



GAPP 2022-23 Strategic Plan

I. Overview

Over the last three years, the Association of Genuine Alaska Pollock Producers (GAPP) has worked to learn as much as possible about our fish, the Wild Alaska Pollock, and about the consumers—both current and potential—who purchase it either in the U.S. or around the world. Think of the last three years as a revamp, a reboot, toward better understanding both the challenges and opportunities that are present when it comes to GAPP's singular focus: building global demand for Wild Alaska Pollock.

In the last three years, GAPP has made great strides in catapulting Wild Alaska Pollock from an anonymous whitefish to a protein with a defined story that resonates with consumers. Through member-driven leadership, GAPP has conducted research to hone that narrative and drill down into what motivates trial, purchase and turns those behaviors into habit. GAPP has forged relationships with key customers across the value chain that have yielded partnerships which put new, innovative Wild Alaska Pollock products into new channels, reaching consumers that have never tried our fish previously.

As a result, demand for our core Wild Alaska Pollock products has never been higher and prices have continued to rise. Yet these increases beg the question: is there a price ceiling on those core Wild Alaska Pollock products, and if so, what is the break-through product that will bust that ceiling and allow for higher value products in the future? The big win for GAPP is to find new products that lift Wild Alaska Pollock into new markets at higher price points that compete with higher cost proteins.

The plan for 2022-23 comes down to two words: **elevate** and **activate**. In the coming year, GAPP will work to *demand even more* from our partnerships, our programs and our research. Equally as important, we will leverage the knowledge we have already gained, and we will *boldly action against it*—taking calculated risks and thinking big about how to propel Wild Alaska Pollock to even greater heights. Impatient with the status quo, we will invest in innovation that are forward-looking, value-added, unique products that solidify growth for our fishery's future.

We are ready to be held accountable against the following ambitious goals, broken down into four key categories: Marketing; Research; Partnerships; and Member Services. Notice in each section a call-out for innovation, which will be an overarching focus for GAPP over the next year.

II. Strategies and Metrics

1. Marketing

After an increase in familiarity of Wild Alaska Pollock from 2019 to 2020, this metric held steady in 2021. This comes after a year where there was difficulty introducing new products into consumer channels as channels like retail were focused on ensuring a stock of essential items, limiting exposure to Wild Alaska Pollock. From 2020 to 2021, favorability and preference for Wild Alaska Pollock also held steady. Despite

holding steady in terms of familiarity, GAPP's proprietary year-over-year research illuminated three key areas for GAPP to focus on in 2022-23 to drive demand: Continue to tie sustainability to Wild Alaska Pollock; Leverage our 100% wild-caught attribute in all messaging; Build consumer awareness and trust in the fish by motivating chefs at sit-down restaurants to menu Wild Alaska Pollock.

Given this intelligence, GAPP will be making a significant shift in its plans for the coming year. Instead of pursuing ad hoc campaigns around certain high-volume, high-noise time periods like Lent, we will instead launch a comprehensive "always on" campaign geared toward driving consumer familiarity with Wild Alaska Pollock and its three attributes most likely to motivate purchase: sustainability, nutrition and wild-caught in addition to the two table steaks of taste and affordability. This campaign will utilize multiple marketing and communications tools and vehicles (social media, influencers, earned and paid traditional media, brand marketing partnerships and more) and span the full year, from April 1, 2022 to March 31, 2023 with the sole goal of raising familiarity. The campaign will leverage GAPP's existing messaging toolkits to the fullest and will form a model for similar campaigns globally in the coming years.

There is also much optimism and opportunity for Wild Alaska Pollock Surimi Seafood. GAPP will work over the next year to rebrand, relaunch and re-introduce U.S. consumers to surimi seafood as part of a separate marketing effort. While the "always on" campaign will promote Wild Alaska Pollock products generally based on three core attribute pillars, the surimi campaign will focus on introducing consumers to surimi seafood in a food-forward way. Based on the surimi-specific research conducted this year, consumers need to be invited to the surimi seafood section at retail, introduced or reminded of the product's existence, and provided with helpful tips and recipes to encourage trial and purchase. GAPP can leverage these insights and create content that does just that, thereby increasing sales for surimi seafood across the category. GAPP will utilize recipe development through influencers and cross-promotional efforts with branded surimi manufacturers to motivate consumer trial and increase sales. GAPP will also continue its efforts, in partnership with the National Fisheries Institute (NFI) to pursue enforcement of truthful labeling regulations and nomenclature that describes surimi seafood not as "imitation."

