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SEAFOOD

THE KEYNOTE REPORT

SNAP! KEYNOTE | September 2017

DATASSENTIAL
FOOD WITH A STORY

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SNAP!
Keynote Report

Datassential's SNAP! Keynote Series leverages the power of SNAP's tools and combines them with exclusive consumer and operator survey data, from motivations to behaviors to opportunities, to bring together trends, data, and insights in a comprehensive report that dives deep into key industry topics and categories. SNAP! tools include:

- **MenuTrends** analyzes thousands of menus to track the top and fastest-growing foods and flavors.
- **INSIDER** tracks, analyzes, and reports on several thousand LTOs and new menu items per year.
- **SCORES** provides consumer ratings for every LTO and new menu item at hundreds of top chains.
- **FLAVOR** tracks consumer sentiment on thousands of foods, beverages, and ingredients.
- **FIREFLY** is a complex database of over 1.3 million operator profiles in the U.S. and Canada.
- **LOCAL** analyzes popular ingredients and flavors in major metro areas across the U.S.
- **BrandFingerprints** reveals the unique set of factors that determine which customers visit a chain and why, including more than 100 key metrics for 130 chains.

For more details, please contact **Brian Darr** at 312-655-0594 or brian@datassential.com

The **Blueprint for LTO Success Keynote** explores how limited-time offers have become a chain restaurant mainstay and a consumer favorite. Learn the reasons why from more than 1,000 consumers and 300 operators, who shared their preferences and usage of LTOs, including their favorite and most successful new menu items. You'll also learn best practices around concept development, backed up by analysis of thousands of actual LTOs launched since 2010.

Qualitative interviews with decision-makers from limited-service and full-service chains provide insights into successful rollout of an LTO as well as mistakes to avoid. In addition, case studies of chains with robust LTO programs reveal how they can lead to same-store sales growth.

The **Sandwiches Keynote** takes a complete look at sandwiches both at home and away from home by delving into perceptions and preferences regarding carriers, proteins, cheeses, toppings, condiments, and accompaniments.

We combined opinions from over 1,000 consumers with hundreds of operator perceptions on sandwiches and leveraged the power of MenuTrends, our trend-tracking menu database, for this extensive report. It will be an invaluable resource to understand the sandwich landscape.

SHOW, BUT DON'T GIVE OR LEAVE BEHIND

This report can be presented live or via webinar, but can not be distributed to outside companies.

If your company has purchased this report, you are encouraged to excerpt key exhibits and build them into your own presentations.

However, you should not provide significant sections of this report to any outside company without express written consent from Datassential.

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Objectives & Methodology

Objectives

- Identify consumer seafood consumption habits, preferences, and perceptions at home, in restaurants, and in other away-from-home venues
- Understand consumer motivators for eating seafood at home and away from home
- Understand consumer perceptions and behaviors around purchasing seafood at retail and preparing seafood at home
- Analyze operator motivators, preferences, and challenges with menuing seafood
- In-depth analysis of seafood's presence on restaurant menus
- Identify supplier opportunities where operators and consumers have unmet needs

Methodology

- Main fielding completed August 2017 (online)
  - Consumers: 1001 respondents who consume fish and/or shellfish (GenPop)
  - Operators: 348 operators who offer seafood (via the Datassential panel), including:
    - 156 restaurant operators
    - 166 on-site operators
    - 26 retail operators
  - Full respondent details available in the appendix

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Definitions

Seafood Definitions

Fish

Unless a specific species is mentioned, "fish" refers to the entire category of fin fish. All MenuTrends, INSIDER, and SCORES data include the following: ahi, cod, skate, anchovy, bass, branzino, catfish, flounder, grouper, haddock, halibut, mackerel, mahi, perch, salmon, scrod, seabass, smelt, snapper, sole, swordfish, tilapia, trout, tuna, whitefish, and yellowtail.

Shellfish

Unless a specific species is mentioned, "shellfish" refers to crustaceans, mollusks, other difficult-to-categorize seafood like sea urchins. All MenuTrends, INSIDER, and SCORES data includes the following: clam, camarone, conch, crab, crawfish, lobster, mussel, octopus, oyster, scallop, sea urchin/uni, shrimp, and squid/calamari.

Seafood Format Definitions

Fresh vs. Frozen

"Fresh" seafood refers to seafood that is sold un-frozen, regardless of whether or not it was previously frozen. Frozen seafood refers to seafood that is purchased in a frozen state.

Raw, Further Processed Seafood

"Raw, further processed" seafood refers to fresh or frozen seafood that is sold raw after being cleaned, such as unseasoned raw fish fillets, headless peeled shrimp, etc.

Prepared Seafood

"Prepared" refers to seafood that has been modified beyond cleaning and portioning, such as raw kebabs from the refrigerated case, frozen fish sticks, etc. Prepared seafood can be fresh or frozen, cooked or raw.

