ALASKA SEAFOOD AT FOODSERVICE 2022
(refresh of 2019 study)
THE STATE OF FOODSERVICE
Consumer Spend.
prepared food & non-alcoholic beverages (in billions)

- 2019: $806.7
- 2020: $608.0
- 2021: $701.4
- 2022: $794.8
- 2023: $855.0
New restaurant introductions and limited-time offers have nearly returned to pre-COVID levels.
Greatest Operator Challenge.

- 38% Inflation
- 30% Supply Chain Disruption
- 33% Labor Shortage
“WHICH CATEGORIES ARE CURRENTLY SHOWING THE MOST INFLATION?”

- Meat: 84%
- Eggs and dairy products: 44%
- To-go packaging: 42%
- Fresh fruit and vegetables: 29%
- Seafood: 21%
- Non-perishable pantry staples: 16%
- Cleaning supplies/cleaning chemicals: 14%
- Breads, rolls, and bakery items: 10%
- Packaged snacks: 8%
- Silverware, glasses, plateware: 6%
- Dressings, sauces, herbs, and spices: 4%
- Alcoholic beverages: 4%
- Plant-based meat alternatives: 3%
- Desserts: 3%
- Plant-based proteins: 1%
**FRONT OF HOUSE**

- Busser / barback / food runner: 12% significantly understaffed, 27% slightly understaffed.
- Server / bartender: 12% significantly understaffed, 27% slightly understaffed.
- Host / greeter: 7% significantly understaffed, 20% slightly understaffed.

**BACK OF HOUSE**

- Executive chef / kitchen manager: 7% significantly understaffed, 21% slightly understaffed.
- Assistant / sous chef: 12% significantly understaffed, 27% slightly understaffed.
- Prep / line / short-order cook: 24% significantly understaffed, 27% slightly understaffed.
- Dishwasher: 17% significantly understaffed, 34% slightly understaffed.
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

- 26% shifting to value tier products
- 17% shifting to mid tier products
- 6% shifting to premium products
Operators look first to entrees for future menu innovation.

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

- Sandwiches, pizzas, and other entrees: 44%
- Center of the plate proteins: 44%
- Salads, vegetables, and fruit dishes: 29%
- Appetizers: 24%
- Side dishes: 23%
- Desserts: 19%
- Soups: 12%
- Fresh bakery items: 12%
- Alcoholic beverages: 9%
- Non-alcoholic beverages: 8%
In the short term, operators will naturally look first to products that can save time, money, and especially labor.

- Labor-saving: 57%
- Versatile: 46%
- Portion Controlled: 34%
- Pre-cut/Pre-washed: 31%
- Frozen: 23%
- Quick-cooking: 22%
- Small Pack Size: 19%
- Par-cooked: 18%
- Customizable: 13%
**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.

**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

<table>
<thead>
<tr>
<th>Segment</th>
<th>Description</th>
<th>Check Avg</th>
<th>Example Brands</th>
</tr>
</thead>
<tbody>
<tr>
<td>QSR</td>
<td>Counter service; focus: speed and value; check avg: &lt; $8</td>
<td></td>
<td>McDonald's, Subway, Taco Bell</td>
</tr>
<tr>
<td>FAST CASUAL</td>
<td>Counter service; focus: customization and quality ingredients; check avg: &gt; $8</td>
<td></td>
<td>Starbucks, Panera, Cheesecake</td>
</tr>
<tr>
<td>ONSITE</td>
<td>Cafeterias; C&amp;U; B&amp;I</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CASUAL</td>
<td>Waiter service; focus: shared plates and bar menus; serves alcohol; check avg: $12-20</td>
<td></td>
<td>Applebee's, IHOP, Red Robin</td>
</tr>
<tr>
<td>FINE DINE</td>
<td>High-end wait service; focus: chef-driven menu; serves alcohol; check avg: &gt; $30</td>
<td></td>
<td>Ruth's Chris Steak House</td>
</tr>
</tbody>
</table>

**Limited Service (LSR)**

**Full Service (FSR)**
Casual and fine dining restaurants are the best venues for seafood and where consumers are most likely to order it.

MONTHLY CONSUMPTION OF SEAFOOD AT DIFFERENT LOCATIONS

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

QSR
- 51% eat seafood at QSR chains in a typical month
- ↓15% vs. 2019

FAST CASUAL
- 49% eat seafood at fast casual chains in a typical month
- ↓12% vs. 2019

CASUAL DINING
- 71% eat seafood at casual dining chains in a typical month
- ↓9% vs. 2019

FINE DINING*
- 70% eat seafood at fine dining restaurants in a typical month

C&U*
- 67% eat seafood at C&U cafeterias in a typical month

B&I*
- 62% eat seafood at B&I cafeterias in a typical month

*not asked in 2019

However, seafood consumption at QSR, fast casual, and casual dining is down vs. 2019.
Boomers lag other generations in their restaurant seafood consumption.

