

Driving Demand of Wild Alaska Pollock 3.0

October 27, 2021



Tracking Wild Alaska Pollock's performance on core KPIs

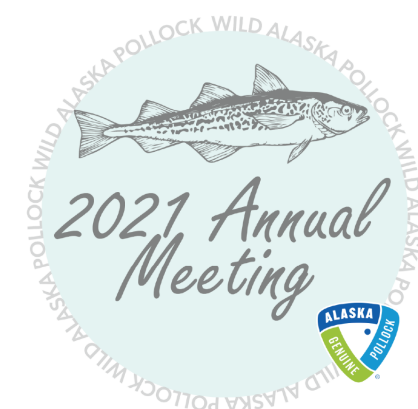
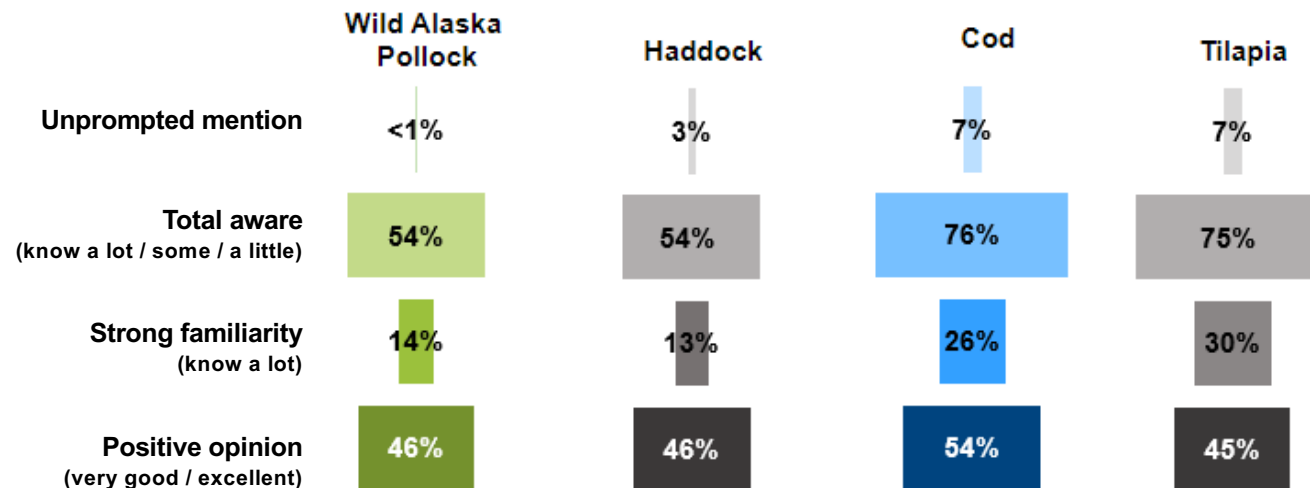
After an increase in familiarity of Wild Alaska Pollock from 2019 to 2020, this metric held steady in 2021. This comes after a year where there was difficulty introducing new products into consumer channels as channels like retail were focused on ensuring a stock of essential items, limiting exposure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

From 2020 to 2021, favorability and preference for Wild Alaska Pollock also held steady.



Tracking Wild Alaska Pollock's performance on core KPIs

When tracking next to other white fish, Wild Alaska Pollock is comparable to haddock in familiarity, but comparable to both haddock and tilapia in positive opinion. Clearly association with cod is beneficial to Wild Alaska Pollock in terms of favorability.



The gap between fish eaters consuming Wild Alaska Pollock in restaurants versus grocery stores has narrowed since last year's survey



How they learn about Wild Alaska Pollock

- 32%** Grocery stores
- 24%** Friends & family
- 21%** Cooking shows
- 15% Sit-down restaurant
- 10% News
- 9% Social media
- 9% Fast-food restaurant

Likely to eat Wild Alaska Pollock in the following settings

(T3B on 10-pt scale)

38%

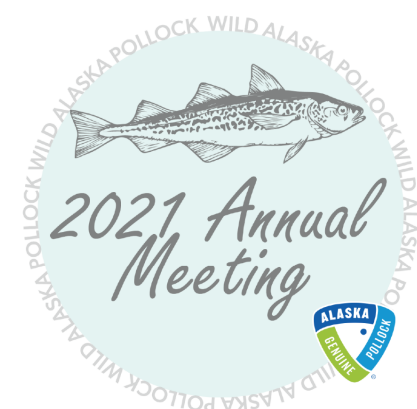
Are likely to eat at a **restaurant**
(37% in 2020)

