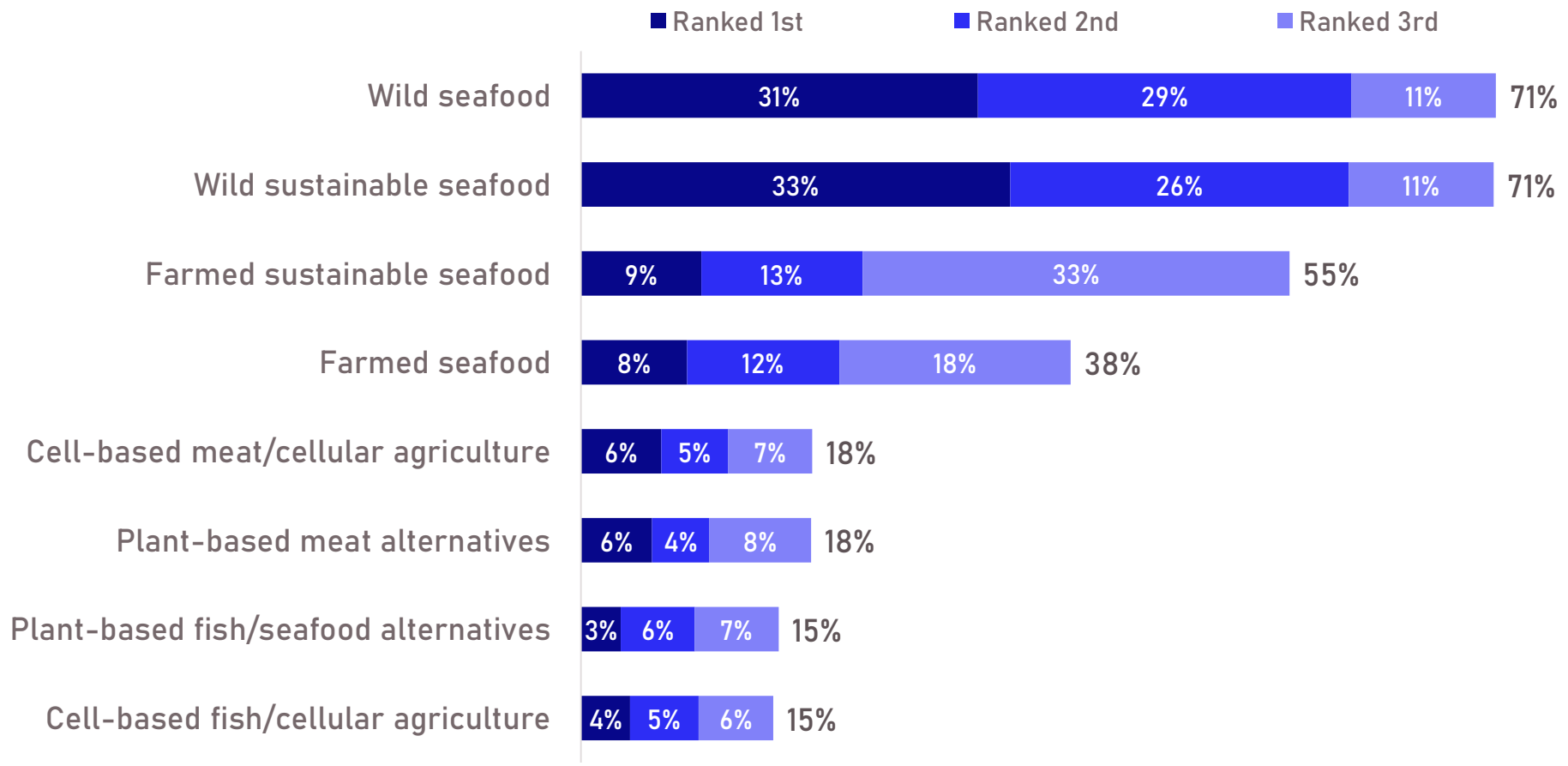


↑↓ = significantly higher / lower than 2019

F1: If given the choice, would you prefer to eat WILD fish/seafood OR FARM-RAISED fish/seafood? (n=1000 | 195 | 257 | 272 | 276)

Ensure you retain 'wild' and 'sustainable' in your labels – they resonate with consumers.