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RESTAURANT SEGMENTS

Limited Service Restaurants (**LSR**)

QSR

262,474 US units

counter service with no wait staff; focus on speed and food often served on disposables

Fast Casual (FC)

63,488 US units

counter service with focus on higher quality, fresh ingredients, and customization

Full Service Restaurants (**FSR**)

Midscale (MDS)

113,413 US units

waiter service at a moderate price; often breakfast-focused and generally no alcohol

Casual (CAS)

190,424 US units

waiter service at a higher price point than midscale and often offering a full bar

Traditional Casual

Upper Casual

Fine Dine

13,974 US units

high-end table service with chef-driven menu; most entrées priced $25 or higher

*unit counts include both chains and independents, Datassential Firefly 2017

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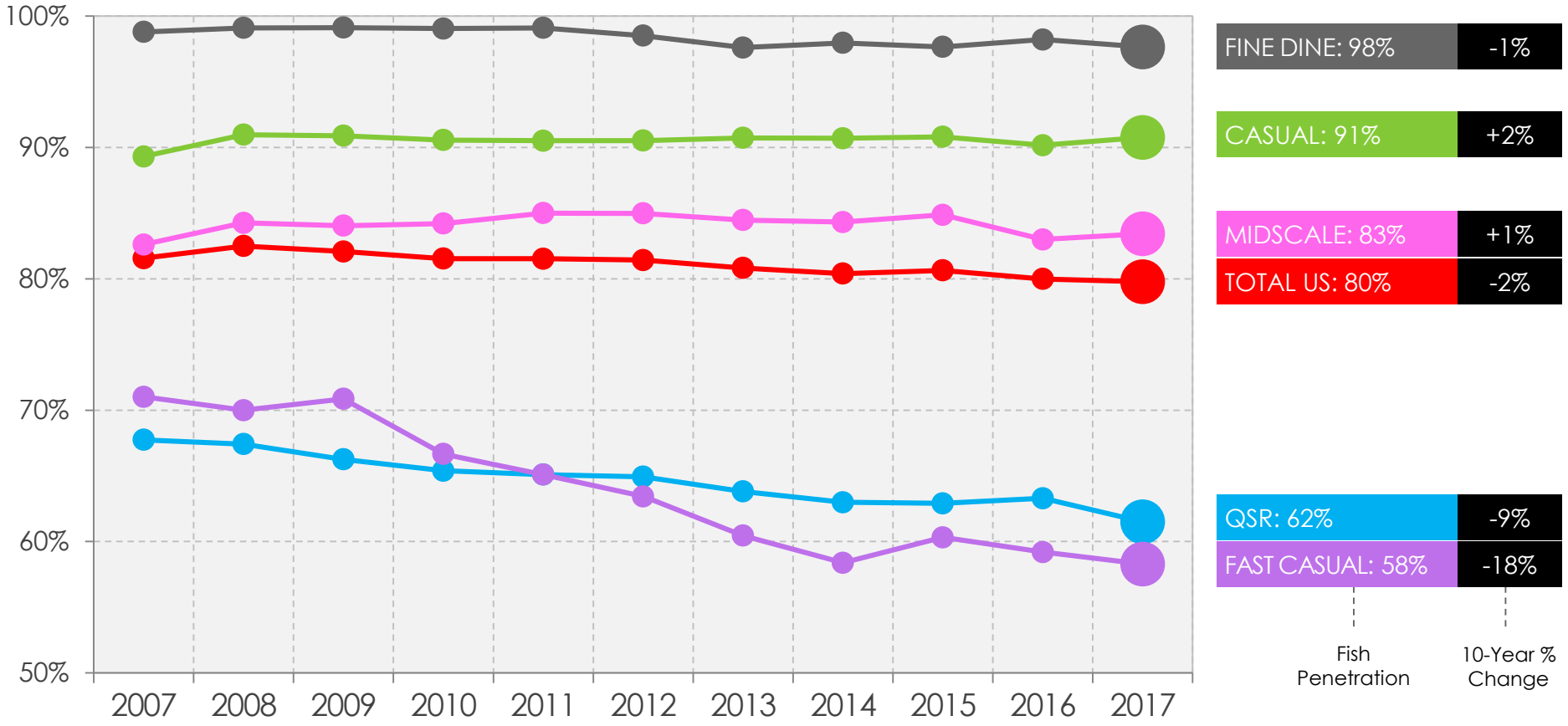
Fish can be found at four out of five restaurants, with much higher penetration at FSRs than LSRs. Fish penetration remains steady in full-service while declining slightly at LSRs.

Fish* Time Trend

penetration time trend by segment



Fish includes: ahi, cod, skate, anchovy, bass, branzino, catfish, flounder, grouper, haddock, halibut, mackerel, mahi, perch, salmon, scrod, seabass, smelt, snapper, sole, swordfish, tilapia, trout, tuna, whitefish, and yellowtail.