Based on the year-over-year research, GAPP must also continue to focus on chefs, as they are a trusted source who can introduce consumers to Wild Alaska Pollock. Over the past two years, GAPP has worked to run "restaurant promotions" in Seattle, Nashville, Chicago and to a lesser extent New York. While these have been hugely informative, we believe we must "elevate" and reach chefs at a higher level—utilizing their networking and continuing education platforms, as well as their membership associations like the National Restaurant Association and other organizations, to introduce them to Wild Alaska Pollock and its attributes. For the coming year, we will focus first on corporate chefs with ties to local and regional restaurant chains to trial outreach activities and measure success.

Marketing Innovation

In order to drive innovation in our marketing, we will put a renewed focus on outreach efforts to major foodservice customers, working to understand their challenges and growth opportunities and working to position Wild Alaska Pollock as a solution for them. With the long-term aim being to double the spend against Wild Alaska Pollock in the U.S. and jumpstart a big increase in Europe, GAPP will identify high-value foodservice targets to meet with, learn about and from, and identify an expert firm to help GAPP ideate on those learnings on behalf of the industry.

GAPP will also work to marry proactivity with preparedness, continuing to collaborate with other seafood allied industry organizations to address issues that may threaten the reputation of the Wild Alaska Pollock industry. A special challenge this year will be reassuring Wild Alaska Pollock customers about the sustainability and management of the fishery considering the quota reductions.

Lastly, in addition to addressing potential reputational issues, GAPP will work to better understand the barriers to increased Wild Alaska Pollock consumption: limited space for product or limited occasional consideration for fish.

Proposed Strategies include:

- Leverage our knowledge base about consumer purchase drivers to create an “always on” marketing and communications strategy around three key pillars: *sustainability*, *nutrition* and *wild-caught*.
- Build upon surimi consumer campaign trial and create content (recipes, messaging) that introduces consumers to surimi seafood made from Wild Alaska Pollock and drives purchase.
- Change the conversation around imitation crab by familiarizing consumers with the surimi vernacular.
- Build relationships with leading Quick-Serve Restaurants to encourage call-out of Wild Alaska Pollock by name and/or attribute.
- Leverage chef-influencers to introduce corporate chefs and their restaurant groups to the attributes of Wild Alaska Pollock, encouraging them to create new items featuring the fish and providing them turnkey assets to drive trial from guests.
- Continue building GAPP’s social media presence in conjunction with an “always on” strategy that leverages our existing messaging.
- Encourage usage of GAPP’s toolkits globally by members, partners and customers and continue developing international resources (messaging, videos, photos, sell sheets) for use in international markets of interest.
- Prepare to protect the Wild Alaska Pollock industry from reputational threats in conjunction with allied industry organizations through creation of crisis messaging playbooks, preparedness drills and close coordination to deal with emerging threats.

Proposed Metrics include: Based on \$1.0 proposed investment

- For targeted audience, increase in Year-over-Year familiarity with Wild Alaska Pollock by at least 2 points to-close the gap with competitors: tilapia or cod.
- For targeted audience, significantly increase in Year-over-Year awareness of key Wild Alaska Pollock attributes (*sustainability*, *nutrition*, *wild-caught*)
- For targeted audience, improve overall consumer perception of Wild Alaska Pollock and out-perform competitive whitefish on the three identified attributes specifically.
- Measured usage of GAPP messaging by customers and partners globally.

- Increase specific Wild Alaska Pollock mentions by name or attribute on QSR menus.
- Increase in corporate chef community awareness of Wild Alaska Pollock and corresponding increase in menu placement of Wild Alaska Pollock.
- Increase in trial of surimi seafood by U.S. consumers and retail prominence.
- Sustain social media engagement rate of above 3.5% (industry standard for an above-average engagement rate for content).

2. Research

Our 2022-23 Wild Alaska Pollock “Learning Agenda” is designed to be an extension and elevation of the learning that we gained over the past year. We built this plan to deepen our core Wild Alaska Pollock knowledge, sharpen our overall messaging, investigate new opportunities for growth, and to address the questions and needs of our committees.

