



Association of Genuine Alaska Pollock Producers

***Annual Report Fiscal Year  
2020-2021***

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# A Letter from the CEO

To say 2020 was a different kind of year would be an understatement, of course. Our businesses and lives were upended in ways no one could have predicted. Yet while tumultuous and challenging, it was also a year of exciting new things at the Association of Genuine Alaska Pollock Producers (GAPP), independent of the pandemic. With the leadership of our esteemed Board of Directors, GAPP set out to action against the following ambitious goals at the beginning of 2020:



**Goal 1:** In 2020-2021 GAPP will significantly increase the percentage of people that are familiar with (52%) and simultaneously decrease the number of people who haven't heard of Wild Alaska Pollock (48%). Our ultimate goal over time is to reach the levels that our competitive whitefish species have achieved.

It is also important to replicate this work on a global scale, as the Wild Alaska Pollock industry depends heavily on its ability to export. As such, we believe it is important to establish and understand the priority export markets and establish awareness and familiarity baselines among consumers in those markets that activities to market and promote Wild Alaska Pollock can be tracked against.

**Goal 2:** In 2020-2021 GAPP will identify the 3-5 priority export markets for Wild Alaska Pollock products and gather research that establishes a clear consumer benchmark for awareness and familiarity of Wild Alaska Pollock in those priority markets.

GAPP is also, first and foremost, a membership organization. As such, it is important that one goal encapsulate the satisfaction of our membership and their likelihood to continue supporting GAPP and its mission and mandate. GAPP will begin conducting an annual membership satisfaction survey to determine the most relevant and important services GAPP provides as well as measuring overall satisfaction.

**Goal 3:** At least 75% of GAPP members will recommend the organization (as measured by a question in the annual membership satisfaction survey).

And then everything changed. In March, we watched as our industry, our country and our world grappled with the onset of a global pandemic. We learned together and we met consumers where they were, together. Volume sales of many Wild Alaska Pollock products reached historic highs in 2020, which was driven largely by widespread stay-at-home orders enacted across the country, prompting unprecedented levels of cooking at home. The consumer tried new things and fell in love with Wild Alaska Pollock—sometimes for the first time.

Conversely, the pandemic proved devastating to the foodservice and hospitality industries. Additionally, products like fish meal, struggled in the ever-evolving circumstances of COVID-19. We're proud of GAPP's ability to pivot resources and our effort to collaborate with you to meet these challenges and opportunities brought on by these (hopefully) once-in-a-lifetime set of events and you'll read about many of those efforts in the following pages.

In summary, across all programs and efforts chronicled in our Annual Report for 2020 — a particularly challenging year — your GAPP team met lofty objectives and consistently delivered against the high standard of performance that Wild Alaska Pollock producers have set and come to count on. We are not about to rest on our laurels, though. GAPP is committed to raising the bar even higher in 2021-22 by driving demand for Wild Alaska Pollock in utterly exciting and entirely new, innovative ways in service to you, our members. The lessons, many of them hard-learned, through this pandemic will no doubt endure, and though the road ahead may not be smooth or certain, we have every reason to be bullish about the future. As GAPP's 2020-21 Annual Report demonstrates, almost anything is achievable.

## CEO ON THE GO!



# GAPP

## 2020-2021

### Strategic Objectives

- 1:** Grow and develop GAPP's leadership & staff to meet and serve industry needs.
- 2:** Build inherit customer loyalty for Wild Alaska Pollock by gathering comprehensive intel and insights that can be disseminated to industry participants for use and domestically and abroad.
- 3:** Encourage new partnerships, new channels, and value-added product innovations that celebrate Wild Alaska Pollock and tell the story of its attributes.
- 4:** Ensure the continued support of GAPP's Membership, Expand GAPP's Associate Membership base, Strengthen Allied Industry Ties and effectively communicate GAPP's Return on Investment.



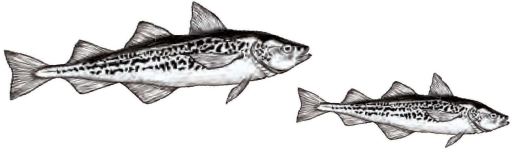
### *Mission*

Our mission is to educate customers and consumers, promote sales and best uses of the fish, and create awareness for product safety, traceability, health benefits, and the fishery.

### *Vision*

The Association of Genuine Alaska Pollock Producers will communicate the innumerable attributes of Wild Alaska Pollock to customers and consumers around the world in a consistent, persuasive, and motivational way in order to build global demand for Wild Alaska Pollock and drive forward the GAPP mission with our members and partners.

# GAPP's Response to COVID-19



With COVID presenting countless new challenges and opportunities, GAPP worked to take a page from the old nursery rhyme and “GAPP be nimble, GAPP be quick” in order to meet consumers where they were: at home. With millions of new short-order cooks whipping up three squares a day, we knew that this was an incredible time to introduce people to Wild Alaska Pollock and help them fall in love with our fish. **Here's what we did.**

## GAPP Partners with James Beard Award-Winning Seattle Chef

The James Beard award-winning chef and owner of popular Seattle restaurants Loulay and Luc, Chef Thierry Rautureau, taught home cooks across the country how to combine Wild Alaska Pollock, in many of its forms, with pantry staples to create stunning and delicious restaurant-quality dishes from the comfort of their kitchens.

The Chef in the Hat™ created seven original recipes, three for lunch and four for dinner. While the recipes weren't necessarily 20-minute meals, they used pantry staples and classic cooking techniques that excited and delighted first-time home cooks and foodies alike. All of the recipes featured Wild Alaska Pollock, which the chef is passionate about having participated in Seattle's first-ever Wild Alaska Pollock week at the beginning of the Lenten season.



*“I love Wild Alaska Pollock because of its versatility and I can't wait to bring that out and show people just how many things you can do with this fish—from classic French tartines, to baked fillets to pasta and more,” said Chef Rautureau. “I also love Wild Alaska Pollock's sustainability story—that's so important to me as a chef and to many consumers as well. I can't wait to have more people learn about this fish and try it out.”*

The recipes created by Chef Rautureau are available on the GAPP website, [www.alaskapollock.org](http://www.alaskapollock.org). The Chef also conducted live cooking demonstrations on GAPP's social media and answered questions from folks at home making the recipes in real time or after the fact. Chef has also received quite a bit of media buzz around this partnership, having been featured in Foodsided and Seattle Magazine. Recipes from the partnership included:

- Baked Wild Alaska Pollock with Lemon Couscous & Harissa Beurre Blanc
- Wild Alaska Pollock Niçoise Salad-Wild Alaska Pollock Surimi Fettuccini
- Wild Alaska Pollock with Clams and Vegetables in Broth
- Smoked Wild Alaska Pollock Tartine with Goat Cheese & Pickled Vegetables
- Wild Alaska Pollock Curry, Coconut, Rice, Bell Pepper, Spinach and Kumquat
- Wild Alaska Pollock with Farro Stew and Red Wine Sauce



# GAPP's Response to COVID-19

(continued)

## GAPP Launches "Special Edition" COVID-19 Toolkit

To account for the shifting consumer behavior, trends and preferences, GAPP also launched a comprehensive COVID-19 toolkit that took the messages from the GAPP toolkit and put them into the correct frame of reference and context for the pandemic situation. This toolkit was released for member use and included turn-key messages, graphics and up-to-date consumer data that was helpful in tracking consumer trends and preferences for decision making.



## GAPP Participates in Industry-Wide COVID-19 response network

When COVID struck, the Alaska fishery groups came together to form the Alaska Fishing Industry Safety & Health Committee in order to coordinate efforts to protect the fishery, workforce and others from the spread of COVID-19 and to ensure we spoke with one voice as a united Alaska fishery industry when answering questions about COVID-19, our preparations, continuity of supply or food safety.

GAPP created several resources as part of this special taskforce including an up-to-date holding statement on our website about the situation. Additionally, GAPP provided a daily COVID-19 update email to members and allied industry that detailed current state and federal response actions, media response and coverage as well as insights on foodservice and restaurant trends.



## Implemented a #COVIDCuisine Focused Social Strategy for Wild Alaska Pollock

As more people across the country faced "shelter in place" orders and were forced to cook each and every meal at home, the GAPP Communications Committee met to determine how to ensure that the Wild Alaska Pollock industry was providing helpful solutions and a healthy helping of empathy.

Supporting consumers at that time meant both by entertaining them, offering new recipes and tricks for cooking (Wild Alaska Pollock, of course) and introducing them to new varieties of Wild Alaska Pollock (like Surimi!) that they may not be familiar with.

