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U.S. AND EUROPE WAP ATTITUDES AND USAGE RESULTS



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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

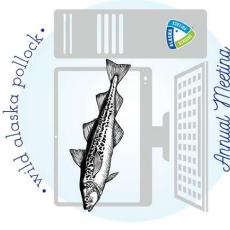
How can we effectively tell Wild Alaska Pollock's story?





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

2

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



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

3

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



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

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



Familiarity*	2019		2020		Likelihood to Consume [^] (within coming month)	Purchase Frozen From Grocery Store (often)
	New	YoY	Very Good/ Excellent Opinion	Fish Preference		
Wild Alaska Pollock	52%	55%	48%	4%	37%	29%
Salmon	83%	85%	56%	32%	39%	25%
Cod	70%	75%	41%	10%	27%	22%
Tilapia	73%	74%	45%	11%	30%	18%
Haddock	54%	56%	41%	4%	28%	22%
Sole	47%	47%	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=264), Cod (n=261), 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=165)

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=264), Cod (n=261), 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

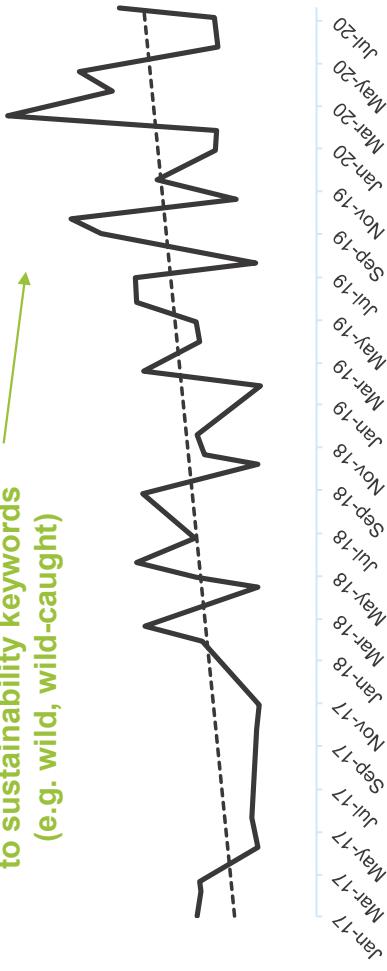


How much would you say you know about Wild Alaska Pollock?

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

+3pt
**Increase in
familiarity**

**Increase in search related
to sustainability keywords
(e.g. wild, wild-caught)**



2019: 52%
2020: 55%

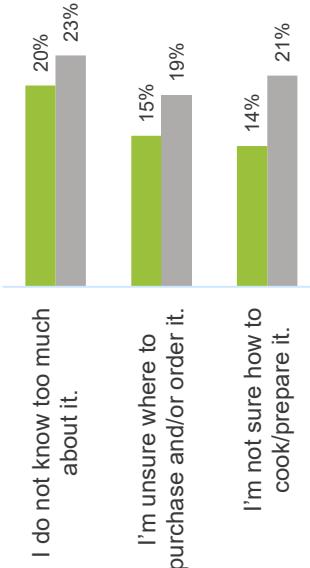
Q1. How much would you say you know about Wild Alaska Pollock? Net: A lot/Some/A little. Base: Total 2020 (n=1244), Total 2019 (n=1026)
* Search Data came from Google Trends

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



It is too expensive.

■ 2020 ■ 2019

What prevents you from purchasing Wild Alaska Pollock?

#2 Cost Barrier



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=261), Tilapia (n=264), Haddock (n=259), Sole (n=249).
 S9. How often do you eat [FISH AWARE] in the following settings? / purchase it at a grocery store or market, frozen. Base: Those who eat fish: Wild Alaska Pollock (n=449), Salmon (n=149), Cod (n=149), Tilapia (n=170), 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 shelffish)
in the past 3 months



66%

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



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**

**Meal
preparers**

**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%** ↑ **21%**

say their
purchase of fish
increased
as a result of COVID-19



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

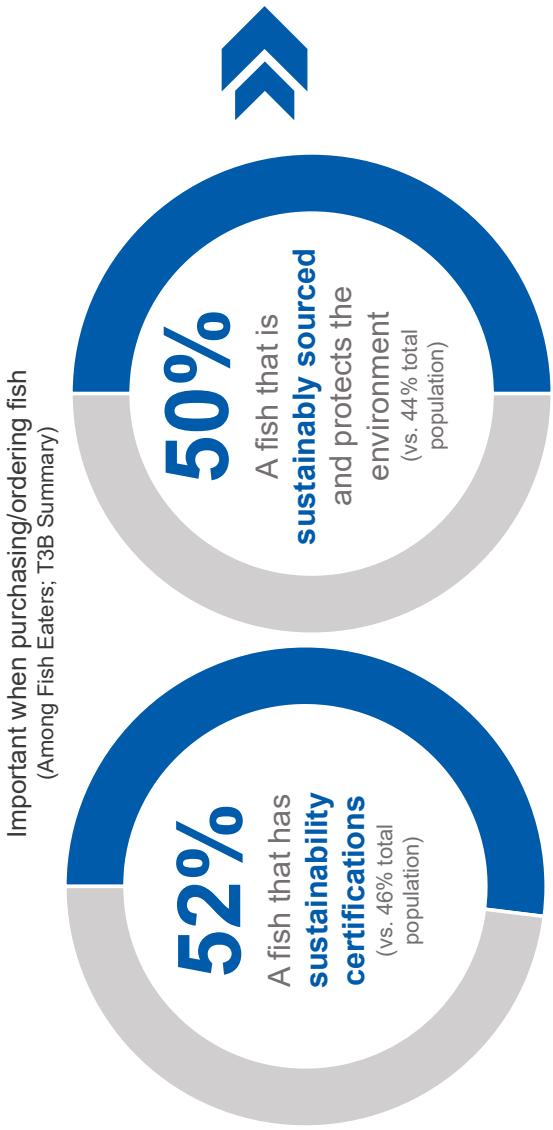
- | | |
|------------|--|
| 41% | Healthy option |
| 38% | Easy to prepare |
| 35% | Healthier alternative to
meat |
| 34% | Provided variety in meals |