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=varied)

<table>
<thead>
<tr>
<th>Number of Monthly Occasions Eating Seafood at Restaurants</th>
<th>Total</th>
<th>Gen Z (A)</th>
<th>Millennial (B)</th>
<th>Gen X (C)</th>
<th>Boomer+ (D)</th>
</tr>
</thead>
<tbody>
<tr>
<td>QSR</td>
<td>1.2</td>
<td>1.4 D</td>
<td>1.4 D</td>
<td>1.3 D</td>
<td>1.3 D</td>
</tr>
<tr>
<td>Fast Casual</td>
<td>1.0</td>
<td>1.2 D</td>
<td>1.3 D</td>
<td>1.1 D</td>
<td>0.8 D</td>
</tr>
<tr>
<td>Casual Dining</td>
<td>1.4</td>
<td>1.3 D</td>
<td>1.5 D</td>
<td>1.6 D</td>
<td>1.6 D</td>
</tr>
<tr>
<td>Fine Dining*</td>
<td>1.4</td>
<td>1.6 D</td>
<td>1.3 D</td>
<td>1.7</td>
<td>1.0</td>
</tr>
</tbody>
</table>

*not asked in 2019

â â = significantly higher / lower than 2019

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

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)

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

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

- Total
- Gen Z (A)
- Millennial (B)
- Gen X (C)
- Boomer+ (D)

<table>
<thead>
<tr>
<th>C&amp;U*</th>
<th>1.6</th>
<th>1.3</th>
<th>1.5</th>
<th>2.2 A</th>
<th>2.4**</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gen Z (A)</td>
<td>1.6</td>
<td>1.3</td>
<td>1.5</td>
<td>2.2 A</td>
<td>2.4**</td>
</tr>
<tr>
<td>Millennial (B)</td>
<td>1.5</td>
<td>1.8</td>
<td>1.4</td>
<td>2.3</td>
<td>0.7**</td>
</tr>
<tr>
<td>Gen X (C)</td>
<td>1.5</td>
<td>1.3</td>
<td>1.8</td>
<td>2.3</td>
<td>0.7**</td>
</tr>
<tr>
<td>Boomer+ (D)</td>
<td>1.5</td>
<td>1.3</td>
<td>1.8</td>
<td>2.3</td>
<td>0.7**</td>
</tr>
</tbody>
</table>

*not asked in 2019

**base size <30; results should be considered directional
Many consumers make their ordering decision while browsing the menu, so ensure that seafood items stand out.

**SEAFOOD ORDERING STRATEGY**

- **I make my decision to have fish or seafood after looking at all of the other menu choices**: 46%
- **I decide before arriving that I will have fish or seafood for that meal**: 22%
- **I only eat seafood at that type of restaurant, so it is always my choice**: 10%
- **I mostly decide to eat a specific fish/seafood item based on the catch of the day, or a wait staff recommendation**: 9%
- **I mostly order seafood if there is a limited time offer that catches my eye**: 8%
- **I mostly order seafood if it is a lower price than other kinds of protein (beef, chicken, etc.)**: 5%

*question was split into 3 questions in 2019*
AFH seafood consumption can be boosted with an emphasis on health benefits and improved taste.

**Change in AFH Seafood Consumption in Past Two Years**

<table>
<thead>
<tr>
<th>Consumption Change</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Consumption increased</td>
<td>24%</td>
</tr>
<tr>
<td>Consumption stayed the same</td>
<td>60%</td>
</tr>
<tr>
<td>Consumption decreased</td>
<td>17%</td>
</tr>
</tbody>
</table>

### Why has consumption increased?

- Healthier than other proteins: 55%
- More serving good tasting fish/seafood: 38%
- Trying to eat less beef, chicken, and/or pork: 37%
- More variety of fish/seafood offered: 35%
- More serving responsibly-sourced: 28%
- Tastes better/fresher than it used to: 26%
- Better for the environment than animal proteins: 26%
- More people in my family eat fish/seafood now: 24%
- Fish/seafood is more sustainable than animal proteins: 22%
- More are identifying the origin on menus: 17%
- Trying to eat fewer plant-based proteins: 16%

### Why has consumption decreased?

- Too expensive, so I am eating less of it: 45%
- I am concerned it won't be fresh: 24%
- Serving fewer items today than they did 2 years ago: 15%
- Eating less meat in general: 13%
- Hesitant to order because of climate change's impact on marine life: 13%
- Don't like the taste of the available dish options out there: 11%
- Hesitant to order because I am concerned about overfishing: 9%
- My favorite restaurant or cafeteria no longer serves my favorite dish: 8%
- My family members/friends/colleagues do not eat fish/seafood, so I stopped or reduced the amount that I eat, too: 8%
- I had a bad restaurant/cafeteria or personal experience that turned me off of fish/seafood: 6%

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

**Note:**

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.