GAPP's plan was to drastically revise its social media strategy to provide new content specific to COVID-19 and to start to work on a rapid-response strategy for channels (food service and restaurants) that were suffering to help them rebound quickly when things returned to normal.



# GAPP's Response to COVID-19

(continued)

## New 'Find our Fish' Feature Connects Consumers to WAP, Directly

While pivoting our content to better meet consumers where they were thanks to COVID-19, we also wanted those consumers seeing our fabulous new recipes and other content to be able to find the products to make it. So, with guidance and help from the GAPP Communications Committee, we launched the new 'Find our Fish' feature over the Summer to help consumers try—and buy—Wild Alaska Pollock. The page featured two products from every GAPP member or North American Partner, as well as a few additional products from industry collaborators (like Bullwhip Hot Sauce). We kept this page updated and fresh, adding additional products and items when released and available.



*"As more products become available at retail to meet consumer demand, we'll continue to build out this site and help consumers find their way to our delicious, nutritious perfect protein," said Margery Schelling, GAPP Communications Committee Chair. "Wild Alaska Pollock is well-positioned at retail. How can we continue to help connect the dots for consumers? That's exactly what this is designed to do."*

GAPP also featured a "where to find" button link in all of its social media posts featuring new recipes and cooking demonstrations from its chef and other food collaborators and asked its members and North American Program partners to do the same. Consumers visiting the site saw a vast array of Wild Alaska Pollock products—in all forms from surimi to fish sticks—and were able to select the item that interested them and see where they could purchase it.



ONE FOR NEPTUNE WHITE FISH JERKY VARIETY 3-PACK: WILD ALASKA POLLOCK HONEY LEMON GINGER, WILD ALASKA POLLOCK CRACKED PEPPER, FIERY CAJUN



GREAT VALUE WILD CAUGHT BONELESS SKINLESS ALASKAN POLLOCK FILLETS



TRIPENT SEAFOODS LOUIS KEMP ALASKA DELIGHTS



GORTON'S SEAFOOD FISH STICKS



TRANS-OCEAN PRODUCTS CRAB CLASSIC



WILD ALASKAN COMPANY 'FREE WILD ALASKA POLLOCK FOR LIFE' PROMOTION



# GAPP's Response to COVID-19

(continued)

## GAPP Partners with Renowned Food and Lifestyle Blogger to Create Wild Alaska Pollock Perfect for Home Cooks

GAPP also partnered with food and lifestyle blogger Jessy Freimann of "The Life Jolie" who created three new recipes using Wild Alaska Pollock and showcased those new recipes "live" on Instagram (@thelifejolie) to her nearly 50,000 followers.

Jessy's recipes are down-to-earth and helpful for home cooks who were facing the daunting task of preparing nearly every meal at home. She was the perfect partner for Wild Alaska Pollock to show how versatile, easy-to-prepare and approachable our perfect protein is! Jessy's recipes included:

- Surimi Macaroni Salad
- Wild Alaska Pollock Po' Boy Sandwiches
- Baked Lemon Dill Wild Alaska Pollock



# GAPP's Response to COVID-19

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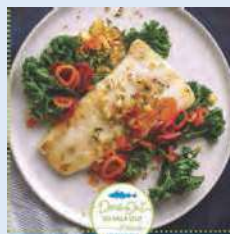
## GAPP Works to Help Restaurants Recover

To assist the struggling foodservice industry, GAPP brought the Wild Alaska Pollock Industry together through its "Fast Start" Program. Utilizing our network of catchers, producers, and sellers, we coordinated with restaurants and their distributors to try and bring Wild Alaska Pollock products to eateries last fall in three key markets: Chicago, Nashville, and Minneapolis.

Wild Alaska Pollock offers several benefits that meet the needs of both the restaurants (such as affordability and frozen supply chain) as well as guests (sustainable, versatile, affordable). GAPP partnered with marketing agency, Castle, to execute the promotion and drive awareness through social media and earned media. After monitoring the state-by-state re-opening plans, it was determined that only Nashville could proceed in 2020, with the other two markets to follow in 2021.

The local Nashville chefs responded enthusiastically to the opportunity to serve Wild Alaska Pollock in their restaurants. Given their cost and operational pressures as a result of COVID-19 safety protocols and limited indoor seating, the many benefits of Wild Alaska Pollock were even more relevant to them.

"Dine Out to Help Out," ran November 9 – 20, 2020, and saw Nashville diners show up to support their favorite participating restaurants. With all involved restaurants upholding COVID-19 safety guidelines, some diners stopped by their favorite spots in person, socially distanced, with masks on and sanitizers in hand, while others opted to help out from the comfort and safety of their homes with convenient takeout and delivery options. Each participating "Dine Out to Help Out" restaurant received a Wild Alaska Pollock product donation of their choice and developed unique dishes that aligned with their culinary styles, all featuring Alaska's unsung, delicious, sustainable seafood hero.





# GAPP's Response to COVID-19

(continued)

## GAPP Works to Help Restaurants Recover (continued)



At local-favorites Pomodoro East, Park Café and Eastland Café, diners enjoyed delicious beer-battered Wild Alaska Pollock. Made with Yazoo Brewing Company's Dos Perros Brown Ale Beer for a mouthwatering crunch, their tasty take on fish and chips provided the perfect opportunity to support these local restaurants and Nashville-based Yazoo Brewing Company, while enjoying the world's best fish.

Over at The Mockingbird, Executive Chef and Partner Brian Riggensch treated guests to pan-seared Wild Alaska Pollock, served with Carolina gold fried rice, merguez sausage and ras el hanout butter. Riggensch, who showcased his skills on Season 24 of the Food Network's award-winning show "Chopped," pan-seared his dish to create golden-crisp edges and a tender, flaky center.

Celebrity Chef Maneet Chauhan, recipient of the prestigious James Beard Award of Excellence, spiced things up at Chauhan Ale & Masala House with her Pollock Rawa Fry. Served with roasted red pepper chutney and garam masala, this semolina-fried Wild Alaska Pollock dish took diners on a flavor adventure, perfectly capturing how versatile the fish is. GAPP hopes to replicate this restaurant support in other markets across the U.S. as conditions hopefully begin to improve in 2021.



# GAPP Partnership Programs

The GAPP Partnership Program continued to grow and deliver significant gains for Wild Alaska Pollock in 2020. With two additional rounds of funding in North American and the first-ever round of funding in European markets, the Program brought new products to market, building awareness and demand for Wild Alaska Pollock like never before. **Read on to learn about the specifics of the Program.**



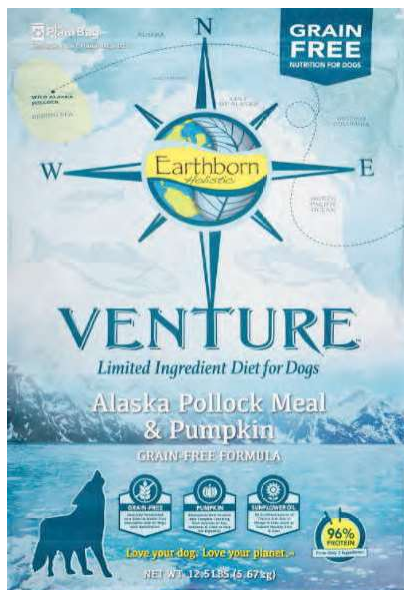
## GAPP Funds 19 Projects in Two North American Funding Rounds

### Round 3 Funding

The GAPP Board of Directors approved almost 1.5 million dollars in funding for the third round of partnerships under its North American Partnership Program. This substantial investment funded twelve unique projects in which the partners committed to supporting the program with matching funds that more than quadrupled the GAPP investment, helping to further build demand and raise awareness for Wild Alaska Pollock.

Four of the funded proposals focused specifically on surimi products, which was of particular interest to the GAPP Board of Directors last year. Round three funding awards also brought Wild Alaska Pollock to new channels where it previously hadn't been like the growing convenience-store channel. Excitingly, Wild Alaska Pollock made its debut in this channel by introducing a fish sandwich to the world's largest convenience retailer, 7-Eleven, in nearly 9,000 U.S. stores.

Independently, two of GAPP's partners, Trident Seafoods and High Liner Foods, capitalized on the ever-popular grilling trend with the nationwide retail and club store launch of burgers and wings made of Wild Alaska Pollock. Separately, another new partner brought Wild Alaska Pollock to the country's four-legged friends in the form of new Wild Alaska Pollock pet food. Lastly, several partners worked with popular influencers on social media, working to bring excitement and buzz to Wild Alaska Pollock by encouraging even seafood skeptics to give our fish a try.