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 increased (n=217)

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



Important when purchasing/ordering fish
(Among Fish Eaters; T3B Summary)



Attributes that encourage fish eaters to eat sustainably



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)

71%	Taste
59%	Cost/price
58%	Method of preparation

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? - N/E: 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 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

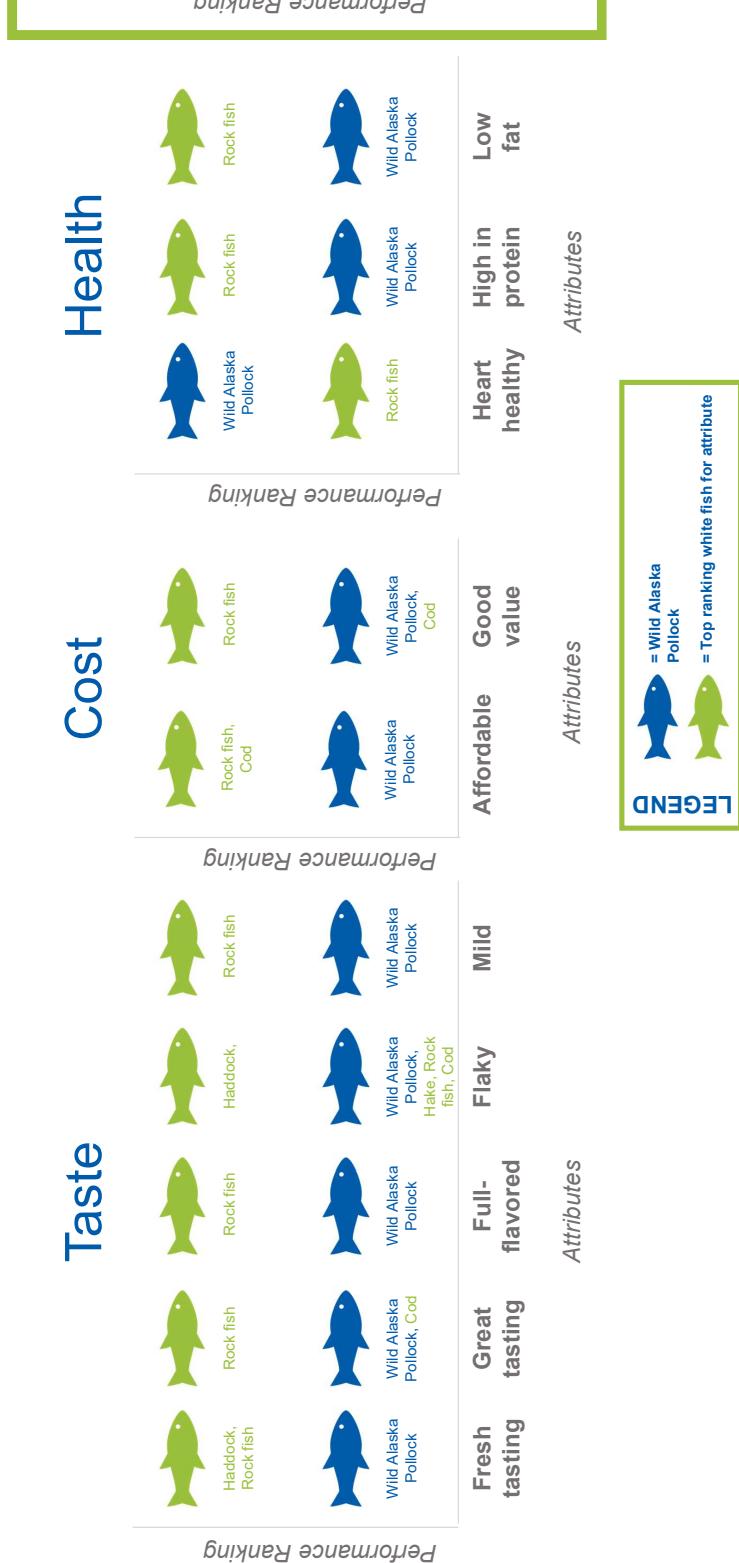
Table stakes.



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)

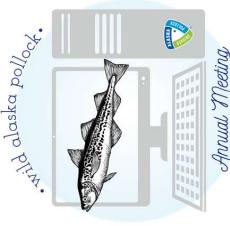


Wild Alaska Pollock gets credit for ease, competitors outperform on taste, health and cost



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; Calfish=216; Rockfish=149)

Versatility is 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

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

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

Differentiators.

