

# THANK YOU TO OUR SPONSORS



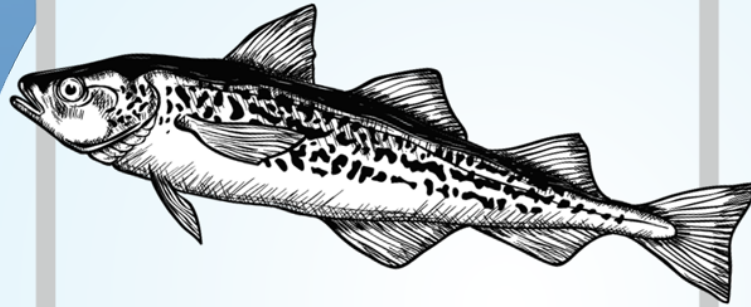
Wild, Natural & Sustainable®



Clark Nuber PS



• wild alaska pollock. •



*Annual Meeting*  
2020

A FISH TO REMEMBER, A YEAR TO FORGET



*A message from:*  
**SENATOR LISA MURKOWSKI**





# GAPP Board of Directors







**CRAIG MORRIS**

Genuine Alaska Pollock Producers

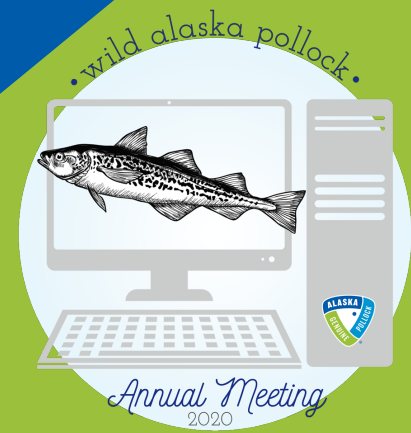


# OPENING REMARKS

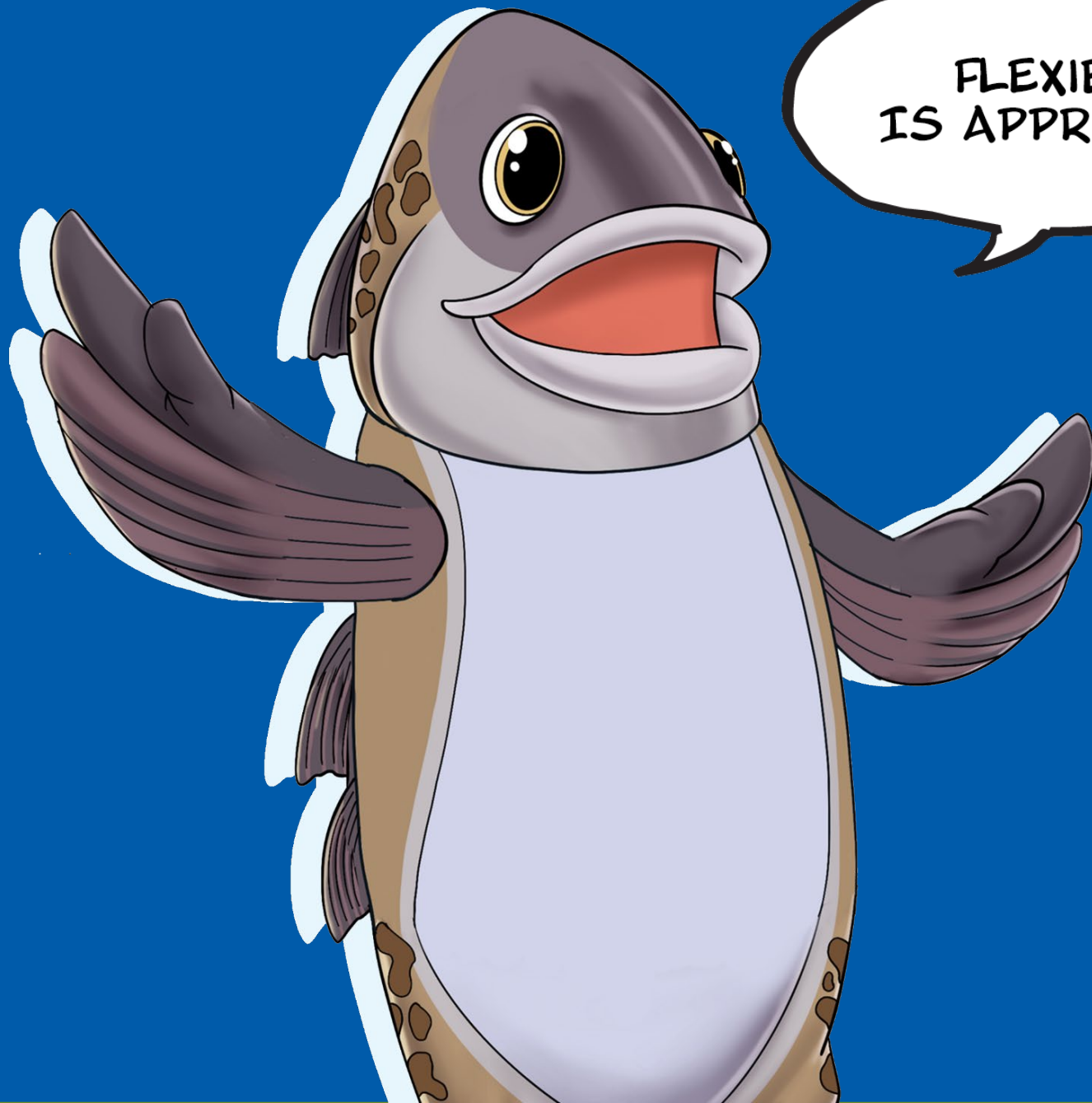




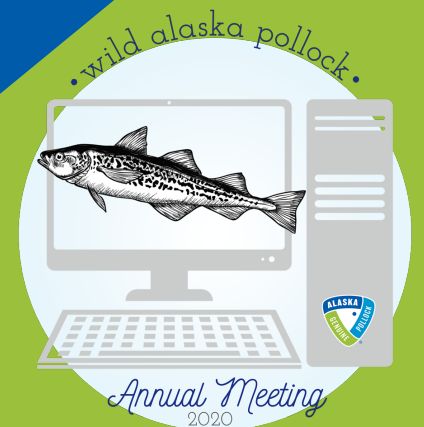
THANK YOU  
FOR  
JOINING US!

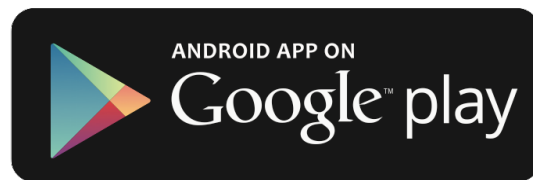






FLEXIBILITY  
IS APPRECIATED!





# GAPP Membership



*Membership is composed of Wild Alaska Pollock harvesters, community development quota groups, and at-sea and shore-based processors. We thank our Members for their support.*

**AKUTAN CATCHER VESSEL  
ASSOC.**

**ALYESKA SEAFOODS**

**AMERICAN SEAFOODS**

**ALEUTIAN PRIBILOF ISLAND  
COMMUNITY DEVELOPMENT  
ASSOC.**

**ARCTIC FJORD/ARCTIC STORM**

**BRISTOL BAY ECONOMIC  
DEVELOPMENT CORP.**

**CENTRAL BERING SEA  
FISHERMEN'S ASSOC.**

**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 CORP.**

**OCEAN BEAUTY SEAFOODS**

**PETER PAN FLEET COOPERATIVE**

**STARBOUND**

**TRIDENT SEAFOODS**

**UNALASKA FLEET COOPERATIVE**

**UNISEA**

**UNISEA FLEET COOPERATIVE**

**WESTWARD SEAFOODS**





# GAPP Associate Members

*Associate membership represent all facets of the Wild Alaska Pollock industry and continue to support our work both in collaboration with GAPP and independently. Thanks to all of our Associate Members for their advocacy.*

## **GOLD**

- Aquamar
- Delta Western
- Gorton's Seafood
- High Liner Foods
- Rapp Marine US
- Simrad Fisheries
- Trans-Ocean Products

## **SILVER**

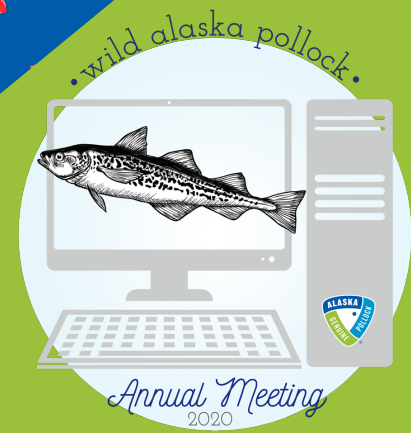
- Alaska Ship Supply
- Frontier Packaging
- KeyBank
- Pallet Services
- Perkins Coie
- Zep, Inc.

## **BRONZE**

- Arion Banki
- Ballard Industrial
- Beck Pack Systems
- Islandsbanki
- International Paper
- Olympia
- Highland Refrigeration
- Griffith Foods Limited
- Northwest Farm Credit
- Petro Marine
- Sugiyo USA
- Wells Fargo

# Partnerships







# THANK YOU TO OUR SPONSORS



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# 2020 Meeting Speakers



# Gappy Hour

*We've got some great prizes ready for you to win after today's conference during our virtual GAPPY Hour! T-shirts, sweatshirts, sake, bourbon, and other fun prizes – all there for the winning.*

## WHEN

3:30pm PDT

## HOW TO JOIN

Zoom link in your email or the Whova app.

G ~~X~~ APPY  
HOUR

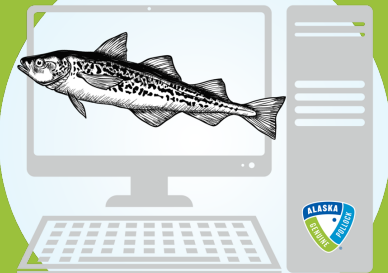






THANK YOU FOR  
MAKING ME THE  
PERFECT PROTEIN!

• wild alaska pollock •



Annual Meeting  
2020



**DREW CHERRY**  
Intrafish



# CONTENT SETTING FOR THE DAY - WHAT WILL I LEAN, WHAT IS OUR PURPOSE

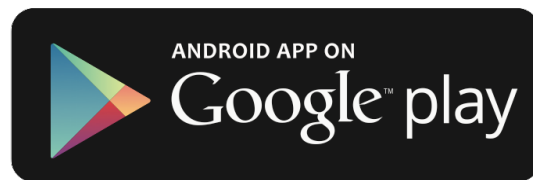
# Registration Packs





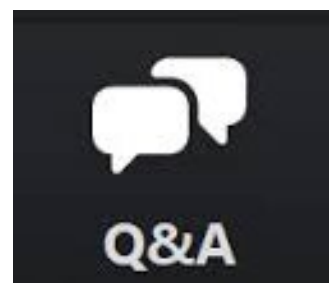
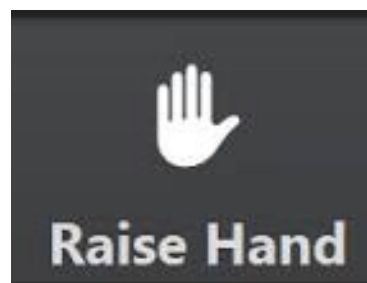


# #GAPPAM2020

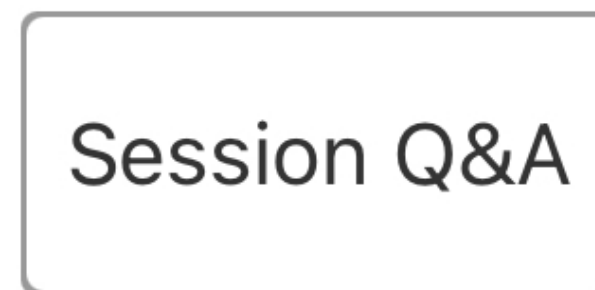




# Submitting Questions



**ZOOM**



**WHOVA**



**HANNAH LINDOFF**  
Alaska Seafood Marketing Institute



**KSENIA GOROVAYA**  
Crisp Consulting



**JENS HOMBECK**  
mk<sup>2</sup>



**SARAH JOHNSON**  
LOTUS



**CAROLINA NASCIMENTO**  
River Global, ASMI South America OMR



**AKIKIO YAKATA**  
Alaska Seafood Marketing Institute

# OVERSEAS WILD ALASKA POLLOCK MARKING EFFORTS





*Wild, Natural & Sustainable®*



*Sauvage, Naturel & Durable®*



*Морепродукты Аляски*



*Selvagem, Natural & Sustentável*



*Wild, Natürlich & Nachhaltig®*



天然のおいしさを、アラスカから。  
サステイナブルシーフード

SPONSORED BY:  
**Clark Nuber** <sup>PS</sup>



**DR. HARRY KAISER**  
Charles H. Dyson School of Applied Economics and Management,  
Cornell University

# GAPP RETURN ON INVESTMENT STUDY



# Study Scope

Conduct economic evaluation of the impacts of Genuine Alaska Pollock Producers' promotion programs on the demand for Wild Alaska Pollock and on overall industry revenue over time and in the most recent period.

Important for GAPP membership to understand the return on their marketing investment and the impact other factors have on demand for Wild Alaska Pollock.

Establish a baseline so that GAPP's overall and individual marketing efforts can be evaluated over time to determine their impact on demand for Wild Alaska Pollock (e.g., marketing investment with surimi vs fillet products, marketing investment in Asia vs Europe vs Americas, etc.)



# Research Questions

*This study answers five key questions:*

1. How have GAPP marketing expenditures over time and most recently impacted the demand for Wild Alaska Pollock?
2. What would Wild Alaska Pollock demand be like had there not been any GAPP marketing expenditures?
3. How does the gain in revenue due to GAPP marketing expenditures compare to the costs of the marketing?
4. What is the ROI of the GAPP marketing programs?
5. What effect do other factors have on demand for Wild Alaska Pollock?





# Econometric Methodology

- Econometrics quantifies economic relationships using statistical procedures with data.
- Widely recognized as best “science” available for evaluating demand impacts of commodity marketing expenditures.
- Required by the Federal Government for Federal checkoff programs (e.g., beef, pork, eggs, milk, etc.).
- Enables simultaneous accounting of impacts of a variety of other factors affecting Wild Alaska Pollock demand and supply.
- Other demand factors include: volume sold, volume of competing products, exchange rates, consumer income, Federal intervention, etc.



# Methodology Used in the GAPP ROI Model

- Two econometric demand models estimated with bi-annual data from 2003 through 2020
  - Fillet demand
  - Surimi demand
- Both models measure “demand” as the wholesale price (unit value) for each product
- Both models use domestic and international demand driver variables but this is a global demand model
- Price chosen as it is most reflective measure of demand for Wild Alaska Pollock because supply is a function of biology, not an economic response



# Demand drivers included in fillet model

- GAPP marketing expenditures
- Volume of fillet in US market
- Quantity of fillet imports into the US market
- US fillet exports to EU
- Quantity of Tilapia, Pangasius, and Cod imports into the US market
- Personal income in US
- GDP in EU
- Marketing expenditures for Wild Alaska Pollock fillet products by private companies (confidentially obtained by GAPP from members and downstream partners who market Wild Alaska Pollock products)
- Exchange rate of US \$ to Euro
- Indicator variable for USDA Bonus Buy
- Indicator variable for US MSC certification
- Indicator variable for Russian MSC certification
- Indicator variable that only U.S.-caught Pollock can be called Alaska Pollock in the U.S.
- Indicator variable for McDonalds Fish McBites promotion
- Indicator variable for Chinese tariffs

# Demand drivers included in Surimi model



- GAPP marketing expenditures
- Volume of Surimi in US market
- GDP in U.S. and Japan
- Wild Alaska Pollock surimi substitutes imported into Japan
- Exchange rate of US \$ to Yen
- Indicator variable that only U.S.-caught Pollock can be called Alaska Pollock in the U.S.
- Indicator variable for Chinese tariffs



# Econometric Evaluation of GAPP: Fillet Model 2003-2020



Of all of those demand drivers in the fillet model, here are a few of note that were statistically significant:

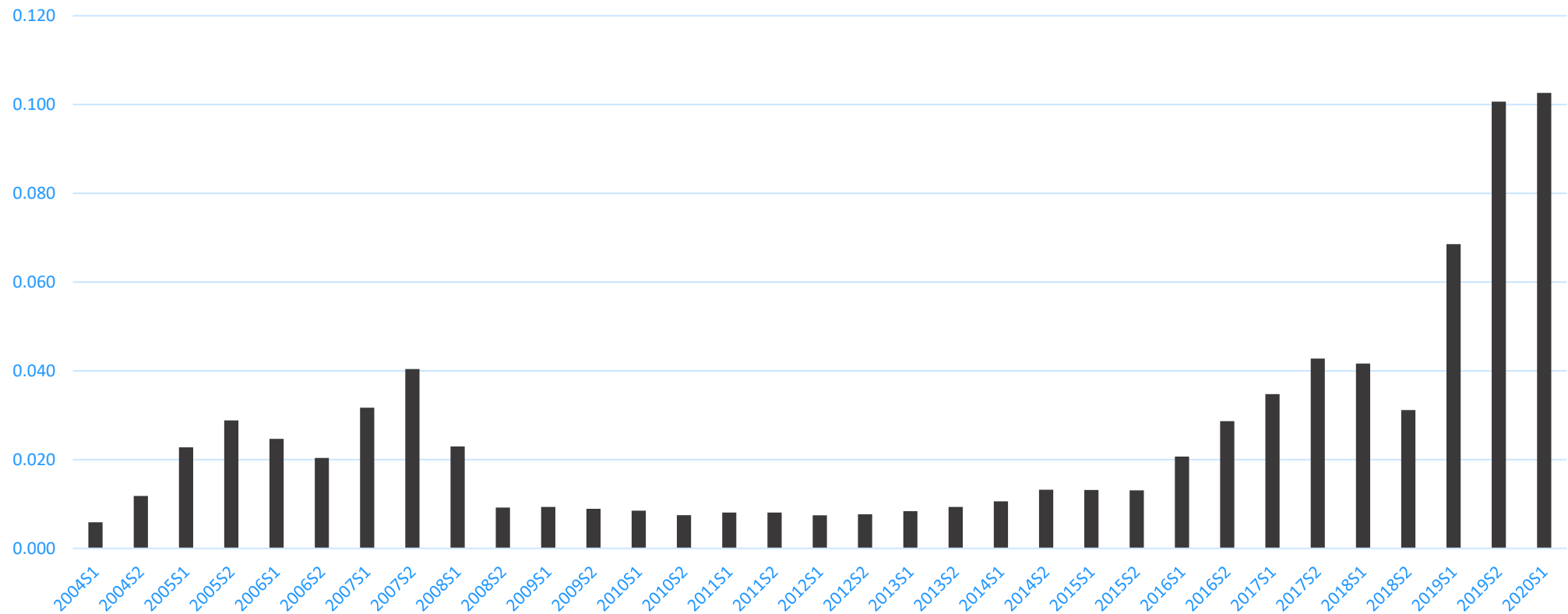
Impact of a 10% increase in:		On Fillet Price
Volume of fillet marketed in US		- 0.77%
US - Euro exchange rate		- 3.43%
<b><i>GAPP marketing investment</i></b>		<b>+ 0.24%</b>

The indicator variables for US MSC certification (average 3.4% increase in fillet price attributed to receiving MSC certification) and 2019-2020 USDA purchases of Wild Alaska Pollock (a 4.8% increase in fillet price attributed to USDA's purchases the past two years) were also notable for the significant effect they had on increasing fillet price as well.