# GAPP Partnership Programs

(continued)

## Round 4 Funding

As part of its partnership programs, GAPP awarded nearly three quarters of a million dollars in funding to seven partners launching exciting new products made with delicious and sustainable Wild Alaska Pollock to feed more consumers every day.



Partners in the Program include Gorton's Seafood, High Liner Foods, Louis Kemp, Pescanova, Restaurant Depot and 7-ELEVEN. Using partnership funds, Gorton's launched a brand-new awareness campaign titled "Move Over Meat, It's Seafood Time," which showcased Wild Alaska Pollock in beautiful, crave-able recipes and highlighted the benefits of adding more seafood to consumers' diets. High Liner Foods, in two separate campaigns, launched and drove awareness for its new "Alaska Wild Pollock Fish Wings" which can be served as a delicious snack or appetizer and is a tasty alternative to chicken wings, while also promoting its "Go Wild" Line—including the "Alaska Pollock Wild Wings" in the ever-popular convenience-store and quick-serve restaurant category.



Speaking of the popular convenience store category, returning partner 7-ELEVEN was awarded funding to promote a new "fish bites" product during the 2021 Lenten season as a follow up to their popular Wild Alaska Pollock fish sandwich launched during Lent 2020. Excitingly, Pescanova, a new GAPP partner, launched a new Fettuccine Protein Pasta targeting the chilled category which was marketed as an "All Good, No Guilt Pasta." Restaurant Depot, another new partner, carried a variety of Wild Alaska Pollock products in their club stores which saw an increase in consumer-traffic due to coronavirus.

Wild Alaska Pollock also got in on the Super Bowl action in early 2021, through a partnership with Louis Kemp and celebrity chef Nancy Fuller. The partnership promoted recipes featuring surimi seafood as the perfect Super Bowl snack for the "big game."

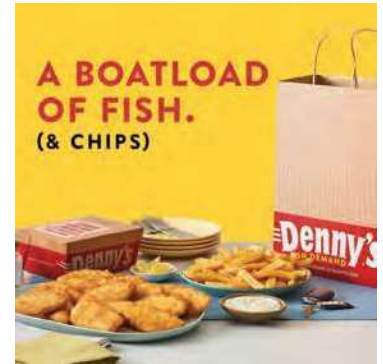


# GAPP Partnership Programs

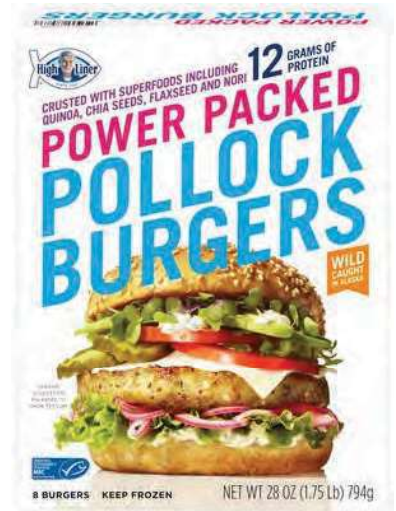
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## Round 3 Highlights

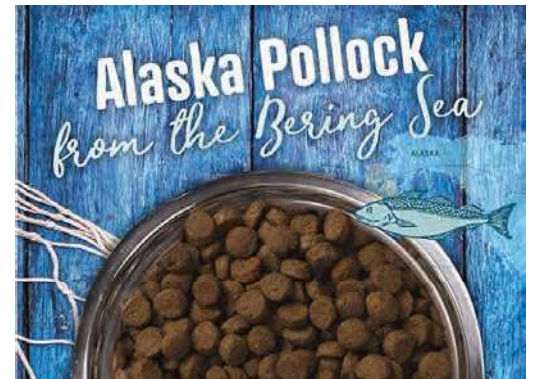
**Denny's Wild Alaska Pollock Platter:** New Wild Alaska Pollock Fried Fish Platter & Family Pack launched on September 9, 2020 and expanded to 80% of restaurants on November 4, 2020. The promotion of this new menu item continued through the end of March 2021 in email, on menus, posters, social, in-dining placemats. Despite challenges due to COVID, the Fried Fish Platter trended 3% above forecast and was the best-selling new dinner menu addition at Denny's.



**High Liner's Power Packed Pollock Burger:** The product, a Wild Alaska Pollock burger with pan-seared crusting and superfoods including chia, flax, nori and quinoa, launched in US & Canada for the 2020 grilling season. GAPP partnership dollars supported the creation of a video, coupons and retail ads. Men (35-44 years old) and individuals craving fast food showed greatest interest in the new product, which has received very encouraging consumer feedback to date.



**Venture Limited Wild Alaska Pollock Ingredient Diet for Dogs:** The awareness & trial campaign kicked off on August 18, 2020 and ran through early November. GAPP partnership funds went to tactics including Google, Facebook & Pinterest Ads. The awareness campaign generated 5.6M impressions & 57k clicked through to website and, most importantly, an estimated 3k+ in sales. The product has received very good feedback from dog owners!



*In total, GAPP has funded nearly 40 partnerships in 2019 and 2020.*



# GAPP Partnership Programs

(continued)

## First-Ever European Partnership Program

After receiving 13 applications for funding under its newly-created European Partnership Program on March 15, 2020, the GAPP Board of Directors approved six partnerships for funding totaling nearly one million dollars in 2020.

Newly awarded Partners in the European Program include Young's Seafood, Nomad Foods, Angulas Aguinaga and Pickenpack Seafoods. Angulas Aguinaga launched two new product lines in Spain utilizing Wild Alaska Pollock surimi seafood including a "heat and eat" line of products and a new category of product with nutritional benefits. In the UK, Young's Seafood launched a delicious new "Chip Shop Quarter Pounder" with Wild Alaska Pollock introducing the species to a whole new generation of consumers. Partnership dollars from GAPP were used to market and promote these new products to build awareness and trial.

In Germany, GAPP worked with Pickenpack Seafoods to bring their new Wild Alaska Pollock Fish and Sauce and Wild Alaska Pollock Potato Topper to popular German retailers and German discount retailers.

**Nomad Foods**  
Europe



*"In Europe, thousands of people eat Pollock every day often not fully knowing the species or understanding that Alaska has the highest standards for quality and sustainability. We are thrilled to invest alongside our partners to communicate those advantages in no uncertain terms!" said Mikel Durham, GAPP Board Chair. "These innovative products celebrate the sustainably wild-caught Wild Alaska Pollock in all of its versatile forms."*

# GAPP Partnership Programs (continued)

## “Off Cycle” Funding Requests & Pivoting Partnerships Due to COVID

One of our Round 3 partners, Gorton's Seafood, was approved for an updated, off-cycle program that reallocated a percentage of their original Round 3 funds. As more consumers were cooking from home more often, sales of frozen prepared foods, including frozen seafood, rose sharply in grocery stores. Gorton's Seafood built on this trend by using partnership dollars to entice new frozen seafood consumers to switch to Wild Alaska Pollock—providing scintillating new recipes as well as an education on Wild Alaska Pollock's many remarkable benefits using engaging rich media ads to target seafood-minded consumers cooking at home.

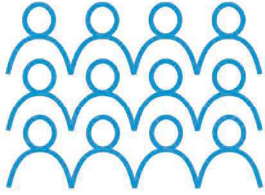
Another off-cycle proposal from Denny's was approved by the GAPP Board of Directors, which focused on offering a number of permanent Wild Alaska Pollock menu items. They also featured a limited time offer for Wild Alaska Pollock in order to build interest and drive sales.

Young's Chip Shop in the UK revised their packaging to showcase Wild Alaska Pollock and partnered with several retailers to promote the product to drive awareness and trial. They report a volume lift of +19% because of these new activities.

Schwan's Home Delivery is another partner that increased their focus on Wild Alaska Pollock last year, which has helped increase their seafood sales by +136% and acquire +157% more buyers. They launched a third item, Signature Parmesan Alaskan Pollock, in March 2020, adding another great variety to their line of Beer Battered Alaskan Pollock Fillets and the Crispy Fish Strips.



# GAPP Marketing, Media Outreach & Brand Development



## GAPP Research Shows that Nearly 10 Million More Consumers Know Wild Alaska Pollock in 2020

Year-over-year research shows that at least ten million more consumers know about Wild Alaska Pollock and its core attributes in the U.S. than did in 2019. Familiarity with Wild Alaska Pollock among U.S. consumers rose three percent from 52% in 2019 to 55% in 2020.

Last year, GAPP set an ambitious goal to achieve an increase in consumer familiarity with Wild Alaska Pollock year-over-year, which was met by three percent, according to the research conducted in August.