MENU PENETRATION: of all restaurants offering apps, entrées, or sides, % that offer fish

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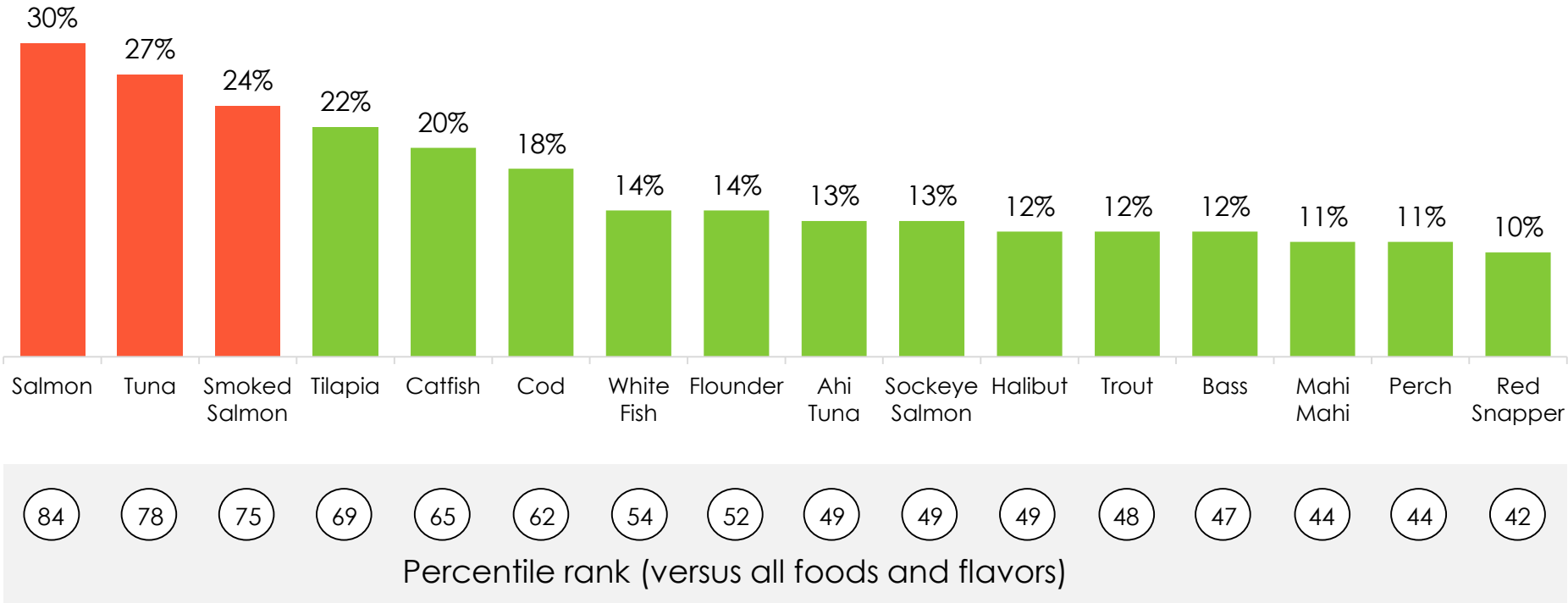
Although salmon and tuna are consumers' most loved fish, affinity is consistent across many different varieties. Certain species, such as ahi tuna and sockeye salmon, rank nearly as high as broader classifications such as cod and white fish.

America's Favorite Fish: Affinity (% who love)



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NOTE: Findings are from FLAVOR, a consumer rating tool covering more than 2,600 foods and ingredients. For more information on how FLAVOR can help you decode consumer preferences, contact Brian Darr at 312-655-0594 or brian@datassential.com.

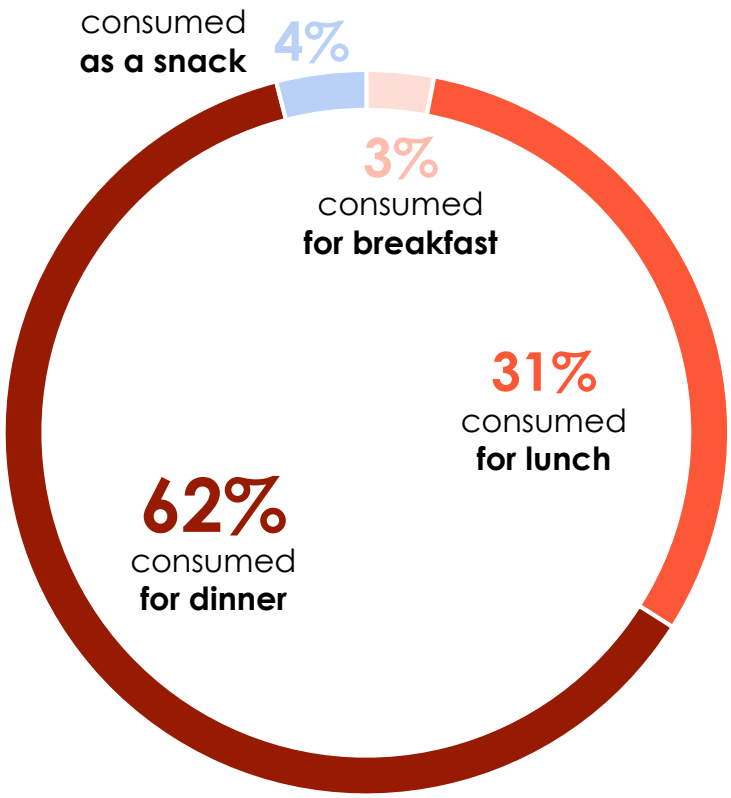
flavor

Seafood consumption is widespread and frequent. Eighty percent of consumers who eat fish/shellfish had it within the past two weeks, mainly for dinner.