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



Sustainability

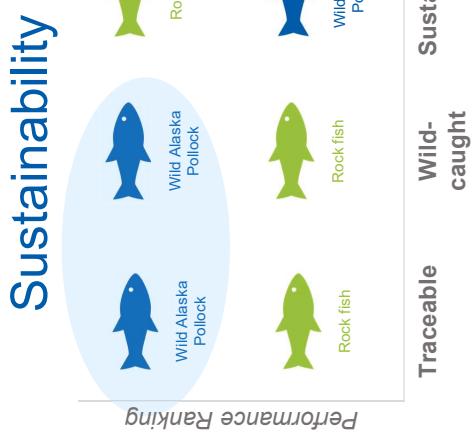
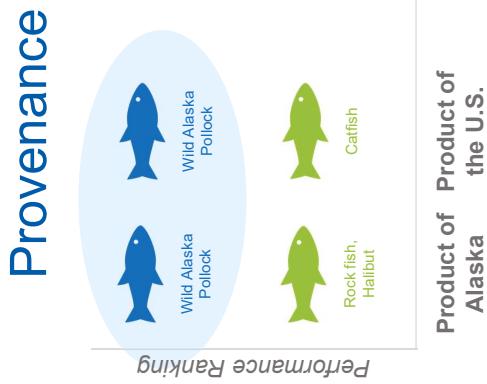
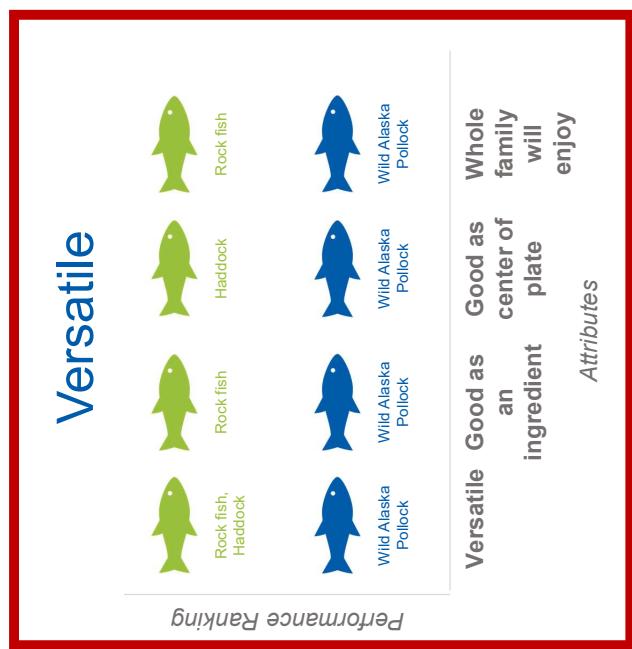
Provenance

Versatility

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; 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



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.



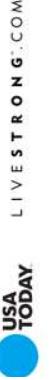
Next steps

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

Wild alaska pollock.





DR. LEIGH MORRIS
STRAT7 Bonamny 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).

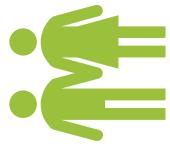
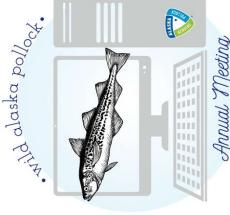
Focus on whitefish – Alaskan Pollock and competitive set



EUROPEAN OVERVIEW



General Themes in the European Fish Category



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

Fish is consumed
mainly **in home**

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

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

No clear bias in incidence across
demographic groups in any market

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

Particularly packaged fish (breaded or
non breaded) in UK and Germany
(France sees general downturn in
intention to eat fish)

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.

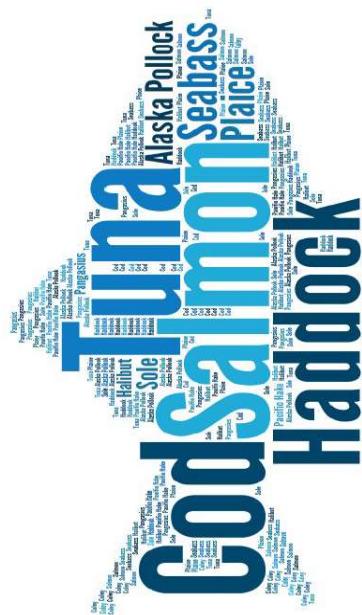
We therefore review each market separately



Germany

UK

France



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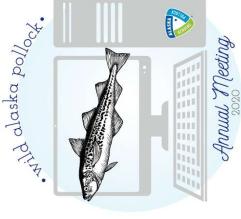
Strong intention (8-10) to eat next 30 days
Base: All fish eaters