Generating greater awareness and familiarity with Wild Alaska Pollock among the general population remains a communications imperative for GAPP. Increasing visibility of Wild Alaska Pollock can aid opinion and preference compared to other species. Fish-eating consumers' experimentation and purchase of fish has soared during COVID, making it a prime opportunity for Wild Alaska Pollock, there was high demand for healthy, easy-to-prepare and sustainable fish.

Google searches for Wild Alaska Pollock have steadily grown, also, over the past three years. Going forward, Wild Alaska Pollock must leverage the "white fish halo" as an approach to lift familiarity, and tout Wild Alaska Pollock's sustainability differentiator in its messaging to consumers in the U.S. market.

The research further showed that consumer's 'table stakes' when purchasing seafood are taste, cost, health and ease of preparation. Wild Alaska Pollock is delivering on ease, currently, but needs to elevate when it comes to taste, cost and health.

The research further showed that once consumers are considering a fish purchase the things that differentiate Wild Alaska Pollock from other options are its versatility, provenance and sustainability. Versatility is what helps people select fish over another protein and it's the number one factor that causes people to choose between different fish species. Wild Alaska Pollock needs to drive an increase in recognition of Wild Alaska Pollock as a versatile ingredient, as center-of-the-plate, as a protein option.

This research helped GAPP know just how to create messaging for consumer-facing brands to talk about Wild Alaska Pollock in the most motivational ways. GAPP is currently working to update its messaging Toolkit for use by the entire industry.



# GAPP Marketing, Media Outreach & Brand Development

## GAPP Continued to Streamline It's Social Media Strategy around Wild Alaska Pollock

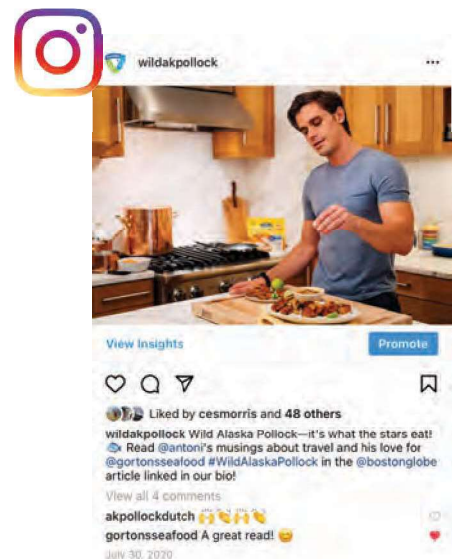
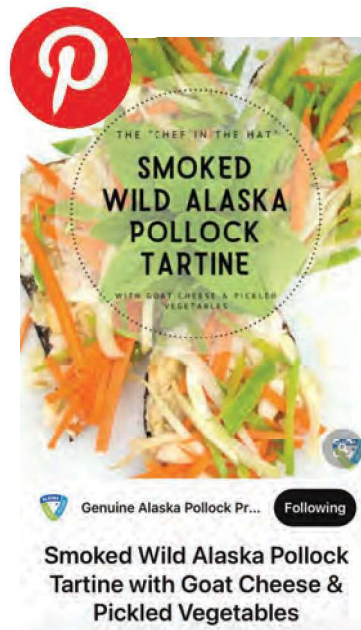
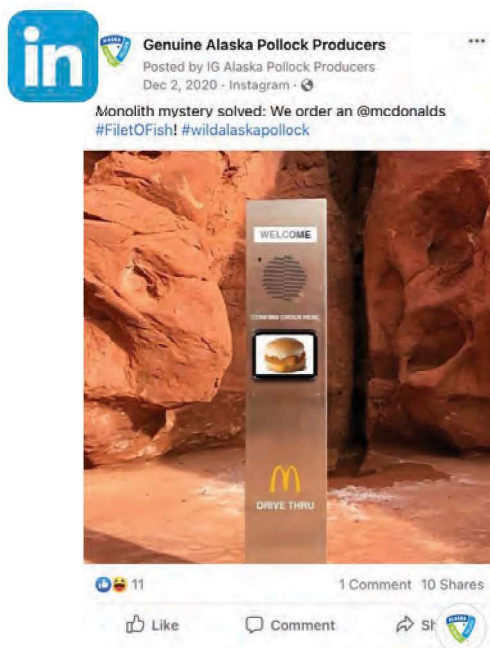
Receiving guidance from the GAPP Communications Committee, last year GAPP worked to further pivot and hone its social media content to drive engagement and build followers.

On Instagram, a largely consumer-facing platform, GAPP amplified Wild Alaska Pollock recipes from members, partners, and 3rd party sources with appropriate credit. To grow our reach and build our audience, we also put paid promotion dollars behind a select number of our top posts. The goal of this strategy was to establish GAPP's reputation in the consumer space as a go-to resource for Wild Alaska Pollock recipes and nutrition information.

Conversely, GAPP's Facebook is industry-facing. Though we published some consumer-oriented content on Facebook during the height of our nation's stay-home orders, we then shifted our content back to industry-related content that our audience is interested in seeing. GAPP & industry news were at the forefront, with supplementary content cross-posted from our Instagram account. Our goal was and continues to be to establish GAPP's reputation in the Wild Alaska Pollock Industry as a go-to source for news, updates, and other information.

We also launched a [GAPP Pinterest account](#) for sharing Wild Alaska Pollock recipes, which we began to build out in the second half of 2020.

Our followings on social media have grown by almost 80 percent in the past year and we're going to continue to grow!





# Oxygen Magazine Confirms that Wild Alaska Pollock is a Superior Protein!

In a continued effort to emphasize the health benefits for Wild Alaska Pollock, this year GAPP continued to work to place the protein research presented by [Nissui at our 2019 GAPP Annual Meeting](#) in publications that focus on health and target health-conscious, athletic consumers.

In the Spring, we worked to pitch Oxygen Magazine about the research and Net Protein Utilization and our efforts were successful! An article on the benefits of Wild Alaska Pollock was officially published on June 8th!

The **Oxygen brand** has been at the forefront of women's health and fitness for 20 years. Oxygen receives **636K** monthly page views, **164K** of which are unique and has massive followings on social media (where they will also promote this content). Oxygen and its content give readers the tools they need to reach their goals with expert advice and the latest research. Every writer and even model for the magazine has an education, background or certifications in the field of Health and Fitness. While most readers personally identify as athletes, many are also professionals in the fitness and health industry – creating a multiplier effect for sharing the benefits of Wild Alaska Pollock with their clients and networks.

Their readers are also our exact demographic for WAP-advocates: **99% female; Median HHI is \$90K; 62% of readers identify as athletes.** Oxygen readers are typically highly-engaged with content, meaning they were likely want to learn more and read the entire article. We also promoted this feature on social media along with Oxygen on their social platforms to drive even further readership.



## The New Protein on the Block: Wild Alaska Pollock

*It turns out this mild, flaky whitefish, which happens to be the most abundant, certified-sustainable fish in the world, is one of the best protein choices for optimizing muscle growth.*



### QUICK FACTS:

#### -Newsletter

Total Sends (Fixed/List): 34,928  
Average/Expected Open Rate: 22.9%  
GAPP Open Rate: 22.5% (Average)  
Average/Expected Click-Through Rate: 4.4%  
GAPP Click-Through Rate: 19.2% (^ 336%)

#### -Website

Average/Expected Pageviews: 666  
GAPP Pageviews: 1,027 (^ 54%)

#### -Social Media

Average/Expected Reach: 24,255  
GAPP Reach: 58,999 (^ 143%)  
Average/Expected Engagement: 222  
GAPP Engagement: 323 (^ 45%)  
Average/Expected Clicks: 197  
GAPP Clicks: 545 (^ 176%)

#### -Banner Ad

Impressions (Fixed): 200,000

## US Dietary Guidelines' Advisory Committee Recommends Seafood for Children

Last Fall, the U.S. Dietary Guidelines Advisory Committee (DGAC), comprised of our nation's leading dietitians, nutritionists and medical professionals, released its official report. The report was historic for a number of reasons. Significantly, for the first time, the DGAC released dietary recommendations for children from birth to two years.

More than that, however, the DGAC highlighted evidence pointing to a "predominantly beneficial" relationship between seafood eaten during pregnancy and cognitive development in children. Studies show that seafood consumption was repeatedly associated with improvements in cognitive development and language and communication development in children,

including developmental milestones and IQ.

Also, the DGAC reported that seafood choices are important components of a healthy dietary pattern for women including before and during pregnancy and during lactation. That finding means that advice can better encourage consumption among pregnant women, without having to risk undermining that message by warning of harm that the DGAC did not find in its systematic review of the evidence that followed the NESR protocol.