Last Seafood Dish: When Eaten

Within the Past Day	14%
Within the Past Week	53%
Within the Past 2 Weeks	13%
Longer than 2 Weeks Ago	20%

Last Seafood Dish: Daypart Eaten



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A1: When is the last time you had any type of SEAFOOD? Please consider all types of seafood: fish filets, shellfish, seafood salads (e.g., tuna salad, shrimp salad), soup (e.g., clam chowder), calamari, etc. **A7: [Among those whose last seafood was in the last 2 weeks]** Still thinking to this last seafood item. When did you eat it? Select one.

n=1001; n=799

Lunch is by far the daypart most heavily menued with seafood. Restaurants are more likely than other segments to menu seafood at dinner and off-peak hours.

Operator Finding

Dayparts when Seafood is Offered (% offering)

	All Operators	Restaurant	On-Site	Retail
	348	156	152	40
Breakfast/Brunch	12%	17%	7%	13%
Mid Morning	13%	19%	3%	30%
Lunch	90%	86%	93%	93%
Mid Afternoon	34%	51%	9%	65%
Dinner	72%	90%	55%	68%
Late Night	11%	19%	5%	8%

statistically lower than the total | statistically higher than the total

A5 (Operator): During what hours do you offer seafood? Select all.

n=varies

Selected Consumer Verbatims: **Reasons for Increasing Restaurant Seafood Purchasing**

"I think **quick service restaurants have vastly improved their seafood offerings** over the past year, in both variety and quality, so now I am more open to purchasing seafood options from them."

"**Wild-caught salmon being available** from Captain D's is a good, quick, and healthy option."

"The **variety is better than it has ever been**. I love the different items that are available for purchase."

"I am **trying to eat less meat.** So while I still don't go to places like this as much, I do go more than I did last year."

"Joe's Crab shack is a decent seafood chain for the quality and value. Preparation are offered in more of a variety way. **Switching up the diet is good**."

"We are going out to eat more often now than we did a year ago, so I can order **fish entrées I would not make at home**."

"We have begun going back to Red Lobster a few months back after a bad experience and so I've tried a couple of **newer dishes** there but I prefer fine dining experiences when I am ordering a specialty fish dish."

"**I have a new taste for seafood** and it has become one of my favorite things to eat. Most of the mentioned full-service restaurants serve **delicious meals that are full of all kinds of flavors**."

D7 & D8: [Among those who have increased seafood purchasing at LSRs or FSRs] You mentioned that you are buying seafood at **[D7:** quick service restaurants**] [D8:** full-service restaurants**]** more often today than a year ago. Why have you increased your seafood purchasing? Please be as detailed as possible. Free text.