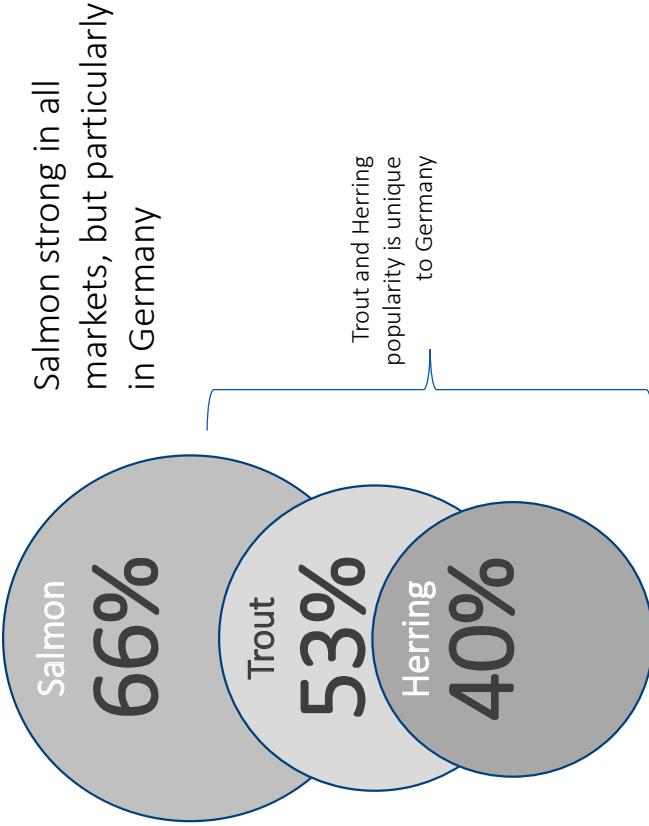
GERMANY



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



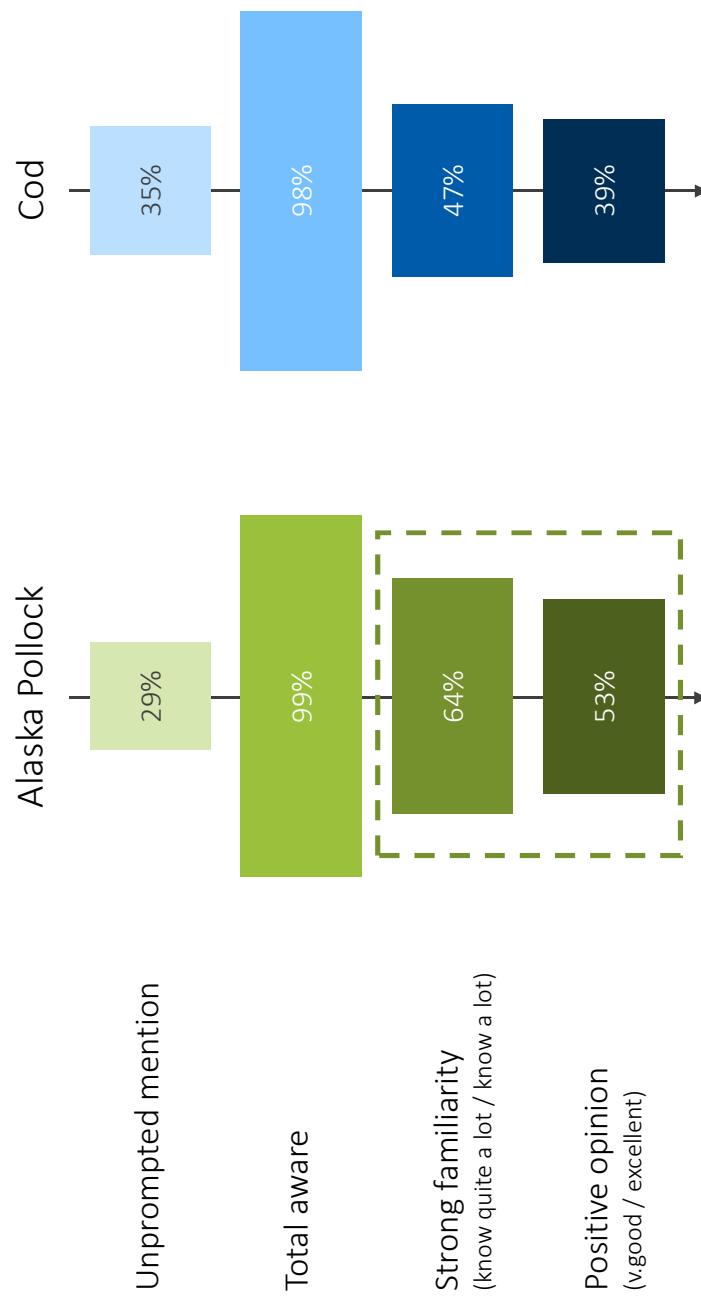
In the whitefish category
Pollock sits just behind Cod
and Perch for being
automatically thought of



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 species 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

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Base = Germany, all fish eaters, n=1000



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

Sustainability factors have the weakest associations for the whole category

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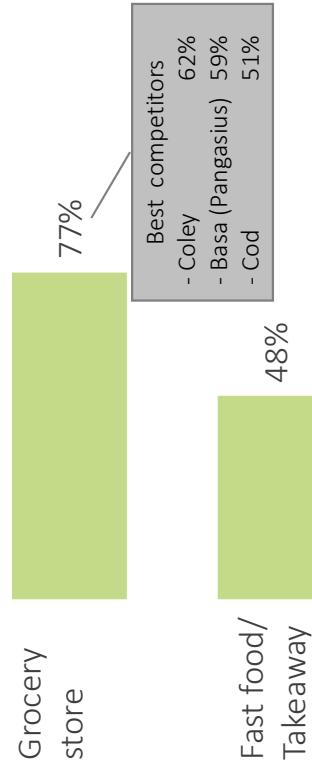
Q13: How much does each statement describe this type of fish?
Base: Germany, familiar with each fish type



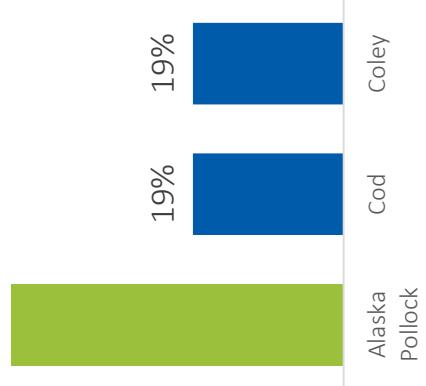
Strong familiarity and positive opinion for Alaska Pollock, supported by affordable pricing and wide availability, translates into the highest whitefish consumption rates



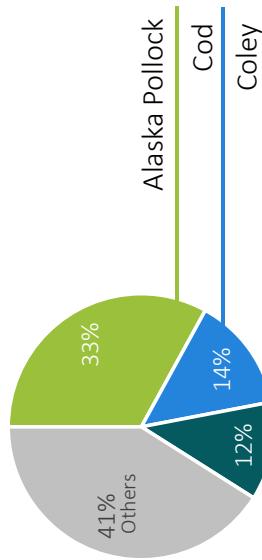
Ease of finding Alaska Pollock to buy at....