<table>
<thead>
<tr>
<th>TOP SAUCES AND FLAVORS</th>
<th>PENETRATION</th>
<th>1-YEAR GROWTH</th>
<th>4-YEAR GROWTH</th>
<th>TRENDING</th>
<th>PENETRATION</th>
<th>1-YEAR GROWTH</th>
<th>4-YEAR GROWTH</th>
</tr>
</thead>
<tbody>
<tr>
<td>Garlic</td>
<td>48.0%</td>
<td>-5%</td>
<td>-7%</td>
<td>Sweet Soy</td>
<td>2.0%</td>
<td>+10%</td>
<td>+41%</td>
</tr>
<tr>
<td>Lemon</td>
<td>34.1%</td>
<td>-2%</td>
<td>-11%</td>
<td>Togarashi</td>
<td>1.4%</td>
<td>+4%</td>
<td>+36%</td>
</tr>
<tr>
<td>Butter</td>
<td>26.3%</td>
<td>-3%</td>
<td>-8%</td>
<td>Spicy Mayo</td>
<td>4.4%</td>
<td>+7%</td>
<td>+28%</td>
</tr>
<tr>
<td>Cilantro</td>
<td>22.7%</td>
<td>-</td>
<td>-2%</td>
<td>Sweet Chili Sauce</td>
<td>3.4%</td>
<td>-5%</td>
<td>+25%</td>
</tr>
<tr>
<td>Wine</td>
<td>20.9%</td>
<td>-4%</td>
<td>-14%</td>
<td>Yellow Curry</td>
<td>1.4%</td>
<td>+18%</td>
<td>+25%</td>
</tr>
<tr>
<td>Red Sauce</td>
<td>19.5%</td>
<td>-4%</td>
<td>-11%</td>
<td>Chipotle Aioli</td>
<td>2.4%</td>
<td>+8%</td>
<td>+24%</td>
</tr>
<tr>
<td>Jalapeno Pepper</td>
<td>19.2%</td>
<td>-12%</td>
<td>-13%</td>
<td>Chimichurri</td>
<td>2.2%</td>
<td>-3%</td>
<td>+23%</td>
</tr>
<tr>
<td>Mayo</td>
<td>19.1%</td>
<td>-5%</td>
<td>-8%</td>
<td>Eel Sauce</td>
<td>3.4%</td>
<td>+6%</td>
<td>+20%</td>
</tr>
<tr>
<td>Tartar</td>
<td>18.9%</td>
<td>-3%</td>
<td>-4%</td>
<td>Soy Glaze</td>
<td>1.1%</td>
<td>+3%</td>
<td>+19%</td>
</tr>
<tr>
<td>Basil</td>
<td>18.2%</td>
<td>-12%</td>
<td>-19%</td>
<td>Chili Flakes</td>
<td>1.2%</td>
<td>-7%</td>
<td>+19%</td>
</tr>
<tr>
<td>Ginger</td>
<td>17.1%</td>
<td>-1%</td>
<td>-6%</td>
<td>Curry Paste</td>
<td>1.1%</td>
<td>+18%</td>
<td>+17%</td>
</tr>
<tr>
<td>Vinaigrette</td>
<td>16.9%</td>
<td>-7%</td>
<td>-19%</td>
<td>Serrano Pepper</td>
<td>2.6%</td>
<td>+5%</td>
<td>+14%</td>
</tr>
<tr>
<td>Sesame</td>
<td>16.5%</td>
<td>-3%</td>
<td>-5%</td>
<td>Thai Basil</td>
<td>1.7%</td>
<td>+13%</td>
<td>+13%</td>
</tr>
<tr>
<td>Lime</td>
<td>16.0%</td>
<td>-3%</td>
<td>-3%</td>
<td>Curry Powder</td>
<td>1.0%</td>
<td>+16%</td>
<td>+12%</td>
</tr>
<tr>
<td>Salsa</td>
<td>15.7%</td>
<td>+1%</td>
<td>-8%</td>
<td>Coconut Curry</td>
<td>1.6%</td>
<td>+5%</td>
<td>+12%</td>
</tr>
</tbody>
</table>
seafood away-from-home
QSR SEAFOOD
Satisfaction with QSR seafood offerings has declined since 2019, as has consumption of many seafood types.

Among those who dine at QSR chains at least once per week:

42% are satisfied with current QSR seafood offerings.

**Satisfaction with Seafood Offering**

(2022: 42% up 7% from 2019)

**Types of Seafood Eaten at QSRs**

(2022 responses)

- Fried fish patty/sticks: 23%
- Shrimp: 17%
- Cod: 16%
- Ahi tuna: 13%
- Canned tuna*: 10%
- Crab: 9%
- Catfish: 9%
- Salmon: 8%
- Imitation crab/Surimi seafood: 8%
- Snapper: 7%
- Pollock: 6%
- Flounder/Sole: 6%
- Whitefish: 6%
- Haddock: 6%
- Calamari*: 6%
- Crawfish: 6%
- Roe*: 6%
- Canned salmon*: 5%
- Clams: 5%
- Tilapia: 5%

* not asked in 2019

**Change from 2019:**

- Fried fish patty/sticks: 7%
- Shrimp: 6%
- Cod: 5%
- Ahi tuna: 5%
- Canned tuna*: 7%
- Crab: 8%
- Catfish: 8%
- Salmon: 10%
- Imitation crab/Surimi seafood: 10%
- Snapper: 11%
- Pollock: 16%
- Flounder/Sole: 16%
- Whitefish: 16%
- Haddock: 16%
- Calamari*: 16%
- Crawfish: 16%
- Roe*: 16%
- Canned salmon*: 16%
- Clams: 16%
- Tilapia: 16%

↑: 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=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.

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

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

- **Beef**
- **Chicken**
- **Seafood**
- **Plant-Based Proteins**

- **(full color)** = no change since 2019
- **(pastel)** = significantly lower than 2019