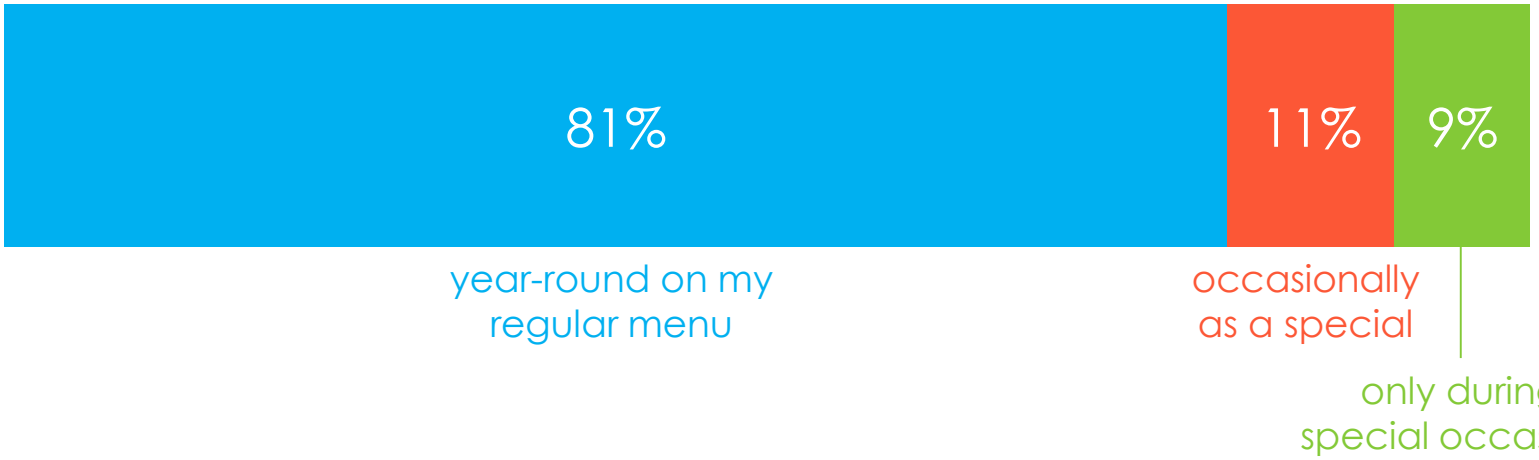
n=182;
n=303

Operators who menu seafood usually do so all year long. The 20 percent who only offer seafood as occasional specials or for holidays/special events may benefit competitively from moving fish/shellfish to their permanent menu.

Operator Finding

Frequency of Seafood Menuing

I menu seafood…



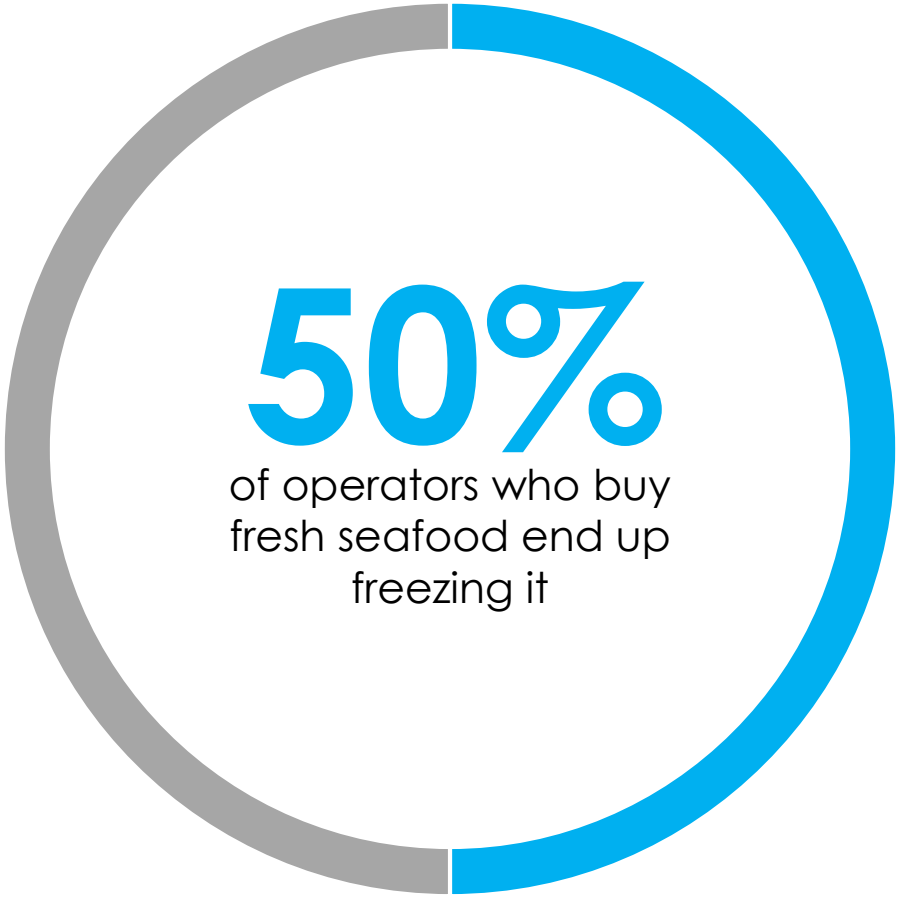
A4 (Operator): Which of the following describes the frequency with which you offer seafood? Select one.

n=348

Fresh seafood commonly ends up being frozen by the operator. This points to its shorter shelf life but perhaps also to difficulty in planning purchases that match customer demand.

Operator Finding

Freezing Seafood that was Received Fresh



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A20 (Operator): Do you ever end up freezing the fresh seafood that you purchase? Select one.

n=210

Guidelines for buying sustainable seafood reach few operators and even fewer consumers. Yet with strong interest in sourcing information, the point of purchase is a key channel for communicating supplier practices.

Consumer: Have You Consulted Sustainability Guidelines?

of consumers have consulted sustainability guidelines when purchasing seafood

Operator: Have You Consulted Sustainability Guidelines?