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"

Likelihood to eat next 30 days is a score of 8-10 out of 10

Share of servings based on calculated number of whitefish servings over a 3 month period

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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





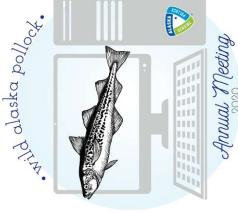
Annual Meeting
2020



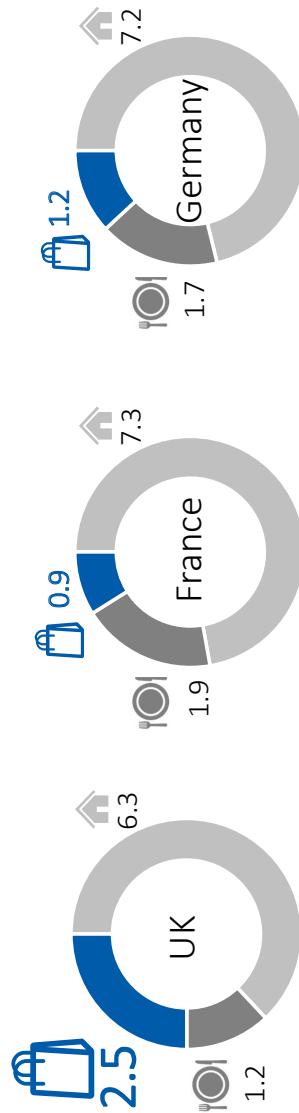
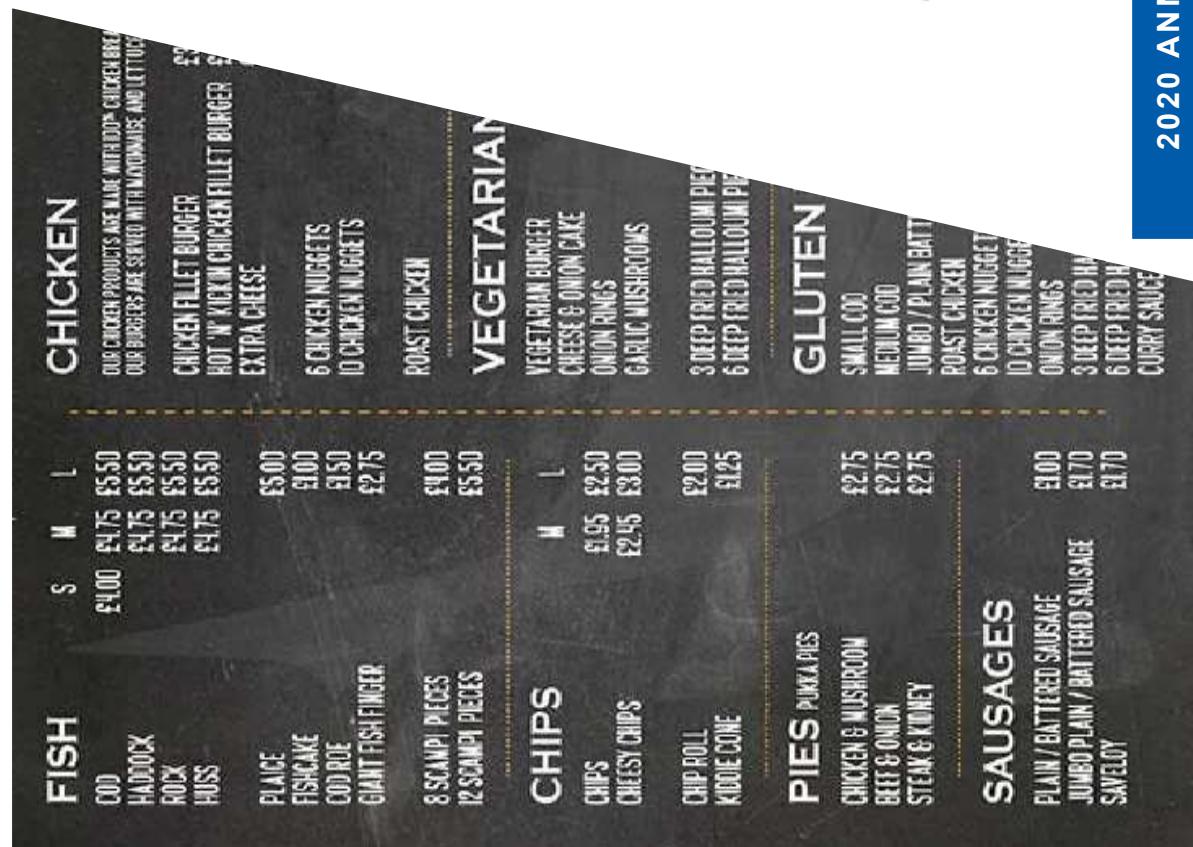
167

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UK

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



Mean share of 10 recent servings

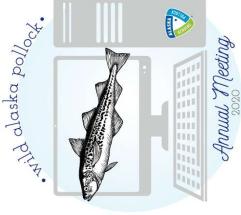
2020 ANNUAL MEETING

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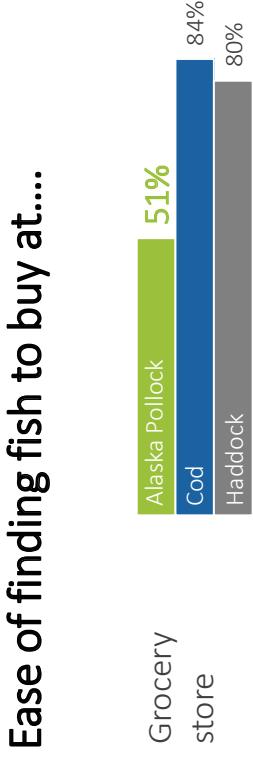
Base: UK, all fish eaters, n=1000



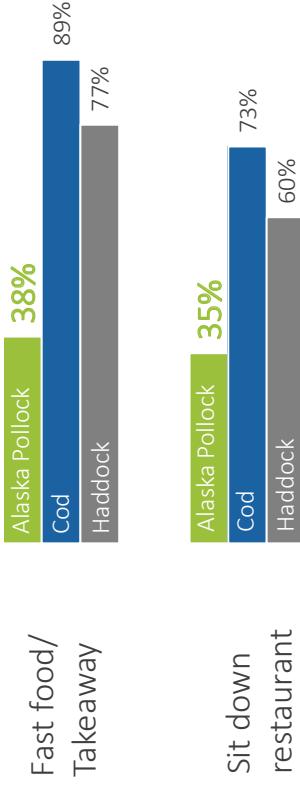
Alaska Pollock is a “hidden in plain sight” fish in the UK, whilst Cod and Haddock are promoted widely in restaurants and grocery stores



Ease of finding fish to buy at....



vs.