# Econometric Evaluation of GAPP: Fillet Model



Alaska Pollock Fillet Price Flexibility for GAPP 2004-2020



# Econometric Evaluation of GAPP: Surimi Model 2003-2020



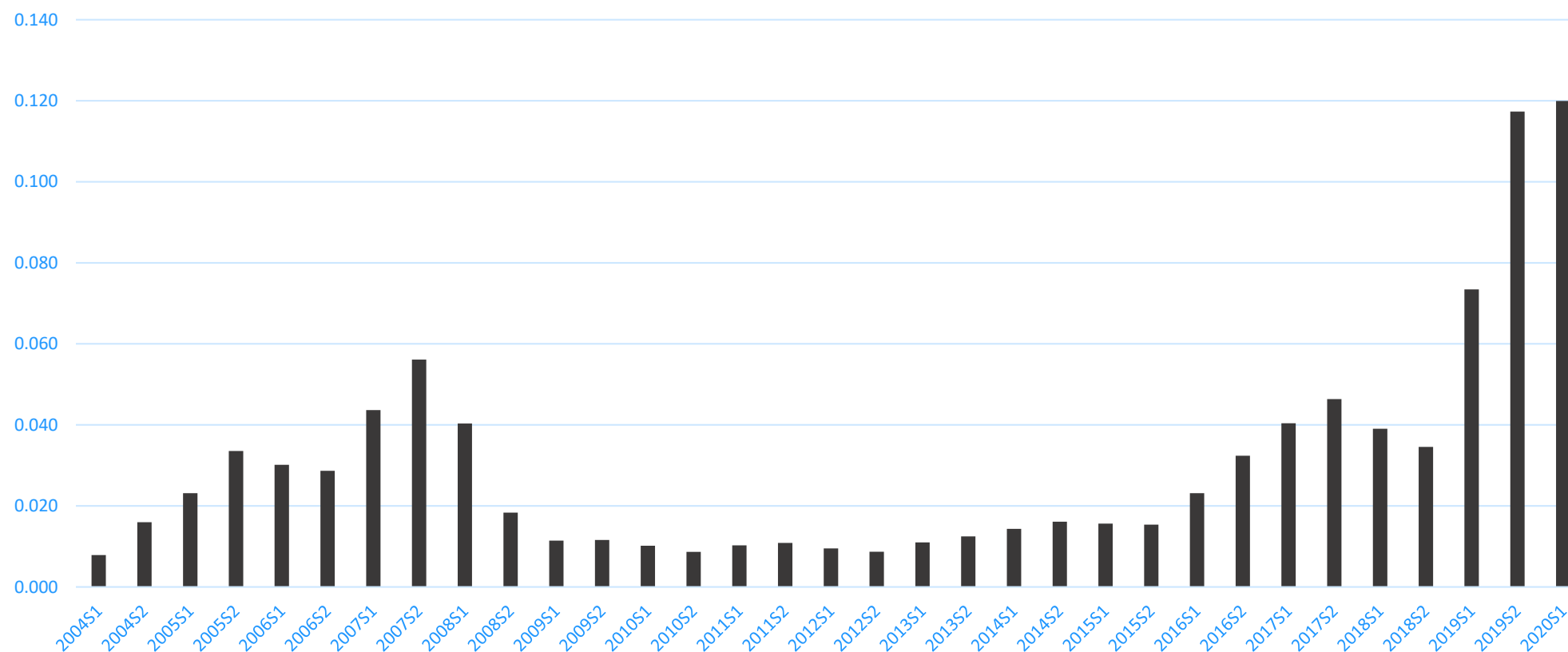
Impact of a 10% increase in:	On Surimi Price
GDP in Japan	- 8.6%
US - Yen exchange rate	- 4.8%
Wild Alaska Pollock Surimi substitutes in Japan	- 2.9%
<b><i>GAPP marketing investment</i></b>	<b>+ 0.3%</b>

The indicator variable for the 2018-20 import tariffs did not show a decrease in Wild Alaska Pollock Surimi demand.



# Econometric Evaluation of GAPP

Alaska Pollock Surimi Price Flexibility for GAPP 2004-2020







# Return on Investment (ROI)

## Average ROI

ROI measure dollar return to industry for each \$1 invested in GAPP

How do we measure this?

Simulate demand models within time sample (2003-2020) for two scenarios

1. GAPP expenditures equal to historical levels from 2003 through 2020
2. GAPP expenditures set equal to zero from 2003 through 2020

## Measurement

All other demand drivers are set to historical levels from 2003 through 2020

⇒ Difference between scenarios measure the impact of GAPP in demand (price)

⇒ Multiple increase in price by product to get total revenue due to GAPP

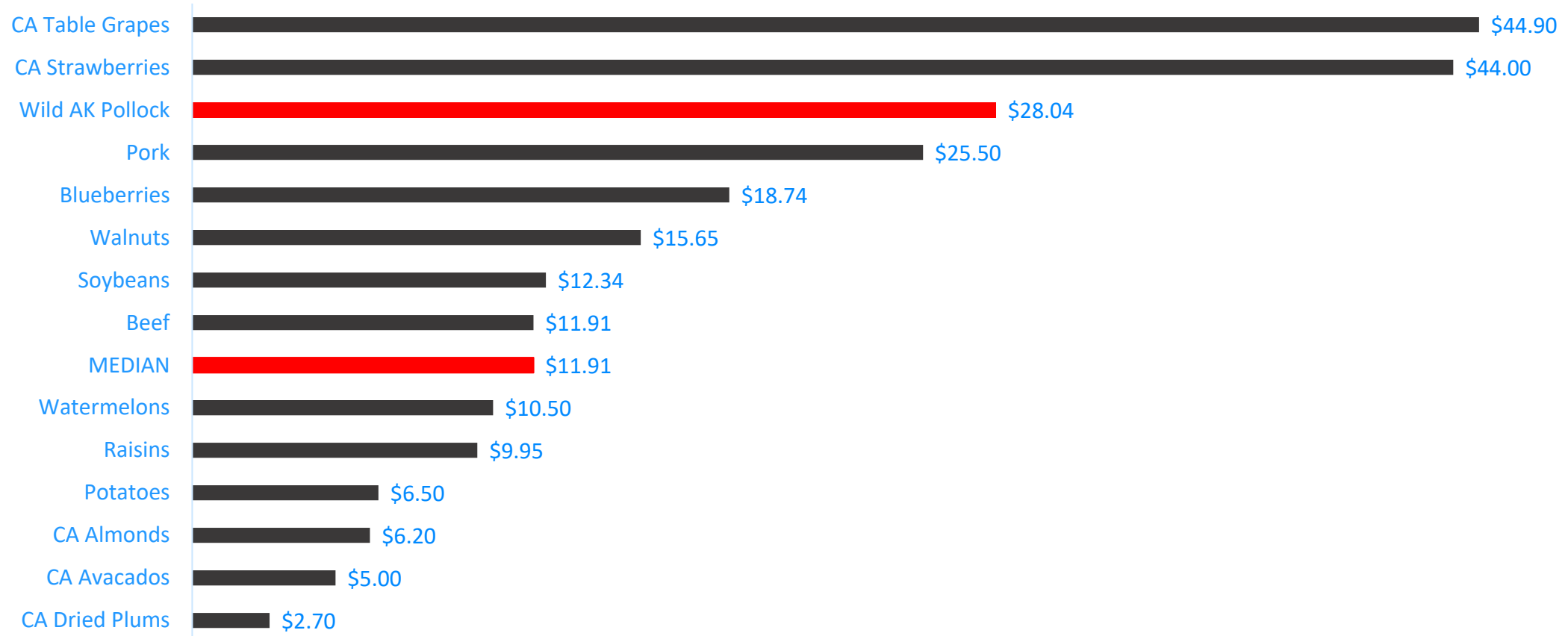
⇒  $ROI = \text{total revenue due to GAPP} \div \text{cost of GAPP}$



# Econometric Evaluation of GAPP: Combined Results

- As the earlier slides show, we can quantify GAPP's marketing investment on both fillet and surimi demand but are combining here for overall ease in understanding.
- As the earlier slides also show, GAPP's marketing investment has had different levels of impact on demand for Wild Alaska Pollock as GAPP's activities and funding have changed over time.
- But, during the past two years that GAPP has been at it's current budget level averaging \$3.65 million per year we found the following:
  - **For each dollar invested during the past two years in GAPP there was a return of \$28.04 in Wild Alaska Pollock fillet + Surimi revenue back to the industry.**

# Sample ROIs from other commodity checkoff programs for \$1 investment

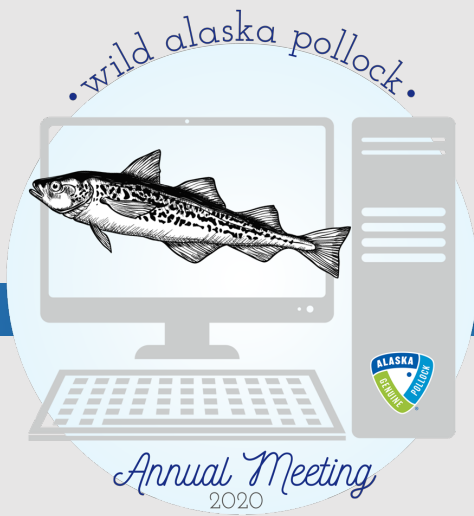




## So now what?

- GAPP and its membership now have baseline data and a model to use in evaluating the organization and its activities moving forward. But, again, this is not a static model as we can adapt it as new variables arise.
- As said upfront, these models help inform marketing organizations how certain activities affected demand so they can use that information when prioritizing future work.
- The model also helps quantify the effect of other variables in the marketplace to inform market participants on their impact on demand such as the impact of large Federal government purchases.





*Thank You*

A FISH TO REMEMBER, A YEAR TO FORGET



# 5 MINUTE BREAK

# THANK YOU TO OUR SPONSORS



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# Newsletter Sign Up

*Want to stay up-to-date on all of the latest GAPP and Wild Alaska Pollock industry news?*

*Email [info@alaskapollock.org](mailto:info@alaskapollock.org) and let us know!*

*We'll get you signed up for our monthly newsletters, trade reports, and weekly catch updates.*



**CHEF DAN CHURCHILL**

# KEYNOTE ADDRESS

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# DAN CHURCHILL

- **Mission: to change the world through food**
  - Exec Chef, Charley St
  - CEO, The Epic Table Productions
  - Host, The Epic Table Podcast
- **Key areas of focus**
  - Sustainability
  - Regenerative agriculture
  - Soil health
  - Water health
  - Knowing your producers



# DAN CHURCHILL



- **Where I use the fish**
  - Personal cooking at home
    - Seared / roasted / whole fish / fish tacos
  - Restaurant deliveries
    - Charley St meal plan successes
  - Dinner parties
    - Great applications for group meals
  - Catering
    - Why this fish works for larger groups
- **Personal connection to the fish**
  - Sustainability
  - Ease
  - Applications
  - And most of all... taste!

# DAN CHURCHILL



- **Consumer conversions**
  - Those who are eating salmon/tuna/cod regularly → how can we get Wild Alaska Pollock in their hands?
    - Teaching them how to use the fish
    - Teaching them about sustainability
    - Appealing to their taste buds
- **What I'm seeing in the industry**
  - People who have never heard the fish want...
    - Something easy to cook
    - Fish that tastes good
- Those who have heard of the fish want...
  - Easy, quick recipes using relatable prep methods
  - A primer on techniques
  - For chefs, an explainer on how the fish behaves in the pan, etc.
- **Why taste always wins**
  - If it doesn't taste good, home cooks and restaurant chefs won't come back to it
  - Break the barrier of accessibility by getting Wild Alaska Pollock in more hands → teach them how good it tastes

# DAN CHURCHILL



- **Restaurant use of fish**
  - From frozen → thawing techniques → marinating techniques → cooking techniques
- **How we serve fish in general**
  - Pan seared and oven baked are two of the most common
  - But Wild Alaska Pollock is also great for whole fish prep methods + more
- **How I see pollock being integrated**
  - Almost anywhere you can use a white fish like cod or halibut, you can use Wild Alaska Pollock
- **What restaurants need to control for**
  - Price and ordering - is it easy to order? Does it ship on time?
  - Inventory - can you keep it in stock easily? Can you freeze it/does it come frozen?
  - Wastage - are you wasting parts of the fish? Does it need to be trimmed?
  - Ease of handling and cooking - can prep cooks easily prepare it?
  - Taste

# DAN CHURCHILL



- **Health trends**

- Consumers care about sustainability more than ever
- Consumers are becoming aware that traditional fish choices aren't the most affordable or the most environmentally sound
- At the same time, we're seeking comfort more than ever
  - Relatable tastes/textures
  - Relatable ingredients
  - Great taste
  - High, clean and lean protein

- **Podcast trends**

- Guests on our podcast report that they're looking for new ingredients to take their cooking to the next level
- Seeking new recipes + techniques to introduce to their clients

- **Industry trends**

- Planet health → sustainability, regenerative ag, soil health, water health
- "Novel ingredients" used in familiar ways (e.g. Wild Alaska Pollock)
- Familiar ingredients used in novel ways (think cauliflower, kale)



# DAN CHURCHILL



- **Anecdotes**
  - “I knew little about Wild Alaska Pollock, but after hearing its story, I am a fish fan”
  - “I’m blown away that this fish is good for you, for the planet, and for our future”

# DAN CHURCHILL



- **Looking forward**
  - How do we continue to reposition this fish?
    - Make it accessible and easy to get
    - Introduce it to people in familiar ways/settings
    - Bring it to restaurants
    - Make recipes using the fish easy to find
- **Where do we see this fish going?**
  - Mainstream consumers (grocery stores, online, national)
  - Mainstream restaurants - fast casual to fine dining
- **How do we push the fish into the area where opportunity is?**
  - Connect with like-minded ambassadors
    - Chefs
    - Influencers
    - Content + recipe creators/bloggers
    - Performance space





## WILD ALASKA POLLOCK FISH TACOS



## BREADED WILD ALASKA POLLOCK



## BAKED WILD ALASKA POLLOCK







## WILD ALASKA POLLOCK POWER BOWL





## WILD ALASKA POLLOCK FISH + CHIPS

# DAN CHURCHILL

- Q&A







*Thank You*

A FISH TO REMEMBER, A YEAR TO FORGET



**JEFF FROMM**  
Barkley US



# FUTUREPROOF YOUR SALES

















**DON'T PANIC**





PRICE  
DECLINES





# Whole Brands vs. Fragmented Brands

Double in market penetration.

+ 2x ↑

Triple in “bought most often.”

3x ↑

75% more likely recommended to others.

75%

Five times more likely “a brand on the rise”

5x ↑

Eleven times more likely to command a premium price.

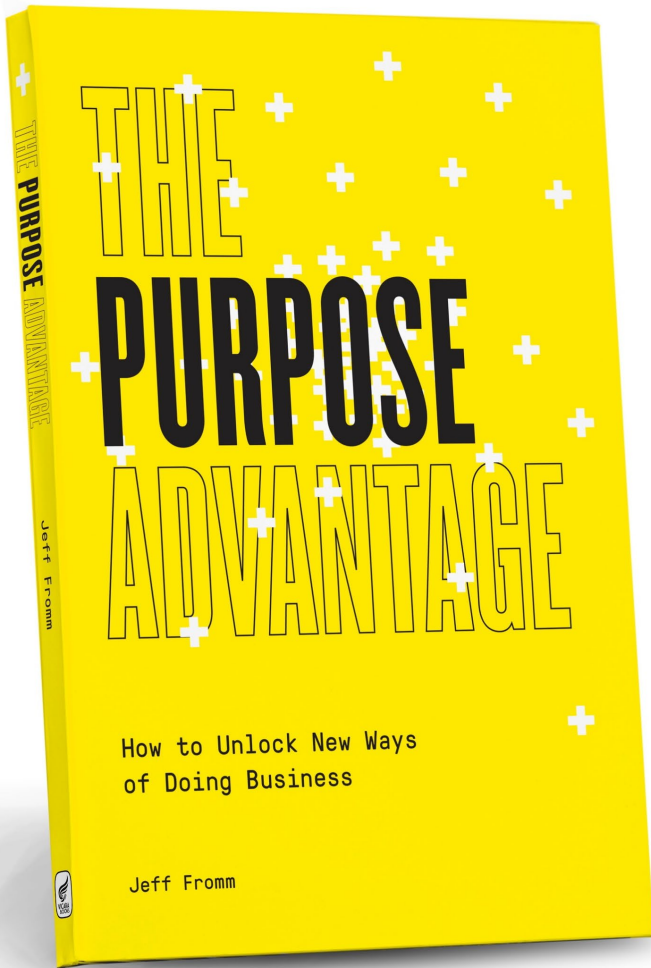
11x ↑

# **pur·pose**

*noun*

the reason for which something is done or created  
or for which something exists.



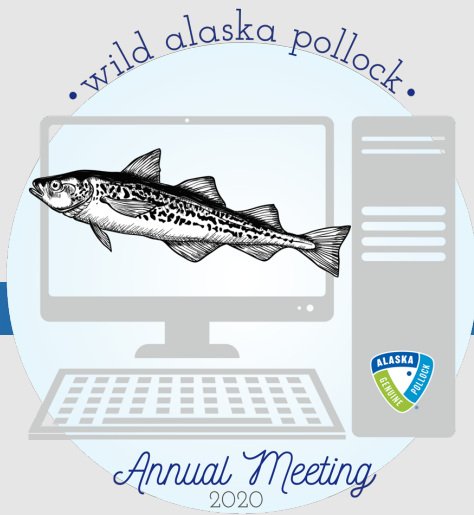


Get your free digital copy of The Purpose Advantage at the link below:

<https://purposebook.barkleyus.com>



Email me at  
[JFromm@barkleyus.com](mailto:JFromm@barkleyus.com)



# Thank You

A FISH TO REMEMBER, A YEAR TO FORGET



**CRAIG MORRIS**

Genuine Alaska Pollock Producers



# TOP HAND AWARD



*Bob Desautel*

**2019 RECIPIENT**





*Margery Schelling*

**2020 RECIPIENT**



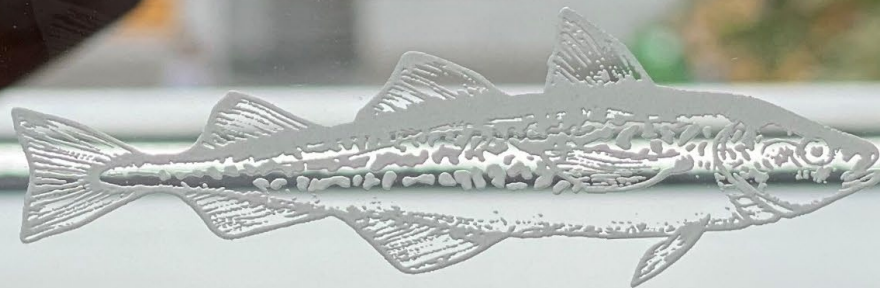


# Association of Genuine Alaska Pollock Producers Top Hand Award

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In recognition of dedication above and beyond to bringing the entire Wild Alaska Pollock industry together behind the GAAP mission to raise awareness and build demand for our perfect fish.

Presented with appreciation to the following individuals:







**MARGERY SCHELLING**  
American Seafoods



**CARLY ARNOLD**  
Nomad Foods



**MIKE CAMPANILE**  
Trident Seafoods



**GAVIN KENNEDY**  
Gorton's



**NICK MENDOZA**  
One for Neptune



**CRAIG MURRAY**  
High Liner Foods

# MARKETING DURING COVID



# 10 MINUTE BREAK

# THANK YOU TO OUR SPONSORS



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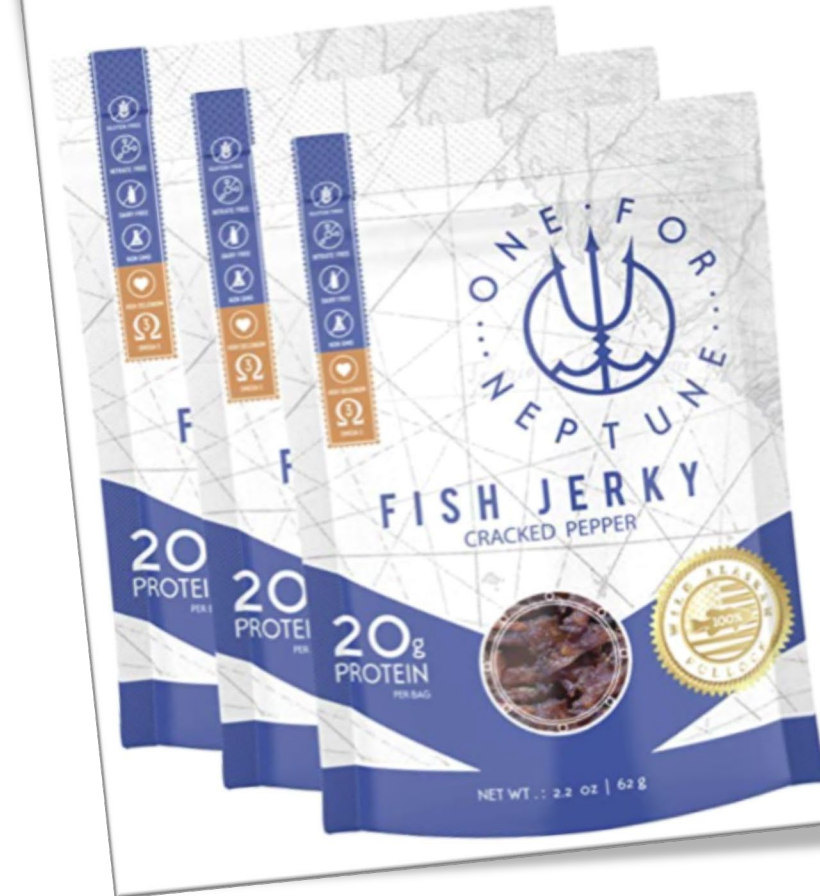
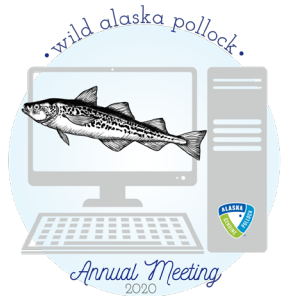




**DREW CHERRY**  
Intrafish







## Wild Alaska Pollock Fish Jerky - Cracked Pepper 3-Pack - OneForNeptune 2.2oz | Organic, Gluten-Free & Paleo | 20g Protein & 450mg Omega 3s | Sustainably Sourced from Healthy US Fisheries

Visit the [OneForNeptune Store](#)  
★★★★★ 23 ratings

Price: **\$22.99** (\$3.48 / Ounce) ✓prime

Size: **3-Pack**

2.2 Ounce (Pack of 1)  
\$7.99 (\$3.63 / Ounce)  
✓prime

**3-Pack**  
**\$22.99** (\$3.48 / Ounce)  
✓prime

8-Pack  
\$49.99 (\$2.84 / Ounce)  
✓prime

- ✦ **UNCHARTERED WATERS:** Like the explorers who set their sails toward far off lands in search of highly coveted black pepper, we sought rich cracked pepper and spices for this jerky made with Wild Alaska Pollock from the pristine, distant edges of the Aleutian islands.
- 🐟 **POWER SNACK:** Our Wild Alaska Pollock white fish jerky is a complete protein snack, perfect for an active lifestyle. Each bag is packed with 20g of lean protein, 450mg of Omega 3s, 140 calories, less than 1g of fat and a source of selenium. A great on-the-go high-protein snack for car rides, camping, hunting, hiking, sporting events or just a day out on the water.
- ✦ **ORGANIC & DELICIOUS:** OneForNeptune prides itself on using sustainable, organic ingredients. The Vikings didn't use GMOs, would we? All of our products are KETO and PALEO-FRIENDLY. They are also GLUTEN-FREE, DAIRY-FREE and contain ZERO nuts, preservatives or artificial ingredients.
- 🐟 **ETHICALLY SOURCED:** We are committed to seafood sustainability, guaranteeing transparency in the sourcing of our high-quality products from the highest quality fisheries.