36%

Are likely to eat from the **grocery store**
(vs. 44% in 2020)

Q2. How did you learn about Wild Alaska Pollock? Base: Fish eaters aware of fish (n=275)

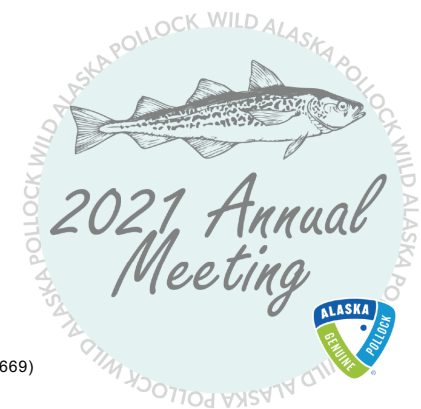
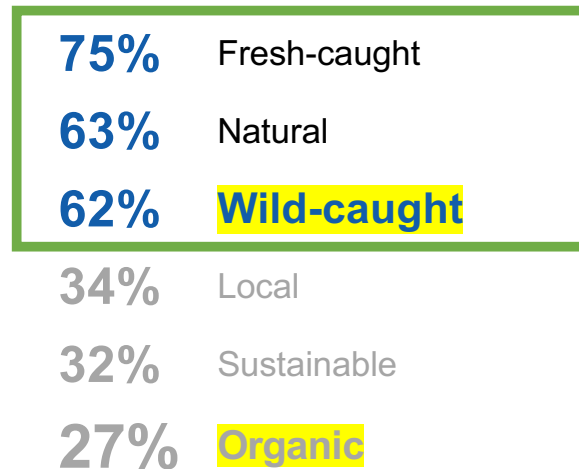
Q5. How likely are you to eat Wild Alaska Pollock from the following settings? Base: Fish eaters aware of Wild Alaska Pollock (n=275)



And when eating in sit-down restaurants, they are more than twice as likely to favor messaging of Wild-caught over organic



Terms that would increase their likelihood to order Wild Alaska Pollock in a high-end sit-down restaurant



N35. If you are eating at a high-end sit-down restaurant, which of the following terms would increase your likelihood to order Wild Alaska Pollock? Base: Fish eaters (n=669)



Taste, cost, and health continue to be top priorities when it comes to buying fish, while versatility, sustainability and provenance remain secondary messaging points

Important Fish Attributes

Overall Fish Importance Score (among fish eaters; T3B Summary)

#1 Taste

Great tasting
(79%)

Fresh tasting
(75%)

#2 Cost

Good value
(67%)

Affordable
(63%)

#3 Health

Heart healthy
(63%)

High in protein
(61%)

#4 Ease

Easy to prepare
(60%)

Freezer-friendly
(51%)

Important Fish Attributes

Overall Fish Importance Score (among fish eaters; T3B Summary)

#5 Versatile

Whole family will enjoy
(57%)

Good as center of plate
(55%)

#6 Sustainable

Sustainable
(47%)

Wild-caught
(45%)

#7 Provenance

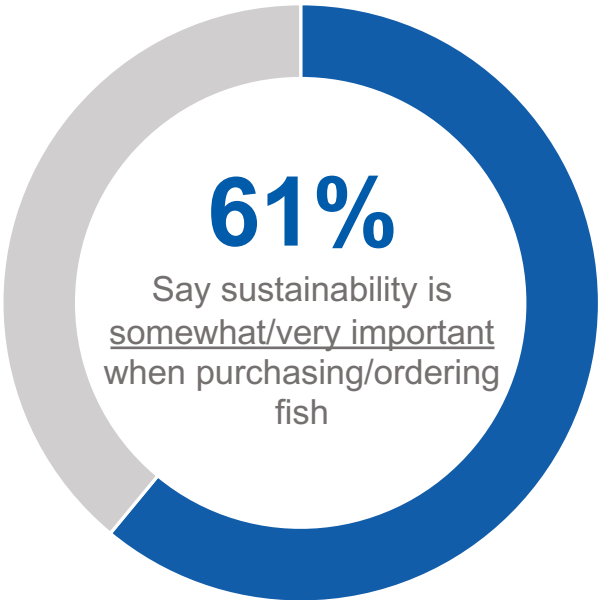
Product of U.S.
(55%)