Easy / Very easy

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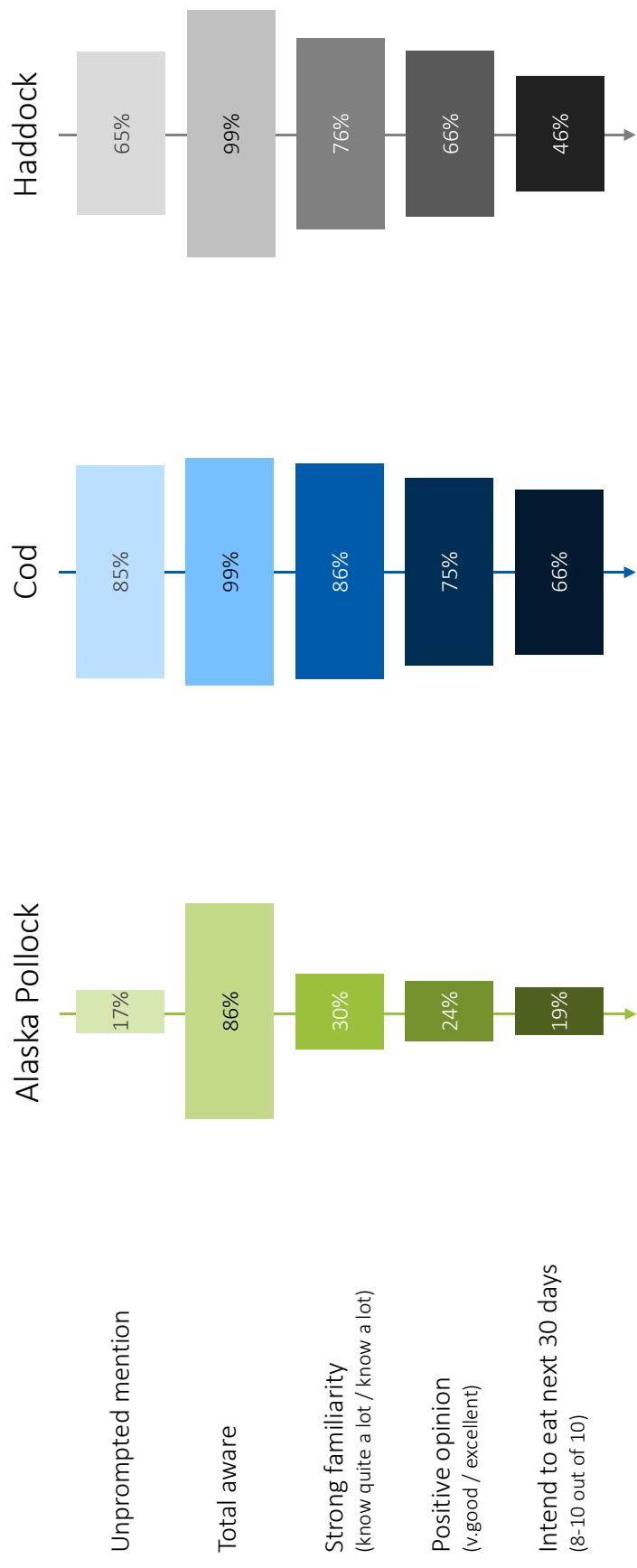
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Base: UK, those aware of fish type and buy fish at location
Excludes “not sure”





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.



