

M E N U A L A S K A



The Case for Menuing More Seafood | RESTAURANT CONSUMER STATS 2016



Wild, Natural & Sustainable®



THERE'S NEVER BEEN A BETTER TIME TO MENU SEAFOOD

Consumers want to eat healthier when dining out, without sacrificing flavor and nothing meets this demand better than seafood from Alaska. With its wild, natural and sustainable attributes, Alaska seafood is the perfect canvas for chefs to showcase their talents, create profitable menu items and deliver superior flavor.

Plus the Alaska Seafood Marketing Institute (ASMI) provides you with the latest consumer preference data regarding seafood at chain restaurants. To learn who the seafood customer is today and how Alaska seafood makes the menu more effective for you, read on.

THE FISH AND SEAFOOD CONSUMER

In any given month 62% of consumers are eating fish/seafood at casual dining restaurants; nearly half of consumers at fast food restaurants.

FISH/SEAFOOD CONSUMPTION FREQUENCY BY CHAIN TYPE				
In a typical month...	Fast Food	Fast Casual	Family-Style Chain	Casual Dining
Consumed at least once	47%	40%	43%	62%

Source: Datassential 2016

TASTE AND HEALTH DRIVES SEAFOOD CONSUMPTION ACROSS ALL RESTAURANTS

STATEMENT AGREEMENT BY SEGMENT (WEEKLY VISITATION)	Fast Food	Fast Casual	Casual Dining
I eat fish/seafood because I like the way it tastes	53%	57%	57%
I would eat more fish/seafood if it were more affordable	43%	46%	46%
I try to eat healthy whenever I can	42%	51%	49%
I eat fish/seafood because it's good for me	41%	49%	50%
I wish fast food restaurants would offer more fish/seafood variety	40%	49%	49%
I like to try new foods	39%	47%	47%
I would order more fish/seafood at restaurants if I knew where it came from	35%	42%	44%
I eat more fish/seafood than I used to	33%	44%	48%
I am an adventurous eater	31%	42%	44%
I trust the restaurant to select fish/seafood varieties that I'll like	28%	36%	40%
I prefer to eat organic foods when I have the chance	27%	38%	40%
I don't really care to know much about the fish/seafood I eat	17%	24%	29%

Source: Datassential 2016

72% OF CONSUMERS
who eat more seafood than 2 years ago do so for health reasons.



Source: Technomic Center of Plate: Seafood & Vegetarian Consumer Trend Report 2015

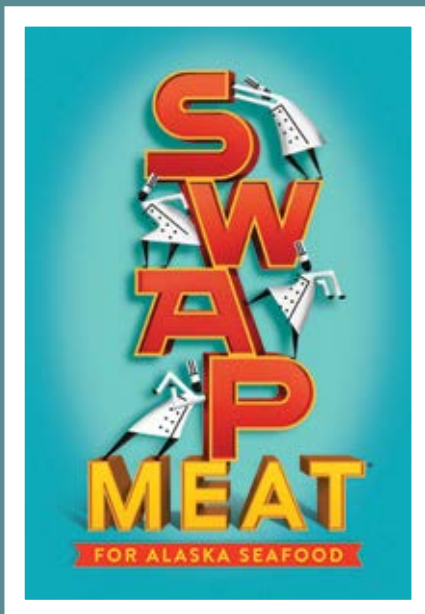
50% OF CONSUMERS
who eat more seafood than 2 years ago do so in lieu of eating meat.



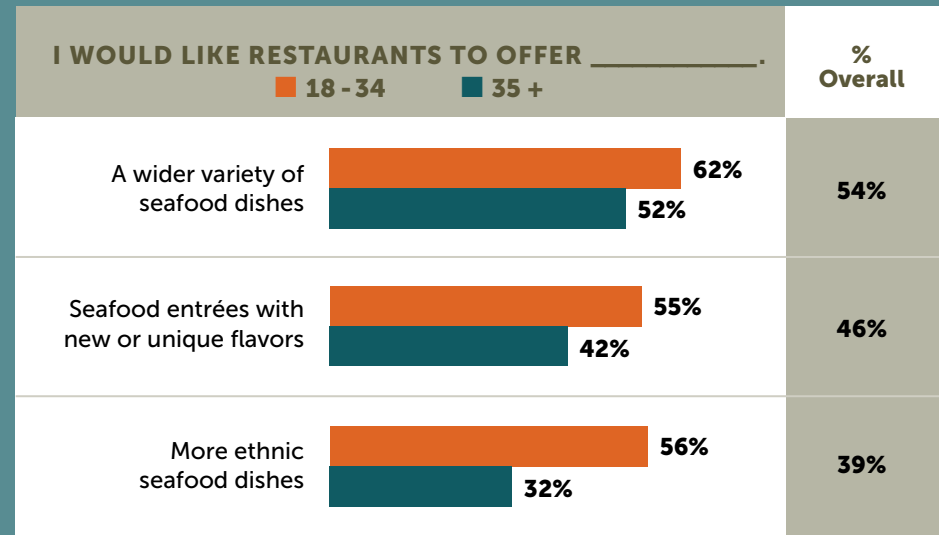
Source: Technomic Center of Plate: Seafood & Vegetarian Consumer Trend Report 2015