Product of Alaska
(35%)

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? T3B Summary (8-10) Base: Fish Eaters (n=669)



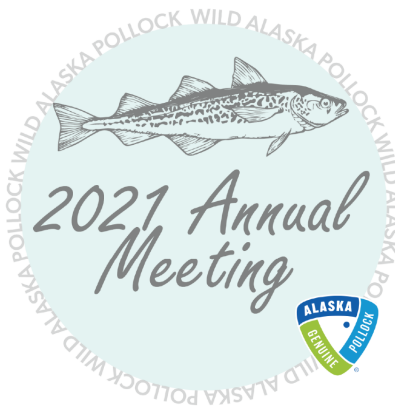
Sustainability is a key driver when purchasing, with attributes aligning with current messaging points



Attributes that are important to fish eaters when eating sustainably (Somewhat/very important)

- 70% Safe for the ocean
- 67% Ensuring supply for future generations
- 64% **Fishery management**
- 56% Zero-waste
- 55% **Carbon footprint**
- 53% Recyclable packaging
- 52% Traceability

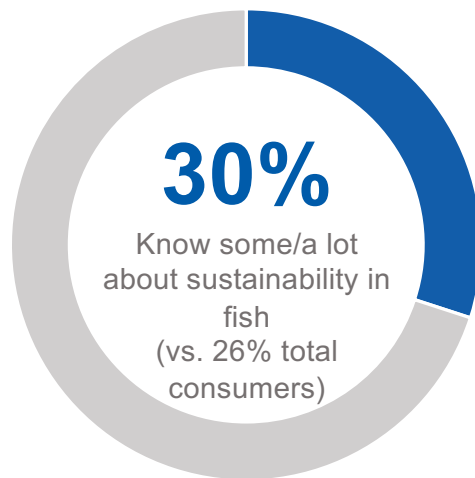
N37. How important is sustainability to you when purchasing/ordering fish? Base: Fish eaters (n=669)
N38. When it comes to purchasing/ordering fish, how important are the following aspects of sustainability to you? Base: Fish eaters (n=669)



Knowledge of Wild Alaska Pollock's sustainability is on par with consumers knowledge of seafood sustainability in general



Sustainability knowledge



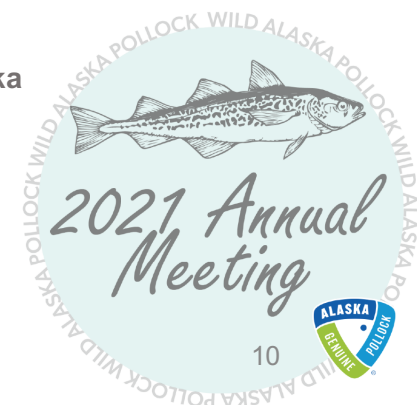
Knowledge of specific fish sustainability (Summary: Those who know some/a lot)

27%

Are familiar with the **sustainability** of Wild Alaska Pollock

N22. How much would you say you know about sustainability in fish? Base: Fish eaters (n=669)