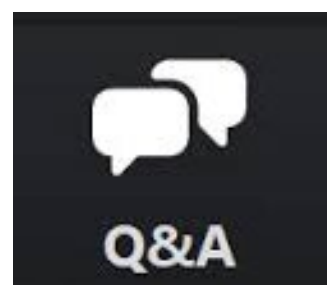
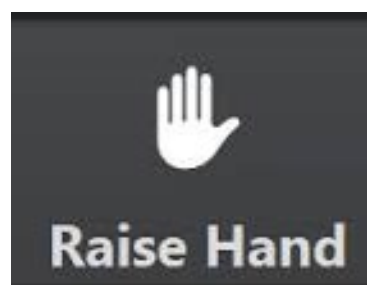




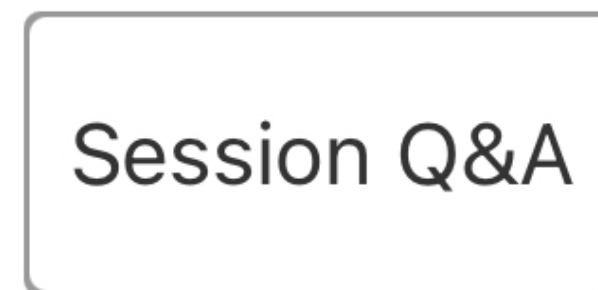
# #GAPPAM2020



# Submitting Questions



**ZOOM**



**WHOVA**

# Gappy Hour

*We've got some great prizes ready for you to win after today's conference during our virtual GAPPY Hour! T-shirts, sweatshirts, sake, bourbon, and other fun prizes – all there for the winning.*

## WHEN

3:30pm PDT

## HOW TO JOIN

Zoom link in your email or the Whova app.

G ~~X~~ APPY  
HOUR







**MELISSA ZGOLA**  
Quantis



**XINYUE ZHANG**  
Quantis



**KRISTINA AMARAL-SALAS**  
Ketchum Analytics



**CARYN LEAHY**  
Ketchum

# LCA RESULTS PRESENTATION & COMMUNICATIONS PLAN



**MELISSA ZGOLA**  
Quantis



**XINYUE ZHANG**  
Quantis

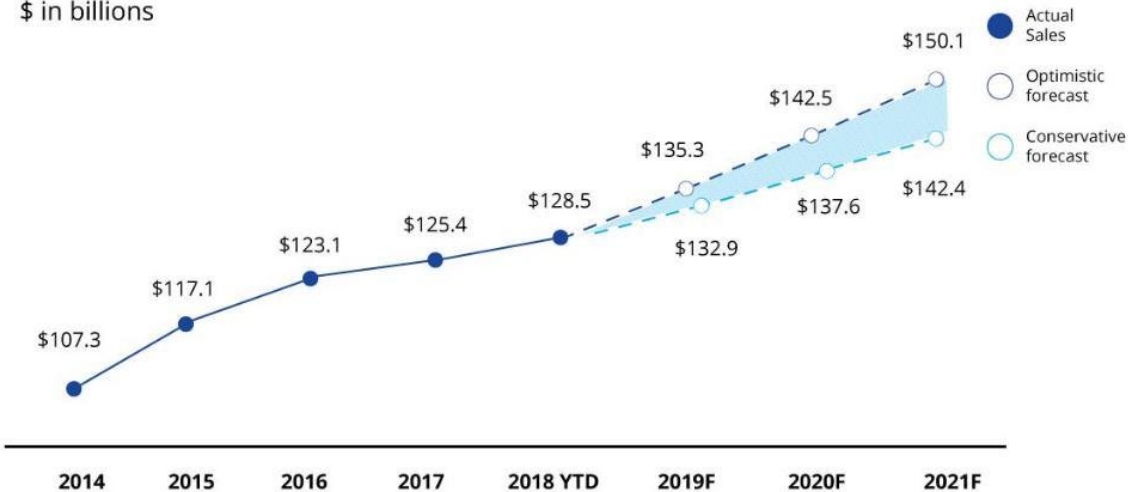
## WILD ALASKA POLLOCK'S SUSTAINABILITY STORY: A LIFE CYCLE PERSPECTIVE

# Growing demand for more sustainable products



## SUSTAINABLE PRODUCT SALES IN THE U.S.

\$ in billions



Sustainability combines free from, clean, simple, sustainable and organic labels.

Source: Nielsen Product Insider, Powered by Label Insight, Week ending 10/20/2018, Projections based on 3 and 2 year CAGR

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- Sales of more sustainable products have grown 20% since 2014.
- Conventional product sales have dropped.
- More sustainable products are currently 22% of total store; projected at 25% in 2021.
- 50% of consumers (75% of Millennials) will change behavior to buy more sustainable products.
- **Consumers are demanding more transparency.**

Source: "Millennials Drive Big Growth in Sustainable Products; BizWomen, Dec 28, 2018:  
<https://www.bizjournals.com/bizwomen/news/latest-news/2018/12/millennials-drive-big-growth-in-sustainable.html?page=all>

# Increasing expectations to be science-based



As of Sep 30, 2020

**20%** Fortune 500 committed to SBT

**47%** Growth in companies committing to SBT past 1 year

Source: SBTi website:  
<https://sciencebasedtargets.org/>; and  
<https://www.ftc.gov/tips-advice/business-center/guidance/environmental-claims-summary-green-guides>

## Environmental Claims Summary of the Green Guides

### General Environmental Benefit Claims

- Marketers should not make broad, unqualified general environmental benefit claims like 'green' or 'eco-friendly.' Broad claims are difficult to substantiate, if not impossible.
- Marketers should qualify general claims with specific environmental benefits. Qualifications for any claim should be clear, prominent, and specific.
  - When a marketer qualifies a general claim with a specific benefit, consumers understand the benefit to be significant. As a result, marketers shouldn't highlight small or unimportant benefits.
  - If a qualified general claim conveys that a product has an overall environmental benefit because of a specific attribute, marketers should analyze the trade-offs resulting from the attribute to prove the claim.

Claiming "Green, made with recycled content" may be deceptive if the environmental costs of using recycled content outweigh the environmental benefits of using it.

### Carbon Offsets

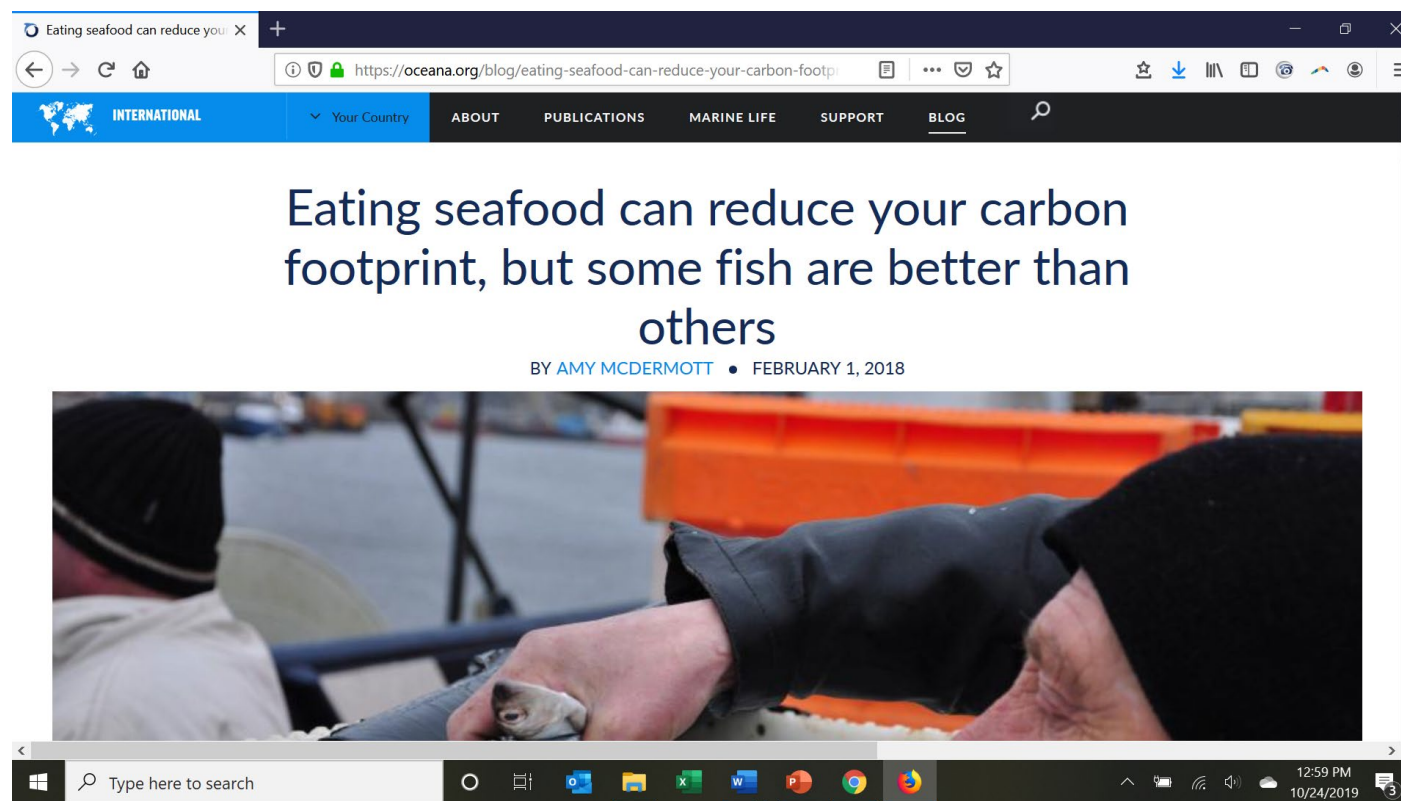
- Marketers should have competent and reliable scientific evidence to support carbon offset claims. They should use appropriate accounting methods to ensure they measure emission reductions properly and don't sell them more than once.
- Marketers should disclose whether the offset purchase pays for emission reductions that won't occur for at least two years.
- Marketers should not advertise a carbon offset if the law already requires the activity that is the basis of the offset.

### Certifications and Seals of Approval

- Certifications and seals may be endorsements. According to the FTC's Endorsement Guides:
  - Marketers should disclose any material connections to the certifying organization. A material connection is one that could affect the credibility of the endorsement.
  - Marketers shouldn't use environmental certifications or seals that don't clearly convey the basis for the certification, because the seals or certifications are likely to convey general environmental benefits.
  - To prevent deception, marketers using seals or certifications that don't convey the basis for the certification should identify, clearly and prominently, specific environmental benefits.



# WAP's story can get even better with the right proof



Source: <https://oceana.org/blog/eating-seafood-can-reduce-your-carbon-footprint-some-fish-are-better-others>



# That's where Quantis comes in . . .







# What is a life cycle assessment and why are we doing one?



A **life cycle assessment (LCA)** is an analysis of:

- Energy & material inputs
- Waste & other outputs
- Environmental impacts

... across all stages of a product's life.

Key steps in a life cycle assessment:

- Determine goal and scope
- Collect data
- Model and assess impacts
- Interpret results and generate insights
- Review by independent expert panel
- Share results



# Our approach to the LCA

- Using **gold-standard methodologies** (ISO 14040, PAS2050) including independent panel review.
- Focus product is **1kg WAP**, weighted avg of fishery / catching-processing / product type.
- No direct competitive comparisons**
  - Among fishing / processing types
  - Against other protein types
  - Among companies
- Assessing **fishing through packaged finished product** (excluding use and end-of-use phases).
- 3 years of data** to address fluctuations
- Diligent allocation** of impacts to WAP vs other fish caught, processed, etc.

2 fishery locations



3 catching & processing methods



At-sea processing



Catcher boat + at-sea processing



Catcher boat + shore-based processing

5 product types



Fillet Blocks



IQF Fillets



Shatterpack Fillet Blocks



Surimi



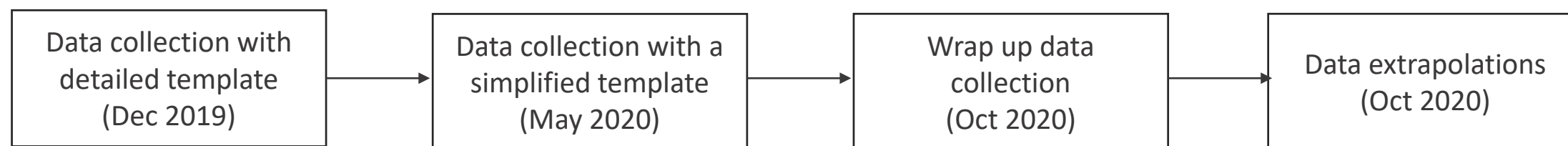
Pollock Roe





# Data collection from GAPP

We have collected data through a form / questionnaire. Below is the data collection process for this project.



**Quantis**

Life Cycle Assessment - GAPP WAP

ALASKA POLLOCK

Data collection file  
Version : 2019.09.18

The following structure has been used in this document:

- Catching & Processing** Standard about input and output shall be considered in the study.
- Packaging** List of the energy consumption, waste produced, and total product
- Distribution** List of materials and quantities used for packaging (primary, second, those materials).
- Instructions** List of downstream transportation to the first business customer; tr distances between processing & first customer, or locations of star

All the information needed to fill this document is presented below :

**Instructions** Please fill in the cells colored in red ( **Example** ) with all available information. Please adapt the cells colored in grey ( **Example** ) if necessary. No need to fill in the cells colored in dark grey ( **Example** ).

If needed, columns and lines can be added to the data collection. Any comment or additional information is welcomed. This document is confidential, do not communicate.

Melissa Zgola Project manager  
Xinyue Zhang Analyst

**GAPP Data Collection Form 2019-10-14 - Excel**

File Home Insert Page Layout Formulas Data Review View Help Tell me what you want to do

**Catching & Processing** List of the energy consumption, waste produced, and total production during

**General Information**

Company name	
Catching location	Gulf of Alaska

**ENERGY consumption during catching & processing**

Catching & processing method	Energy type	2016		2017		2018	
		Annual usage	Unit of Measure	Annual usage	Unit of Measure	Annual usage	Unit of Measure
Motherhip (please specify if catching and processing data can be separated)	Diesel		gal		gal		gal
Motherhip (please specify if catching and processing data can be separated)	Natural Gas		m3		m3		m3
Motherhip (please specify if catching and processing data can be separated)	Gasoline		gal		gal		gal
Motherhip (please specify if catching and processing data can be separated)	Others (please list them if relevant)						
Motherhip (please specify if catching and processing data can be separated)	Others (please list them if relevant)						
Catcher Processor	Diesel		gal		gal		gal
Catcher Processor	Natural Gas		m3		m3		m3
Catcher Processor	Gasoline		gal		gal		gal
Catcher Processor	Others (please list them if relevant)						

## Fishing data:

- Input:** Fuel & energy; cooling materials; other consumables (e.g. hydraulic fluid, lubricants, anti-fouling agent, etc.); durable goods (e.g. net, chain, rope, wire, etc.).
- Output:** WAP; losses from refrigerants; waste.

## Processing data:

- Input:** Fuel & energy; cooling materials; other consumables (e.g. hydraulic fluid, lubricants, anti-fouling agent, etc.); durable goods (e.g. wire, chain, rope, batteries, etc.); packaging.
- Output:** all WAP products; losses from refrigerants; waste.



# Overview of data received

## Data completeness/response rate

- Catchers to Shore-based processors : ~11%
- Catchers to Motherships: ~10%
- Catcher-processors: ~79%
- Shore-based processors: ~54%
- Motherships: ~34%

Percentage based on catching volume.

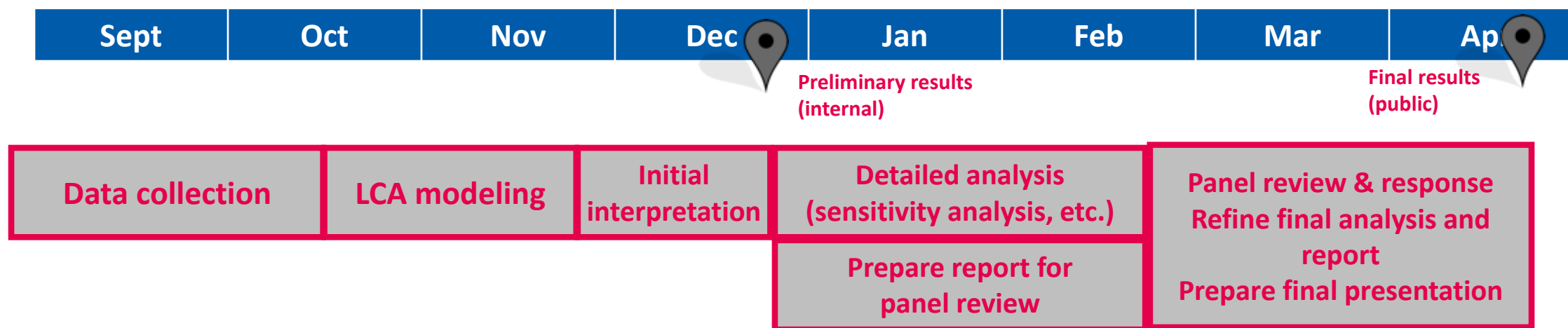
Within the responses, there might be some data gaps for some specific data we are looking for. For example, for Catcher-processors where we got 79% response rate, there is only only 31% of data coverage for durable goods.

## How we addressed data gaps:

- Energy and refrigerant: we have a good data representation here.
- Durable goods and non-durable goods:
  - We will calculate an average value, normalized to production volume, based on responses received within the same segment/vessel category if possible. Otherwise we'll take the normalized to production volume data from another vessel category.
  - This normalized average activity data quantity, combined with the non-responding company's production volume, determines the activity data for the missing company.