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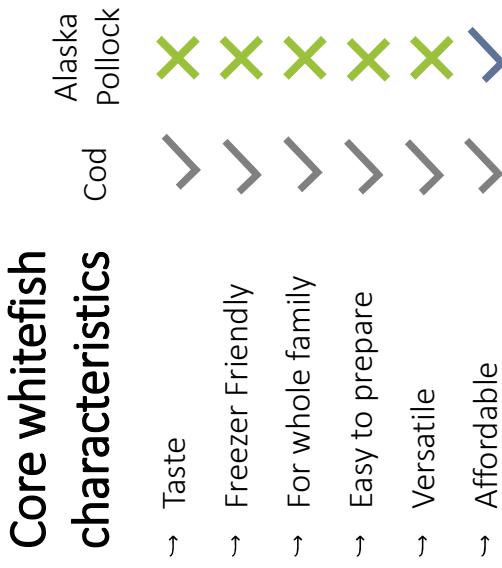
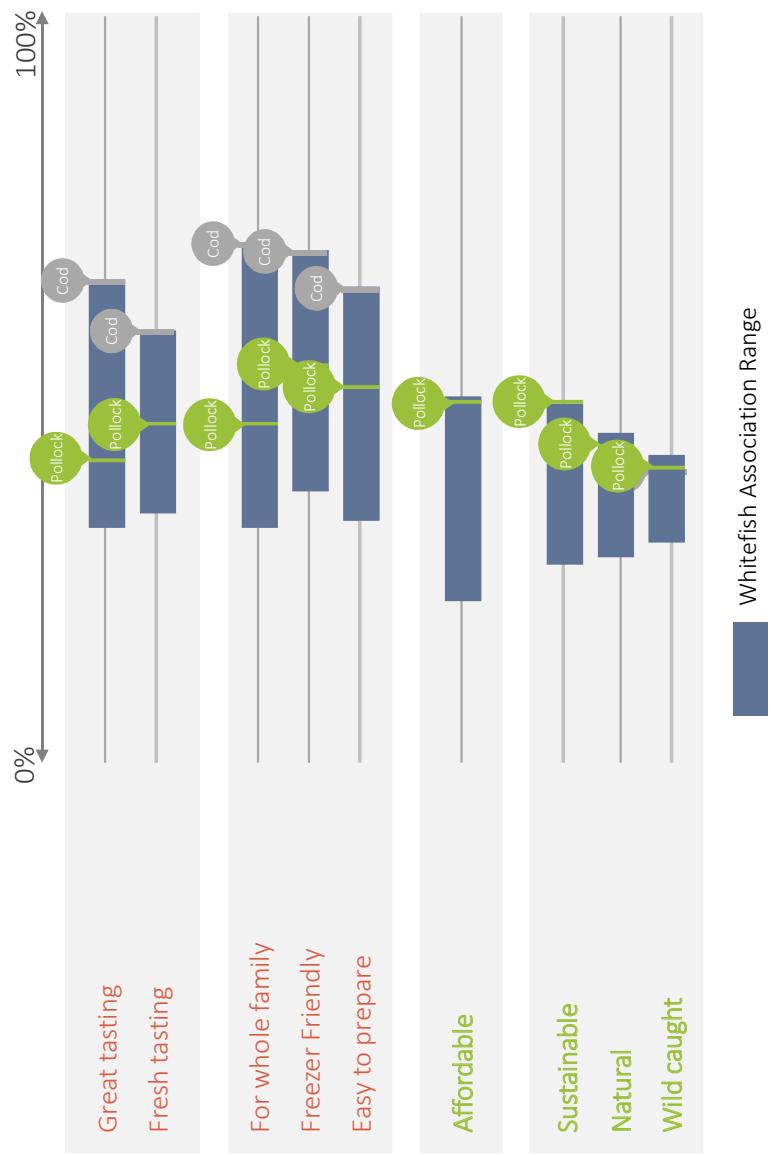
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Base: UK, all fish eaters, n=1000



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



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



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FRANCE

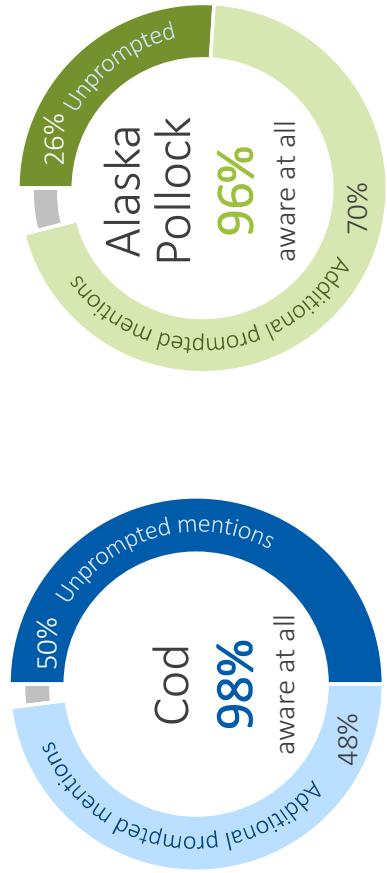
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In France almost all fish eaters recognise the Alaska Pollock name, but it has much lower category salience than Cod (the strongest species)



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



Cod twice as likely to
come to mind as
Alaska Pollock

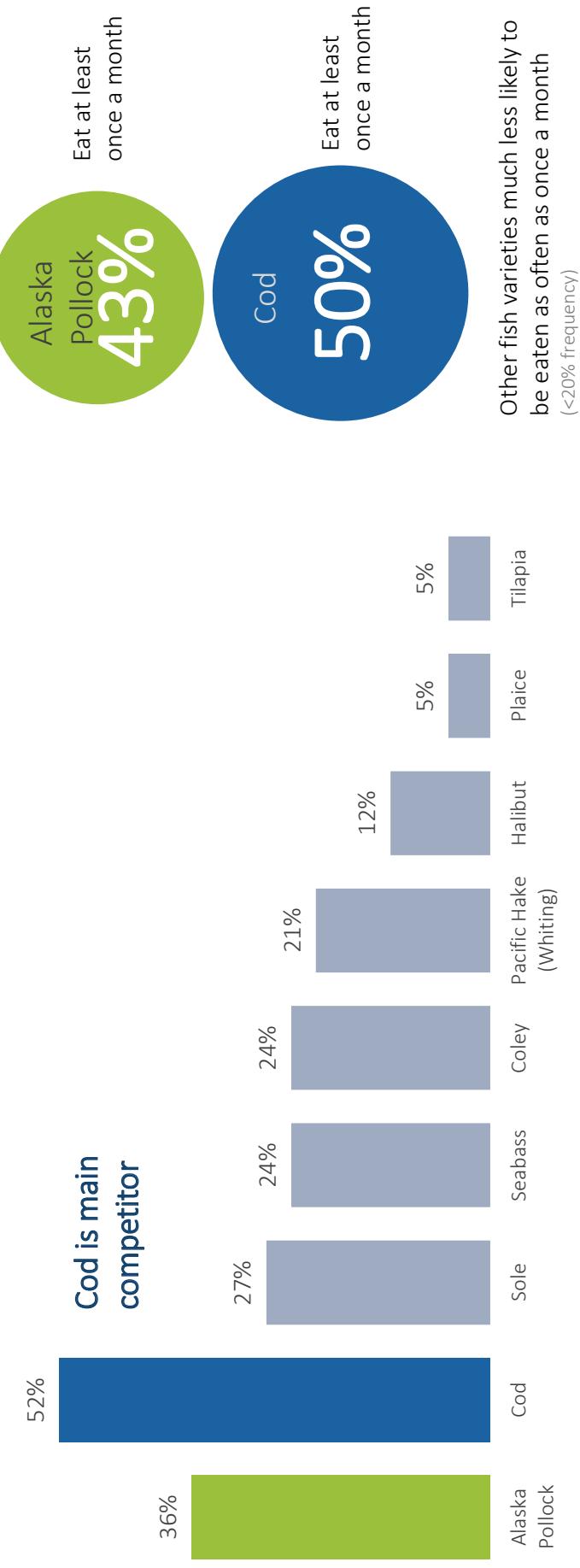
Other data shows Alaska
Pollock also has much
weaker familiarity