These findings are significant advancements for the seafood and Wild Alaska Pollock industries. This report formed the basis for the official Dietary

Guidelines for Americans, which was released in January and will be valid for the next five years. Despite this good news, there were still common misconceptions about seafood consumption noted in the guidelines. GAPP worked with our industry association partners, including the Pacific Seafood Processors Association (PSPA) to note our concerns about these issue areas with the Department of Health and Human Services and the U.S. Department of Agriculture.



# GAPP Research

## GAPP Research Projects At-a-Glance

At its March 2020 meeting, the GAPP Board of Directors approved \$175,000 for domestic market research and \$400,000 for foreign market research to better understand our consumers both in the U.S. and abroad. While COVID-19 might have postponed the launch of much of the budgeted research, many of the projects still successfully launched last year with gusto and generated insights that will be incredibly illuminating for our industry to understand consumer needs and the greatest opportunities for Wild Alaska Pollock going forward.

Most significantly, GAPP completed an analysis on the U.S. “Attitudes and Usage” around Wild Alaska Pollock. In 2020, we launched the second year of this tracker, that last year (in 2019) reported U.S. consumer familiarity with Wild Alaska Pollock at 52%. GAPP will conduct this year-over-year research each year, to measure any increases in that familiarity as well as other attributes that consumers find motivating about our fish and determine the overall success of GAPP’s efforts.

Additionally, as Europe is such a significant market for Wild Alaska Pollock, GAPP also put into the field a similar “Attitudes and Usage” study in three key European markets to measure awareness and familiarity with Wild Alaska Pollock and its attributes. This study will allow us to establish a baseline for improvement with additional GAPP campaigns, initiatives and partnerships in coming years.

GAPP also launched two studies geared to understanding surimi consumption, products, attitudes and usage in Japan and a similar study in the U.S. GAPP recognizes the growing opportunity for Surimi around the world and these studies are the first step in knowing how best to position the industry’s resources to take advantage of these opportunities.

As 2020 drew to a close, GAPP launched online consumer “bulletin boards” to understand how to best communicate around the forthcoming result of the Wild Alaska Pollock industry Life Cycle Assessment. These bulletin boards, which spanned three days, hosted seafood consumers who shared their thoughts in response to a series of questions around sustainability communications and marketing. The insights from these bulletin boards will help GAPP craft the best messages to communicate to consumers about our forthcoming LCA results.

Read on for an in-depth look at the results of those research projects.

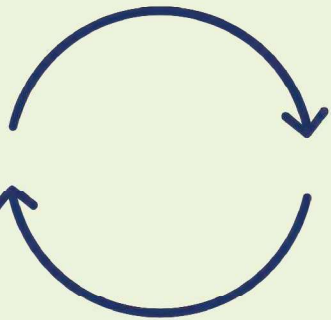


# GAPP Research (continued)

## GAPP Life Cycle Assessment Advances

In January, GAPP began the lengthy process of collecting data through a questionnaire sent to many of your staff for completion. Thanks to your dedication and recognition of the importance of this work, we were able to achieve an incredibly high response rate which has helped us work to quantify the industry's environmental impact as it pertains to carbon footprint and energy usage. Many of our customers have been asking for such data and we know we have a good story to tell—and this comprehensive Life Cycle Assessment will help us tell those stories with concrete facts and figures to back them up.

With all the data collected by mid-Summer, GAPP worked with its partner, Quantis, to begin to analyze and fine-tune the data, as well as pose follow up questions around certain figures received. GAPP also selected a third-party panel of experts who will review the final analysis provided by Quantis to ensure that it is viable, accurate and above reproach. The biographies of those experts are available on the GAPP website.



The final third-party verified results are expected in July 2021 and (spoiler alert) our carbon footprint is significantly lower than any other animal protein on the planet—which is huge news for our species and we can't wait to share it far and wide. Thank you to all that helped on this ambitious project!

## GAPP Works to Understand Consumer Perceptions of Sustainability in Advance of LCA Results

Sustainability is increasingly on the minds of consumers, and we know from consumer research this is an important differentiator for Wild Alaska Pollock. 82 percent of respondents in the 2019 consumer study said sustainability is an important attribute in their purchase decisions. In anticipation of the Life Cycle Assessment (LCA), GAPP partnered with Ketchum to further explore how to best communicate sustainability and the analyzed results from the LCA study.

In early September to ground the work in the consumer, Ketchum organized 3 days of online focus groups where we had the opportunity to engage with 30 diverse seafood eating consumers recruited from across the U.S.. We explored their understanding of sustainable food and its importance on purchase decisions as well as their awareness of the sustainability of Wild Alaska Pollock.

We heard a lot of passion for sustainability in general because of consumers' emotional connection to protecting natural resources and the environment for the sake of their families and generations to come. Consumers have a lot of familiarity of fish as a sustainable protein alternative, however, they were not certain which fish species are sustainable. Most were unfamiliar with Wild Alaska Pollock and its sustainability story, but upon learning became very intrigued and wanted to learn more. We uncovered a key consumer benefit of eating more sustainable seafood is that it is healthier and good for the planet.

These consumer perception results, coupled with our final LCA report, will form the basis for extensive media and consumer outreach in Summer 2021.



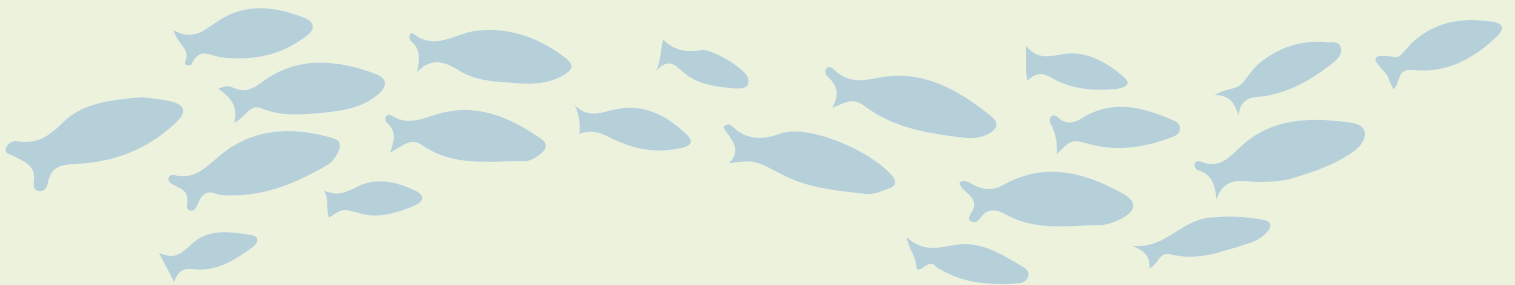
# GAPP Research

(continued)



## GAPP Create First-Ever Surimi Seafood Tracker

Last year, GAPP and its Surimi Committee worked to create a tracking mechanism for international surimi seafood supply and demand. The GAPP Surimi Committee selected firm Urner Barry for this important work and, together, worked to collect and organize surimi production and trade data into a format that is both accessible to and digestible for the GAPP membership. This will be the very first time that data like this has been compiled, analyzed and synthesized in a comprehensive way. As a result of these efforts the first quarterly Surimi Seafood Tracking Report was launched in May 2021. This report tracks the supply, composition and demand for Wild Alaska Pollock surimi (in all its forms), globally and this will be the first time data like this has been compiled, analyzed and synthesized in a comprehensive way. The reports will be available to all GAPP members for their use.





## GAPP Completes Two European Consumer Studies; Identifies Challenges, Opportunities in Key Markets

With the support and guidance of the GAPP Fillet Committee, last year GAPP selected renowned European research firm Bonamy Finch, a UK-based research company, to conduct research about consumer perceptions of Wild Alaska Pollock in five key European countries: Germany, France, United Kingdom, Belgium and the Netherlands. This research was utilized to assess the consumer awareness and the importance of the origin of Wild Alaska Pollock and to gauge the understanding and relative importance of sustainability to European consumers. This research showed that, indeed, consumers do expect products labeled as “Alaska Pollock” to come from Alaska and that the provenance of Alaska, much like in the U.S., carries great weight with consumers.

Additionally last year, GAPP launched a consumer tracking program to measure the consumer health of the Wild Alaska Pollock species in order to shape and optimize GAPP’s strategy to increase Wild Alaska Pollock demand and value. GAPP also worked with Bonamy Finch to conduct this research in the UK, France, and Germany. Bonomy Finch produced a questionnaire that was given to a representative sample of 1000 fish-eating consumers identified in each country (France, Germany and the UK) and respondents completed a 15-minute survey to ascertain familiarity, consumption, and perceptions of a variety of fish.