Operator Finding

of operators have consulted sustainability guidelines when purchasing seafood

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B10: Have you ever consulted seafood purchasing guidelines published by industry, government, or environmental groups, such as Seafood Watch from the Monterey Bay Aquarium for information on seafood sustainability? Select one. **B9 (Operator):** Have you ever consulted seafood purchasing guidelines published by industry, government, or environmental groups, such as Seafood Watch from the Monterey Bay Aquarium for information on seafood sustainability?

n=1001; n=348

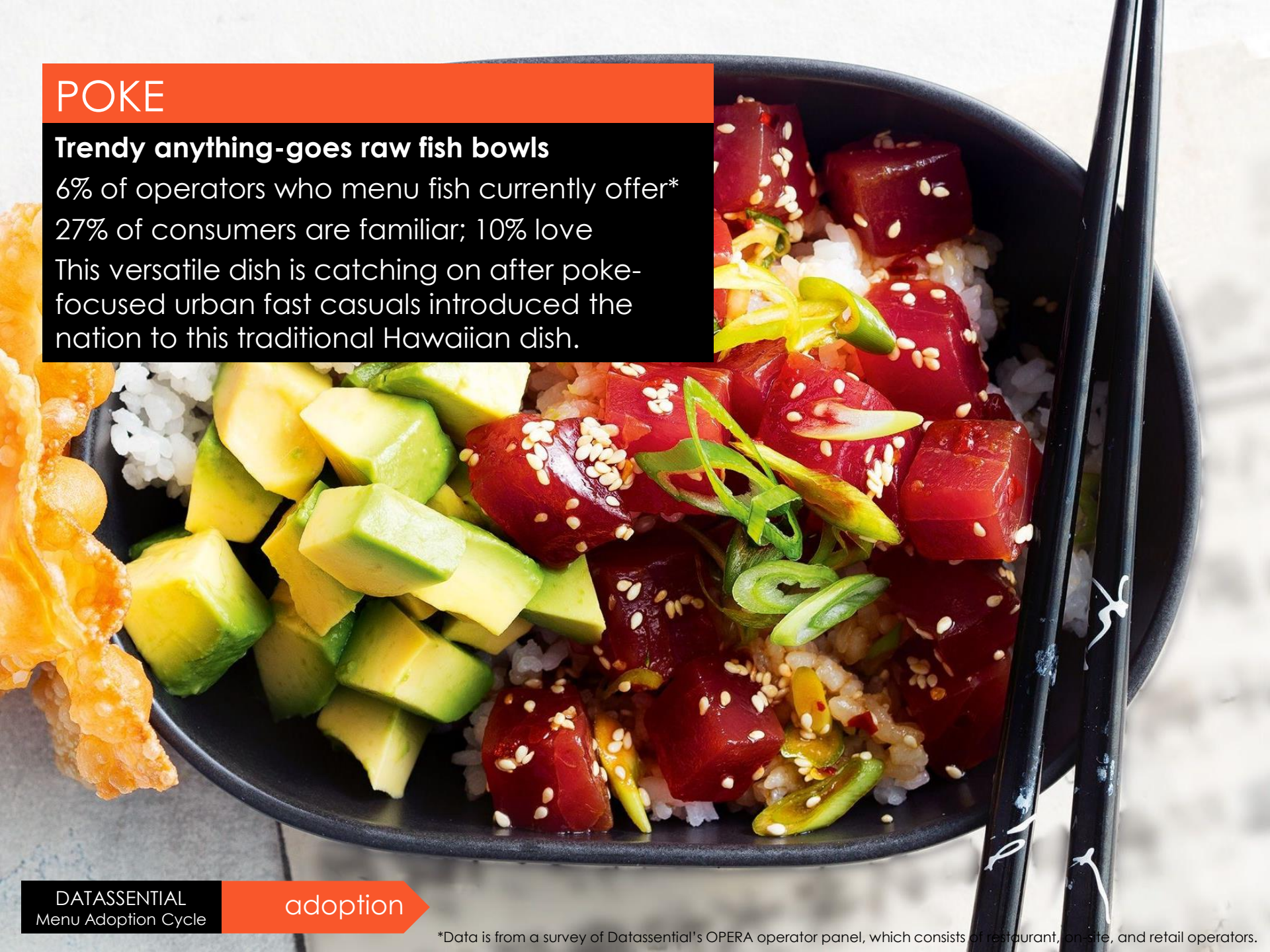
POKE

Trendy anything-goes raw fish bowls

6% of operators who menu fish currently offer*

27% of consumers are familiar; 10% love

This versatile dish is catching on after poke-focused urban fast casuals introduced the nation to this traditional Hawaiian dish.