# Completing this chapter of the story



## Final Deliverables include:

- Summary presentation – methodology, results, insights & recommendations
- Summary of key messages – to support Ketchum’s development of public messaging
- Detailed LCA report
- Summary of data used, assumptions made





# The sustainability journey

Strong foundation  
of robust metrics

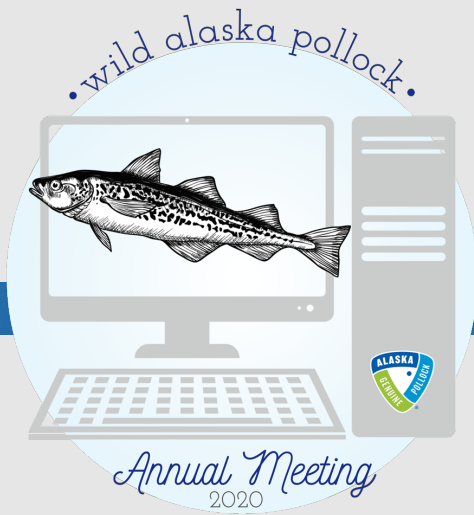
Concrete business  
relevant actions and  
internal buy-in

Strategic sustainability  
brand-building,  
reporting, storytelling  
and audience  
engagement

Ambitious and  
achievable science-  
based goals

Measurement of  
progress toward  
goals





# Thank You

A FISH TO REMEMBER, A YEAR TO FORGET



**KRISTINA AMARAL-SALAS**  
Ketchum Analytics



**CARYN LEAHY**  
Ketchum

# GAPP LCA AND SUSTAINABILITY CONSUMER LEARNINGS

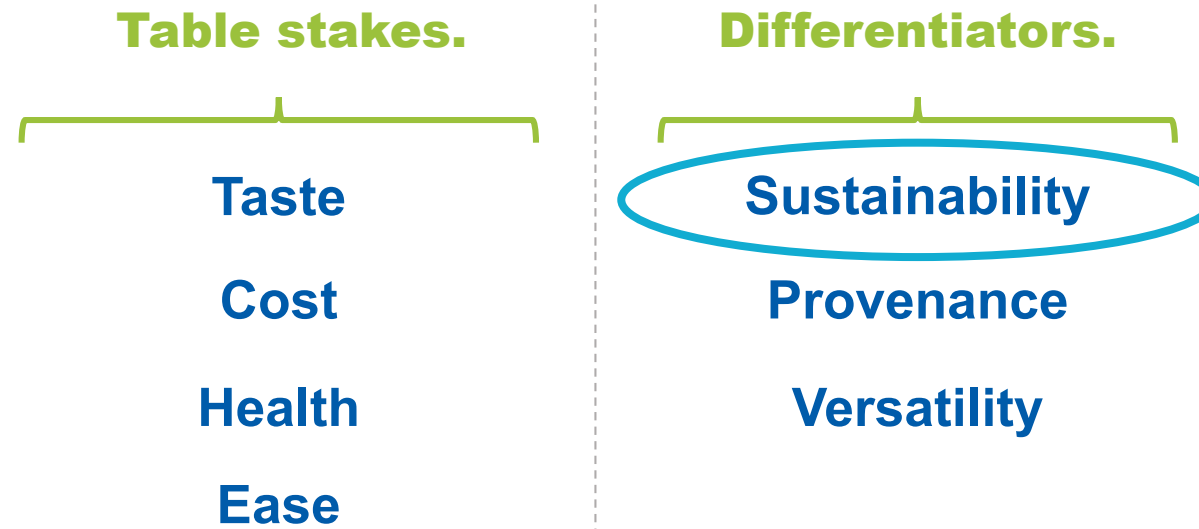


# What we learned

**Sustainability matters** to consumer audiences.  
It's also a **key differentiator** for Wild Alaska  
Pollock compared to other fish species.



### Summary of Top Importance Attributes and Key Messaging Priorities



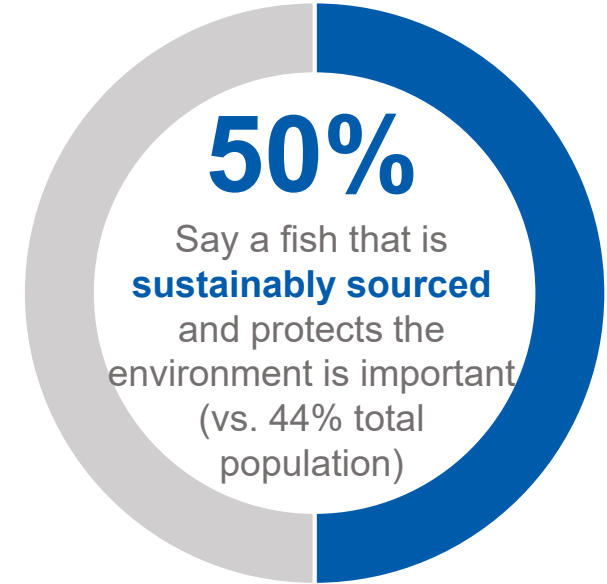
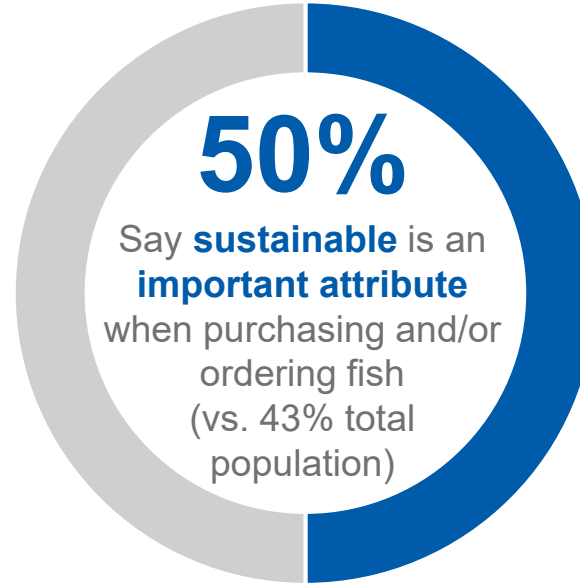
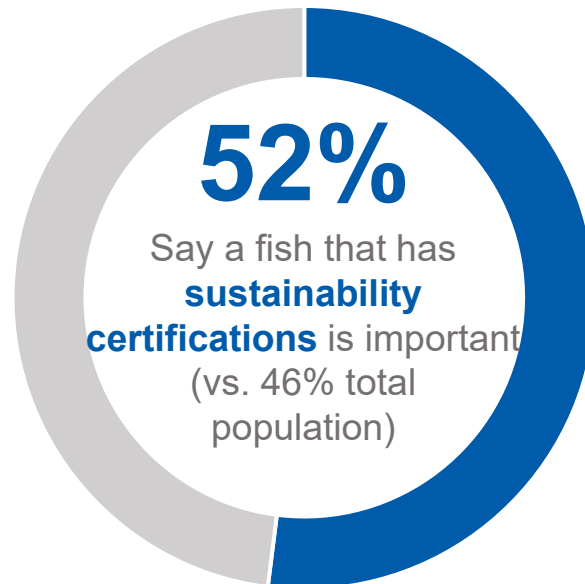
Q8. Below is a list of attributes that people may use to describe seafood. For each, please rate how important that attribute is to you when purchasing and/or ordering fish. Base: Total (n=1,244) Fish eaters (n=764)



# Sustainability is *especially important* to our target consumer audience.



Important when purchasing/ordering fish  
(Among Fish Eaters; T3B Summary on a 10-pt scale)



Q8. Below is a list of attributes that people may use to describe seafood. For each, please rate how important that attribute is to you when purchasing and/or ordering fish. Base: Total (n=1,244) Fish eaters (n=764)

N9. For each of the following statements, please rate how important it is to you when purchasing and/or ordering fish. Base: Total (n=1,244) Fish eaters (n=764)

# Consumers are incentivized to eat sustainably if they know it promises **greater health** benefits, **improved taste** and **protection of the planet**.



Attributes that encourage fish eaters to eat sustainably

**HEALTH** **41%** Healthier for me/my family  
(+5 total pop.)

**PROTECTING THE PLANET** **37%** Good for the planet  
(+7 total pop.)

**36%** Protects species  
(+7 total pop.)

**TASTE** **34%** Improves taste  
(+5 total pop.)



Fish, when cooked properly is very nutritious. However it is a must that we keep the rivers, lakes, and oceans, environmentally clean for this food source to be sustained. **Water pollution will hurt not only the present generation but those of future generations.**" -Male.



I really do [care about purchasing sustainable food] because I care about the environment. Sustainability means so much more than the environment, it is also about **how we can support our world to become healthier** and that starts with the people. There should be more awareness when it comes to purchasing and ordering food." -Female.



I believe **wild caught has more nutrients** due to eating what is provided for by the natural ocean resources compared to farmed fish which diet is provided to by farmer." -Female.

N23. What factors, if any, would encourage you to eat sustainable fish? Base: Total (n=1,244) Fish eaters (n=764)  
^ This data should be used directionally, as it is based on a sample of focus group respondents that is not significant  
( ) denotes the +/- percentage points compared to the total population sampled in the survey.

# Key Implications



The **importance of sustainability** to both **business** and **consumer** audiences **cannot be overstated**. Now is the time to communicate Wild Alaska Pollock's **unique sustainability story**.

Promising greater **health benefits, taste and protection of the planet** incentivizes consumers to eat sustainably. **Lead with these three consumer benefits** before delving into Wild Alaska Pollock's sustainability story.



**What is the behavior and sentiment of consumers towards sustainability?**





# Not everyone shares the **same** definition of sustainability.



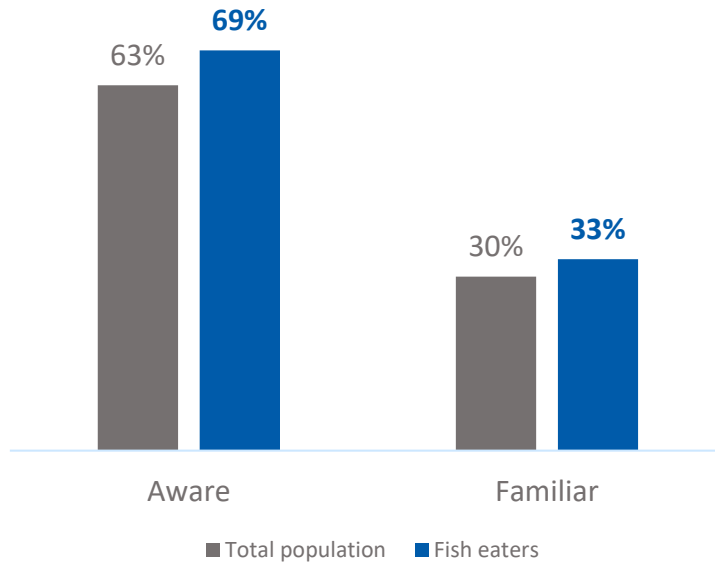
- “To me sustainability is **living within the local ecological boundaries**, as well as in kinship with the natural world. It is surviving with only the resources available in local proximity to you, without anything else for 5000 miles plus.” -Female.
- “I think many **people do not fully understand what it means** to have sustainability in the marketplace. Some think it **means ‘organic’** while others think it **relates to manufacturing**.” –Male.
- “I think about the present and the future because just a word itself talks in reference to sustaining things, you know? And you have to take care of it now for the future. **And I think about my granddaughters. What would be frankly, here for them.**” -Female.
- “What comes to mind with sustainable food for the body is healthy food, **food that will sustain your energy**. I also think of the shelf life of foods and their packaging that helps to preserve products.” -Female.



# The top barriers to making sustainability decisions include **familiarity**, **cost** and **accessibility**.



How much would you say you know about *sustainability* in fish?  
(Among Fish Eaters and the total population; T3B  
Summary on a 10-pt scale)



## 50%

of focus group respondents  
say **living a sustainable  
lifestyle is very or  
somewhat easy**<sup>^</sup>



I feel like, it's harder to live that kind of life because **it's usually more expensive**. What stinks is that to live healthier you have to be able to spend money and sometimes, people don't have the means!" -Female.



I don't think that **living the status quo American lifestyle readily allows Americans to easily live a sustainable life**, unless they are surrounded by organic grocery stores, have access to a backyard garden or community garden, have income that would allow them to drive a more fuel-efficient or electric car, etc." -Female.

N22. How much would you say you know about sustainability in fish? Base: Total (n=1,244) Fish eaters (n=764)

Aware denotes know a lot, some, a little

Familiar denotes know a lot, some

<sup>^</sup> This data should be used directionally, as it is based on a sample of focus group respondents that is not significant

# Consumers are reliant on **grocery stores, news, and documentaries** to inform their understanding of sustainability.



Focus group respondents cite the **grocery store or market** as their

# #1

**choice for reliable sustainability information when buying fish**

- “**Reading the news or scientific articles** on the current condition of our planet **helps me understand sustainability**, as well as **watching documentaries** on streaming services.” -Female.
- “Television **documentaries and shows** are where I’ve learned about this. I do not recall the names. There were some on Netflix, Discovery Channel, and other channels.” -Female.
- “I’ll think about sustainability after I have seen or heard something **in the news, a documentary** or listening to public radio. Or if a label or a sign in a grocery store reminds me or indicates that something is sustainable. Usually it is a moment or a reminder that triggers me to think about it.” -Female.
- “I am **attentive to the signs and/or packaging labels**. I am looking for details **regarding the sustainability**....catch method, etc.” -Male.

# Key Implications



Though they are interested in it, sustainability presents an **education hurdle** for consumers.

Keeping GAPP's sustainability language **high-level and simple** for consumers will tell a more compelling story, as not many are knowledgeable.

In particular, leverage **grocery store** and **news channels** to educate consumers about sustainability.





**What do consumers specifically think about carbon footprint, traceability and sustainability certifications?**



Highlighting carbon footprint is **appealing** to respondents, particularly if they understand its broader **impact on the planet**. Just remember it **takes a lot of explanation...**



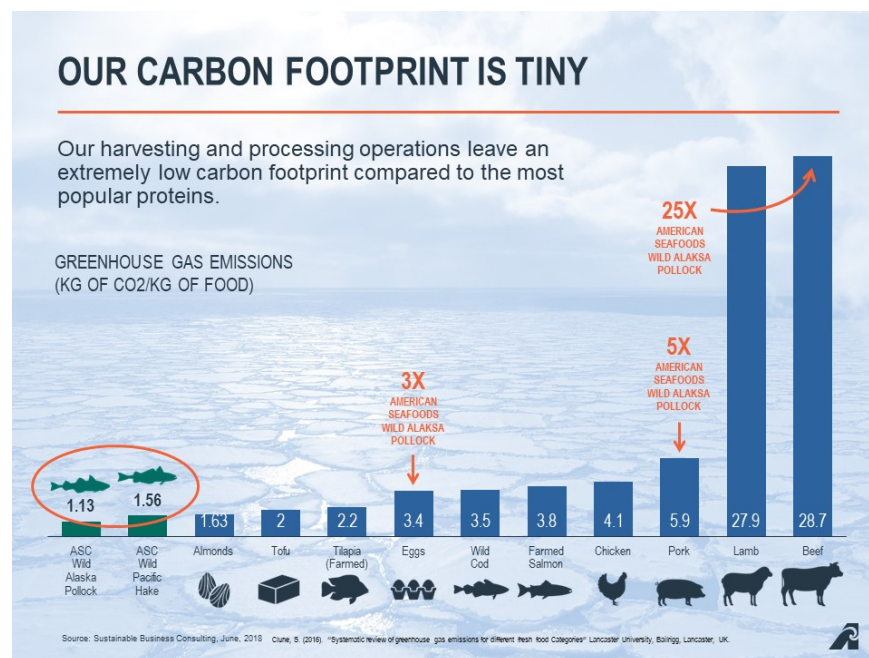
“If we knew more about the carbon footprint of all the proteins/ food, we buy **I believe people would make better choices** to buy certain food with a lower carbon footprint as it would put things into perspective. Also, it would make you **want to support a company** more that takes the appropriate steps to lower their carbon footprint.” -Male

“Yes, but only if the numbers were shown relative to other animal protein. **Just a number itself would not be understood**, I'm not sure if the average American (including myself) knows specific numerical standards.” -Female

“There are so many things in this world that demand immediate attention. I personally am **just interested in the type fish, where it came from, and how it was raised**. I leave the finer details to the scientists and environmentalists.” -Male

“I would be better informed, but **it might not change my opinion if other things were right**. There are only so many things you can consider when making your shopping list.” -Female.

# Demonstrating how Wild Alaska Pollock's carbon footprint compares to other proteins **helps educate consumers** on this otherwise abstract topic.



- It's interesting to know that Wild Alaska Pollock's carbon footprint is much lower but it doesn't negatively impact my perception of other proteins." -Female.
- It doesn't hurt my perception of other proteins but instead makes me appreciate the one of the fish itself." -Male.
- The chart gives me a very good idea of which proteins are the most sustainable. Now I know that Wild Alaska Pollock has the very best rating and I also know that most all fish products are much more sustainable than beef or lamb." -Male.

*\*\*Chart was shown to respondents for illustrative purposes only, given that GAPP LCA results are not finalized yet.  
Source: American Seafoods*



# There is strong interest in Wild Alaska Pollock's **traceability** as understanding provenance and raising conditions **builds trust**.



- “ I see traceability as an important aspect of sustainability that matters a lot. Yes. I’d like to have the ability **to verify the history and location** of the Pollock on the packaging” -Female.
- “ Knowing the traceability makes the company **seem more transparent and trustworthy**. Also, I think it would be beneficial to the consumer to know where their food came from and do more research on their end if they wanted to learn more.” -Female.
- “ I think the first thing would be if it was farm raised, how it was farm raised. I have watched programs that show some fisheries and the way they crowd/feed the fish is bad for the ‘meat’ and the taste. So I guess this would be traceability, **how I can track the fish's history**.” -Male.
- “ That is super important because I **NEED to know where the fish is coming from** and where it is being prepared **so I feel more comfortable about consuming**.” -Female.





There's an overall **lack of knowledge** when it comes to sustainability certifications, but some **recognizable phrases can help** bridge the gap.



Respondents were most likely to be drawn to certifications that clearly stated “certified sustainable” or “responsible.”



None are more trustworthy than the other because **I don't know enough about them.** -Female.



[Most attentive to] "Certified Sustainable" and "Farmed Responsibly" as **they are clear in meaning to me.** -Male.



There are so many certifications out there, with most being a sales tactic to make products seem more trustworthy. So no **I do not know which ones are truly authentic or trustworthy.** -Male.



Respondents are **reliant on front-facing product packaging labels** for certification and sustainability information.



**84%**

of focus group respondents say that the **front of the package** is where they want to see certifications^



I would like to **learn about Wild Alaska Pollock's sustainability on the packaging at the grocery stores**. Recently, I have started spending time reading the labels, so that would be the most useful way for me to learn about it." -Female.



I think it would be **most effective to learn about Wild Alaska Pollock's sustainability through packaging** as people tend to look at that when shopping and read the labels. If it has those key facts on there, it would definitely make a difference for consumers." -Male.



I would like to learn on the **product packaging when in store, or media or news outlets** like social media and tv or commercials." -Male.

^ This data should be used directionally, as it is based on a sample of focus group respondents that is not significant

# Key Implications

To address the **carbon footprint education hurdle**, use **simple language**, **protein comparison graphics** and **relatable explanations** about carbon footprint when communicating about Wild Alaska Pollock's LCA.

Many consumers **do not know enough about sustainability certifications** and have difficulty distinguishing between them. However, **words do matter** and terms like “**certified**” and “**responsible**” build trust.

**Front-facing product labels** are key in building transparency about where Wild Alaska Pollock comes from and its unique sustainability benefits.





So, what does all of this mean for you?



# Here's what you need to know when talking about Wild Alaska Pollock's LCA to consumers:



1.

Business audiences are hot for sustainability and clamoring for this information.

2.

Consumer audiences also care about sustainability. But education is the biggest hurdle, followed by cost and access.

3.

Carbon footprint, traceability and certifications are attractive to consumers. However, simple and easy-to-understand messages / visuals are key to help with education.

4.

When telling Wild Alaska Pollock's sustainability story, lead with the fish's great taste, health and ability to help protect the planet – that'll get consumers' attention.

5.

Place sustainability messaging where they want to see it:  
Front of package  
+ grocery stores  
+ news.



Following these insights when positioning Wild Alaska Pollock's LCA will build trust and help make the fish consumers' top of mind, sustainable seafood choice.