The research results showed that Wild Alaska Pollock is ‘front of mind’ for many consumers in Germany and consumed daily in the United Kingdom (U.K.) and France. Much opportunity exists to build both demand and consumer familiarity for the fish in key European markets.



Specifically, Germany is quite a success story. About 29% of people automatically think of Alaska Pollock when they think of fish to eat; and 99% of people have heard of the species in Germany. Alaska Pollock was ahead of Cod and 2 out of 3 people knew of Alaska Pollock. On top of that, consumers have very strong positive opinion of the species. Alaska Pollock emerges in the market as the leading whitefish.

The three markets, however, are markedly different in terms of consumer familiarity and awareness of Wild Alaska Pollock with Alaska Pollock being a top whitefish for many people in Germany, right behind Cod and Perch for being automatically thought of in the whitefish category. Much like the U.S., Alaska Pollock in the UK is the unnamed fish, “hidden in plain sight” (battered and breaded) in retail and in fish and chip shops (fast food). In the UK, fish is ordered by name and 1 in 4 fish-eating occasions occur outside the home and fish is advertised by name. By comparison, France falls between Germany and the UK as the most developed Alaska Pollock market. The French are aware of Alaska Pollock, but it sits behind Cod in the second tier of whitefish in France, along with Sole, Hake and Seabass. Much like Germany, Alaska Pollock is considered an affordable, family and freezer friendly fish with solid perceived availability in retail—factors which drive its relatively strong consumption performance.

GAPP will use this research and data going forward to help guide its marketing and promotion activities, as well as future partnership work to launch new products and marketing campaigns to promote Wild Alaska Pollock’s attributes in line with these country-specific marketing opportunities.

## GAPP Seeks to Improve Understanding of Surimi Perceptions in U.S. Through Two-Part Study

Consumers long thought to have been put off by terminology used by surimi seafood products in the U.S. market may be able to put those fears to rest after research indicated that consumers are not put off by 'imitation' labels and see information about surimi seafood's origin—Wild Alaska Pollock—as a huge bonus. Consumers also appreciate surimi seafood products for their ease of use, versatility and value, as described in the first report of a landmark research project undertaken by GAPP to understand what drives demand for surimi seafood.

Consumers interviewed demonstrated an incredibly favorable impression of the products and, excitingly, the research unequivocally shows that learning that surimi seafood is made with Wild Alaska Pollock seems to improve the already favorable impressions these consumers have about surimi.

C+R Research, a full-service custom consumer research firm conducted a qualitative study with a diverse group of consumers to explore their perceptions of Surimi seafood made from Wild Alaska Pollock last year as part of a two-part study by GAPP to understand the global market for surimi seafood. Consumers participated in this exploratory study to unearth their perceptions of Surimi, how they use it, and in what occasions it is consumed, as well as to understand what drives their consumption of Surimi products.

The study looked at different demographics and cultures including Black/African American, Hispanic, Asian American, Jewish and Non-Hispanic Whites shared their experiences and thoughts on Surimi through an online message board. Through this exercise, participants also shared a recipe exemplifying the different ways in which Surimi is prepared and consumed.

Results indicate that Asian-American and Hispanic consumers cite more frequent consumption of Surimi and a stronger alignment with their respective traditional cuisines. Specifically, Asian-Americans readily acknowledge a link between Asian cultures and the consumption of fish and Surimi, citing various uses in traditional dishes such as crab cakes, soups and 'hot pot' recipes. By contrast, Hispanics' connection with Surimi is more pragmatic. They acknowledge its consumption as a functional ingredient in recipes they enjoy, largely dominated by Ceviches.

In December, GAPP launched the second-part of this study, quantitative research to be conducted to help determine the challenges and opportunities for surimi seafood, at retail, in the U.S.



# GAPP Meetings, Events, & Pre-COVID Travel



## GAPP Goes to China

The export market has never been more critical for the Wild Alaska Pollock industry and GAPP worked last January to learn as much as possible about the opportunities abroad. GAPP applied for and was awarded grant funding under the U.S. Department of Agriculture, Foreign Agricultural Service Emerging Market Program funds to facilitate a trip to China—arguably the greatest emerging market for our products. The following leaders were selected from within the industry to travel to China for a 10-day trade mission trip:

- Jeff Welbourn, Trident Seafoods
- Jason Martin, Golden Alaska
- Jacob Christensen, Arctic Storm
- Bill Maio, Trident Seafoods
- Jostein Rortveit, American Seafoods
- Margery Schelling, American Seafoods
- Jeff Kauffman, Central Bering Sea



On the mission, GAPP visited key customers in three cities: Shanghai, Qingdao and Beijing and worked to better understand the opportunities available for Wild Alaska Pollock in China. Participants learned of incredible innovation taking place, the growing Quick-Service Restaurant (QSR) sector (where fish has an incredible opportunity), how traditional Chinese dishes like hot pot can feature Wild Alaska Pollock surimi seafood, and how important relationships and loyalty are to Chinese customers. Customers repeatedly shared with GAPP just how much they want to use Wild Alaska Pollock because of its incredible story and countless attributes.

On the final day of the trip, industry leaders met with senior officials including the Minister Counselor of Agriculture, Bobby Richey at the U.S. Embassy in Beijing. The industry representatives impressed upon the U.S. Department of Agriculture staff the importance of China to the Wild Alaska Pollock export market and how the tariffs have impacted our ability to do business in the region. Department staff were incredibly receptive and worked with the participants to discuss short-term and long-term solutions that may aid in increasing demand and building awareness for Wild Alaska Pollock throughout China.

For more in-depth accounts of the China mission trip, be sure to read the GAPP blog.

## A LONG SWIM AWAY FROM HOME



# GAPP Events

(continued)

## Alaska Pollock Industry Collaborates to Host Seattle Wild Alaska Pollock Restaurant Week



In partnership with the Alaska Seafood Marketing Institute (ASMI), GAPP supported the first-ever Wild Alaska Pollock Week in Seattle from February 28 - March 8, 2020. As part of the Wild Alaska Pollock week, local Seattle restaurants created innovative dishes with Wild Alaska Pollock as a great way to kick off the Lent 2020 season! GAPP and ASMI worked together to promote the week to local area consumers and to generate some buzz with chefs nationwide about the versatility of Wild Alaska Pollock for their menus. Some of the Seattle's premier restaurants incorporated Wild Alaska Pollock into new dishes. The event was a huge success and many restaurants experienced record sales of the Wild Alaska Pollock items and were eager to keep those items on their menus.



## GAPP Visits Japan to Talk Surimi Research

In February, the GAPP team traveled to Tokyo for the Tokai Denpun Surimi show and saw first-hand Wild Alaska Pollock products in the hands of Japanese customers and buyers from around the world. GAPP CEO and staff also met with key partners including the ASMI staff, Nissui, Unisea and others to discuss GAPP research projects around Roe and Surimi, the Tokyo Olympics, as well as promotion and partnership opportunities for Wild Alaska Pollock in Japan in 2020 and beyond.





# GAPP Events

(continued)

## GAPP Hosts Summer Seminar Series to Engage, Remotely



As part of our continued COVID-19 coverage, GAPP hosted a weekly summer webinar series that explored topics related to new consumer trends, marketing best practices and crisis management communications in relation to COVID-19. We kicked off our Summer Seminar Series on Friday, June 5 with a presentation from Ketchum titled, “How to Position Wild Alaska Pollock During COVID-19 Recovery.” Our guest speakers discussed the impact that COVID-19 has had on consumer sentiment and how Wild Alaska Pollock had the potential to thrive in this new normal.

Our June 12 webinar, “Swimming Against the COVID-19 Tide: How Consumers & Seafood Are Coping,” was presented by Sharon Ripps & Bill Romania of R3 Consulting. The duo gave us an in-depth look at the shifts in consumer behavior in response to the long list of changes brought on by COVID-19. From this data, they were also able to conclude that Wild Alaska Pollock ticks all of the right boxes to make a positive impression on consumers as the world emerges into the COVID-19 recovery period.

Turning to the workplace, we heard from crisis communications expert Mike Koenigs about how important it was for more company leadership to engage in consistent communication with employees, even if they didn't in the past. In stressful situations, employees will gravitate toward others who offer care and empathy — this means that your communication should show empathy, concern, support, authenticity, direction, and flexibility.

Barkley U.S. caught us up to speed on the QSR channel, telling us that it's incredibly important for QSRs to hit the consumer “sweet spot” when it comes to the products they're selling. This sweet spot is the intersection of value and quality.