OFFER A WIDER VARIETY OF SEAFOOD MENU ITEMS TO DRIVE TRAFFIC AND SALES

Many consumers, particularly younger consumers, demand that restaurants offer a wider variety of seafood items, including dishes featuring unique or ethnic flavors. 54% of all consumers want a wider variety of seafood dishes, 62% for Millennials.



To learn about the many ways to SWAP Meat® visit wildalaskaseafood.com



Source: Technomic Center of Plate: Seafood & Vegetarian Consumer Trend Report 2015



Source: Technomic Center of Plate: Seafood & Vegetarian Consumer Trend Report 2015

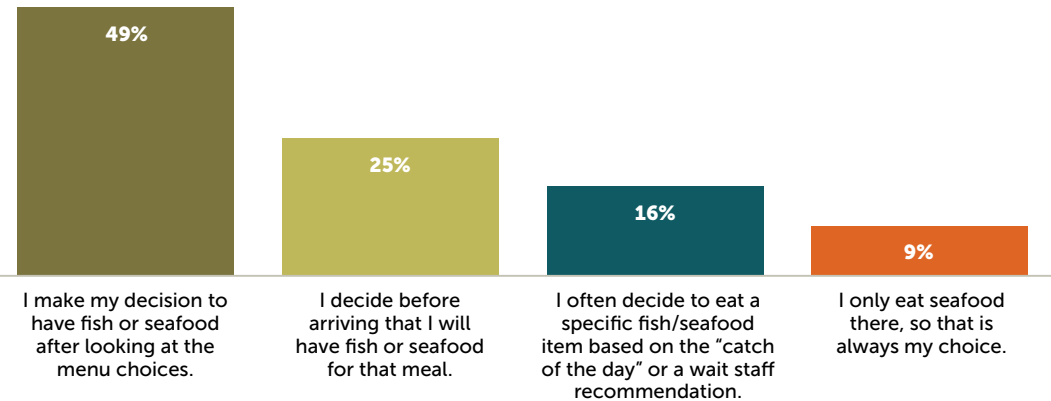
THE FISH AND SEAFOOD CONSUMER

PROMOTING FISH/SEAFOOD ON THE MENU HOLDS THE POWER

For most consumers, ordering decisions are made at the restaurant.

FISH/SEAFOOD DECISION MAKING PROCESS

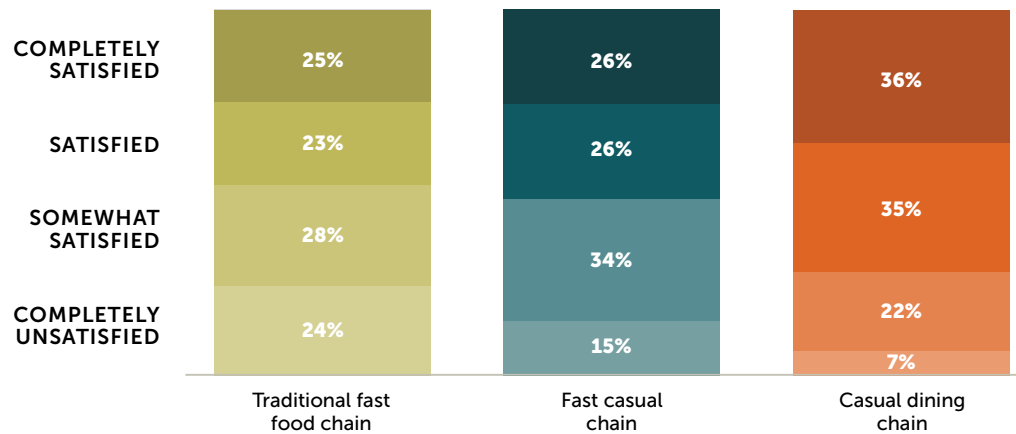
Among those who visit restaurants at least once per week



Source: Datassential 2016

SATISFACTION WITH CURRENT FISH/SEAFOOD OFFERINGS

Yet, few consumers are truly satisfied with chain seafood offerings.