^ This data should be used directionally, as it is based on a sample of focus group respondents that is not significant

# Optimized messaging and key channels to tell Wild Alaska Pollock's LCA story.



## Message 1

### Best Use Cases:

- Owned and social content
- Packaging ("certified-sustainable")

*Wild-caught in the Bering Sea, Wild Alaska Pollock comes from the most abundant, **certified-sustainable** fishery in the world. With full traceability from the sea to the table, Wild Alaska Pollock is a climate-friendly fish.*

## Message 2

### Best Use Cases:

- Owned and social content to ensure room for explanation and context

*Wild Alaska Pollock is delicious, nutritious and easy to cook, and happens to be one of the most sustainable protein sources for the planet. Wild-caught by U.S. fishermen off the coast of Alaska, Wild Alaska Pollock is top-ranked and verified by a Lifecycle Assessment (LCA) as a climate-smart fish choice thanks to abundant wild populations, our sustainable harvest practices, and careful management all the way to shore.*

## Message 3

### Best Use Cases:

- Owned and social content to ensure room for explanation and context
- Pair with LCA graphic of other proteins

*A Lifecycle Assessment (LCA) of Wild Alaska Pollock evaluating its environmental impact from fishing to transportation and processing all the way to shore, shows a lower carbon footprint than just about every other mainstream animal protein, such as beef, pork, chicken and lamb.*

## Message 4

### Best Use Cases:

- Owned and social content
- Packaging (bolded text)
- Paid ads

***Wild Alaska Pollock is good for you and good for the planet.** Recognized as one of the 20 most nutritious foods on the planet, Wild Alaska Pollock is the fish we need to help meet the challenges of the present and ensure future generations live in a clean, safe, and prosperous world.*

## Message 5

### Best Use Cases:

- Owned and social content
- Packaging (bolded text)
- Paid ads

***Your food choices matter.** Eat Wild Alaska Pollock to help build a safe and promising future that your family can be proud of.*



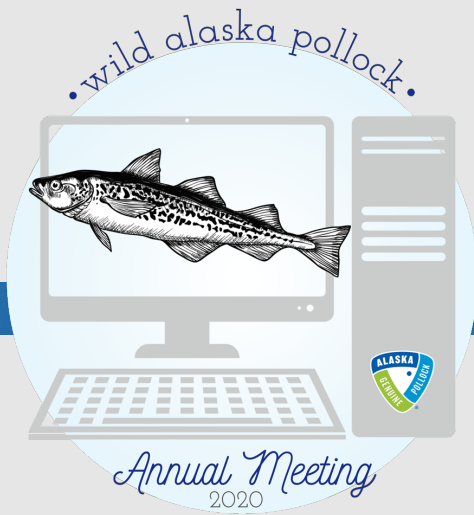
# Next steps



## Actions from this research

- Create turnkey member LCA communications materials for both business and consumer audiences
- Use findings to inform GAPP's 2021 communications strategy (e.g. influencer, earned and social media, content)



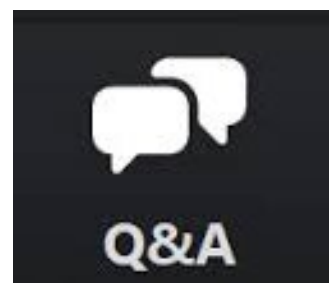
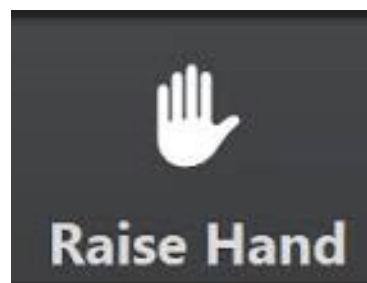


# Thank You

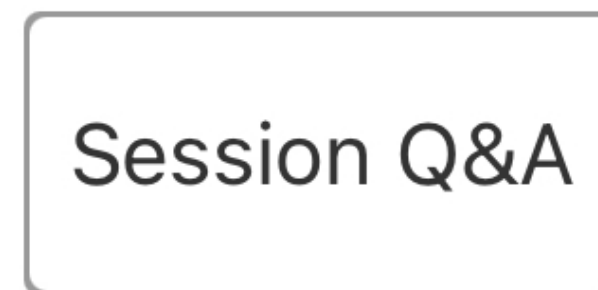
A FISH TO REMEMBER, A YEAR TO FORGET



# Submitting Questions



**ZOOM**



**WHOVA**



**MARY ELIZABETH GERMAINE**  
Ketchum Analytics



**DR. LEIGH MORRIS**  
STRAT7 Bonamy Finch

## U.S. AND EUROPE WAP ATTITUDES AND USAGE RESULTS



**MARY ELIZABETH GERMAINE**

Ketchum Analytics

GAPP

# US CONSUMER MARKET: YEAR OVER YEAR RESULTS





# Focus of the study:



## Performance Over Time

How, if at all, did Wild Alaska Pollock change year over year on key tracking questions compared to competitor fish?



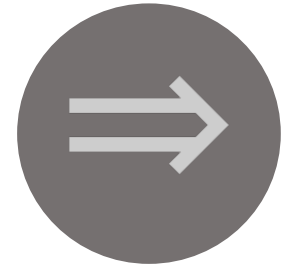
## Our Fish Eater Target Audience

What must GAPP and its members understand about fish eaters, knowing they are the target audience?



## Drivers of Demand for Wild Alaska Pollock

What specific attributes will drive demand among fish eaters for Wild Alaska Pollock?



## Communication Implications for Wild Alaska Pollock

How can we effectively tell Wild Alaska Pollock's story?



**So, what are our key year-over-year learnings?**



# YoY learnings from the general population



## 2019 Finding

1

Unfamiliarity and cost are the greatest barriers for consumers when buying fish.



## 2020 Finding

They continue to be the greatest barriers. Cost has become a top concern.

2

Wild Alaska Pollock has name recognition, but many are not familiar with it.



Significant improvement in familiarity but there is still opportunity to grow.

3

People just want fish to be tasty, healthy and easy.



Taste, health, and ease continue to matter with affordability being a core matter.

4

Wild Alaska Pollock can't stand on just taste, health and ease – versatility, provenance and sustainability also matter.



Wild Alaska Pollock is more commonly associated with provenance and sustainability, but its versatility story is less known.



# Tracking and assessing performance over time

(among the total population)



# Familiarity is growing; Wild Alaska Pollock is on par with other fish perceptions



YoY	Familiarity*	
	2019	2020
Wild Alaska Pollock	52%	55%
Salmon	83%	85%
Cod	70%	75%
Tilapia	73%	74%
Haddock	54%	56%
Sole	47%	47%

New	Very Good/ Excellent Opinion	Fish Preference	Likelihood to Consume^ (within coming month)	Purchase Frozen From Grocery Store (often)
	2020	2020	2020	2020
	48%	4%	37%	29%
	56%	32%	39%	25%
	41%	10%	27%	22%
	45%	11%	30%	18%
	41%	4%	28%	22%
	41%	1%	28%	21%

Q1. How much would you say you know about the following fish ? Base: Total 2020 (n=1244), Total 2019 (n=1026)

\*Familiar based on those who know a lot/ some/ a little

N6. Based on everything you know about [FISH AWARE], what is your overall opinion of it? Base: Those aware of fish: Wild Alaska Pollock (n=610), Salmon (n=261), Cod (n=264), Tilapia (n=259), Haddock (n=253), Sole (n=249).

N7. Overall, what is your favorite type of fish to eat? Base: Those aware of fish (n=1165)

N8. How likely are you to eat [FISH AWARE] in the coming month? Base: Those aware of fish: Wild Alaska Pollock (n=610), Salmon (n=261), Cod (n=264), Tilapia (n=259), Haddock (n=253), Sole (n=249).

^ Denotes T3B (8-10 on 10-pt scale)

S9. How often do you eat [FISH AWARE] in the following settings? I purchase it at a grocery store or market, frozen. Base: Those who eat fish: Wild Alaska Pollock (n=449), Salmon (n=149), Cod (n=170), Tilapia (n=163), Haddock (n=174), Sole (n=179).

# GAPP achieved its YoY goal of increasing familiarity of Wild Alaska Pollock by 3% pts



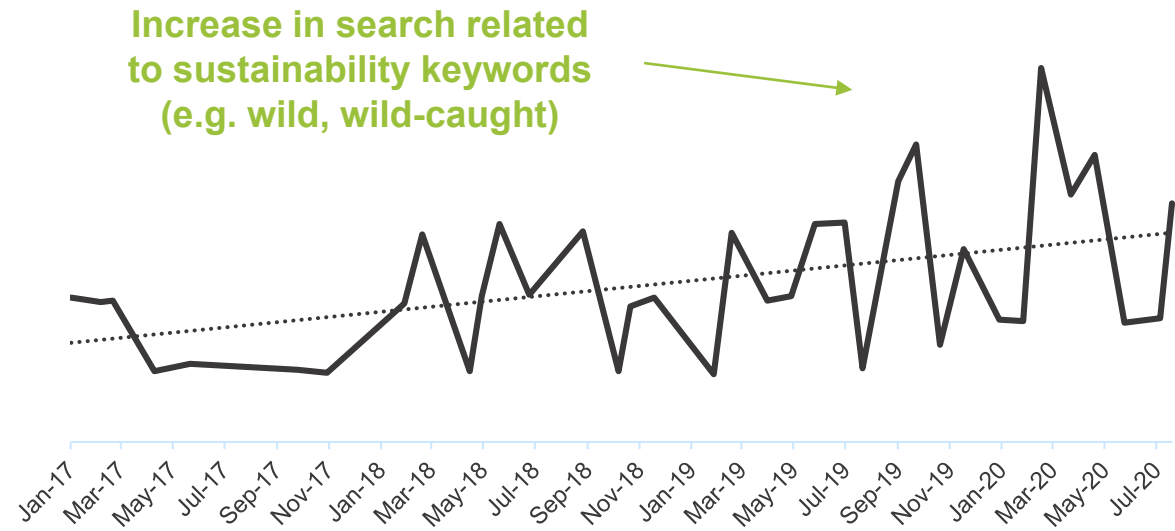
How much would you say you know about Wild Alaska Pollock?

**+3pt**  
**Increase in familiarity**

2019: 52%

2020: 55%

Google Search of Wild Alaska Pollock Over Time\*  
(Jan 2017 – Aug 2020)



Q1. How much would you say you know about Wild Alaska Pollock? Net: A lot/Some/A little. Base: Total 2020 (n=1244), Total 2019 (n=1026)

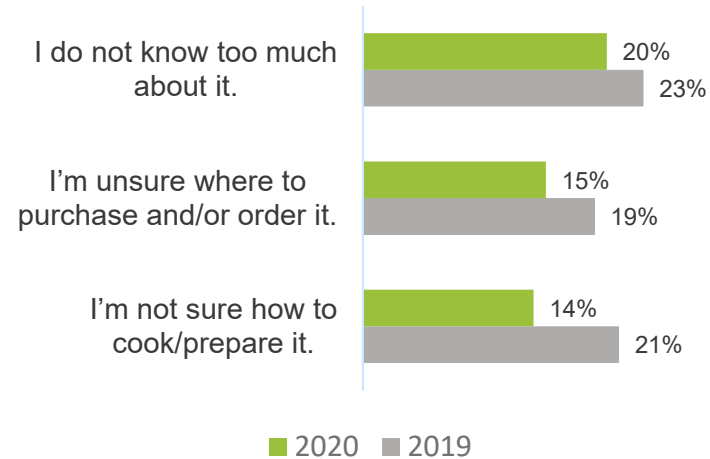
\* Search Data came from Google Trends

# Despite this improvement, familiarity and cost are still barriers to purchase



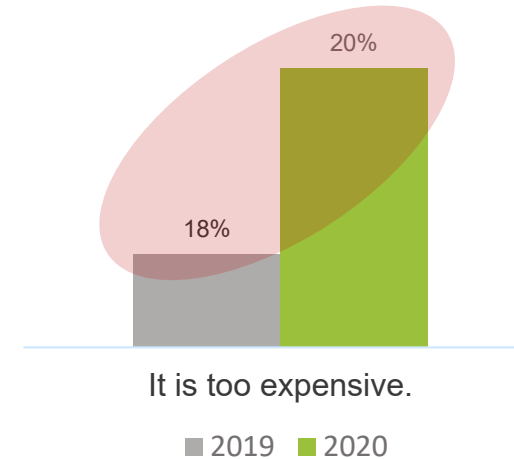
What prevents you from consuming Wild Alaska Pollock or consuming it more often?

## #1 Familiarity



What prevents you from purchasing Wild Alaska Pollock?

## #2 Cost Barrier



**56%** say "affordable" is an important attribute when purchasing and/or ordering fish^

**46%** say "cost" is a concern when consuming fish^

Q25. Overall, what prevents you from consuming Wild Alaska Pollock or consuming it more often? Base: Those aware of fish 2020 (n=610), Those aware of fish 2019 (n=491)

Q8. Below is a list of attributes that people may use to describe fish. For each, please rate how important that attribute is to you when purchasing and/or ordering fish. Base: Total (n=1244)

N18. How much of a concern are the following items when consuming fish? Base: Total (n=1244)

^ Denotes T3B (8-10 on 10-pt scale)

# Many view Wild Alaska Pollock favorably and are likely to eat it

But salmon and other white fish are preferred.



	Very Good/ Excellent Opinion	Fish Preference	Likelihood to Consume^ (within coming month)	Purchase Frozen From Grocery Store (often)
	2020	2020	2020	2020
Wild Alaska Pollock	48%	4%	37%	29%
Salmon	56%	32%	39%	25%
Cod	41%	10%	27%	22%
Tilapia	45%	11%	30%	18%
Haddock	41%	4%	28%	22%
Sole	41%	1%	28%	21%

N6. Based on everything you know about [FISH AWARE], what is your overall opinion of it? Base: Those aware of fish: Wild Alaska Pollock (n=610), Salmon (n=261), Cod (n=264), Tilapia (n=259), Haddock (n=253), Sole (n=249).

S9. How often do you eat [FISH AWARE] in the following settings? I purchase it at a grocery store or market, frozen. Base: Those who eat fish: Wild Alaska Pollock (n=449), Salmon (n=149), Cod (n=170), Tilapia (n=163), Haddock (n=174), Sole (n=179).

N7. Overall, what is your favorite type of fish to eat? Base: Those aware of fish (n=1165)



## Key implication

Generating **greater awareness** and **familiarity** with Wild Alaska Pollock among the general population **remains a communications imperative.**

**Increasing visibility** of Wild Alaska Pollock **can aid opinion and preference** compared to other species.





# Understanding fish eaters





# Fish eaters are a core audience for Wild Alaska Pollock—they are key decision makers and buyers within core channels



## Fish Eaters

How this audience was defined:



Have consumed fish (not exclusively shellfish) in the past 3 months



**AND**  
Have purchased any of the following types of fish in the past 3 months:

- Fish from any type of restaurant
- Fresh fish from a grocery store or market
- Packaged refrigerated/frozen non-breaded fish— plain or prepared
- Frozen breaded fish
- Fish in a can or pouch (not exclusive)



### Grocery decision-makers

**66%**

do all (or nearly all) of the *grocery shopping* in their household

### Meal preparers

**3 in 5**

do all (or nearly all) of the *cooking* in their household

### Fresh and frozen filet buyers

**50%**

Purchased **packaged refrigerated/frozen non-breaded fish** in the last 3 months

**59%**

Purchased **fresh fish** from a grocery store or market in the last 3 months

N33. How much of the grocery shopping in your household do you do? Base: Fish eaters (n=764)

N34. How much of the cooking in your household do you do? Base: Fish eaters (n=764)

N3. Which of the following types of fish have you purchased in the past 3 months? Base: Fish eaters who have eaten fish in the last 3 months (n=764)

# Fish eaters' experimentation and purchase of fish soared amid COVID-19, as they desired healthy, easy, sustainable fish



Increased Behavior as a Result of COVID-19  
(Among Fish Eaters – Increased Summary)

↑ **25%**  
say their  
purchase of fish  
increased  
as a result of COVID-19

↑ **21%**  
say their  
experimentation with  
recipes/fish recipes  
increased  
as a result of COVID-19



Top Reasons for Increased Behavior  
(Among Fish Eaters whose purchase/experimentation with fish increased)

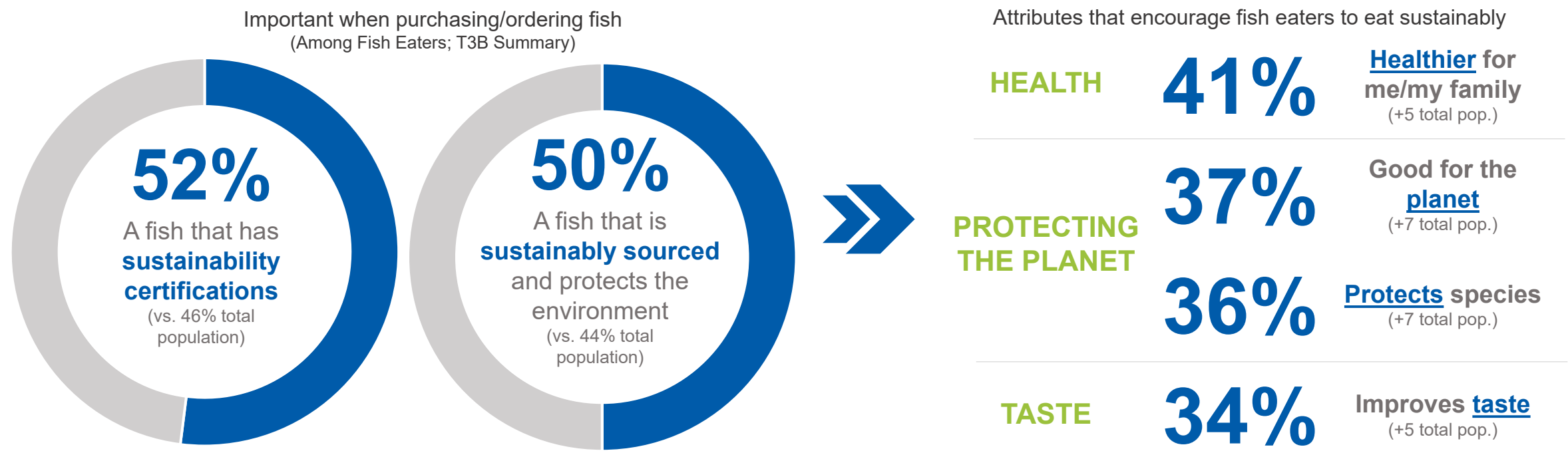
- 41%** Healthy option
- 38%** Easy to prepare
- 35%** Healthier alternative to meat
- 34%** Provided variety in meals

N25. How have the following items changed as a result of Coronavirus/COVID-19? - Increased Summary Base: Fish eaters (n=764)

N26. You indicated your purchase and/or experimentation with fish recipes increased during Coronavirus/COVID-19. Why was this? Base: Fish eaters whose purchase/experimentation with fish and recipes increased (n=217)



# Sustainability is a strong sell point for fish eaters, especially if it promises better taste, health & protection of the planet



N9. For each of the following statements, please rate how important it is to you when purchasing and/or ordering fish. Base: Total (n=1,244) Fish eaters (n=764)  
N23. What factors, if any, would encourage you to eat sustainable fish? Base: Total (n=1,244) Fish eaters (n=764)

# And promoting Wild Alaska Pollock as a white fish is also compelling – but cod is getting the white fish credit



**66%**  
of fish eaters have a **positive perception of white fish**  
(vs. 55% total population)

**59%**  
of fish eaters are aware that white fish is a **general term**

## Knowledge of white fish attributes (Among Fish Eaters: Summary of know A Lot/Know Some)

<b>71%</b>	Taste
<b>59%</b>	Cost/price
<b>58%</b>	Method of preparation
<b>54%</b>	Health benefits
<b>47%</b>	Nutritional value
<b>45%</b>	Sustainability
<b>43%</b>	Sourcing

## The white fish fish eaters think they are eating at restaurants:

- #1 Cod (48%)**
- #2 Tilapia (29%)**
- #3 Haddock (22%)**
- #4 Wild Alaska Pollock (19%)**

N15. In general, what is your overall perception of white fish? Base: Total (n=1244); Fish eaters (n=764)  
N13. You mentioned you eat fish at least once every few months. Did you know that white fish is not a single type of fish, but just a general term for fish with white flesh? Fish eaters who eat fish at least once every few months (n=755)  
N16. How knowledgeable, if at all, are you about the following attributes of white fish? - NET: Know a lot/know some. Base: Fish-eaters with enough about white fish to have a perception (n=707)  
N14. Sometimes, restaurants serve fish without identifying which type it is (i.e. fish and chips, fish sandwich, fish sticks, etc.). When you have eaten this non-identified fish, what type(s) of fish did you think you were eating? Base: Fish eaters (n=764)





## Key implication

Leverage the **white fish halo** as an approach to **lift familiarity**, and tout **Wild Alaska Pollock's sustainability differentiator**, as it delivers and elevates table stakes (taste/health) and protection of the planet.