If we only did one study next year, it should be our Year-Over Year-study, conducted by Ketchum Analytics. Going into its fourth year, it is the cornerstone of our Wild Alaska Pollock understanding, measuring consumers’ perceptions of Wild Alaska Pollock over time and identifying what matters most to them. We use this tool to measure our progress in building our Wild Alaska Pollock brand in the U.S. and to ensure our marketing and communications are in line with consumers’ ever evolving wants and needs. Maintaining this critical annual research is not only key to our future but is critical to measuring the success of our new “always on” marketing approach.

Next, we want to move beyond the foundational consumer understanding of Wild Alaska Pollock and focus on value, examining consumers’ “willingness to pay” for certain products or product differentiators through a series of studies. We will get a deeper understanding of which bundle of Wild Alaska Pollock claims (most sustainable, low carbon footprint, great mild taste, high Omega 3s etc.) will have the greatest impact on sales overall and when compared to competitive white fish, like Cod and Tilapia. With these learnings, we can create the most compelling communications depending on the situation and these insights can be leveraged by everyone in the industry with a consumer-facing brand.

Mirroring our marketing focus on utilizing chefs to introduce consumers to our fish, with every restaurant program we do, we get smarter on how to build our brand in that channel. As we look to develop our restaurant strategy going forward, we want to tap into the industry expertise of a Datassentials or Technomics to help guide that strategy and support our foodservice/restaurant channel development for both fillet and surimi.

Our ongoing relationship with Urner Barry gives all GAPP members access to not only the Surimi Supply Tracker and its wealth of data but also access to Urner Barry’s analytics team to conduct custom deep dives on member-specific issues. We will continue honing this tool in the coming year for our industry’s benefit.

Our Surimi Attitudes and Usage (A&U) study has driven a lot of action and pinpointed quite a few opportunities. One of those opportunities is bringing surimi seafood to the forefront of the smoked fish/seafood section of retail. Based on input from the surimi committee, we will explore the consumer path to purchase, seafood buyer concerns and needs, and the elements of a retail value story for surimi. We will also conduct research to support GAPP and NFI’s efforts to petition federal regulators for more

truthful labeling of surimi seafood, specifically removal of the term “imitation” from current label and packaging requirements.

Turning to the global market, GAPP will be completing its “Wild Alaska Pollock 2040 Project” that will identify the 20 global markets, both developed and developing, with the highest potential for long term demand growth for high value items. GAPP will utilize this study as a roadmap to determine what consumer or business intelligence is required for us to fully capitalize on the unique opportunity each of these markets, that span the entire globe, have to offer.

Lastly, we plan on supporting Roe growth initiatives in either existing markets or in disruptor markets with insights that will support the creation of new materials for use by our members and customers.

Research Innovation

GAPP will also look at conducting research into unmet consumer needs and how various Wild Alaska Pollock products—from fillet, to surimi, to roe, to meal and oil—could potentially meet those needs. Contrasted with the research listed above, this research is designed to identify white space, to fuel new innovation and opportunity. GAPP will identify at least one such study to look to conduct in the coming year focused not on existing products, but on new opportunities and unmet needs.

Proposed Strategies include:

- Identify the barriers to increased consumption and build the business case to address those barriers.
- Move beyond foundational consumer understanding into learning about key drivers and opportunities that could lead to product innovation to increased demand.
- Identify the preferred areas for Wild Alaska Pollock growth that will elevate the species based on increased understanding of foodservice consumption behaviors and opportunities for market expansion and growth.
- Build out global surimi paste supply tracker to better meet member needs.
- Conduct research around surimi seafood to aid in retail product placement as well as to support regulatory enforcement strategy.
- Understand the 20 highest potential markets for Wild Alaska Pollock demand growth and develop research strategies unique to each market.
- Create an immediate action plan for how Wild Alaska Pollock will win 3 out of the top twenty in-market for execution in 2023-24.
- Understand global opportunities for roe and roe-based products and action against those opportunities.

- Support NFI surimi-labeling-change effort with consumer research that identifies marketplace confusion.

Proposed Metrics include:

- Identify at least 3 key purchase drivers and explore drivers with key partners to bring innovations to life.
- Identify at least 1 opportunity for Wild Alaska Pollock growth/innovation in foodservice category.
- Better disseminate surimi paste supply tracker and increase member engagement with tool to ensure full industry utilization.
- Identify 2 in-market tests of in-store promotions/branding at retail and measure increase in volume/usage based on shopper/retail work to activate in 2023-24.
- Successfully deploy regulatory engagement strategy with the National Fisheries Institute for surimi seafood nomenclature.
- Complete the “Wild Alaska Pollock 2040 Project” and develop a roadmap of next steps and an immediate action plan for at least 3 markets.
- Identify and issue comprehensive report on future global roe opportunities.
- Identify at least 1 unmet consumer need where Wild Alaska Pollock product(s) can be a solution.