54% want to see more seafood species on QSR menus overall

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

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.

```
<table>
<thead>
<tr>
<th>Type of Seafood</th>
<th>Satisfaction (2019)</th>
<th>Satisfaction (2021)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shrimp</td>
<td>(29%)</td>
<td>(29%)</td>
</tr>
<tr>
<td>Barramundi</td>
<td>(17%)</td>
<td>(17%)</td>
</tr>
<tr>
<td>Fried fish patty/sticks</td>
<td>(17%)</td>
<td>(17%)</td>
</tr>
<tr>
<td>Cod</td>
<td>(16%)</td>
<td>(16%)</td>
</tr>
<tr>
<td>Salmon</td>
<td>(16%)</td>
<td>(14%)</td>
</tr>
<tr>
<td>Crab</td>
<td>(14%)</td>
<td>(14%)</td>
</tr>
<tr>
<td>Catfish</td>
<td>(14%)</td>
<td>(13%)</td>
</tr>
<tr>
<td>Crawfish</td>
<td>(13%)</td>
<td>(12%)</td>
</tr>
<tr>
<td>Tilapia</td>
<td>(12%)</td>
<td>(12%)</td>
</tr>
<tr>
<td>Canned tuna*</td>
<td>(12%)</td>
<td>(11%)</td>
</tr>
<tr>
<td>Lobster*</td>
<td>(11%)</td>
<td>(11%)</td>
</tr>
<tr>
<td>Swai</td>
<td>(11%)</td>
<td>(10%)</td>
</tr>
<tr>
<td>Whitefish</td>
<td>(11%)</td>
<td>(10%)</td>
</tr>
<tr>
<td>Trout</td>
<td>(10%)</td>
<td>(9%)</td>
</tr>
<tr>
<td>Imitation crab/Surimi seafood</td>
<td>(10%)</td>
<td>(9%)</td>
</tr>
<tr>
<td>Canned salmon*</td>
<td>(10%)</td>
<td>(9%)</td>
</tr>
<tr>
<td>Calamari</td>
<td>(9%)</td>
<td>(9%)</td>
</tr>
<tr>
<td>Grouper</td>
<td>(9%)</td>
<td>(9%)</td>
</tr>
<tr>
<td>Clams</td>
<td>(9%)</td>
<td>(9%)</td>
</tr>
<tr>
<td>Scallops</td>
<td>(9%)</td>
<td>(9%)</td>
</tr>
</tbody>
</table>
```

* significantly higher / lower than 2019

Note: * not asked in 2019

- However, imitation crab and several species of fish are on the rise.
- 53% are satisfied with current fast casual seafood offerings
- SATISFACTION WITH SEAFOOD OFFERING (top 2 box, 5-pt. scale)
Appetizers, tacos, grain bowls, and entrées are good vehicles for seafood at fast casuals.

**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.

**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)

- **63%**
- **12%**

are satisfied with current casual dining seafood offerings

**Seafood Eaten at Casual Dining**

(top 20 responses)

- Shrimp: 40%
- Calamari: 34%
- Salmon: 33%
- Flounder/Sole: 29%
- Crab: 26%
- Cod: 26%
- Catfish: 25%
- Mahi Mahi: 22%
- Tilapia: 22%
- Scallops: 21%
- Clams: 20%
- Lobster: 19%
- Smoked salmon: 18%
- Fried fish patty/sticks: 17%
- Ahi tuna: 15%
- Halibut: 15%
- Mussels: 15%
- Swordfish: 15%
- Haddock: 15%
- Crawfish: 14%

↑↓ = 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.

Among those who dine at casual dining chains at least once per week, 50% want to see more seafood species on casual dining menus overall.
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)

84% are satisfied with current fine dining seafood offerings

SEAFOOD EATEN AT FINE DINING
(top 20 responses)

- Salmon: 34%
- Shrimp: 30%
- Scallops: 29%
- Calamari: 28%
- Crab: 28%
- Lobster: 28%
- Mussels: 28%
- Halibut: 26%
- Mahi Mahi: 26%
- Oysters: 25%
- Tilapia: 25%
- Fried fish patty/sticks: 23%
- Sea bass: 23%
- Clams: 23%
- Cod: 23%
- Rockfish: 22%
- Ahi tuna: 21%
- Flounder/Sole: 21%
- Haddock: 21%

*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) BI: 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

53% want to see more seafood species on fine dining menus overall

*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)

53% want to see more seafood species on fine dining menus overall
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)

68%
are satisfied with current C&U seafood offerings

SEAFOOD EATEN AT C&Us
(top 20 responses)

- Canned tuna: 29%
- Catfish: 21%
- Cod: 21%
- Clams: 20%
- Orange roughy: 20%
- Crawfish: 19%
- Haddock: 18%
- Grouper: 17%
- Flounder/Sole: 16%
- Hake: 16%
- Swai: 16%
- Rockfish: 14%
- Sablefish/Black cod/Butterfish: 14%
- Salmon: 14%
- Shrimp: 14%
- Trout: 14%
- Lobster: 14%
- Pollock: 14%
- Scrod: 14%
- Tilapia: 14%
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

![Bar chart showing the percentage of consumers who want to see more of each dish type on C&U menus. Breakfast, soups, salads, appetizers, tacos, sandwiches, grain bowls, and entrées are shown. Beef, chicken, seafood, and plant-based proteins are represented by different colors. The chart indicates that 54% want to see more seafood species on C&U menus overall.]

*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 entrees.

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

Breakfast  Soups  Salads  Appetizers  Tacos  Sandwiches  Grain Bowls  Entrées

54% want to see more seafood species on C&U menus overall

*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)
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)

- **59%** are satisfied with current B&I seafood offerings

**Seafood Eaten at B&Is**
(top 20 responses; 23 shown due to tie)

- Catfish: 22%
- Canned tuna: 15%
- Haddock: 15%
- Clams: 14%
- Crab: 14%
- Cod: 13%
- Oysters: 13%
- Flounder/Sole: 12%
- Fried fish patty/sticks: 12%
- Canned salmon: 12%
- Tilapia: 11%
- Whitefish: 11%
- Pollock: 10%
- Snapper: 10%
- Imitation crab/Surimi seafood: 10%
- Grouper: 9%
- Hake: 9%
- Halibut: 9%
- Roe: 9%
- Salmon: 9%
- Scallops: 9%
- Shrimp: 9%
- Trout: 9%