# Understanding drivers of demand for Wild Alaska Pollock

(among fish eaters)



# There are simple table stakes that drive fish eaters' purchase habits



## Summary of Top Importance Attributes and Key Messaging Priorities

### Table stakes.



**Taste**

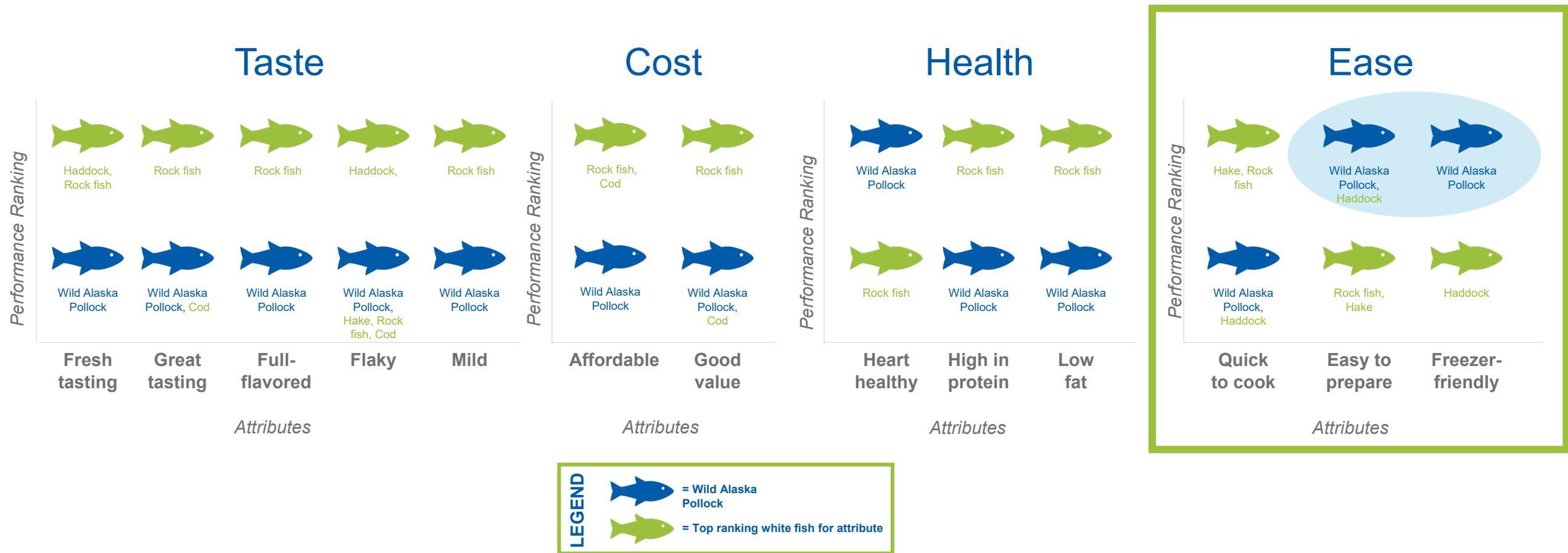
**Cost**

**Health**

**Ease**

Q8. Below is a list of attributes that people may use to describe fish. For each, please rate how important that attribute is to you when purchasing and/or ordering fish? Base: Fish Eaters (n=764)

# Wild Alaska Pollock gets credit for ease; competitors outperform on taste, health and cost



Note: Salmon and Tuna have been omitted from this analysis.  
Q9. Now, thinking about the attributes associated with fish, please tell us how well you feel each one describes [FISH AWARE] using a 0 to 10 scale. Summary Top 3 Box on 10-pt scale (8-10) Base: Fish eaters who are aware of Fish (n: Cod=170; Tilapia=163; Haddock=174; WAP=449; Sole=179; Hake=180; Halibut=178; Catfish=216; Rockfish=149)

# Versatility is a not only a differentiator, but also a key driver in the category and among competitor species...



## Summary of Top Importance Attributes and Key Messaging Priorities

### Differentiators.

**Versatility**

**Provenance**

**Sustainability**

What drives people to **select fish** over other protein:

1. Taste
2. Cost
3. Health
4. Ease
- 5. Versatility**

What drives them to **choose between** fish species:

- 1. Versatility**
2. Taste
3. Cost
4. Health
5. Provenance

Based on FISH EATERS:

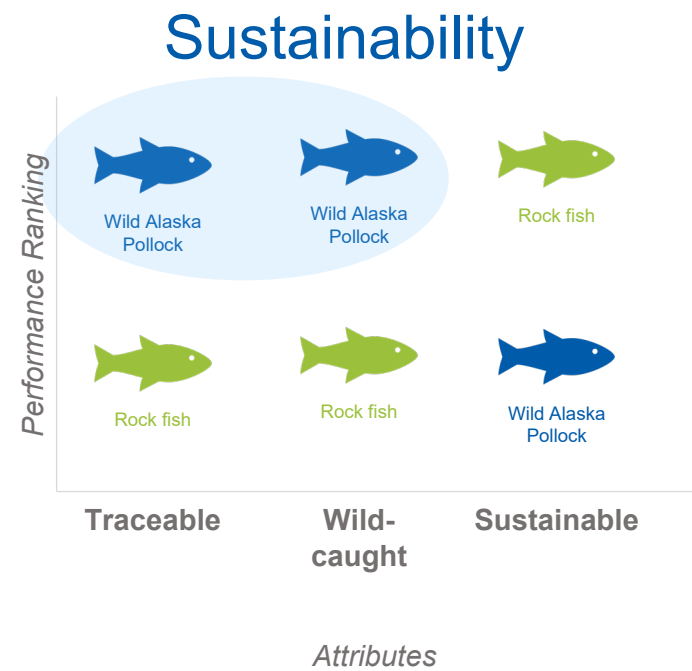
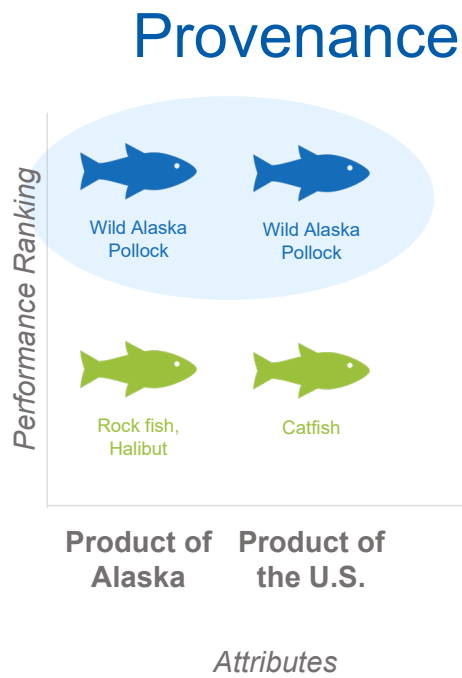
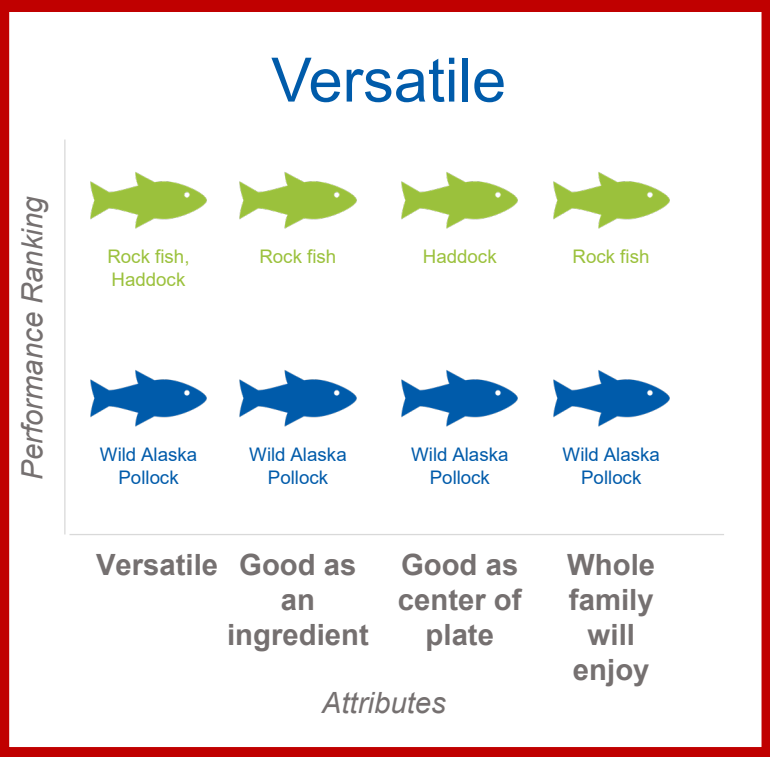
Q8. Below is a list of attributes that people may use to describe seafood. For each, please rate how important that attribute is to you when purchasing and/or ordering fish. BASED ON TOP 3 BOX. Base: All (n=1244)

N8. How likely are you to eat [FISH AWARE] in the coming month? Please use a 0 to 10 scale, with 0 being "not at all likely" and 10 being, "extremely likely." Base: Those Aware of Fish (bases below)

Q9. [ONLY ASK FOR FISH AWARE] Now, thinking about the attributes associated with fish, please tell us how well you feel each one describes [FISH AWARE] using a 0 to 10 scale, with 0 being "does not describe the fish at all" and 10 being, "describes the fish extremely well." Base: Those Aware of Fish (n: Cod=264; Tilapia=259; Haddock=253; Wild Alaska Pollock=610; Sole=249; Hake=250; Halibut=254; Catfish=338; Rockfish=215; Salmon=261, Tuna=266)



# But Wild Alaska Pollock’s versatility story is less known, while provenance and sustainability pull through



LEGEND

= Wild Alaska Pollock

= Top ranking white fish for attribute

Note: Salmon and Tuna have been omitted from this analysis.  
Q9. Now, thinking about the attributes associated with fish, please tell us how well you feel each one describes [FISH AWARE] using a 0 to 10 scale. Summary Top 3 Box on 10-pt scale (8-10) Base: Fish eaters who are aware of Fish (n: Cod=170; Tilapia=163; Haddock=174; WAP=449; Sole=179; Hake=180; Halibut=178; Catfish=216; Rockfish=149)

# To drive demand, emphasize specific Wild Alaska Pollock table stakes and its versatility



## Summary of Top Importance Attributes and Key Messaging Priorities

### Table stakes.

Taste	→	EMPHASIZE
Cost	→	EMPHASIZE
Health	→	EMPHASIZE
Ease	→	MAINTAIN

### Differentiators.

Versatile	→	EMPHASIZE
Provenance	→	MAINTAIN
Sustainability	→	MAINTAIN

Q8. Below is a list of attributes that people may use to describe fish. For each, please rate how important that attribute is to you when purchasing and/or ordering fish? Base: Fish Eaters (n=764)



# Key implication

Lean into Wild Alaska Pollock's  
**versatility story without sacrificing  
table stake messaging.**



# Communications and marketing implications for Wild Alaska Pollock





# A two-pronged strategy to communicate about Wild Alaska Pollock



## Situation

The increasing demand for great tasting, healthy, versatile fish that doesn't break the bank has made white fish a hot commodity. The only problem is that **when consumers think of white fish, they don't think of Wild Alaska Pollock as often as competitor species.**

## Opportunity

1) The opportunity for Wild Alaska Pollock lies in **capitalizing on the white fish halo.**

2) It will be critical to also **identify Wild Alaska Pollock's differentiators** that make it unique to competitor species (e.g. versatility, provenance, sustainability).



# Sample messages to advance the two-pronged strategy



Summary of Top Importance Attributes and Key Messaging Priorities

## Table stakes.

Taste	→	EMPHASIZE
Cost	→	EMPHASIZE
Health	→	EMPHASIZE
Ease	→	MAINTAIN

## Differentiators.

Versatile	→	EMPHASIZE
Provenance	→	MAINTAIN
Sustainability	→	MAINTAIN

**Sample messages to establish Wild Alaska Pollock as a white fish chock-full of benefits we know U.S. consumers care about:**

- Wild Alaska Pollock is an affordable, certified-sustainable white fish that can be easily prepared in many delicious, nutritious dishes.
- Wild Alaska Pollock is a popular white fish that is known for being affordable and easy to prepare in many mouthwatering dishes.

## **Sample Slogan:**

For an affordable, versatile and certified-sustainable white fish, choose Wild Alaska Pollock.



## Next steps

## What we'll explore further...



- Additional sustainability message testing
- Updating GAPP's Wild Alaska Pollock Communications Toolkit
- A targeted communications strategy to increase familiarity of Wild Alaska Pollock






# Some examples of how we might build awareness of Wild Alaska Pollock across channels



✓ **Organic and paid social media campaigns** on channels fish eaters frequent   

✓ **Strategic partnerships** with reputable influencers, chefs and restaurant owners

✓ **Educate target health and nutrition media** about the Wild Alaska Pollock Difference

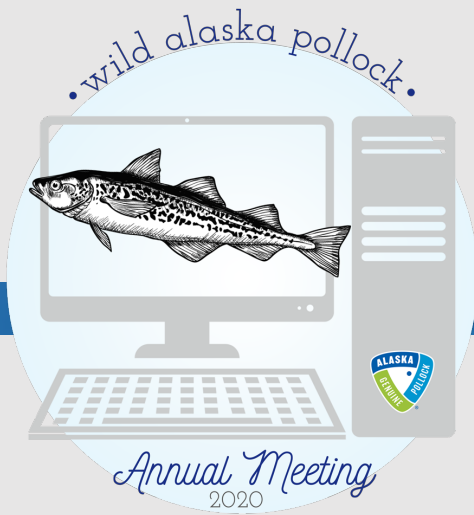
✓ **Earned media placements** in high-visibility outlets and blogs targeting fish eaters and business audiences   

✓ **Search engine marketing** to people actively searching about white fish and other related terms in our category

✓ **Native advertising** in high-profile outlets visited by fish eaters    

✓ **Retail RD promotions** with key retailers to drive interest and purchases in-store through credible nutrition voices

✓ **Local earned media and/or digital advertising campaign** to trigger organic local and family conversations



# Thank You

A FISH TO REMEMBER, A YEAR TO FORGET





**DR. LEIGH MORRIS**  
STRAT7 Bonamy Finch

# ALASKA POLLOCK EUROPEAN PERFORMANCE



# Alaska Pollock

## European Performance

Management Summary  
Germany, France, UK





# Web-based survey in Germany, UK and France

## Representative sample of 1000 fish eaters in each

A 15 minute survey to ascertain familiarity, consumption and perceptions of a variety of fish amongst the fish eating audience (as in US).

Focus on whitefish – Alaskan Pollock and competitive set





# EUROPEAN OVERVIEW





# General Themes in the European Fish Category



Demographic spread of fish eaters is **in line** with profile of general population

No clear bias in incidence across demographic groups in any market



Fish is consumed mainly **in home**

7 in 10 occasions in France / Germany  
6 in 10 occasions in UK



Covid 19 has driven a net **decrease in restaurant** occasions and **increase in grocery purchasing**

Particularly packaged fish (breaded or non breaded) in UK and Germany

(France sees general downturn in intention to eat fish)



The most likely place to **first learn** about Alaska Pollock is from the **grocery store**

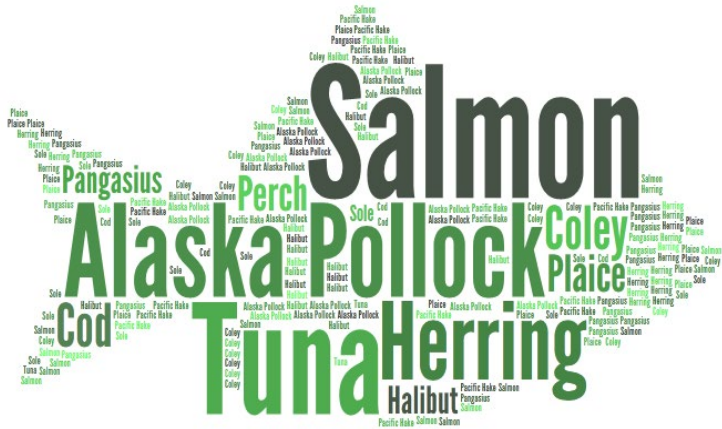
Restaurants and friends and family play a role too, but to about half the extent

(NB: For France, friends and family are nearly as important as grocery stores)

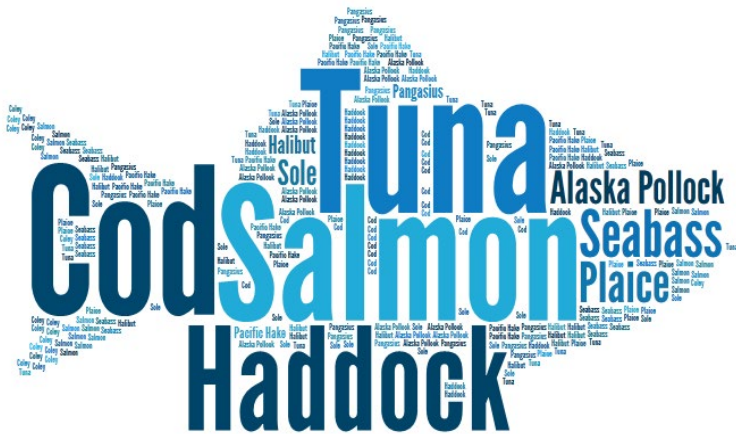




The three European markets are markedly different in terms of general profile of species eaten, and also specifically in relation to Alaska Pollock. We therefore review each market separately



Germany



UK



France



 GERMANY

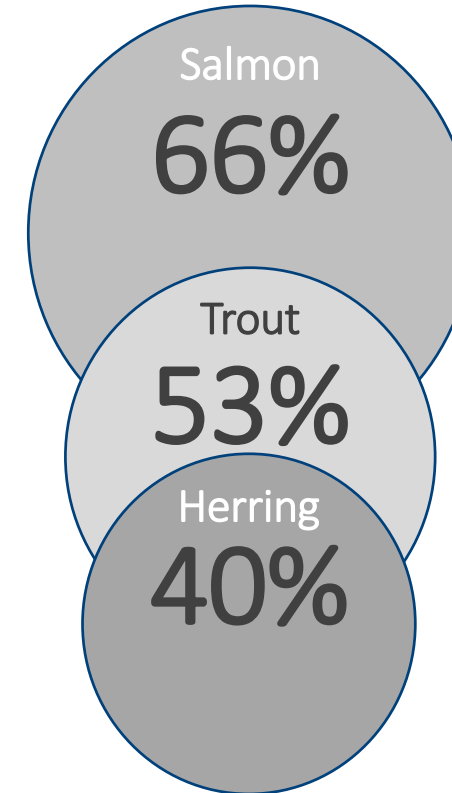
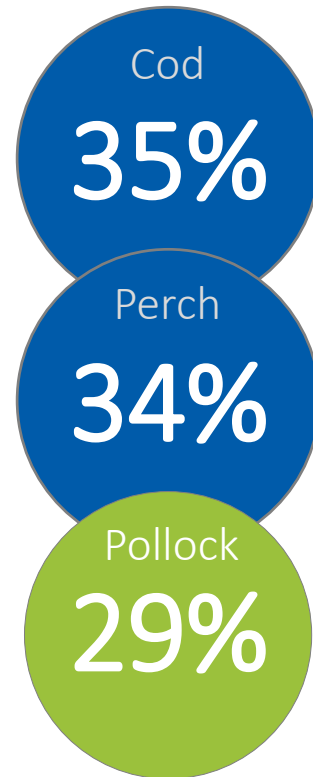




Alaska Pollock is a “front of mind” whitefish for many people in Germany, but this is in the context of very strong salience of “oily” fish species



In the whitefish category  
**Pollock sits just behind Cod  
and Perch** for being  
automatically thought of

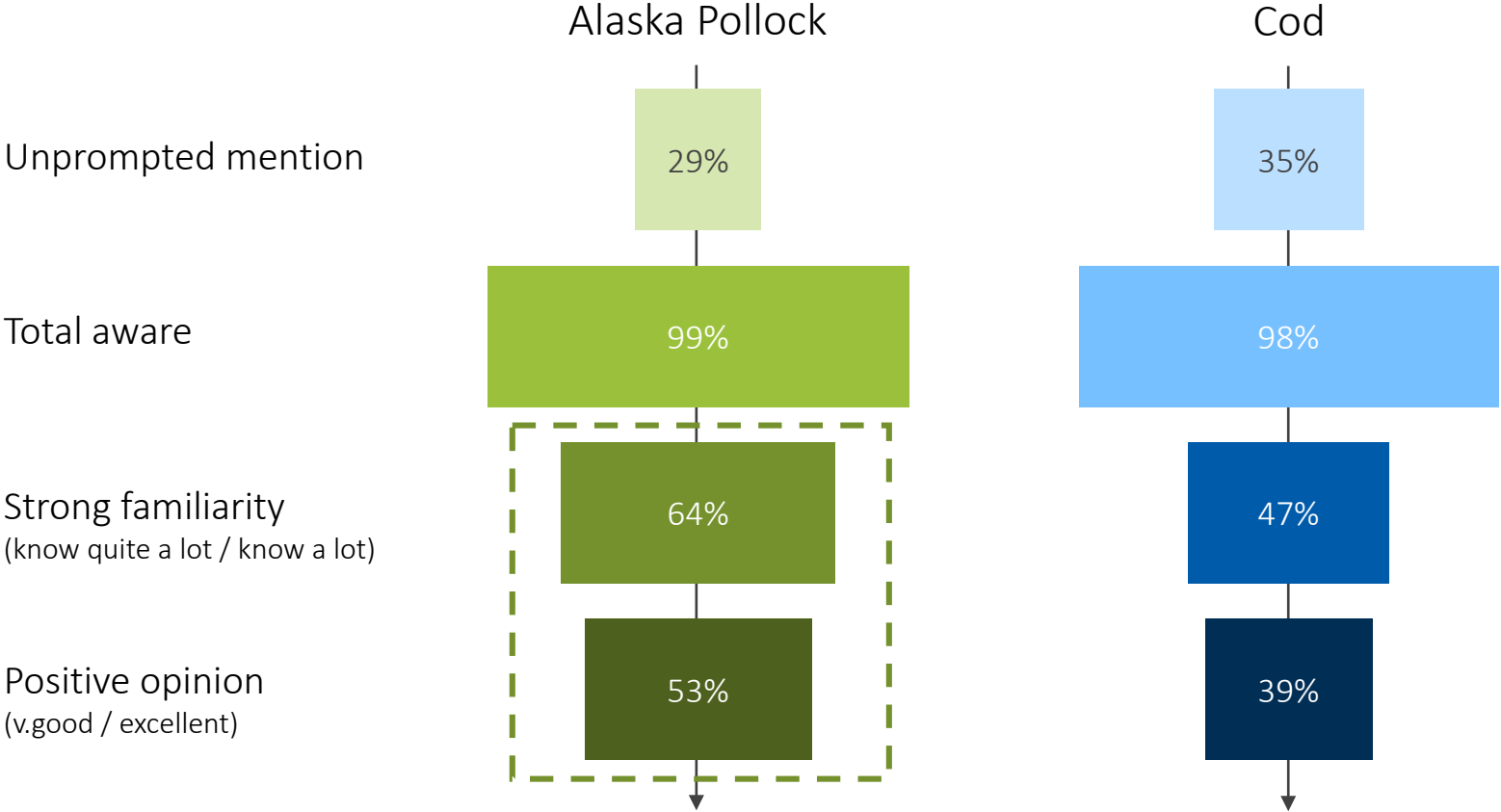


Salmon strong in all  
markets, but particularly  
in Germany

Trout and Herring  
popularity is unique  
to Germany

When thinking of fish that people eat, what fish comes to mind?