APPEAL OF DIFFERENT SEAFOOD PRODUCTS

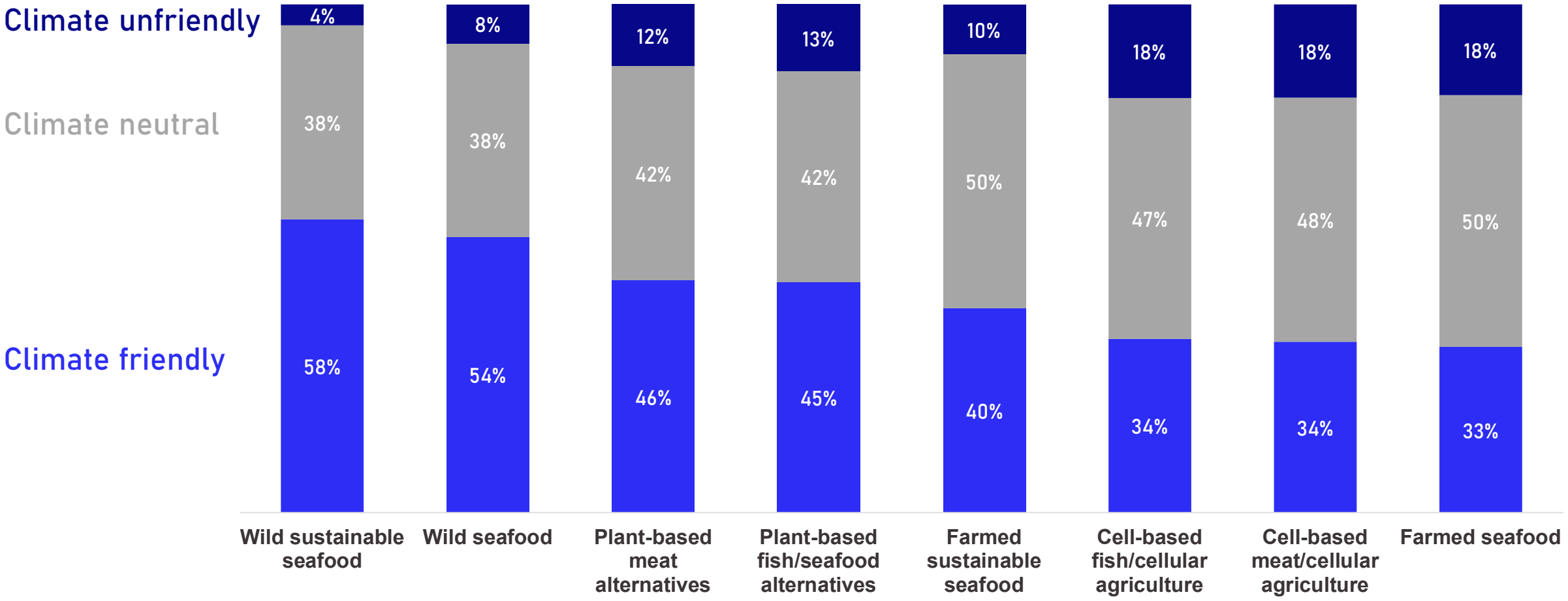


*not asked in 2019

G8: Which of these products do you find most appealing to eat? (n=1000)

Wild seafood is seen as more environmentally sound than farmed or plant-based alternatives.