Source: Datassential 2016

USE YOUR WORDS

WRAP IT. BOWL IT. THEY WILL TRY IT.

Classic seafood entrees are great, but wowing your customer base takes innovation. Menu modernization paired with the draw of sustainable and wild Alaska seafood is powerful.

For entrees, appetizers and tacos, fish/seafood is the #1 protein that consumers would like to see more of—at all types of restaurants.

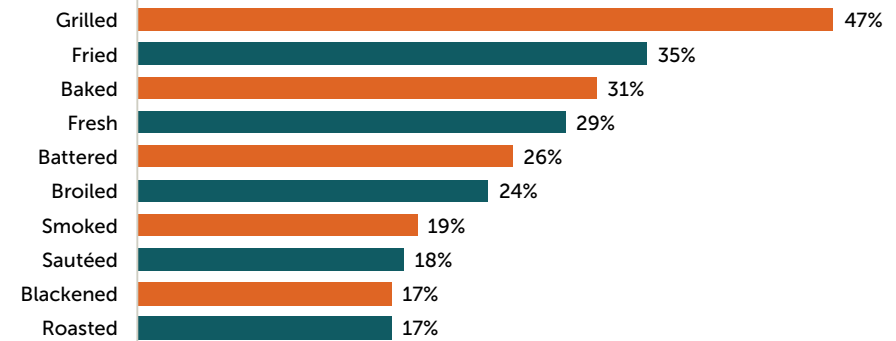
CONSUMERS WOULD LIKE TO SEE MORE...		Fast Food	Fast Casual	Casual Dining
ENTREES	fish/seafood	7.1	7.7	8.4
	chicken	6.5	6.3	5.6
	beef	4.6	5.4	5.1
SANDWICHES/WRAPS	fish/seafood	4.9	5.5	4.9
	chicken	5.7	5.6	5.1
	beef	4.1	4.9	4.1
SALADS	fish/seafood	3.8	4.4	4.8
	chicken	5.2	5.6	5.1
	beef	2.5	2.8	2.7
APPETIZERS	fish/seafood	5.7	5.4	6.6
	chicken	5.2	4.9	4.5
	beef	3.6	3.6	3.9
SOUPS	fish/seafood	2.7	3.1	3.8
	chicken	2.9	3.3	2.8
	beef	2.5	2.6	2.4
TACOS	fish/seafood	4.6	4.6	4.9
	chicken	4.5	3.8	4.1
	beef	4.6	4.0	4.1

Source: Datassential 2016

GRILL IT. FRY IT. THEY WILL BUY IT.

Consumers across the board are looking for grilled seafood when it comes to dining out, followed by fried seafood.

TOP 10 FISH/SEAFOOD DESCRIPTORS DRIVING ORDERING BEHAVIOR



Source: Datassential 2016

There's a clear preparation distinction by segment for what's on the menu. This presents a great opportunity for Fast Food to incorporate grilled fish sandwiches.

TOP 10 FISH/SEAFOOD ENTRÉE PREPARATION METHODS

FAST FOOD Method/Penetration %		FAST CASUAL Method/Penetration %		CASUAL DINING Method/Penetration %	
Fried	37%	Grilled	30%	Grilled	50%
Sautéed	20%	Sautéed	17%	Fried	46%
Grilled	15%	Roasted	14%	Sautéed	41%
Breaded	10%	Seared	11%	Roasted	24%
Battered	9%	Fried	9%	Seared	22%
Steamed	9%	Marinated	9%	Battered	20%
Deep Fried	9%	Breaded	6%	Steamed	19%
Baked	8%	Battered	6%	Seasoned	18%
Marinated	7%	Baked	6%	Breaded	16%
Smoked	5%	Toasted	6%	Baked	16%

Source: Datassential 2016

MENU DESCRIPTORS AND INNOVATION MAKE ALL THE DIFFERENCE

SUSTAINABLE SEAFOOD CAPTURES MILLENNIALS

40% OF 18-34 YEAR OLDS expect restaurants to only offer sustainable seafood.