*not asked in 2019
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

57% want to see more seafood species on B&I menus overall

*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 is most commonly menued as the highlight of an entree but is also actively menued on multi-protein plates like surf and turf, or within pastas like shrimp scampi.
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**

- 2012: 37.6%
- 2013: ~38%
- 2014: ~40%
- 2015: ~42%
- 2016: ~44%
- 2017: ~46%
- 2018: ~48%
- 2019: ~50%
- 2020: ~52%
- 2021: ~54%
- 2022: 46.1%

4-Year Growth: +14%
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**

<table>
<thead>
<tr>
<th></th>
<th></th>
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<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>0%</td>
<td>3.4%</td>
<td>4%</td>
<td>4%</td>
<td>4%</td>
<td>4%</td>
<td>4%</td>
<td>4%</td>
<td>4%</td>
<td>4%</td>
<td>4%</td>
<td>8.5%</td>
</tr>
</tbody>
</table>

4-Year Growth: +48%
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.

<table>
<thead>
<tr>
<th>Seafood</th>
<th>Menu Penetration</th>
<th>1-Year Growth</th>
<th>4-Year Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shrimp</td>
<td>16.5%</td>
<td>+9%</td>
<td>+31%</td>
</tr>
<tr>
<td>Salmon</td>
<td>9.3%</td>
<td>-1%</td>
<td>+53%</td>
</tr>
<tr>
<td>Tuna</td>
<td>8.4%</td>
<td>+4%</td>
<td>+21%</td>
</tr>
<tr>
<td>Fish</td>
<td>4.6%</td>
<td>+15%</td>
<td>+27%</td>
</tr>
<tr>
<td>Ahi Tuna</td>
<td>3.0%</td>
<td>+11%</td>
<td>+53%</td>
</tr>
<tr>
<td>Crab</td>
<td>1.9%</td>
<td>-9%</td>
<td>-21%</td>
</tr>
<tr>
<td>Eel</td>
<td>1.1%</td>
<td>-10%</td>
<td>+3%</td>
</tr>
<tr>
<td>Clam</td>
<td>1.0%</td>
<td>-15%</td>
<td>-40%</td>
</tr>
</tbody>
</table>

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.

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)

- "Wild" at 18% is preferred over "farmed" at 6%
Taste and affordability continue to reign supreme.

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

### SEAFOOD ATTITUDES

<table>
<thead>
<tr>
<th>Statement</th>
<th>% Agree Complete/Somehow, 5-pt. Scale</th>
</tr>
</thead>
<tbody>
<tr>
<td>I eat fish/seafood because I like the way it tastes</td>
<td>84%</td>
</tr>
<tr>
<td>I believe seafood is just as filling as meat</td>
<td>78%</td>
</tr>
<tr>
<td>Fish/seafood is healthier than meats like beef and pork</td>
<td>78%</td>
</tr>
<tr>
<td>I am very knowledgeable about the origin of the fish/seafood that I eat</td>
<td>43% ↓11%</td>
</tr>
</tbody>
</table>

### SEAFOOD DESIRES AFH

<table>
<thead>
<tr>
<th>Statement</th>
<th>% Agree Complete/Somehow, 5-pt. Scale</th>
</tr>
</thead>
<tbody>
<tr>
<td>I would eat more fish/seafood if it were more affordable</td>
<td>76%</td>
</tr>
<tr>
<td>I wish fast food restaurants would offer more fish/seafood variety</td>
<td>67%</td>
</tr>
<tr>
<td>I would order more fish/seafood from restaurants if I knew where it came from</td>
<td>61% ↓6%</td>
</tr>
<tr>
<td>I would order more fish/seafood if I knew it was sustainable</td>
<td>54% ↓11%</td>
</tr>
</tbody>
</table>

↑↓ = significantly higher/lower than 2019
perceptions of Alaska seafood
Alaska salmon and seafood are the top protein types likely to garner a recommendation.

<table>
<thead>
<tr>
<th>Protein Type</th>
<th>Likelihood to Recommend (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alaska salmon</td>
<td>40%</td>
</tr>
<tr>
<td>Alaska seafood</td>
<td>37%</td>
</tr>
<tr>
<td>Maine seafood*</td>
<td>37%</td>
</tr>
<tr>
<td>USDA prime sirloin</td>
<td>37%</td>
</tr>
<tr>
<td>Angus beef</td>
<td>35%</td>
</tr>
<tr>
<td>Atlantic salmon</td>
<td>34%</td>
</tr>
<tr>
<td>New England seafood</td>
<td>34%</td>
</tr>
<tr>
<td>USDA organic chicken</td>
<td>33%</td>
</tr>
<tr>
<td>Louisiana / gulf seafood</td>
<td>29%</td>
</tr>
<tr>
<td>Kobe beef</td>
<td>28%</td>
</tr>
<tr>
<td>Farm-to-table pork</td>
<td>26%</td>
</tr>
<tr>
<td>Asian seafood</td>
<td>23%</td>
</tr>
<tr>
<td>Farmed seafood</td>
<td>23%</td>
</tr>
<tr>
<td>Plant-based burger meant to replicate meat*</td>
<td>18%</td>
</tr>
<tr>
<td>Veggie burger (bean burger, mushroom burger, etc.)</td>
<td>17%</td>
</tr>
</tbody>
</table>

*not asked in 2019

Likelihood to recommend each protein has not changed significantly since 2019.
Communications should reinforce consumers’ already strong perception that seafood from Alaska is fresh, great tasting, and high quality.