GAPP CEO Craig Morris hosted the July 15th workshop about the North American Partnership Program and a July 22nd webinar that discussed how GAPP was working to help address the troubled restaurant industry with a fall Wild Alaska Pollock promotion targeting restaurants in three U.S. markets through its Restaurant Recovery Plan.

Gavin Kennedy of Gorton's Seafood filled us in on the Gorton's “One Bite” campaign and how the company had to quickly adjust their plans for the program when COVID-19 made a name for itself in the United States.

High Liner Foods executive Craig Murray brought his expertise on innovation and collaboration to the table during his session, encouraging the Wild Alaska Pollock industry to grow their market share by targeting other proteins instead of trying to “steal” share from within seafood. He noted that it is important to innovate and launch new Wild Alaska Pollock products in underrepresented categories, such as snack foods, and to share the incredible story of our fish.

Finally, we closed our series with a fireside chat between Jana Dombrowski and Tim Quinlan of Wells Fargo. Jana and Tim fielded questions regarding the impact COVID-19 has had on the economy and how the Wild Alaska Pollock industry can successfully move forward through these unprecedented times. You can view all of our 2020 summer webinars on the GAPP website.

# GAPP Events

(continued)

## GAPP Hosted Successful 2nd Annual Meeting

It may have been different than we had planned and it may have been virtual, but the second-ever Wild Alaska Pollock Annual Meeting was just as engaging and just as informative as the first one last year! Over 250 attendees gathered via zoom to hear excellent speakers and panels discussing the latest research around Wild Alaska Pollock, new products in the market over the last year, and what the future holds for the fish. Drew Cherry of Intrafish was a phenomenal Master of Ceremonies for the day and attendees even had the opportunity to participate in a virtual “GAPPY Hour” after the event, hosted by the Garrigan Lyman Group (GLG).

Key, interactive sessions included:

- Overseas Wild Alaska Pollock Marketing Efforts: Hannah Lindoff, ASMI (moderator); Jens Hombeck, Germany; Sarah Johnson, UK; Ksenia Gorovaia, Eastern Europe; Akiko Yakata, Japan; and Carolina Nascimento, South America
- GAPP Return on Investment Study: Dr. Harry Kaiser, Cornell University
- Keynote Speaker: Chef Dan Churchill
- Futureproof Your Sales: Jeff Fromm, The FutureCast
- Marketing During COVID: Margery Schelling, American Seafoods (Moderator), Craig Murray, High Liner Foods; Gavin Kennedy, Gorton's Seafoods; Nick Mendoza, One for Neptune; Carly Arnold, Nomad Foods; Mike Campanile, Trident Seafoods
- LCA Results Presentation & Communications Plan: Melissa Zgola & Xinyue Zhang, Quantis; Kristina Amaral-Salas & Caryn Leahy, Ketchum
- U.S. & Europe Wild Alaska Pollock Attitudes and Usage Results: Mary Elizabeth Germaine, Ketchum Analytics; Dr. Leigh Morris, Bonamy Finch

If you missed out but would still like to hear the presentations from the day, you can watch the entire meeting and download the PowerPoint presentations on the GAPP website.

GAPP would once again like to thank the sponsors for the event without which the great day could not have been possible: American Seafoods, Alaska Seafood Marketing Institute, Clark Nuber, Garrigan Lyman Group, Glacier Fish Company, Global Seas, Golden Alaska Seafoods, Starbound, Sysco Seattle, Trans-Ocean Products, OneforNeptune and UniSea.



# GAPP Communications

## GAPP Celebrates School Nutrition and National Seafood Month

In October, for National Seafood Month, GAPP worked with the School Nutrition Association to run a full-page ad in their magazine for foodservice directors and school professionals that celebrated the benefits of Wild Alaska Pollock for kids and the versatility of the fish as a school lunch option.

# IT'S TRUE!

Wild Alaska pollock is the ultimate kid-friendly fish!

## WHY?

**HEALTH BENEFITS GALORE!**  
LOW IN FAT AND HIGH IN OMEGA-3 FATTY ACIDS AND B VITAMINS, WILD ALASKA POLLOCK IS AN EXCELLENT MUSCLE-BUILDING PROTEIN

**WILD ALASKA POLLOCK IS ARGUABLY THE KING OF VERSATILITY.**  
YOU WON'T HAVE TO WORRY ABOUT IT HOLDING UP IN YOUR CREATIVE RECIPES!

**SURIMI SEAFOOD IS THE REAL DEAL!**  
SURIMI SEAFOOD IS THE STAR IN SUSHI BAR FAVORITES LIKE CALIFORNIA ROLLS, POKE BOWLS AND A DELICIOUS SUBSTITUTE FOR SHELLFISH IN SALADS AND SANDWICHES.

CELEBRATE NATIONAL PESCATARIAN MONTH THIS OCTOBER BY INCORPORATING WILD ALASKA POLLOCK AND SURIMI SEAFOOD INTO YOUR SCHOOL'S MEALS.

**BRING ON THE SLIDERS, FISH FINGERS, SEAFOOD NUGGETS, PASTAS AND STIR FRIES. YUM!**

**GO pescatarian**

**ALASKA GENUINE POLLOCK**

WWW.ALASKAPOLLOCK.ORG

# GAPP Communications

(continued)

## GAPP Creates Wild Alaska Pollock Messaging Toolkit, Trains Industry on Use

When purchasing and ordering fish, comprehensive research conducted by the Association of Genuine Alaska Pollock Producers (GAPP) found that across the board, key consumer audiences are looking for a tasty, healthy, sustainable option that is easy to prepare and that Wild Alaska Pollock delivers everything consumers crave in a whitefish! Specifics around how best to communicate those attributes and familiarize consumers nationwide with Wild Alaska Pollock were detailed in GAPP's toolkit that were released to its membership and partners in its North American Partnership Program last year.

The quest to tell a unique and consistent story about Wild Alaska Pollock began last year with GAPP embarking on a journey to understand what people think of Wild Alaska Pollock and what would motivate them to purchase or order the fish more frequently. The research revealed "future Wild Alaska Pollock advocates" as being educated, affluent (household income greater than \$50,000.00), millennials (age 23-38) as those with the strongest purchase power for Wild Alaska Pollock across all business channels.

The GAPP toolkit showed industry customers and partners know how to talk about Wild Alaska Pollock to all audiences and across all purchasing platforms, outlining which specific attributes are most motivational to each special group. GAPP held virtual training sessions on the toolkit for industry marketers, sales leads and partners to help answer about the research and derived messages.

The overarching goal of the toolkit and the training is to ensure that everyone connected to the Wild Alaska Pollock industry is talking about Wild Alaska Pollock the same way and highlighting the attributes that the GAPP research has shown to be the most motivational to consumers. Building a brand for our fish means speaking with one consistent voice.

This coming year, GAPP will work to update this toolkit and add several more to its reserve including one dedicated to Surimi Seafood and one specifically designed for European audiences.

## MESSAGE MAP BY BUSINESS CHANNEL



### GROCERY SEAFOOD CASE\*

\*Audiences most likely to shop here: Millennials, Gen X and Boomers

Wild Alaska Pollock is a delicious, fresh-tasting, flaky whitefish that is mild in flavor and firm but tender in texture that consumers are looking for at the seafood counter.



### GROCERY FROZEN AISLE\*

\*Audiences most likely to shop here: Millennials, Gen X and Boomers

Wild Alaska Pollock is the perfect fish to add to the frozen seafood aisle. It's delicious, fresh-tasting, and packed with heart-healthy omega-3s.



WILD ALASKA POLLOCK

## COMMUNICATIONS TOOLKIT



NEARLY HALF OF CONSUMERS (49%) EAT FISH OFTEN\*



2 IN 3 CONSUMERS (66%) TYPICALLY PREPARE AND EAT FISH AT HOME

I'M COOL WITH IT [FROZEN FISH], AND IT'S WHAT I BUY THE MAJORITY OF THE TIME BECAUSE ITS SO CONVENIENT AND TASTES FRESH.

— Female, focus group



# GAPP Finances

For GAPP's 2020-2021 fiscal year (April 1, 2020 to March 31, 2021), the association brought in **\$3,545,794.72** in revenue and had **\$3,711,349.75** in expenses resulting in a net loss of \$177,205.63 for the year. This net loss was planned for by the GAPP Board in an effort to work down the reserve that had been built during the prior two years while GAPP was building its strategic plan and team.