PERCEIVED CLIMATE FRIENDLINESS OF SEAFOOD PRODUCTS



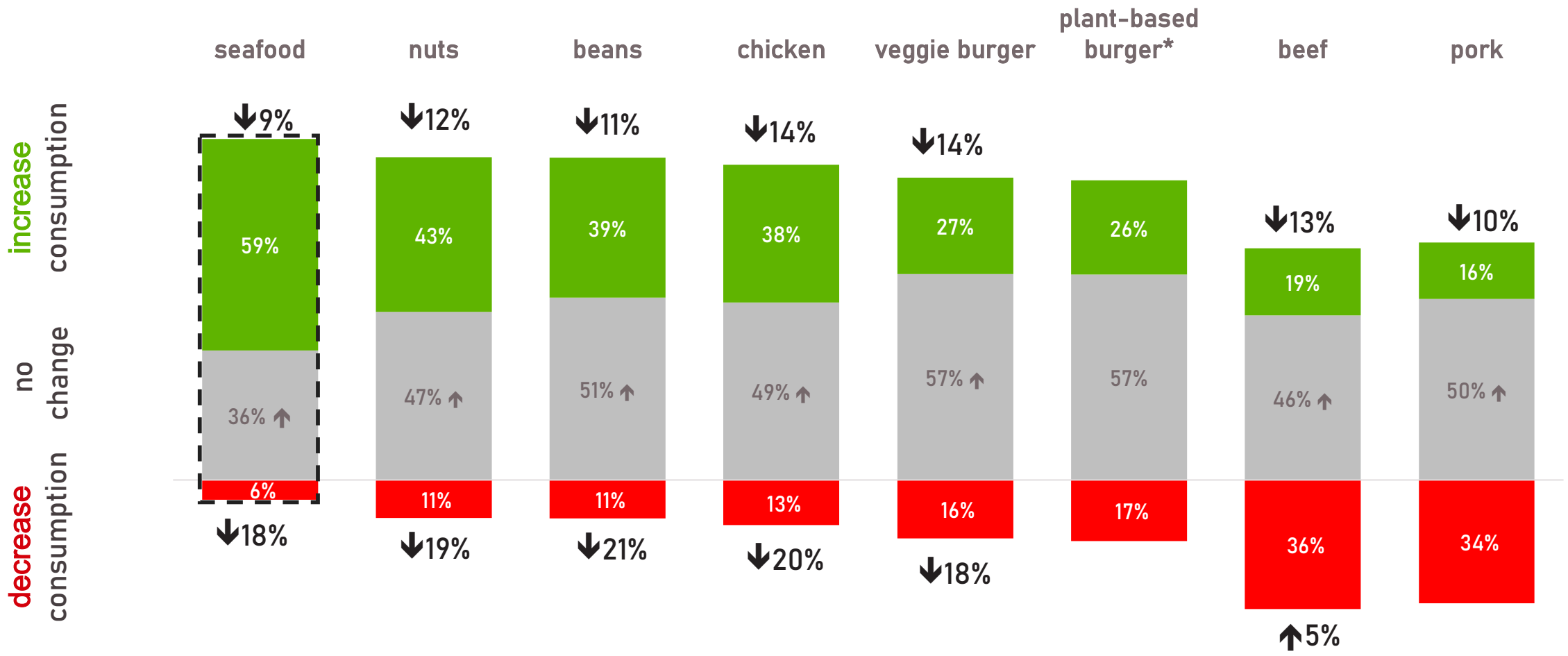
*not asked in 2019

G10: For each of the following proteins, do you generally consider it to be…. Climate-friendly, Climate-neutral, Climate-unfriendly. (n=1000)

plant-based proteins & meat alternatives

Fewer people are intentionally changing protein types consumed. However, most are still interested in eating more seafood.