**Impressions of Seafood from Alaska (Unaided)**

- **Fresh/fresh caught**: 28%
  - “It tastes good and fresh, is sustainable, and is not overfished to keep the numbers growing.”

- **Great taste**: 22%
  - “It is the freshest fish you can get in the USA.”

- **Excellent/amazing**: 9%
  - “I heard that seafood from Alaska is more sustainable because it is caught and farmed well.”

- **Superior quality**: 8%
  - “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.”

- **Wild/wild caught**: 7%
  - “Fish from Alaska are the healthiest and most nutritious you can find. Alaska Seafood also contains no artificial colouring, preservatives, pesticides or GMO.”

- **Healthy**: 6%

- **High opinion/good experience**: 5%

- **Pure water/pristine environment/no chemicals/unpolluted**: 5%
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.

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)

*not asked in 2019
Preference for Alaska seafood has grown since 2019 and is now preferred over 2-to-1.

Specifying “wild Alaska” can be even more impactful.

<table>
<thead>
<tr>
<th>Seafood Item</th>
<th>Preference for Restaurants or Cafeterias</th>
</tr>
</thead>
<tbody>
<tr>
<td>King crab legs</td>
<td>73%</td>
</tr>
<tr>
<td>Pollock sandwich</td>
<td>73%</td>
</tr>
<tr>
<td>Fresh halibut</td>
<td>72%</td>
</tr>
<tr>
<td>Atlantic salmon</td>
<td>70%</td>
</tr>
<tr>
<td>Fish and chips</td>
<td>65%</td>
</tr>
<tr>
<td>Whitefish sandwich</td>
<td>64%</td>
</tr>
<tr>
<td>Grilled Alaska salmon salad</td>
<td>63%</td>
</tr>
<tr>
<td>Atlantic cod sandwich</td>
<td>62%</td>
</tr>
<tr>
<td>Alaska flounder taco*</td>
<td>62%</td>
</tr>
<tr>
<td>Grilled cod bowl</td>
<td>42%</td>
</tr>
</tbody>
</table>

*Options not shown in 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)
The restaurant/cafeteria cares about the quality of food it serves 95% +1%

The restaurant/cafeteria has high quality food 95% +2%

The restaurant/cafeteria values buying domestic (from the USA) 95% +3%

The restaurant/cafeteria is proud to serve Alaska fish/seafood 94% +3%

The restaurant/cafeteria is a good place to get fish/seafood 94% +3%

The restaurant/cafeteria cares about offering healthy choices 93% +4%

The restaurant/cafeteria believes in sustainable sourcing 91% +4%

I'd be more likely to order a fish/seafood dish from that restaurant/cafeteria 91% +3%

I'd be more likely to return to that restaurant/cafeteria 91% +3%

The restaurant/cafeteria cares about the environment 90% +4%

*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).
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

<table>
<thead>
<tr>
<th>Statement</th>
<th>% Agree without Logo</th>
<th>% Agree with Logo</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>The restaurant/cafeteria is <strong>proud to serve Alaska fish/seafood</strong></td>
<td>54%</td>
<td>64%</td>
<td>+10%</td>
</tr>
<tr>
<td>The restaurant/cafeteria has high quality food</td>
<td>46%</td>
<td>56%</td>
<td>+10%</td>
</tr>
<tr>
<td>The restaurant/cafeteria <strong>cares about the quality of food</strong> it serves</td>
<td>45%</td>
<td>55%</td>
<td>+10%</td>
</tr>
<tr>
<td>The restaurant/cafeteria values buying domestic (from the USA)</td>
<td>45%</td>
<td>56%</td>
<td>+11%</td>
</tr>
<tr>
<td>I'd be <strong>more likely to order a fish/seafood dish</strong> from that restaurant/cafeteria</td>
<td>43%</td>
<td>51%</td>
<td>+8%</td>
</tr>
<tr>
<td>The restaurant/cafeteria is a <strong>good place to get fish/seafood</strong></td>
<td>43%</td>
<td>56%</td>
<td>+13%</td>
</tr>
<tr>
<td>I'd be <strong>more likely to return</strong> to that restaurant/cafeteria</td>
<td>43%</td>
<td>50%</td>
<td>+6%</td>
</tr>
<tr>
<td>The restaurant/cafeteria cares about offering healthy choices</td>
<td>40%</td>
<td>51%</td>
<td>+11%</td>
</tr>
<tr>
<td>The restaurant/cafeteria believes in sustainable sourcing</td>
<td>35%</td>
<td>53%</td>
<td>+18%</td>
</tr>
<tr>
<td>The restaurant/cafeteria cares about the environment</td>
<td>34%</td>
<td>47%</td>
<td>+13%</td>
</tr>
</tbody>
</table>

% Change from Logo Addition

*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).

Note: 2019 survey asked about restaurant only, rather than restaurant/cafeteria.

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**

<table>
<thead>
<tr>
<th></th>
<th>Price Gap</th>
<th>% Increase</th>
</tr>
</thead>
<tbody>
<tr>
<td>QSR*</td>
<td>$2.79</td>
<td>+27%</td>
</tr>
<tr>
<td>Fast Casual*</td>
<td>$4.11</td>
<td>-62%</td>
</tr>
<tr>
<td>Midscale</td>
<td>$2.69</td>
<td>+20%</td>
</tr>
<tr>
<td>Casual</td>
<td>$3.00</td>
<td>+20%</td>
</tr>
<tr>
<td>Fine Dining</td>
<td>$13.05</td>
<td>+65%</td>
</tr>
<tr>
<td>All</td>
<td>$25.64</td>
<td>+28%</td>
</tr>
</tbody>
</table>

**Price Gap** = Alaska Seafood – Overall Seafood

**% Increase** = (Alaska Seafood/Overall Seafood) - 1

*Indicates small sample size*
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.