SUSTAINABLE SEAFOOD is the priority. Alaska has one of the world's few governments that is truly dedicated to sustainability. It's a commitment that dates all the way back to Alaska becoming a state in 1959, when Alaskans wrote sustainability into their Constitution—calling for all fisheries to be sustainably managed. In this way, Alaska promises to provide wild-caught and sustainable seafood for generations to come.

Source: Technomic Center of Plate, Seafood & Vegetarian Consumer Trend Report 2015

FRESH FLAVOR FROM ALASKA

Alaska's brand is tied to freshness...and greatness.

TOP DESCRIPTORS

of fish/seafood from Alaska:

- ~ GOOD/GREAT
- ~ FRESH

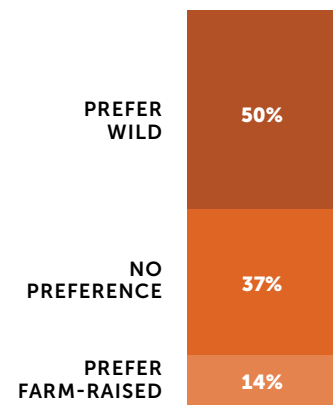


Source: Datassential 2016

WILD = THE "PRIME" OF SEAFOOD

Restaurants are increasingly aware of the positive perceptions surrounding wild seafood, with specific mentions of it on the rise (vs. mentions of 'farm-raised' which have been falling over time).

SEAFOOD PREFERENCE: WILD VS. FARMED



Of Restaurants Serving Seafood Entrées, % That Offer...

	Penetration %	4 Year Growth
Wild	8%	+28%
Farm-raised	3%	-9%

Source: Datassential 2016

WILD SEAFOOD— IT'S ALL ABOUT THE TASTE



WILD FISH/SEAFOOD FROM ALASKA



FIVE SPECIES OF SALMON:

King, Sockeye, Coho, Keta, Pink

WHITEFISH:

Halibut, Cod, Pollock,
Sole/Flounder, Sablefish/Black Cod,
Rockfish, Surimi Seafood

SHELLFISH:

King, Dungeness and Snow Crab,
Scallops, Spot Prawns, Oysters

3 TOP PREFERENCE

drivers for wild seafood:

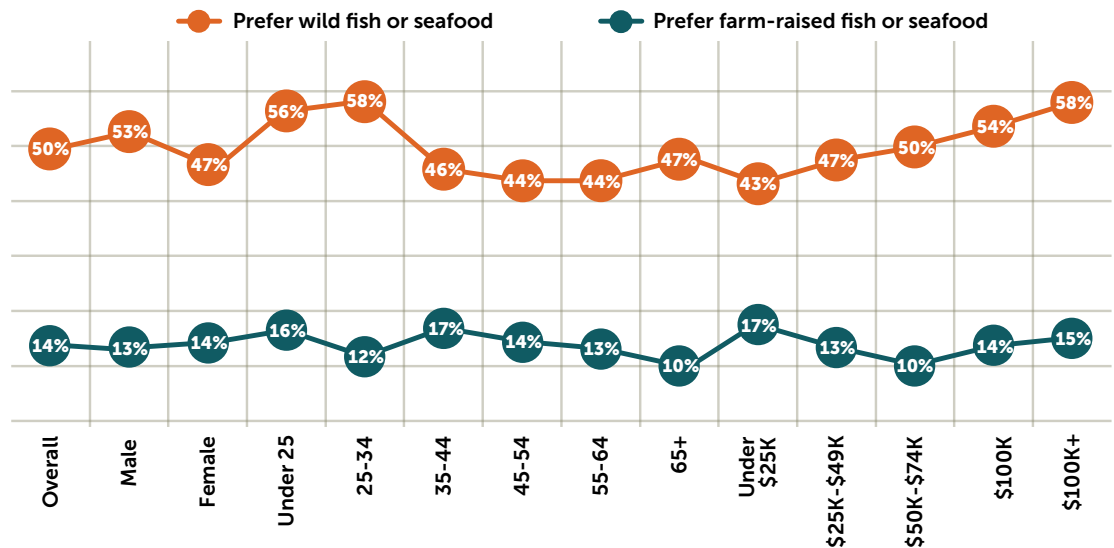
- ~ TASTE
- ~ HEALTHY
- ~ NATURAL



Source: Datassential 2016

Younger and affluent consumers prefer wild over farmed.