DESIRED CHANGE IN CONSUMPTION BY PROTEIN TYPE



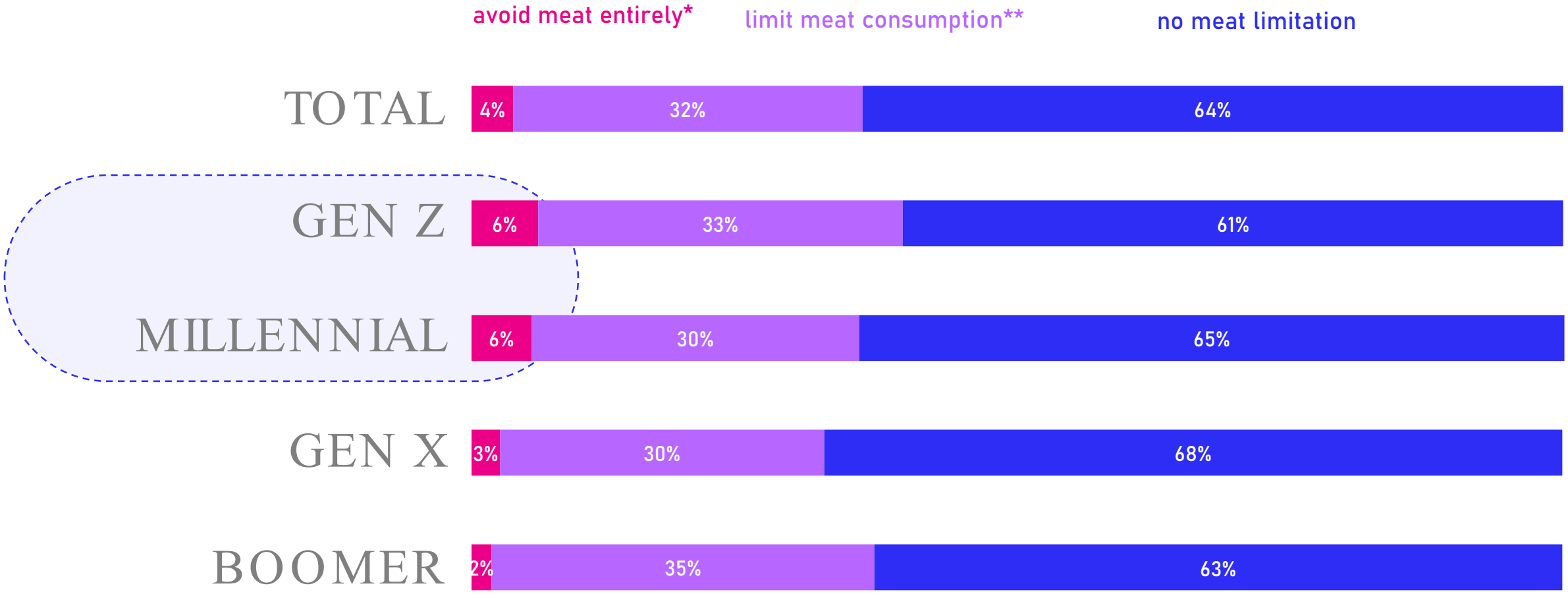
*not asked in 2019

↑↓ = significantly higher / lower than 2019

G1: For each of the following proteins, are you generally trying to… Increase your consumption? Decrease your consumption? Not change level of consumption? (n=1000)

Younger generations are more likely to completely avoid meat, including seafood.

APPROACH TO MEAT LIMITATION



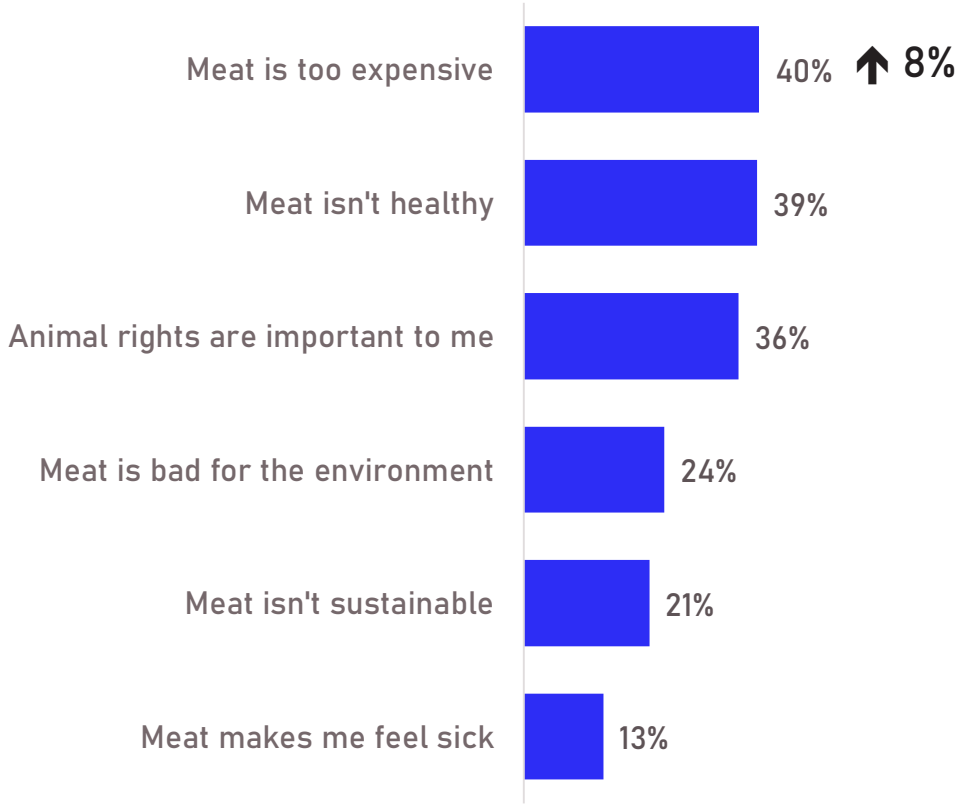
*vegetarians and vegans; **flexitarians and pescatarians*

G2: Which of the following best describes the way you eat today? (n=1000 | 195 | 257 | 272 | 276)

Expense plays an even bigger role in 2022 for replacing meat. Citing its value will help bolster seafood's position as the top replacement.