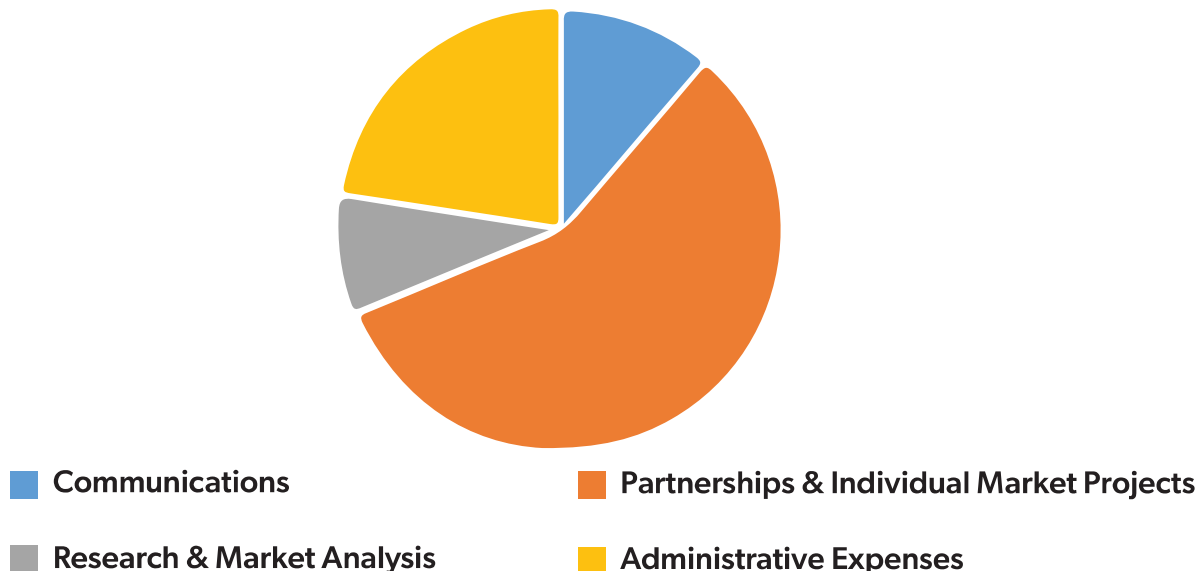
As of April 1, GAPP currently maintains a cash reserve of \$3,314,885.49 with fully \$2,379,248.46 unobligated to brand partnerships that have yet to occur. Revenue for the year came in at 95.83% of estimates and expenses came in at 88.94% of estimates. The primary cause of expenses coming in under estimates was due to COVID where much planned foreign market consumer research, in large measure, was put on hold due to the unique environment consumers were living in.

**GAPP's budget is broken into four main categories: *Communications, Partnerships & Individual Market Projects, Research & Market Analysis, and Administrative Expenses.*** For the year, GAPP invested as follows:

- **\$417,886.02 in Communications.** The primary Communications costs for the year were the Restaurant Recovery Campaign and GAPP's work with Ketchum to develop and deploy toolkits for Brand Partners and build a narrative around Wild Alaska Pollock.
- **\$2,133,187.97 in Partnerships & Individual Market Projects.** These costs were focused on GAPP's Brand Partners in both North America and Europe.
- **\$323,194.61 in Research & Market Analysis.** These costs were mainly for nationwide surveys of U.S. consumers related to Wild Alaska Pollock fillet and surimi products as well as nationwide surveys of German, French and U.K. consumers related to Wild Alaska Pollock fillet products.
- **\$837,081.15 in Administrative Expenses.** A note will be applied to the Administrative Expenses line for the year as \$126,867.81 of those costs were to contractors that assisted GAPP with high priority projects including the Life Cycle Assessment, Partnership Program, and the Restaurant Recovery Campaign. In future years those costs will be assigned to the appropriate project line in the budget. As such, GAPP's Administrative Expenses for the year will be footnoted as \$710,213.34 for future year comparative purposes and as a percentage of overall budget of 19.14% for the year.

More detailed accounting reports are available to all members at any time. Please reach out to [craig.morris@alaskapollock.org](mailto:craig.morris@alaskapollock.org) for any requests.

GAPP FY20 Expenses Breakdown



# GAPP

## Membership & Board of Directors

### ROI Study Shows GAPP Delivers Significant Gains for Investment

For each dollar invested by the Wild Alaska Pollock industry into GAPP during the past two years there was a **return of \$28.04** in Wild Alaska Pollock fillet and Wild Alaska Pollock Surimi revenue back to the industry. The GAPP Board is committed to a data-oriented, results-based approach to stimulating demand for Wild Alaska Pollock and so far so good, said a “Return on Investment Study” conducted by a renowned academic expert.

GAPP is early in its journey to build the brand behind Wild Alaska Pollock and this aptly-termed “Return on Investment” study, conducted by Dr. Harry Kaiser of Cornell University, is a critical tool to keep the organization honest, drive best-return activities and measure impact in the marketplace.

Dr. Kaiser’s work helps organizations like GAPP in two significant ways: First, the data provides those who pay into such marketing organizations independent, verified information relative to their investments. Second, and perhaps more importantly, such data advises organizational leadership, like our GAPP Board of Directors, about which specific activities are best to invest in over time.

Kaiser is a renowned econometric evaluation expert who regularly performs such studies for various commodity marketing and promotion organizations. The GAPP-commissioned study was used to simultaneously evaluate various impacts affecting Wild Alaska Pollock demand and supply. These studies are thought to be the best “science” available for evaluating demand impacts of commodity marketing expenditures and are credited with improving the effectiveness of commodity marketing organizations over time.

The GAPP study found a very significant effect from the recent record purchases of Wild Alaska Pollock by the U.S. federal government that equated to a lift of 4.8% in the value of wholesale frozen fillet block price. Investment in such a study was especially important given the 2018 Board approved increased industry investment in GAPP. Critically, GAPP will use this information to communicate the return on investment to the industry, but more importantly, to help guide its projects and initiatives for the future. GAPP will continue to invest in such studies to keep its programs as impactful as possible.

### Comparative ROIs for Marketing Organizations



# GAPP

## Membership & Board of Directors



### GAPP Membership Approves 2021-22 Assessment Rate; Elects Officers

At its annual membership meeting held virtually on December 4, 2020, the GAPP membership approved two critical resolutions for the future of the organization. First, the membership approved an assessment rate of consistent with the assessment amount collected during the past three (3) years that has equated to an overall assessment rate of \$3.33 million per year for the BS/AI sectors and an equivalent rate per ton for the Gulf of Alaska.

Second, the membership re-elected the following members to serve on the GAPP Board of Directors for 2021-22:

#### *BS/AI Shoreside Sector*

Joe Bundrant  
Tom Enlow  
Mark JoHahnson

#### *BS/AI Catcher Sector*

Bob Desautel

#### *BS/AI Catcher-Processor Sector*

Karl Bratvold  
Mike Breivik  
Doug Christensen  
Mikel Durham

#### *At Large Member(s)*

John Woodruff  
Mark Franklin

#### *CDQ Sector*

Paul Peyton (Subsequently replaced by Grant Mirick)

At the Board of Directors meeting immediately following the virtual annual Membership Meeting, the Board re-elected Mikel Durham to serve as GAPP Board Chair and Doug Christensen to serve as Treasurer.

# GAPP

## Membership

### Members

*Akutan Catcher Vessel Association  
Alyeska Seafoods  
American Seafoods  
Aleutian Pribilof Island Community Development Association  
Arctic Fjord/Artic Storm  
Bristol Bay Economic Development Corporation  
Central Bering Sea Fishermen's Association  
Coastal Villages Region Fund  
Glacier Fish Company  
Global Seas  
Golden Alaska Seafoods  
High Seas Fleet Cooperative  
Icicle Seafoods  
Northern Victor Fleet Cooperative  
Norton Sound Economic Development Corporation  
Ocean Beauty Seafoods  
Peter Pan Fleet Cooperative*

*Peter Pan Seafoods  
Starbound  
Trident Seafoods  
Unalaska Fleet Cooperative  
UniSea  
UniSea Fleet Cooperative  
Westward Fleet Cooperative  
Westward Seafoods  
Yukon Delta Fisheries Development Association*

### Associate Members

#### Gold

*Aquamar  
Delta Western  
Gorton's Seafood  
High Liner Foods  
King & Prince Seafood  
Rapp Marine US  
Simrad Fisheries  
Trans-Ocean Products  
Zep, Inc. | AFCO*

#### Silver

*Alaska Ship Supply  
Frontier Packaging  
KeyBank  
Girard Wood Products  
Perkins Coie*

#### Bronze

*Arion Banki  
Ballard Industrial  
Beck Pack Systems  
Islandsbanki  
International Paper Olympia  
Highland Refrigeration  
Northwest Farm Credit  
Petro Marine  
Sugiyu USA  
Wells Fargo  
Young Ocean, Inc*

# THANK YOU!