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





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

47%

Alaska Pollock

39%

Coley

38%

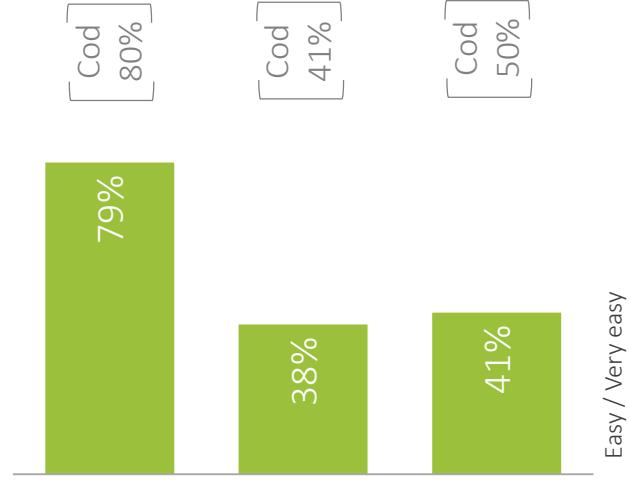
Fast food/
Takeaway

37%

Sit down
Restaurant

Agreement score 8-10 out of 10

Alaska Pollock can be easily found at...



Easy / Very easy

Base: France, aware of fish type

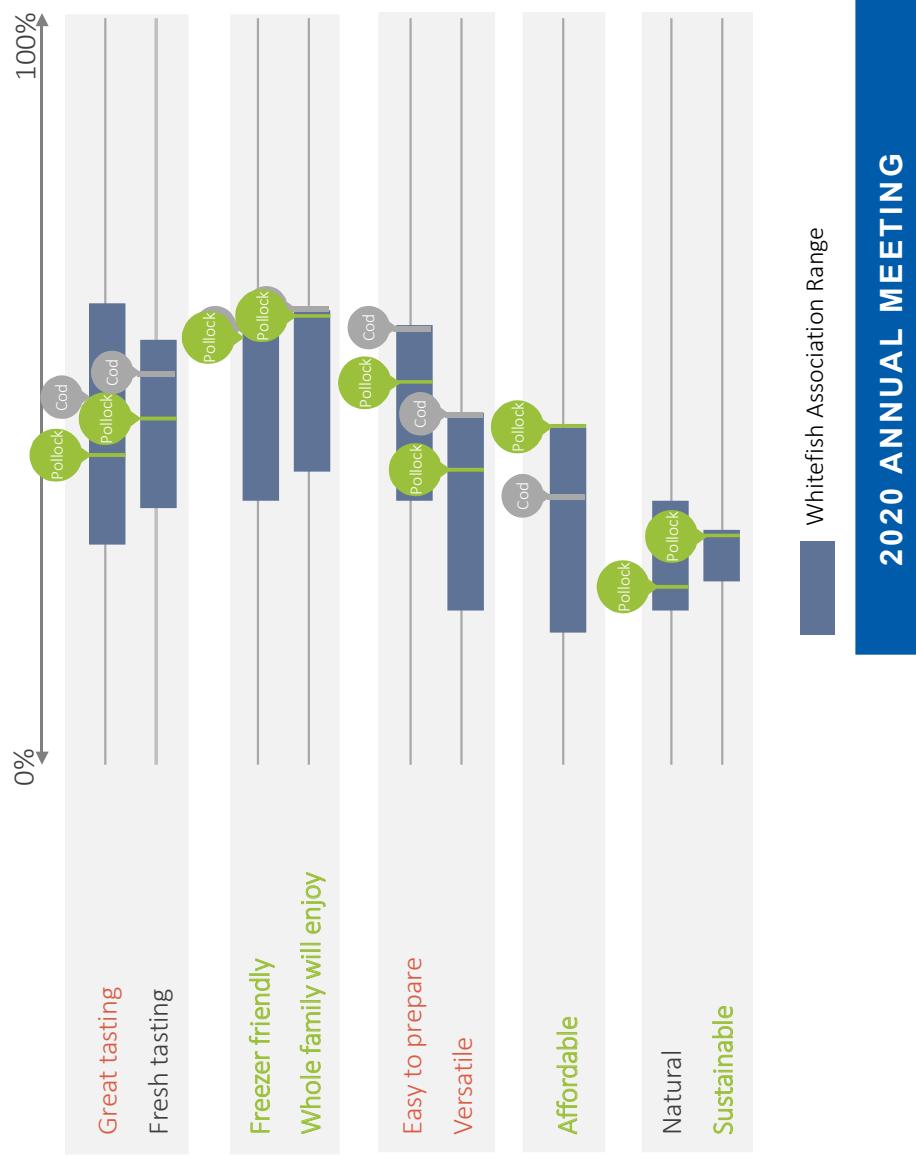
Excludes "not sure"

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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



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Q13: How much does each statement describe this type of fish?
Base: France, familiar with each fish type

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