3. Partnerships

Over the past three years, GAPP has invested significantly into putting Wild Alaska Pollock into new product forms, into new channels or associating it with influencers to raise its profile with consumers. Those goals will always be the core of the GAPP Partnership Program and this will remain unchanged.

But this year, in the spirit of our overall plan, GAPP will focus on elevating the partnership program in two key ways. First, we will look to add more specificity around the types of partnerships we will approve and ultimately fund. Those specifics will be based on a comprehensive analysis of past partnership learnings, trends and insights data GAPP has funded and collected over the last three years, and advice and counsel from our committees. Within the application process, GAPP will specifically seek certain proposals for specific channels, categories and product-forms. We will seek these proposals globally and fund the proposals—regardless of location—that meet these new elevated program goals and have the potential to deliver the most return on investment.

To put forth these new specifications for proposals, we will spend the first part of the year identifying new products and/or channels where we believe the funding should be focused. Leveraging our significant body of research, and some of the aforementioned studies, we will create a proverbial “wish list” of product-types and channels for investment. Then, leveraging the new relationships and networks we accessed this year to attract new partners to the program, we will disseminate updated requirements and work to solicit partners with the ability to innovate these specific products or enter

the identified channels. We will also explore the possibility of a think-tank or innovation summit that brings together potential partners, past partners and GAPP leadership to work together creatively.

We also must fully leverage the learnings of our past partners. With the significant volume of partners we have accumulated, GAPP will work to collate learnings, yielding an analysis that will help inform future partnerships and the future direction of the program. We will also utilize this analysis to create a more comprehensive application requirements, funding breakdowns by geography and channel and better utilize trend and consumer insights to identify the most fruitful product category opportunities.

We will also utilize the analysis to create improved metrics that measure the success of the individual partnerships, as well as the program overall, so that GAPP can better track its significant investment in this area. Similarly, GAPP will leverage the learnings from the Wild Alaska Pollock 2040 Project research—which will identify emerging international markets with the most opportunity for Wild Alaska Pollock—to determine if there is benefit in a program in a new market(s) and the associated specifications of that new program.

Second, GAPP will work to engage and ultimately recruit a select few partners for special innovation. Through our food chain outreach analysis and engagement referenced above, GAPP will work to identify 2-3 high-value targets for partnership innovation and work to brainstorm ideas and bring those ideas to fruition. Whether that partner comes from foodservice, retail or even institutional, this specific effort will be focused on identifying the proverbial “white whale” for the industry.

Lastly, GAPP will work to ensure that all partners are actively using our consumer-tested messaging and turnkey materials. From the beginning, one of the core elements of GAPP’s marketing strategy has been to encourage consistency from everyone in terms of positioning Wild Alaska Pollock to consumers. This becomes even more important with an “always on” marketing strategy that leverages not only GAPP’s voice, but the voices of all who touch consumers—including our partners with consumer-facing brands—to amplify the key platforms around which GAPP is creating content: sustainability, nutrition and wild-caught. The partners in the coming year will need to be even more fully integrated into GAPP’s marketing and communications plans for it to be successful.

Partnership Innovation

While the core of the partnership program, described above, will continue, GAPP will also look to light a fire under innovation. We will do this by reserving a percentage of funds to be used for specific partners that GAPP cherry-picks. Such partners will be selected based, in part, on the unmet needs research and also on the research of the past and key learnings that have identified product gaps or opportunities to be filled. GAPP will then conduct targeted, specific outreach to companies that we believe would be interested in trialing a concept with us. In doing this, GAPP may recruit and solicit an R&D firm to help with product development and partner identification, as well as concept execution.

For example, if GAPP were to have spotted the “hot chicken” trend that drove the chicken sandwich wars in 2020 and had this program in place, it might have worked to develop a “hot Wild Alaska Pollock” sandwich and gone after a specific QSR who we felt might be interested in the concept. GAPP would have then worked with that specific company to develop a partnership and bring the concept to fruition. It is important to note that GAPP isn’t doing innovation itself, but rather identifying opportunities for

innovation and driving back through the industry to execute against that innovation. These funds are dedicated to finding the next “white whale” customer for the industry to chase.