<table>
<thead>
<tr>
<th>Alaskan Seafood</th>
<th>Overall Seafood</th>
<th>Steak</th>
<th>Chicken</th>
<th>Pork</th>
</tr>
</thead>
<tbody>
<tr>
<td>$17.90</td>
<td>$13.99</td>
<td>$12.99</td>
<td>$11.00</td>
<td>$10.95</td>
</tr>
</tbody>
</table>

4-Year Change:
- Alaskan Seafood: +$1.77
- Overall Seafood: +$1.99
- Steak: +$1.06
- Chicken: +$1.56
- Pork: +$1.77

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

<table>
<thead>
<tr>
<th>Price Gap</th>
<th>% Increase</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall Seafood</td>
<td>$3.91</td>
</tr>
<tr>
<td>Steak</td>
<td>$4.91</td>
</tr>
<tr>
<td>Pork Sum</td>
<td>$7.04</td>
</tr>
<tr>
<td>Chicken</td>
<td>$6.90</td>
</tr>
<tr>
<td>Average</td>
<td>$5.69</td>
</tr>
</tbody>
</table>
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.

### TOP BRANDS ON MENUS (excluding beverages)

#### TOP RANKED ON INCIDENCE

<table>
<thead>
<tr>
<th>Brand</th>
<th>INCIDENCE %</th>
<th># of ITEMS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oreo</td>
<td>0.1%</td>
<td>846</td>
</tr>
<tr>
<td>Certified Angus</td>
<td>0.1%</td>
<td>550</td>
</tr>
<tr>
<td>Beyond Meat</td>
<td>0.1%</td>
<td>471</td>
</tr>
<tr>
<td>San Marzano</td>
<td>0.1%</td>
<td>458</td>
</tr>
<tr>
<td>Nutella</td>
<td>0.1%</td>
<td>450</td>
</tr>
<tr>
<td>Impossible Foods</td>
<td>0.1%</td>
<td>427</td>
</tr>
<tr>
<td>Lays</td>
<td>0.1%</td>
<td>391</td>
</tr>
<tr>
<td>Reese's</td>
<td>0.1%</td>
<td>339</td>
</tr>
<tr>
<td>Alaska Seafood</td>
<td>0.0%</td>
<td>287</td>
</tr>
<tr>
<td>M&amp;M</td>
<td>0.0%</td>
<td>235</td>
</tr>
<tr>
<td>Craisins</td>
<td>0.0%</td>
<td>234</td>
</tr>
<tr>
<td>Doritos</td>
<td>0.0%</td>
<td>227</td>
</tr>
<tr>
<td>Heath</td>
<td>0.0%</td>
<td>185</td>
</tr>
<tr>
<td>Tabasco</td>
<td>0.0%</td>
<td>178</td>
</tr>
<tr>
<td>Fritos</td>
<td>0.0%</td>
<td>168</td>
</tr>
<tr>
<td>A1</td>
<td>0.0%</td>
<td>154</td>
</tr>
<tr>
<td>Bourin</td>
<td>0.0%</td>
<td>136</td>
</tr>
<tr>
<td>Butterfinger</td>
<td>0.0%</td>
<td>135</td>
</tr>
<tr>
<td>Snickers</td>
<td>0.0%</td>
<td>130</td>
</tr>
</tbody>
</table>

#### TOP RANKED ON PENETRATION

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

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

Why do you have no preference?

Top 6 reasons:

- Both taste good: 27%
- Like both / not picky: 14%
- Don't know the difference: 13%
- It's all the same: 7%
- Both are fresh: 4%
- Can't tell there is a difference: 4%

“Because wild fish and farm-raised fish both have their own characteristics and both have a delicious and attractive taste.”

“As long as it’s safe and fresh either is fine”
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

<table>
<thead>
<tr>
<th>Generation</th>
<th>Prefer Wild-Caught</th>
<th>Prefer Farm-Raised</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>59%</td>
<td>41%</td>
</tr>
<tr>
<td>Gen Z</td>
<td>50%</td>
<td>50%</td>
</tr>
<tr>
<td>Millennials</td>
<td>10%</td>
<td>90%</td>
</tr>
<tr>
<td>Gen X</td>
<td>11%</td>
<td>89%</td>
</tr>
<tr>
<td>Boomers</td>
<td>6%</td>
<td>94%</td>
</tr>
</tbody>
</table>

Comparison to 2019:
- **Total:** Prefer wild-caught: **6%** lower than 2019
- **Gen Z:** Prefer farm-raised: **6%** higher than 2019
- **Millennials:** Prefer wild-caught: **44%** lower than 2019
- **Gen X:** Prefer farm-raised: **2%** lower than 2019
- **Boomers:** Prefer farm-raised: **3%** lower than 2019