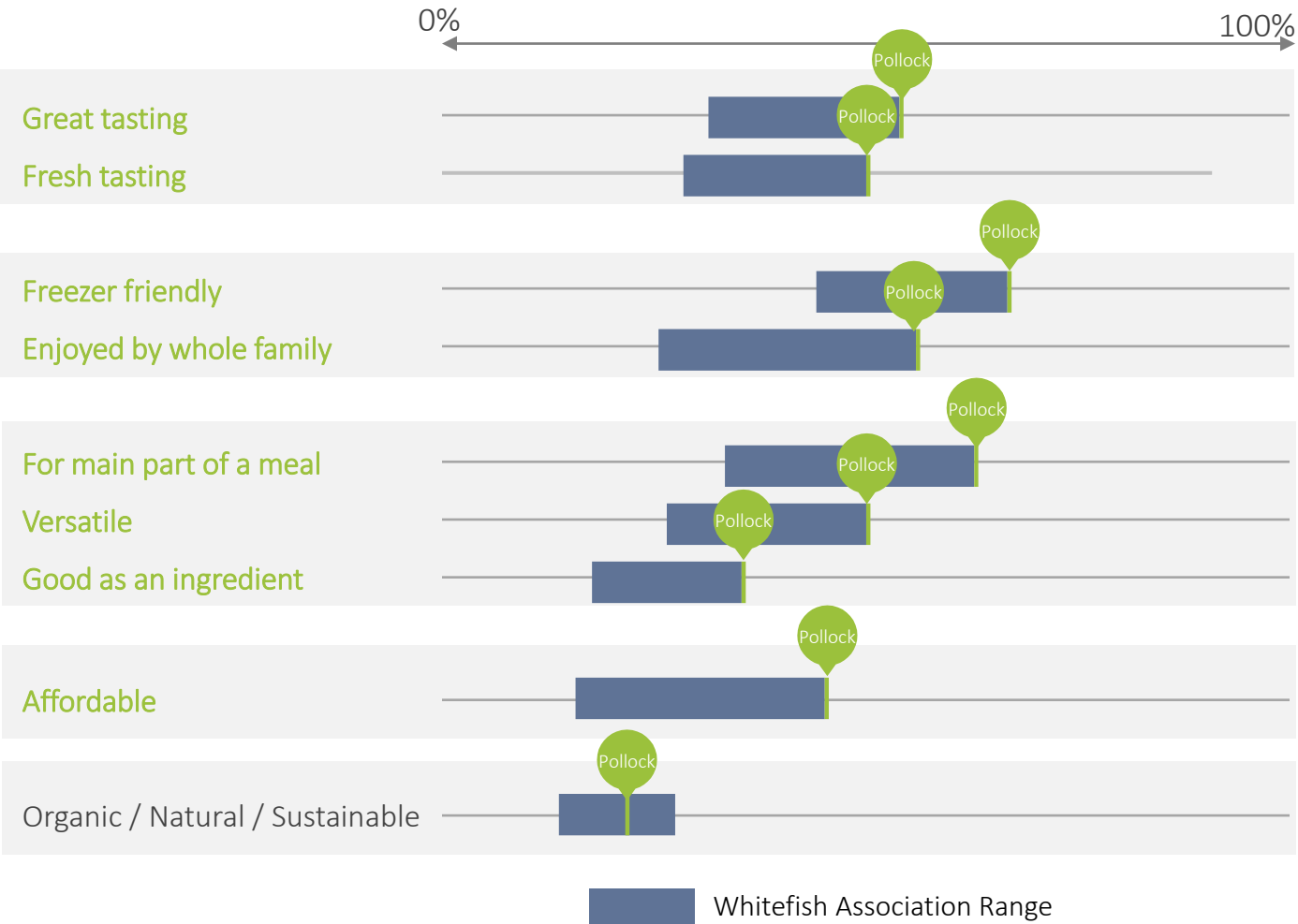
Alaska Pollock has almost complete awareness, and people know more about it as a specie than other whitefish. What they know supports a more positive opinion than for other whitefish.



In Germany, Alaska Pollock emerges as the leading whitefish. Complete awareness translates into strong familiarity and positive opinion



Whitefish is generally perceived as a convenient and affordable, cook-at-home family food; Alaska Pollock particularly stands out on these attributes



Core whitefish characteristics

- Taste ✓
- Freezer Friendly ✓
- For whole family ✓
- Easy to prepare ✓
- Versatile ✓
- Affordable ✓

Alaska Pollock

Sustainability factors have the weakest associations for the whole category

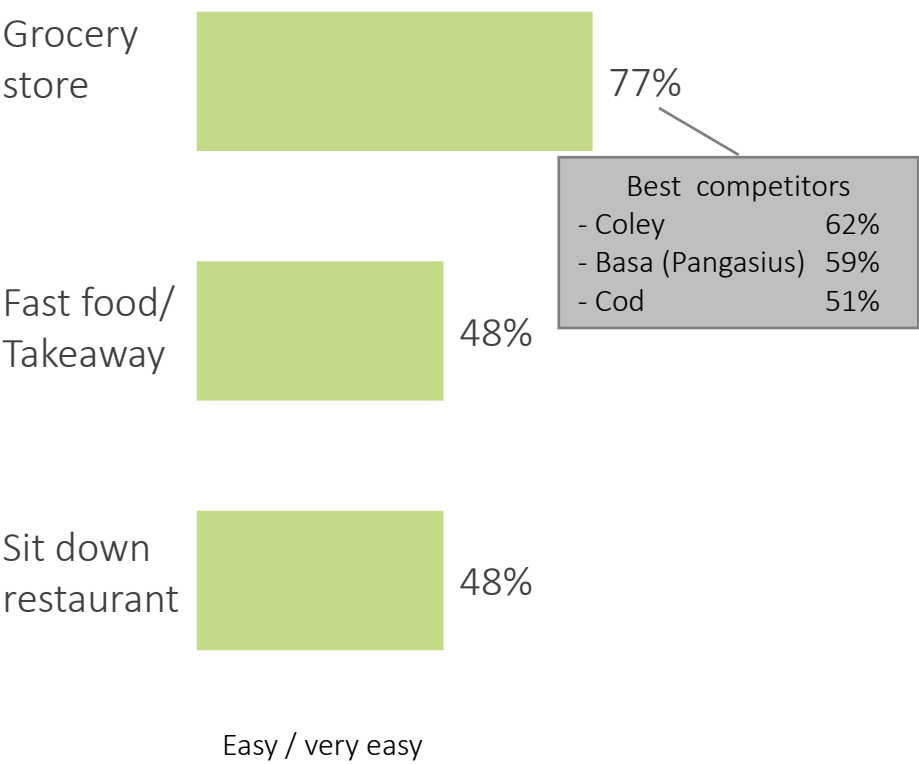




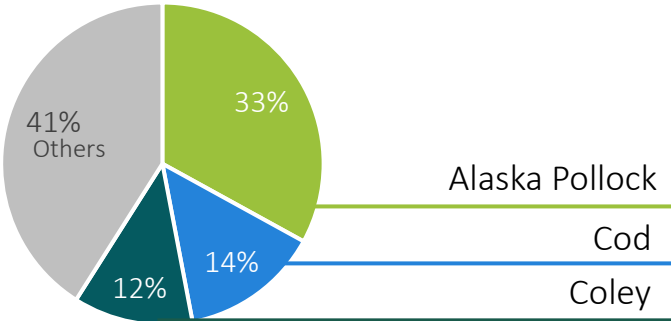
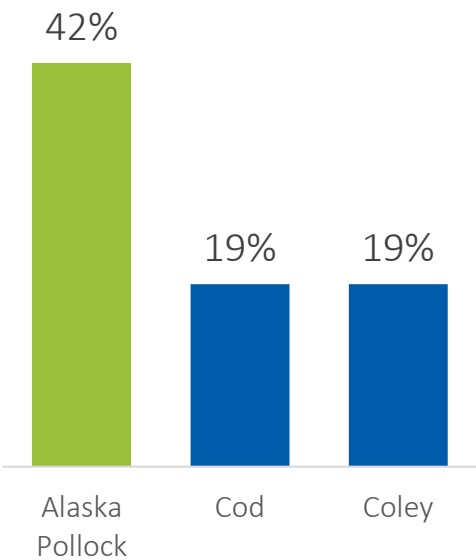
Strong familiarity and positive opinion for Alaska Pollock, supported by affordable pricing and wide availability, translates into the highest whitefish consumption rates



Ease of finding Alaska Pollock to buy at....



Alaska Pollock is the whitefish most likely to be consumed in the next 30 days...



... and occupies the highest share of named whitefish servings

Base: Germany, those familiar with Alaska Pollock and buy fish at each channel nowadays. Excludes "Not sure"



# Germany Summary

- Alaska Pollock in Germany is in a league of its own. It is the leading whitefish, a market leader owning the convenience and affordable family favourite territories
- Given its strong awareness, familiarity, opinion and availability (particularly in retail), it commands both high future purchase intent and share of stomach
- In Germany, Alaska Pollock should continue to defend its position as the leading whitefish and begin to elevate the specie into more premium applications to drive greater value





 UK





FISH	S	M	L
COD	£4.00	£4.75	£5.50
HADDOCK		£4.75	£5.50
ROCK		£4.75	£5.50
HUSS		£4.75	£5.50

PLAICE			£5.00
FISHCAKE			£1.00
COD ROE			£1.50
GIANT FISH FINGER			£2.75

8 SCAMPI PIECES			£4.00
12 SCAMPI PIECES			£5.50

CHIPS	M	L
CHIPS	£1.95	£2.50
CHEESY CHIPS	£2.45	£3.00

CHIP ROLL			£2.00
KIDDIE CONE			£1.25

PIES	PUKKA PIES
CHICKEN & MUSHROOM	£2.75
BEEF & ONION	£2.75
STEAK & KIDNEY	£2.75

SAUSAGES	
PLAIN / BATTERED SAUSAGE	£1.00
JUMBO PLAIN / BATTERED SAUSAGE	£1.70
SAVELOY	£1.70

**CHICKEN**

OUR CHICKEN PRODUCTS ARE MADE WITH 100% CHICKEN BREAST  
OUR BURGERS ARE SERVED WITH MAYONNAISE AND LETTUCE

CHICKEN FILLET BURGER £3.00  
HOT 'N' KICKIN CHICKEN FILLET BURGER £3.50  
EXTRA CHEESE

6 CHICKEN NUGGETS  
10 CHICKEN NUGGETS

ROAST CHICKEN

**VEGETARIAN**

VEGETARIAN BURGER  
CHEESE & ONION CAKE  
ONION RINGS  
GARLIC MUSHROOMS

3 DEEP FRIED HALLOUMI PIECES  
6 DEEP FRIED HALLOUMI PIECES

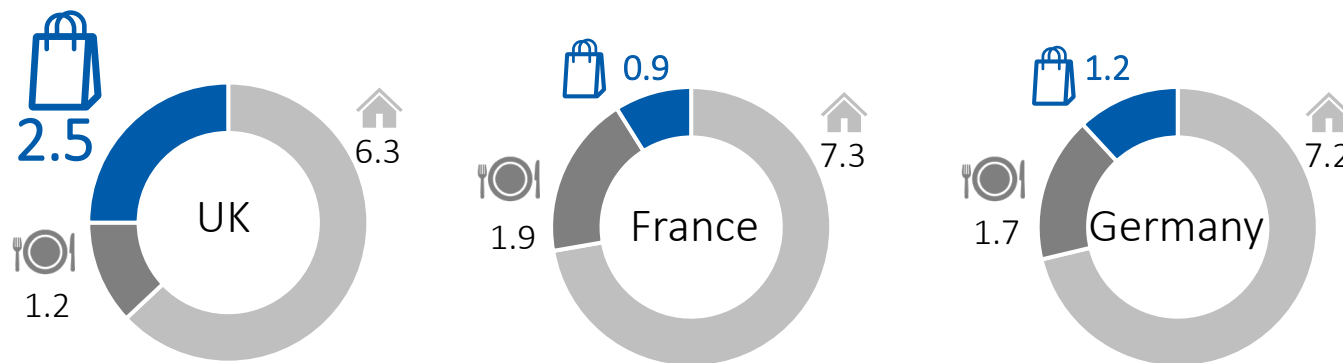
**GLUTEN**

SMALL COD  
MEDIUM COD  
JUMBO / PLAIN BATTERED  
ROAST CHICKEN  
6 CHICKEN NUGGETS  
10 CHICKEN NUGGETS  
ONION RINGS  
3 DEEP FRIED HALLOUMI  
6 DEEP FRIED HALLOUMI  
CURRY SAUCE



The British tradition of “fish & chips” means that the fast food sector plays a significant role in the UK

Fish is ordered by name – overwhelmingly Cod or Haddock – and this influences the structure of the whitefish market



Mean share of 10 recent servings



Alaska Pollock is a “hidden in plain sight” fish in the UK, whilst Cod and Haddock are promoted widely in restaurants and grocery stores



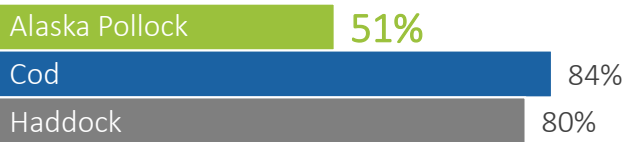
VS.



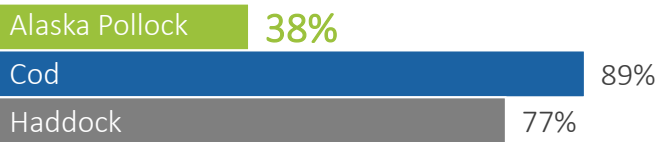
Alaska Pollock specified in small font on the back of the packaging

## Ease of finding fish to buy at....

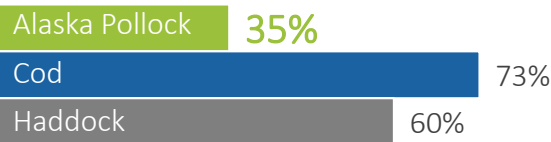
Grocery store



Fast food/  
Takeaway



Sit down restaurant

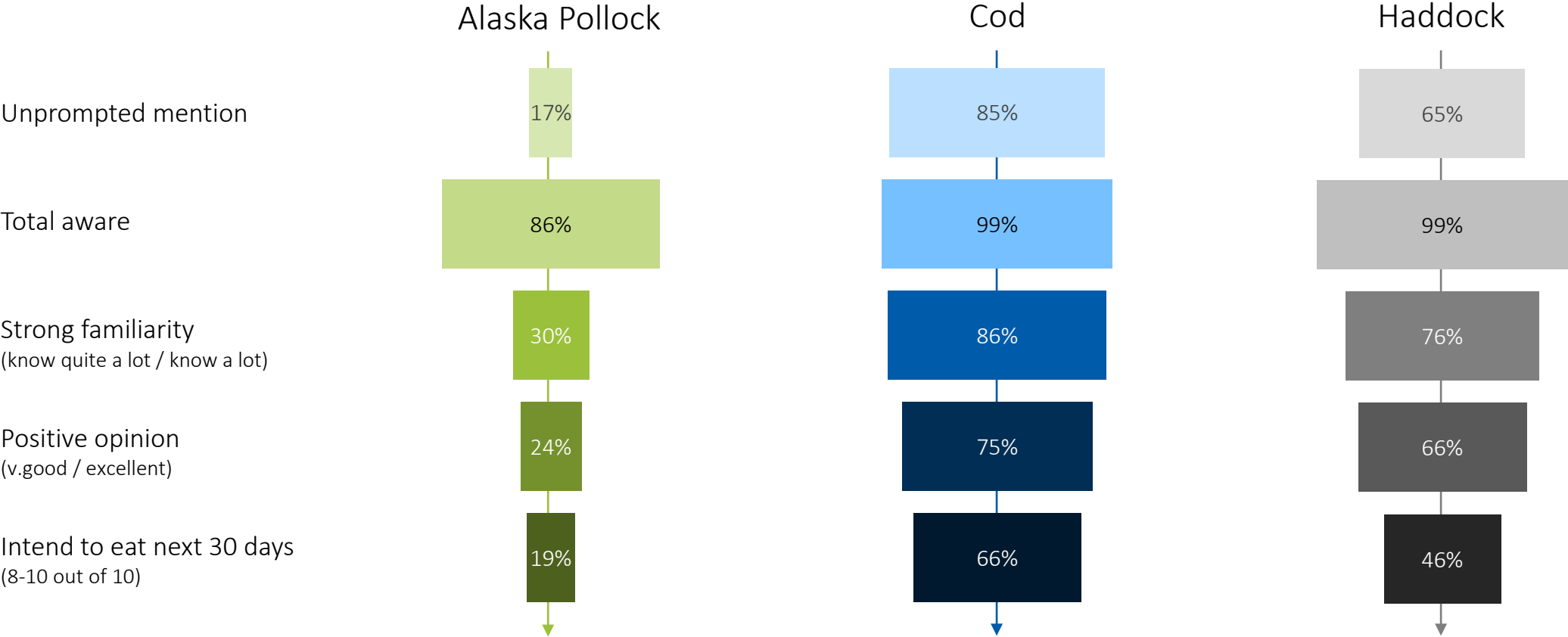


Easy / Very easy



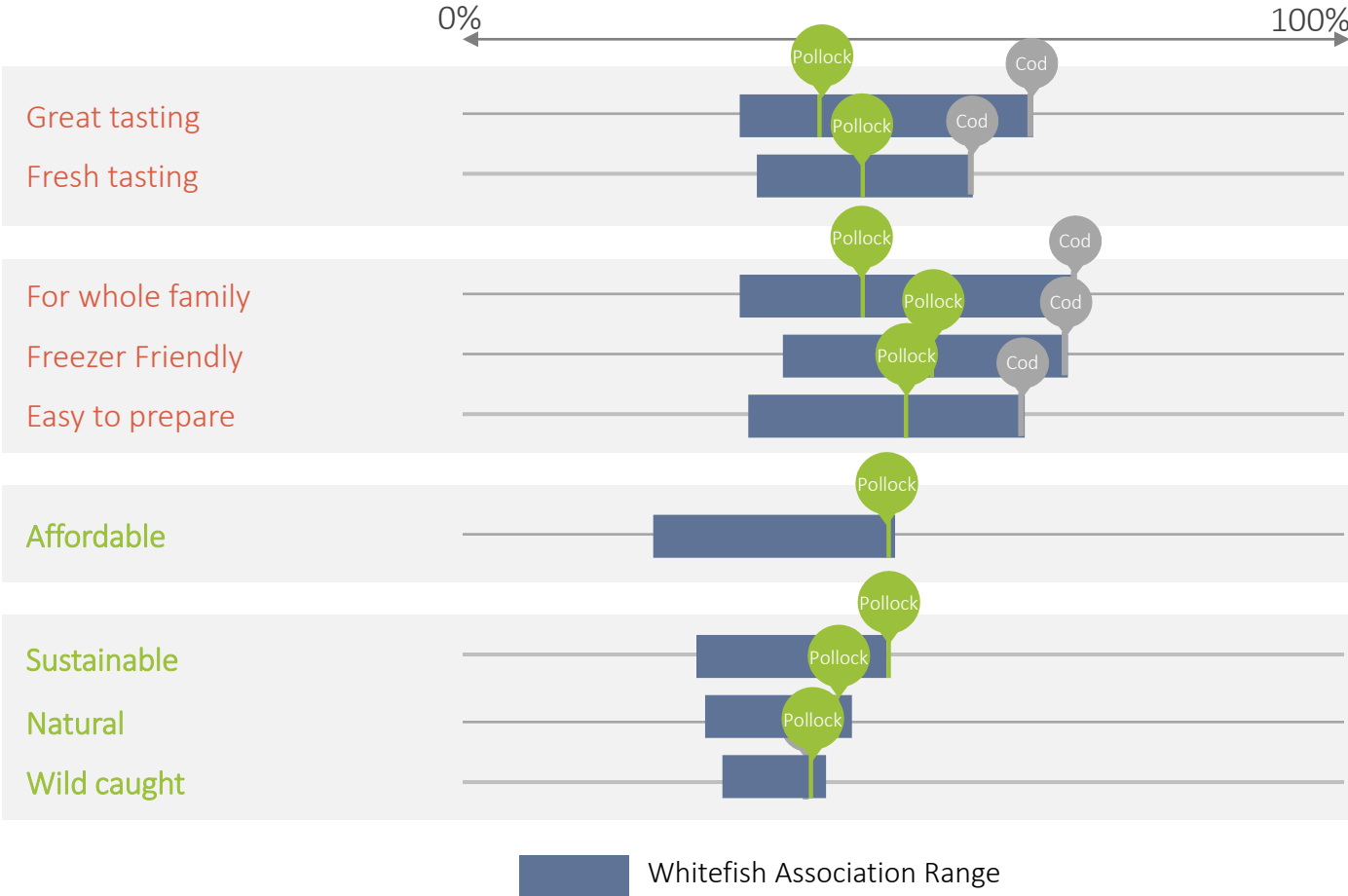


Despite people being aware of Alaska Pollock when prompted, it is a long way behind both Cod and Haddock, which dominate consumers' whitefish consideration. Alaska Pollock should prioritise building awareness and familiarity.