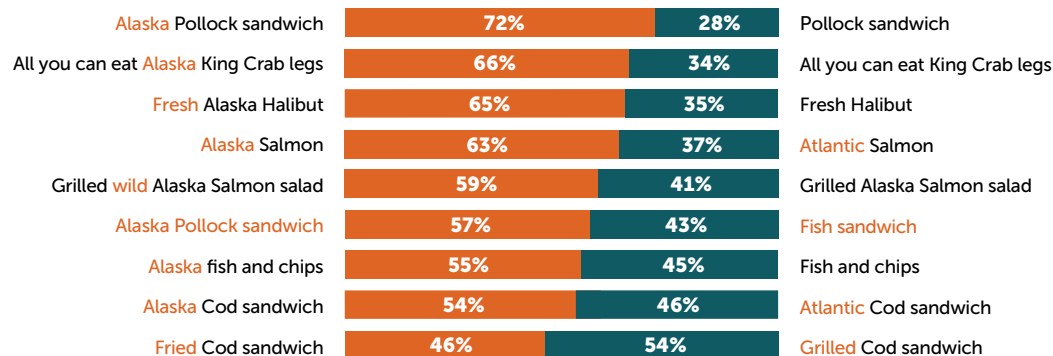
SEAFOOD PREFERENCE: WILD VS. FARMED by demographic



Source: Datassential 2016

ALASKA = A STANDOUT CALL-OUT ON THE MENU

PREFERRED MENU ITEM AT CHAIN RESTAURANTS



Source: Datassential 2016

Consumers are much more likely to order a fish/seafood dish when "Alaska" is included in the Menu Description.

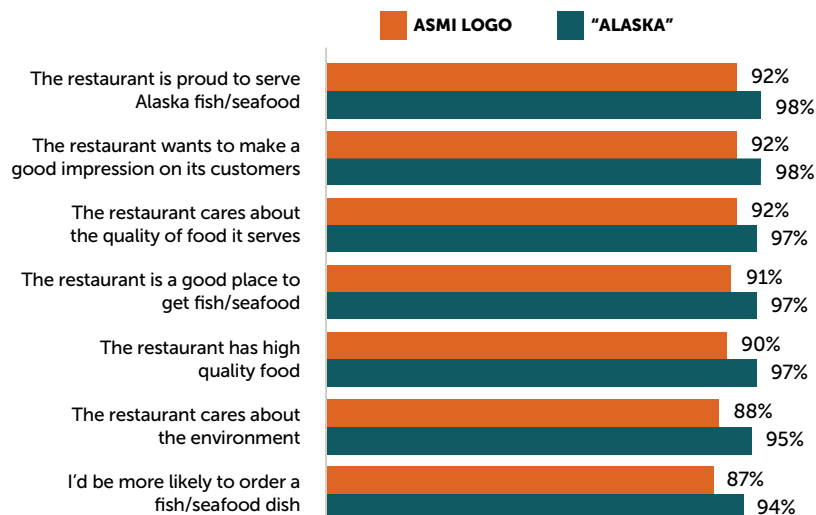
"Alaska" on menus even extends beyond ordering behavior to include positive perceptions of a venue overall.

MENU SUCCESS IS IN OUR NAME

ALASKA SEAFOOD is the
#1 BRAND
 among proteins
 on U.S. menus

Source: Datassential 2016

IMPACT OF "ALASKA" AND ASMI LOGO ON CHAIN MENUS



Source: Datassential 2016

USE OF "ALASKA" AS A DESCRIPTOR IS POWERFUL AND DRIVES SALES

94% OF CONSUMERS


are more likely to order a fish/seafood dish when the word "Alaska" is used.



Source: Datassential 2016

A battered-cod basket that incorporates "Alaska" and specifies "wild-caught" scores higher for purchase intent.

IMPACT OF "ALASKA" ON MENU ITEMS: EXAMPLE


Alaskan Hand-Battered Cod Basket		CONCEPT PERFORMANCE	
	Our 100% wild-caught Alaskan cod is freshly prepared, hand-dipped in our classic batter and cooked to golden perfection.	RAW SCORE	RANKING
		Purchase Intent	56%
Uniqueness	25%	15	
Frequency	19%	85	
Draw	51%	97	


Pub Battered Cod Basket		CONCEPT PERFORMANCE	
	Our pub battered cod is served with fries and slaw.	RAW SCORE	RANKING
		Purchase Intent	52%
Uniqueness	25%	15	
Frequency	14%	31	
Draw	39%	61	

Source: Datassential 2016

A fish sandwich using "Alaska" and "Pollock" scores significantly better than a fish sandwich offering without these descriptors.