F: 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

<table>
<thead>
<tr>
<th>Product</th>
<th>Ranked 1st</th>
<th>Ranked 2nd</th>
<th>Ranked 3rd</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wild seafood</td>
<td>31%</td>
<td>29%</td>
<td>11%</td>
</tr>
<tr>
<td>Wild sustainable seafood</td>
<td>33%</td>
<td>26%</td>
<td>11%</td>
</tr>
<tr>
<td>Farmed sustainable seafood</td>
<td>9%</td>
<td>13%</td>
<td>33%</td>
</tr>
<tr>
<td>Farmed seafood</td>
<td>8%</td>
<td>12%</td>
<td>18%</td>
</tr>
<tr>
<td>Cell-based meat/cellular agriculture</td>
<td>6%</td>
<td>5%</td>
<td>7%</td>
</tr>
<tr>
<td>Plant-based meat alternatives</td>
<td>6%</td>
<td>4%</td>
<td>8%</td>
</tr>
<tr>
<td>Plant-based fish/seafood alternatives</td>
<td>3%</td>
<td>6%</td>
<td>7%</td>
</tr>
<tr>
<td>Cell-based fish/cellular agriculture</td>
<td>4%</td>
<td>5%</td>
<td>6%</td>
</tr>
</tbody>
</table>

*not asked in 2019

GB: 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.

<table>
<thead>
<tr>
<th>Product Type</th>
<th>Climate Unfriendly</th>
<th>Climate Neutral</th>
<th>Climate Friendly</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wild sustainable seafood</td>
<td>4%</td>
<td>38%</td>
<td>58%</td>
</tr>
<tr>
<td>Wild seafood</td>
<td>8%</td>
<td>38%</td>
<td>54%</td>
</tr>
<tr>
<td>Plant-based meat alternatives</td>
<td>12%</td>
<td>42%</td>
<td>46%</td>
</tr>
<tr>
<td>Plant-based fish/seafood alternatives</td>
<td>13%</td>
<td>42%</td>
<td>45%</td>
</tr>
<tr>
<td>Farmed sustainable seafood</td>
<td>10%</td>
<td>50%</td>
<td>40%</td>
</tr>
<tr>
<td>Cell-based fish/cellular agriculture</td>
<td>18%</td>
<td>47%</td>
<td>34%</td>
</tr>
<tr>
<td>Cell-based meat/cellular agriculture</td>
<td>18%</td>
<td>48%</td>
<td>34%</td>
</tr>
<tr>
<td>Farmed seafood</td>
<td>18%</td>
<td>50%</td>
<td>33%</td>
</tr>
</tbody>
</table>

*not asked in 2019
plant-based proteins & meat alternatives
Fewer people are intentionally changing protein types consumed. However, most are still interested in eating more seafood.

G1: For each of the following proteins, are you generally trying to... Increase your consumption? Decrease your consumption? No change level of consumption? (n=1000)

*not asked in 2019

↑↓ = significantly higher / lower than 2019
Younger generations are more likely to completely avoid meat, including seafood.

**Approach to Meat Limitation**

<table>
<thead>
<tr>
<th></th>
<th>Avoid Meat Entirely*</th>
<th>Limit Meat Consumption**</th>
<th>No Meat Limitation</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total</strong></td>
<td>4%</td>
<td>32%</td>
<td>64%</td>
</tr>
<tr>
<td><strong>Gen Z</strong></td>
<td>6%</td>
<td>33%</td>
<td>61%</td>
</tr>
<tr>
<td><strong>Millennial</strong></td>
<td>6%</td>
<td>30%</td>
<td>65%</td>
</tr>
<tr>
<td><strong>Gen X</strong></td>
<td>3%</td>
<td>30%</td>
<td>68%</td>
</tr>
<tr>
<td><strong>Boomer</strong></td>
<td>2%</td>
<td>35%</td>
<td>63%</td>
</tr>
</tbody>
</table>

*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

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meat is too expensive</td>
<td>40%</td>
</tr>
<tr>
<td>Meat isn't healthy</td>
<td>39%</td>
</tr>
<tr>
<td>Animal rights are important to me</td>
<td>36%</td>
</tr>
<tr>
<td>Meat is bad for the environment</td>
<td>24%</td>
</tr>
<tr>
<td>Meat isn't sustainable</td>
<td>21%</td>
</tr>
<tr>
<td>Meat makes me feel sick</td>
<td>13%</td>
</tr>
</tbody>
</table>

### Preferred Ways to Limit Meat

**Replacing with…**

- **Fish/Seafood**: 46% (Rank 1st), 18% (Rank 2nd), 6% (Rank 3rd)
- **Vegetables**: 17% (Rank 1st), 22% (Rank 2nd), 20% (Rank 3rd)
- **Pulses/Beans/Legumes**: 11% (Rank 1st), 17% (Rank 2nd), 18% (Rank 3rd)
- **Traditional Plant-Based Protein**: 9% (Rank 1st), 17% (Rank 2nd), 20% (Rank 3rd)
- **Plant-Based Meat Analogs**: 12% (Rank 1st), 15% (Rank 2nd), 18% (Rank 3rd)
- **Whole Grains**: 6% (Rank 1st), 12% (Rank 2nd), 18% (Rank 3rd)

*not asked in 2019

**Total ranked 1-3**

- Fish/seafood: 70%
- Vegetables: 59%
- Pulses/beans/legumes: 46%
- Traditional plant-based protein: 45%
- Plant-based meat analogs*: 45%
- Whole grains: 36%

* = 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**

- **Total**: 56% Replace most/all seafood with plant-based, 28% Replace some seafood with plant-based, 24% Eat plant-based in addition
- **Gen Z**: 75% CD, 7% D
- **Millennial**: 71% CD, 6% D
- **Gen X**: 50% D, 4% 6%
- **Boomer+**: 35% CD, 15% 2% 4%

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.