DATASSENTIAL
Menu Adoption Cycle

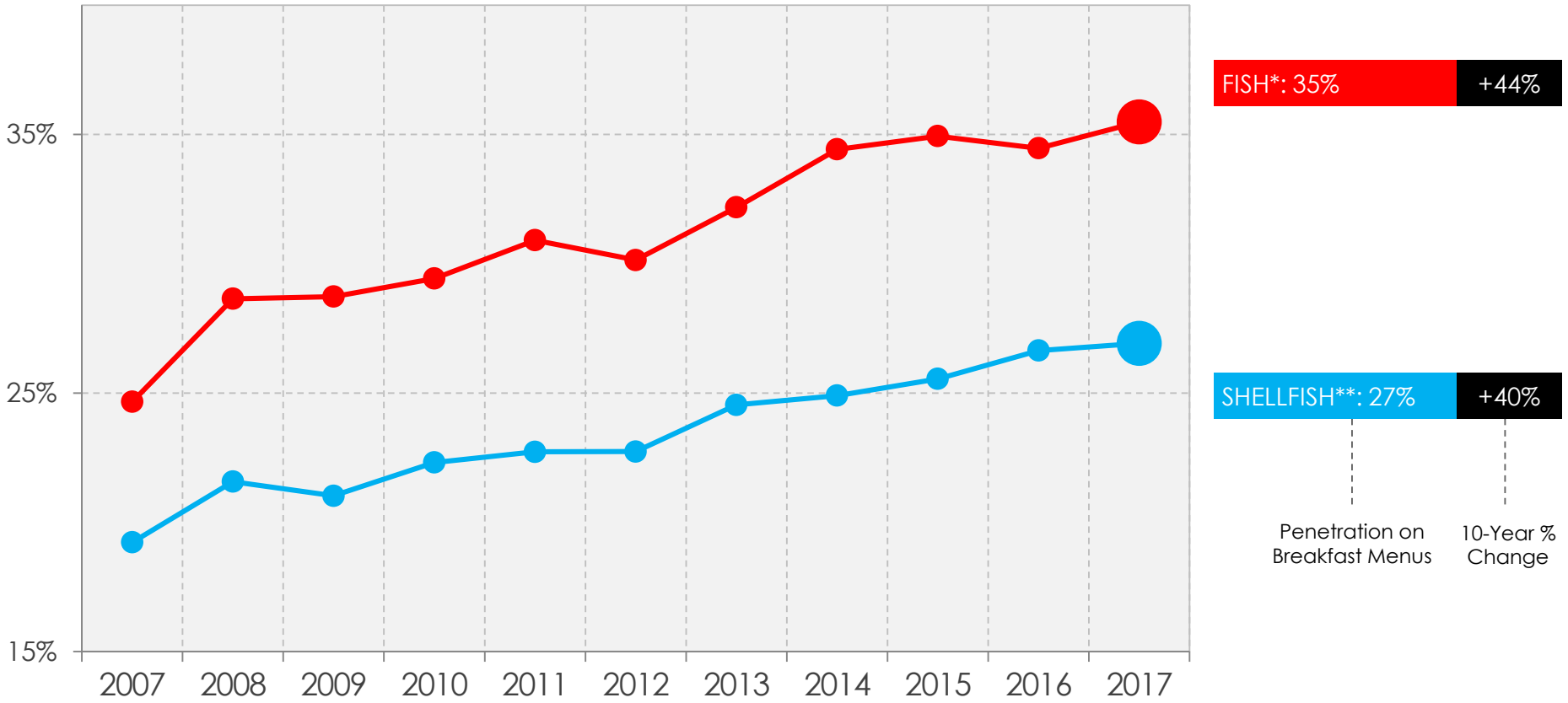
adoption

*Data is from a survey of Datassential's OPERA operator panel, which consists of restaurant, on-site, and retail operators.

Breakfast is increasingly a showcase for seafood, with both fish and shellfish rising steadily on menus. Seafood growth on breakfast and brunch menus is driven by seafood benedicts, shrimp and grits, and upscale items like ceviche.

Seafood on Breakfast Menus

penetration time trend



Fish includes: ahi, cod, skate, anchovy, bass, branzino, catfish, flounder, grouper, haddock, halibut, mackerel, mahi, perch, salmon, scrod, seabass, smelt, snapper, sole, swordfish, tilapia, trout, tuna, whitefish, and yellowtail.

**Shellfish includes: clam, camarone, conch, crab, crawfish, lobster, mussel, octopus, oyster, scallop, sea urchin/uni, shrimp, and squid/calamari.*