IMPACT OF "ALASKA POLLOCK" ON SANDWICH ITEMS: EXAMPLE

Fish Sandwich		CONCEPT PERFORMANCE	
	Made with a 100% Alaskan Pollock Fish Filet, tangy tartar sauce and shredded lettuce all on a regular bun.	RAW SCORE	RANKING
		Purchase Intent	48%
Uniqueness	20%	4	
Frequency	18%	72	
Draw	39%	61	

Fish Sandwich		CONCEPT PERFORMANCE	
	Breaded white fish filet with lettuce and tartar sauce on a small white bun.	RAW SCORE	RANKING
		Purchase Intent	36%
Uniqueness	15%	1	
Frequency	18%	72	
Draw	30%	13	

Source: Datassential 2016

ALASKA = A STANDOUT CALL-OUT ON THE MENU

Across all segments, consumers are likely to recommend Alaska Salmon and Alaska Seafood over nearly every other protein tested.

Use of "wild" in combination with "Alaska" makes the greatest impact.

PROMOTERS BY SEGMENT (WEEKLY VISITATION)	Fast Food	Fast Casual	Casual Dining
USDA Prime Sirloin	44%	48%	49%
Alaska Salmon	43%	48%	49%
Alaska Seafood	43%	47%	50%
Angus Beef	42%	44%	46%
New England Seafood	37%	44%	47%
USDA Organic Chicken	33%	41%	44%
Louisiana/Gulf Seafood	32%	39%	40%
Farm-To-Table Pork	30%	38%	39%
Atlantic Salmon	30%	37%	38%
Kobe Beef	29%	39%	40%
Farmed Seafood	23%	32%	36%
Asian Seafood	21%	31%	30%

Source: Datassential 2016



59% OF CONSUMERS PREFER
Grilled WILD Alaska Salmon Salad vs. 41% of consumers who prefer Grilled Alaska Salmon Salad

Source: Datassential 2016

Even without menu photos, a salmon salad that incorporates "wild" and "Alaska" in the description scores higher for purchase intent.

ALASKA AND WILD TOGETHER— THE HOLY GRAIL OF MENUING SEAFOOD

IMPACT OF "WILD" ON MENU ITEMS: EXAMPLE				
Mighty Wild Salmon Salad	CONCEPT PERFORMANCE			
A nutrition-rich, potent mix of organic field greens, beets, beans, nuts and more, topped with grilled wild Alaska sockeye salmon.	RAW SCORE	RANKING		
	Purchase Intent	34%	25	
	Uniqueness	33%	42	
	Frequency	17%	61	
	Draw	37%	49	
Balsamic Salmon Salad	CONCEPT PERFORMANCE			
We start this supreme salad with a bed of mixed greens and spinach and top it off with chilled roasted salmon, green beans, grape tomatoes, pickled eggs, and black olives.	RAW SCORE	RANKING		
	Purchase Intent	32%	19	
	Uniqueness	36%	54	
	Frequency	17%	61	
	Draw	34%	31	

Source: Datassential 2016

5 TOP DESCRIPTORS

as true and unique to Alaska:

- ~ GREAT TASTE
- ~ FRESH
- ~ WILD
- ~ 100% NATURAL
- ~ PURE WATER/
PRISTINE ENVIRONMENT



Source: Datacentral 2016

WORDS

THAT

SELL

TAP INTO THE CRAVEABILITY OF ALASKA SEAFOOD BY USING APPETIZING DESCRIPTORS ON THE MENU

authentic
aromatic
beer-battered
buttery
distinctive
delicate
encrusted
flakey
grilled
glazed (honey, beer, teriyaki, etc.)

healthy
hearty
rubbed
infused (citrus, etc.)
juicy
poached (broth, etc.)
savory
seasoned
slow-cooked
smothered
succulent

savory
subtle
sweet
sustainable
stuffed with
topped with
tender
zesty
velvety
wild, wild-caught
wood-fired

AVAILABLE RESOURCES

The Alaska Seafood Marketing Institute (ASMI) has the tools and resources to make it easy for you to build successful promotions and add customer appeal to your menu.

- Chef and waitstaff training
- Educational materials
- Recipes
- National and regional consumer trends data
- Training in the selection, handling and uses of all varieties of wild Alaska seafood
- Menu concept development
- Turnkey promotions
- Photographs and artwork to customize your needs
- Ready access to seafood marketing consultants
- Directory of Alaska seafood suppliers
- Online marketing assistance

For more information, please contact us at
800-806-2497 or visit www.alaskaseafood.org
and www.wildalaskaseafood.com

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