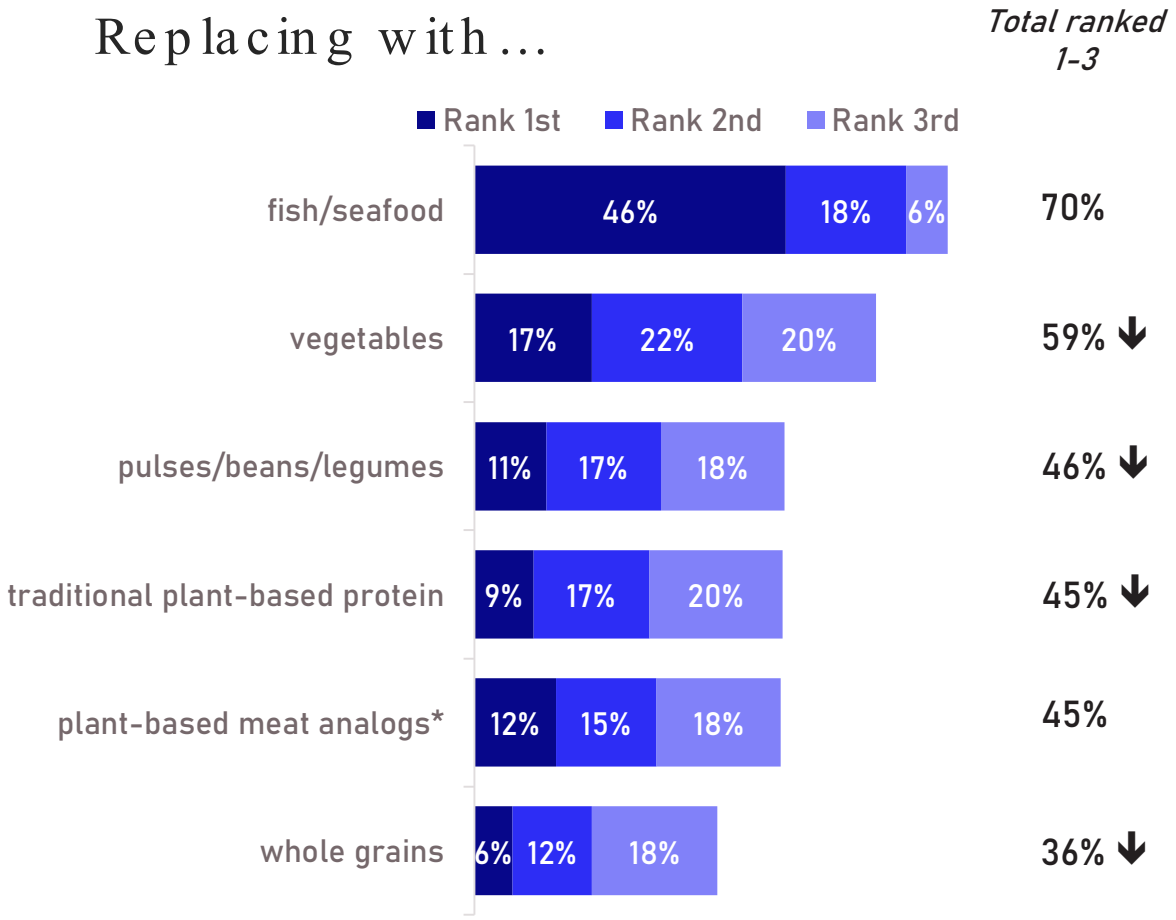
REASONS FOR LIMITING MEAT

among those who limit meat consumption



PREFERRED WAYS TO LIMIT MEAT

ranking; among those who limit meat consumption



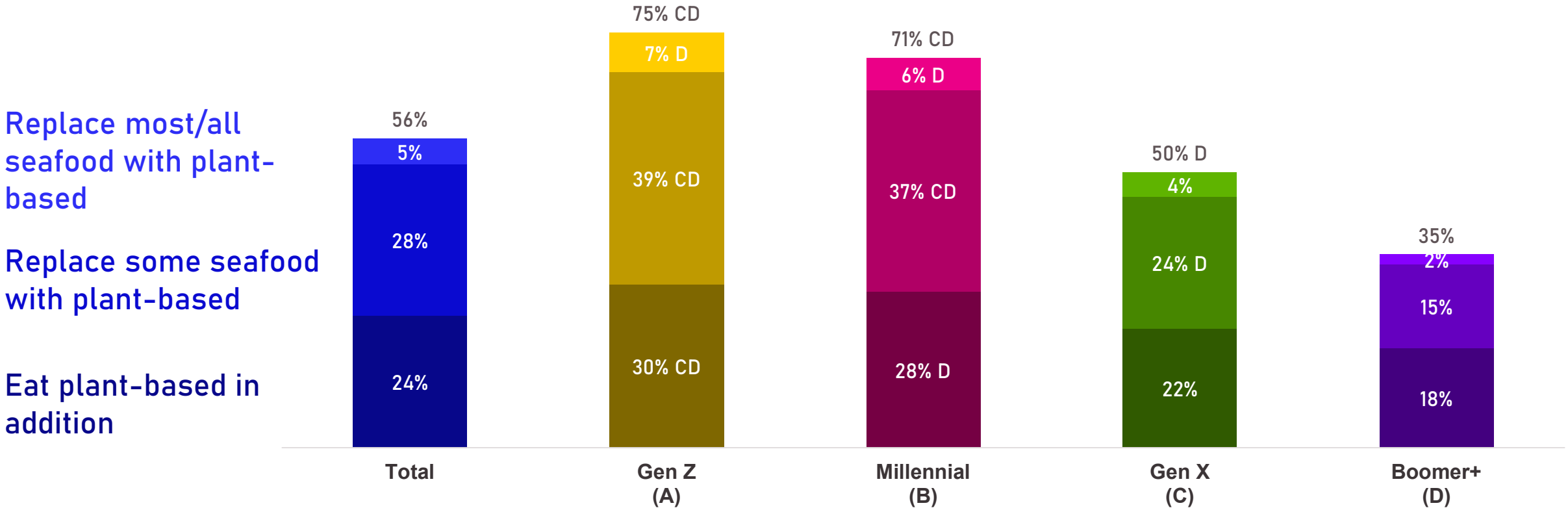
*not asked in 2019

↑↓ = significantly higher / lower than 2019

G3 - What are your reasons for limiting your meat consumption (n=358) G4 - Which of the following approaches to reducing meat (beef, pork, poultry) consumption do you find appealing? (n=358)

Growth for plant -based seafood will most likely come from younger generations, more as a supplement than a complete replacement.

HOW FIT PLANT-BASED SEAFOOD IN DIET BY GENERATION



G9: Which of the following best describes how you would fit plant-based seafood alternatives into your diet? (n=1000 | 195 | 257 | 272 | 276)

Thank You!

what we learned

Away from home dining is down, but at-home consumption of fish and seafood is up.

Inflation has eaten away at consumers' pocketbooks and dining out has taken a hit, including fish and seafood. Lower satisfaction with seafood at LSR and casual dining restaurants may be a factor, perhaps due to supply chain issues. Menus play a key role in patrons' decision-making, so it is important that Alaska seafood stands out. Emphasis on seafood's health benefits and improved taste will aid this. On a positive note, more consumers are eating fish and seafood at home than before the pandemic started. Therefore, helping at-home consumers understand the benefits of Alaska seafood is key.

Although interest in many AFH seafood items has fallen since 2019, seafood entrées, tacos, and grain bowls have held constant.