In building familiarity, Alaska Pollock should seek to address a perceived taste shortfall, and also credentials in the family convenience heartland

Affordability is a consistent strength across markets



Core whitefish characteristics	Cod	Alaska Pollock
→ Taste	✓	✗
→ Freezer Friendly	✓	✗
→ For whole family	✓	✗
→ Easy to prepare	✓	✗
→ Versatile	✓	✗
→ Affordable	✓	✓

The “Alaska” country of origin branding helps to convey a sustainable, natural, wild caught positioning.

# UK Summary

- The UK is a strong whitefish market due to the UK's ubiquitous “fish and chips”, with cod and haddock at the core of this experience
- Much like the US, 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)
- Building salience and familiarity will be the foundation of increased Alaska Pollock demand, and should focus on addressing perceptions of a taste shortfall and credibility on the “family convenience” attributes





 FRANCE

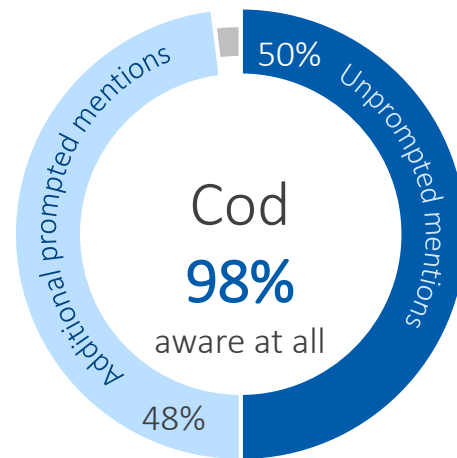




In France almost all fish eaters recognise the Alaska Pollock name, but it has much lower category salience than Cod (the strongest specie)

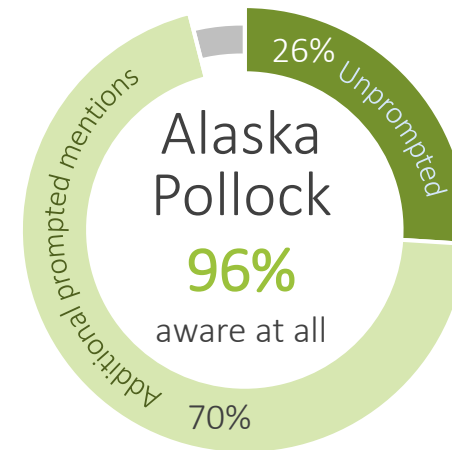


When thinking of fish that people eat, what fish comes to mind?

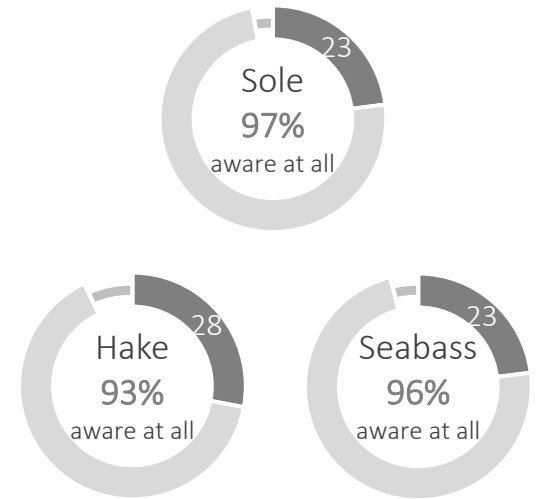


Cod twice as likely to come to mind as Alaska Pollock

Other data shows Alaska Pollock also has much weaker familiarity

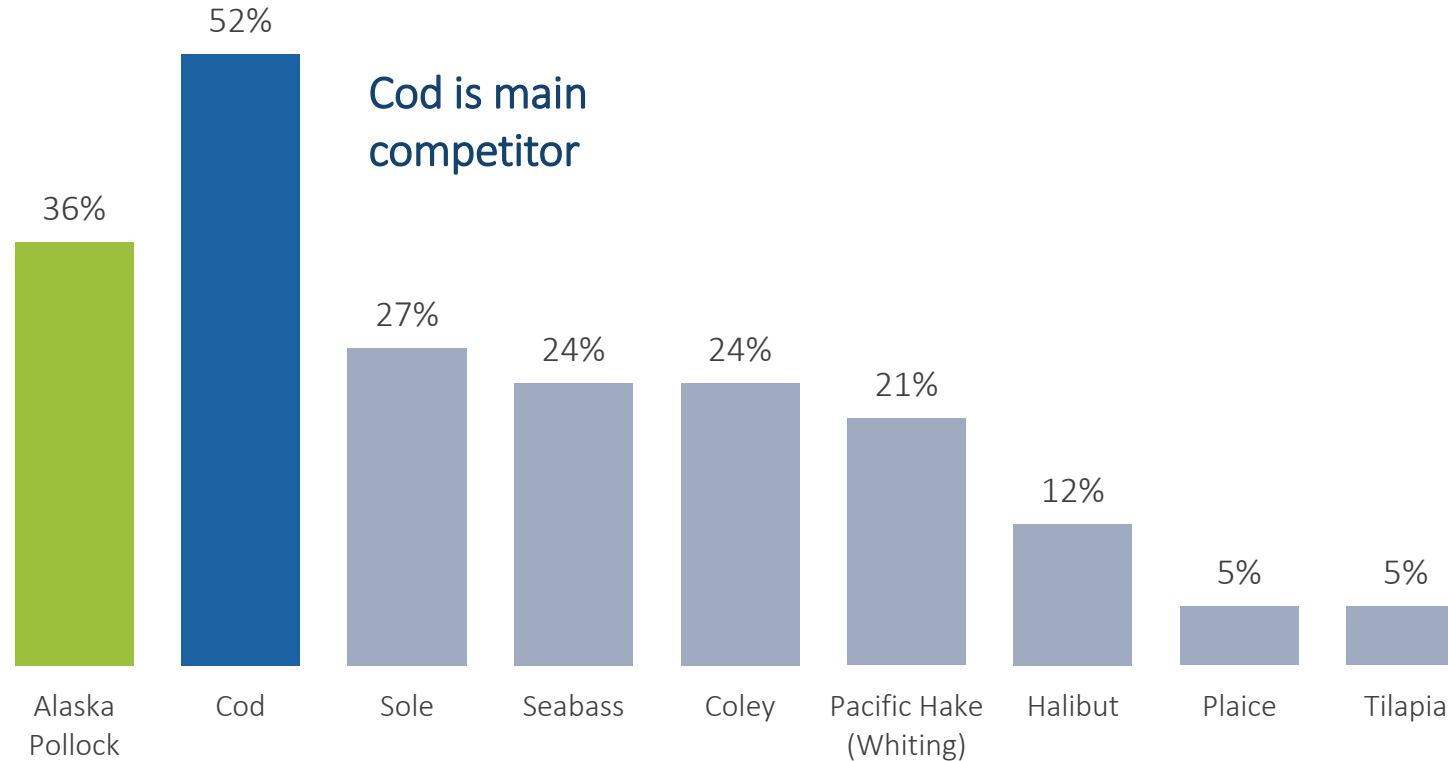


Alaska Pollock is in a "secondary tier" of whitefish species which includes with Sole, Seabass, Hake

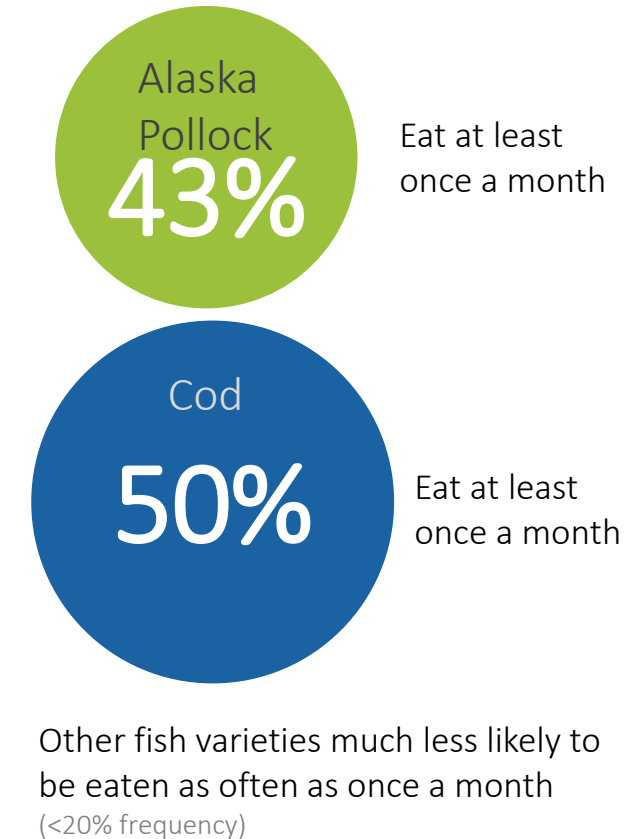




French consumers' whitefish repertoire is more diverse than other markets  
Despite not having a salience advantage over other species, Alaska Pollock is in a clear second place for whitefish consumption



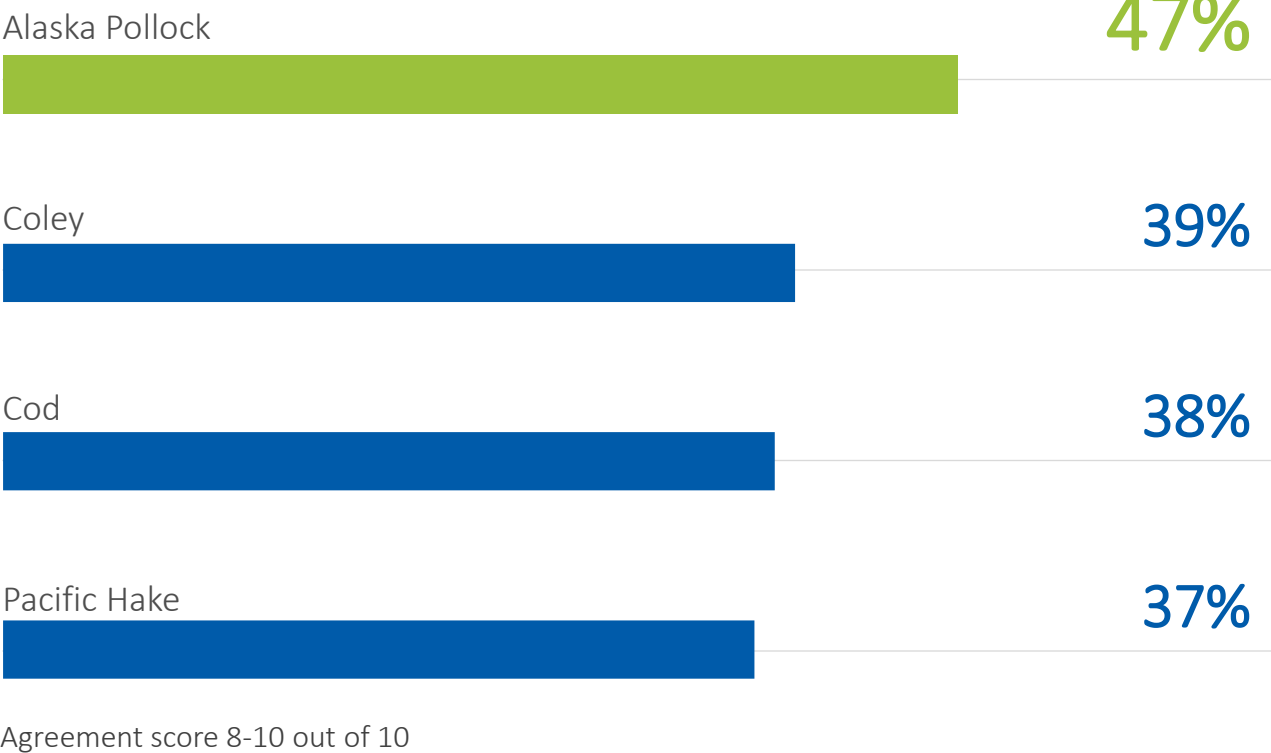
Likely to eat in next 30 days  
(score 8-10)



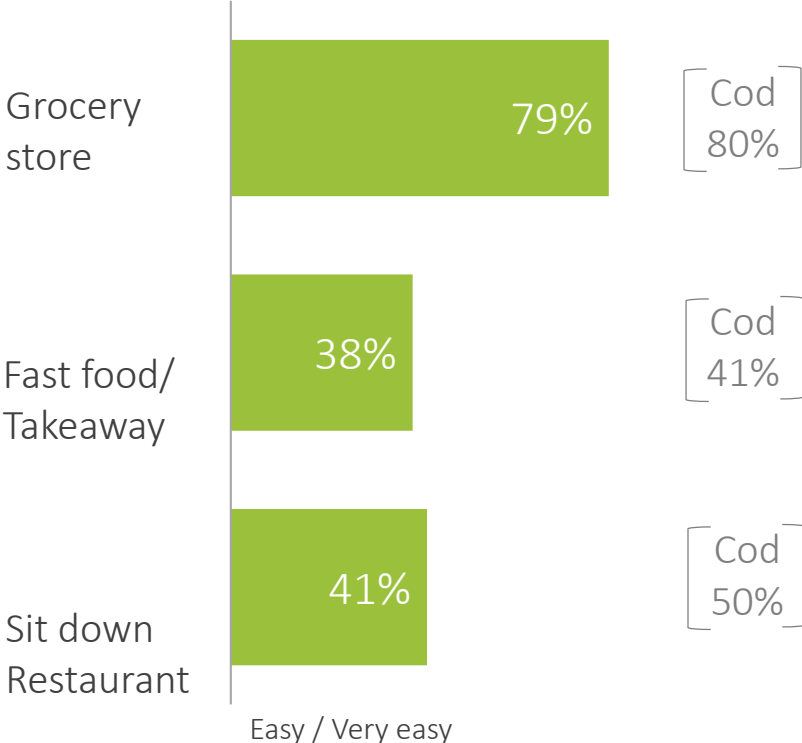
Alaska Pollock perceived to be most affordable whitefish - clearly ahead of Cod - and just as easy to find. This is helping to drive consumption.



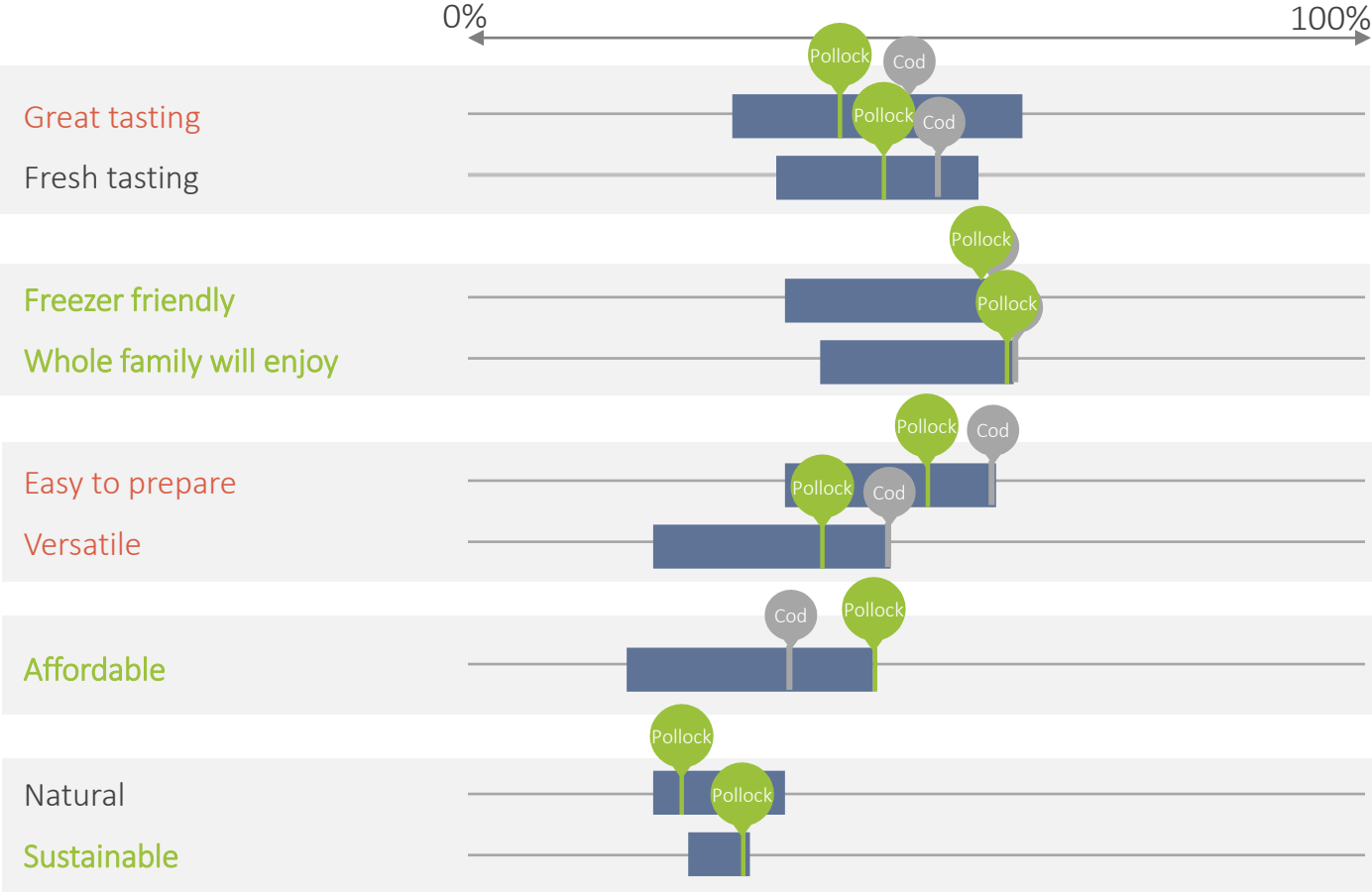
### Is affordable



### Alaska Pollock can be easily found at...



In France, Alaska Pollock needs to address perceived shortfalls in taste (as in UK). The Ease & Versatile element of “Family convenience” needs to come through more strongly



### Core whitefish characteristics

	Cod	Alaska Pollock
→ Taste	—	✗
→ Freezer Friendly	✓	✓
→ For whole family	✓	✓
→ Easy to prepare	✓	✗
→ Versatile	✓	✗
→ Affordable	✗	✓

Alaska Pollock strong performance for sustainability territory, as in UK

Whitefish Association Range

# France Summary

- France falls between Germany as the most developed AP market and the US & UK on the other hand. 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
- As in the UK and US, building salience and familiarity will be the foundation of increased Alaska Pollock demand, and should focus on addressing perceptions of a taste shortfall (similar to UK) and enhancing Ease of Preparation and Versatility in relation to delivering “family convenience”





# Next Steps





## Next Steps



①

Develop **Communications Toolkit(s)** by Country

②

**Train industry and partners** on Toolkit messaging

③

Work with partners to **launch new products and marketing campaigns** that utilize new messaging and promote WAP attributes, aligned with country specific goals

# Alaska Pollock

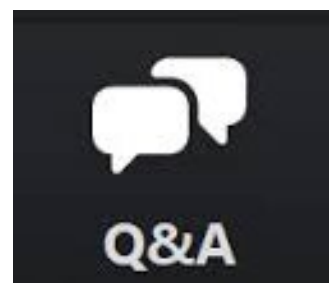
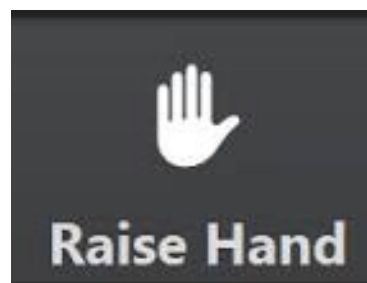
## European Performance

Management Summary  
Germany, France, UK

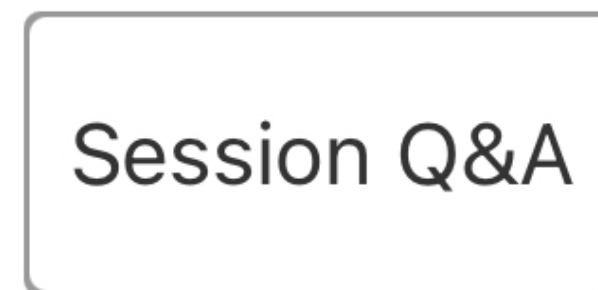




# Submitting Questions



**ZOOM**



**WHOVA**





# Thank You

A FISH TO REMEMBER, A YEAR TO FORGET

SEE YOU AT  
GAPPY HOUR!