Proposed Strategies include:

- Develop a comprehensive recommendation for Board approval on the strategic priorities of the partnership program including recommendations for spend that consider: geography, channel, category and product value based on analysis of past partnership program insights and consumer trends data and intelligence.
- Leverage research to identify a wish-list of new products and new channels for partnership program proposals.
 - Attract additional partners to the North America Partnership Program with a focus on new channels and new product innovations in key areas.
 - Attract new partners to Global Partnership Program with a focus on new countries and new product innovations in key areas.
 - Encourage use of Wild Alaska Pollock messaging toolkits by partners and fully leverage them in new marketing and communications strategy.
 - Better collect and collate insights from partnerships on programs and key learnings to inform metrics for future partnerships and program overall.
 - Explore possibility of additional Partnership Program market based on WAP 2040 research.
 - Partner with surimi companies to expand footprint of surimi in store and improve communication about surimi seafood at retail.
 - Conduct targeted foodservice food-chain outreach to identify new big menu innovation for Wild Alaska Pollock based on a deep understanding of their specific challenges and opportunities.

Proposed Metrics include:

- 3-year Partnership Program plan that identifies list of product innovation categories and channels that will govern all new programs and associated requirements.
- Partnership recruitment targets broken down by geographic, channel, category and product.
- Develop usage criteria and tracking mechanism for partner usage of GAPP messaging and integrate at least 2 partners into new “always on” marketing program.
- Issue 2 learning reports on past partnerships and hold at least one partnership event for GAPP members as a “thinktank” for innovation.
- Bring proposal to GAPP Board for approval of additional market for Partnership Program based on identified 2040-research opportunities for activation in 2023-24.
- Gain Wild Alaska Pollock placement on menu (permanently) in 2 foodservice establishments in collaboration with ASMI

- Identify 1 “white whale” concept and one potential partner and execute an MOU to begin collaboration.

4. Member Services

GAPP will always be, first and foremost, a membership-led organization. It has worked hard to build up and solidify the membership, develop and adhere to core strategies and tactics, report transparently on investment return, and solicit new sources of funding. All of those activities will continue in 2022-23 with an eye towards elevating our membership services to continue demonstrating value for all who support GAPP’s mission.

Proposed Strategies include:

- Ensure that member services are first and foremost for the benefit of the members and current GAPP partners.
- Ensure full and sustained participation in GAPP by existing members through outreach and discussion and shared belief in the value GAPP delivers.
- Revisit the current committee structure to empower greater representation and diversity from various levels within member companies and to ensure it best meets the needs of members and drives GAPP to build demand for Wild Alaksa Pollock.
- Evaluate membership-services (newsletters, reports, etc.) and make necessary adjustments in cadence and delivery; maintain accurate membership lists and newsletter preferences.
- Begin preparations for updated ROI study that evaluates GAPP’s programs and initiatives against member investment.
- Continue to build GAPP Associate Membership Program, casting a wide net to attract new allied industry members to join and participate.
- Strategize on additional ways to reward associate members for their investment in GAPP and find ways to drive GAPP member business to associate members through access and connections.
- Host GAPP Annual Meeting and explore opportunities for other smaller, members-only events and gatherings either virtual or in-person.
- Conduct new “industry needs” assessment to inform drafting of new GAPP 5-year plan that explores long-term program plans and funding increase to continue growing demand for Wild Alaska Pollock.

Proposed Metrics include:

- Secure full GAPP member participation.
- Rank member services and member satisfaction.
- Increase % of GAPP members who would recommend organization to a colleague.
- Affirmatively meet with catcher vessel coops during year to secure funding for future years.

- Plan out ROI study to begin work in 2023.
- Attract at least 100k in additional Associate Membership or other new revenue to GAPP.
- Engage members in new and exciting ways and grow Annual Meeting and event attendance.
- Draft and present to GAPP Board of Directors new 5-year Program and Funding Plan.
- Restructure committees to maximize participation and input into GAPP strategies and tactics.

III. Conclusion

These goals comprise the plan for GAPP's work for 2022-2023 and represent what we feel will bring the most value to the entire Wild Alaska Pollock industry. We look forward to being held accountable against these and working to continue to build awareness and demand for Wild Alaska Pollock around the world.