Entrées are the most popular seafood item for all segments but C&Us, where tacos are preferred (and plant-based protein is a competitor). Basic prep methods – grilled, fried, baked, and broiled – continue to be the top methods. Featuring seafood entrées that use these methods will help to engage interest. Consumers would eat more fish/seafood if it were more affordable (which is difficult to address given current inflation). They choose it for its taste and health benefits. In fact, consumers feel fish/seafood is healthier than plant-based proteins / meat alternatives. Communicating seafood's superior taste and health advantages will resonate with consumers.

Seafood from Alaska continues to be strong.

Preference for Alaska seafood has grown since 2019, and it is now preferred 2-to-1 over seafood not labeled from Alaska. Consumers see Alaska seafood as fresh, wild, and tasty, as well as offering strong health benefits. And consumers prefer the term wild over farm-raised. Wild boosts interest likely since it's seen as more climate-friendly. Emphasizing how Alaska seafood is wild-caught will help to establish Alaska's connection to these key criteria in consumers' minds. (Note: newly added, Maine seafood appears to hold similar appeal.)

Interest in plant-based protein is steady, with greater interest among younger consumers.

Fewer consumers plan to change the type of proteins they consume, including fish / seafood. However, most are still interested in fish / seafood even if they are not actively planning to increase consumption. Although meat avoiders are a small minority, those that fall within this group tend to be younger. Expense is a main driver for reducing consumption of meat, along with health benefits and animal rights. Communications focusing on Alaska seafood's value as well as its health benefits will help to offset concerns. Plant-based seafood alternatives garner moderate interest, mostly from younger consumers. However, these alternatives would most likely be in addition to regular fish / seafood.