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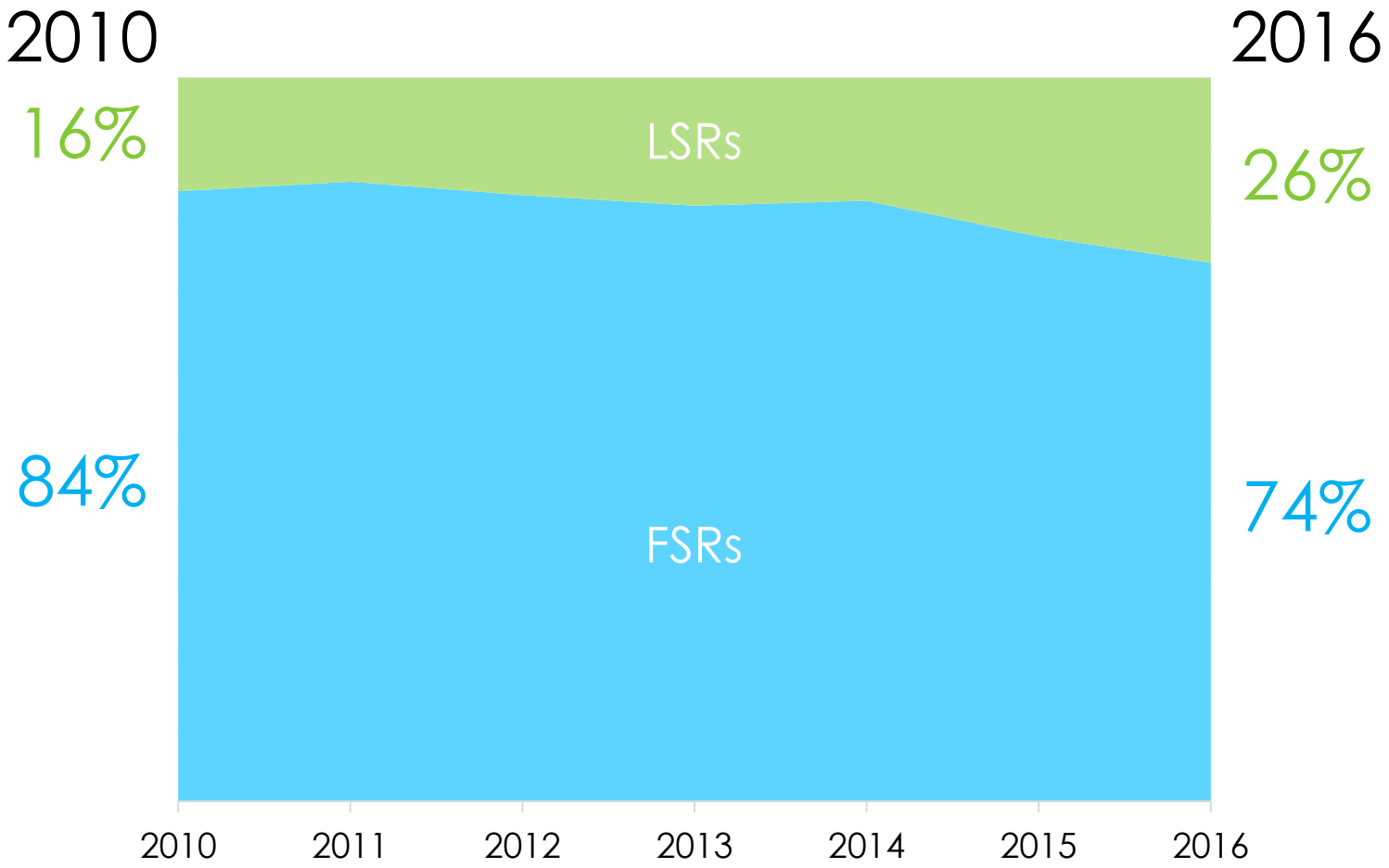
FSRs represent the bulk of new seafood menuing. However, the LSR footprint has increased since 2010.

INSIDER

Distribution of New Seafood Items Between LSRs and FSRs

time trend in chain restaurants, 2010-2016*



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*Data is from Datassential's **INSIDER** database, which tracks LTOs and new menu items from the top 250 chain restaurants and c-stores on a monthly basis. The base size for all restaurant seafood LTOs is over 4,800.

Select Seafood-Centric Operator Examples

Slapfish

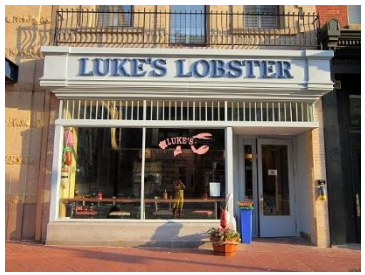
9 locations
Huntington Beach, CA (HQ)

Sustainable, Seasonal, and Customizable

Slapfish co-founder Andrew Gruel was working at Long Beach, CA's Aquarium of the Pacific and learning about sustainable seafood when he got the idea to open Slapfish, taking inspiration from fast casual pioneer Chipotle. Billed as a "modern seafood shack," Slapfish offers sustainably-sourced seafood at affordable prices. Some of its dishes have become iconic, like its Chowder Fries – natural-cut fries topped with the chain's signature New England Clam Chowder and bacon.

PRO TIP **Gruel opened the original Slapfish in a leased food truck, offering just three items on the menu – a fish sandwich, fish taco, and lobster roll.**

Luke's Lobster



27 locations
New York, NY (HQ)

On a Roll with a Regional Classic

Former lobster fisherman Luke Holden opened his first shack in New York's East Village in 2009. The concept has since expanded across the country and has even opened a unit in Japan. Lobster rolls are the star of the menu, although the crustacean also can be found on a grilled cheese sandwich, mixed into mac and cheese, and topping a grain bowl. Most units feature a "relaxed vibe and decor," Holden told SouthFlorida.com, with weathered wood and chalkboard menus.

PRO TIP **Sustainability is a core value. Luke's sister company, Cape Seafood, sources seafood from along the Northeastern U.S. and Canadian coasts caught in sustainable nets and traps.**

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