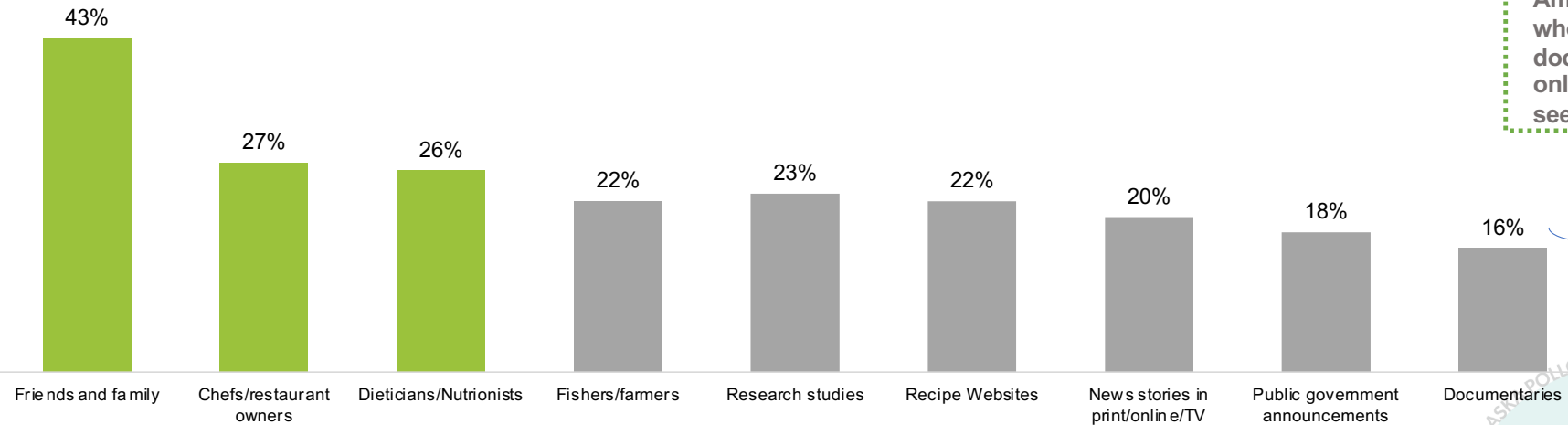
N36. How familiar, if at all, are you with the sustainability of each of the following fish? Base: Fish eaters (n=669)



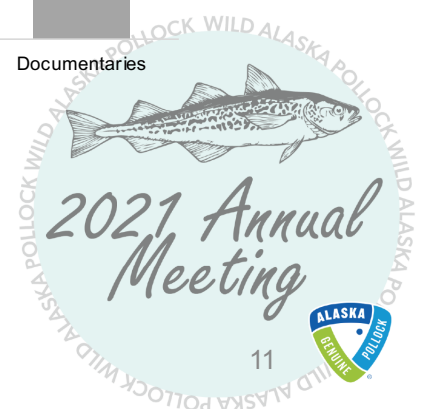
And when it comes to news about fish, this audience puts their trust in friends and family, as well as professionals in the food industry



What sources fish eaters trust when it comes to news and information about fish



Among those who trust documentaries, only 8% have seen Seaspiracy



N30. Which of the following sources do you trust when it comes to news and information about fish? Base: Fish eaters (n=669)
 N46. Which, if any, of the following documentaries have you seen? Base: Those trust documentaries, Fish eaters (n=105)

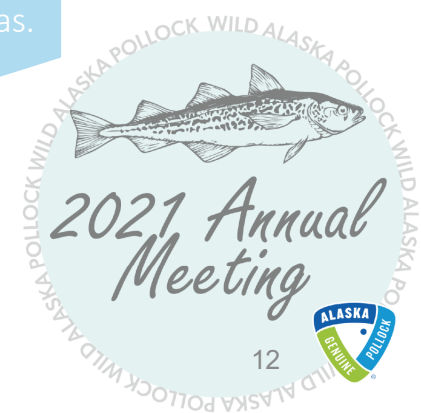
Key Takeaways

Continue prioritizing the use of Wild Alaska Pollock in all channels from communications to retail.

Continue to emphasize key messaging pillars as they fall in line with consumer perception and expectation

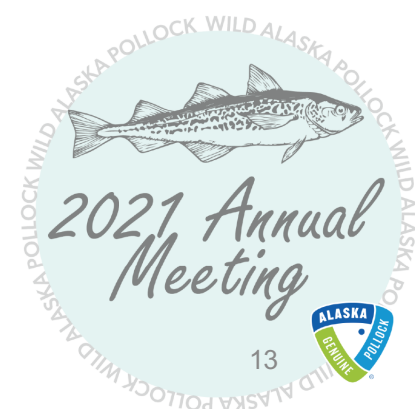
Identify opportunities to partner with trusted sources for information to disseminate information about Wild Alaska Pollock

Taste continues to reign as a priority for purchase so lean into recipes and visual content to help heighten awareness of delicious usage ideas.



What Does This Mean for GAPP?

- Consumers trust information from chefs and restaurants. If we want to increase demand for Wild Alaska Pollock, GAPP must continue to make Wild Alaska Pollock a part of the dining out experience and invest in specific programming that reaches chefs at sit-down restaurants versus quick-service restaurants.
- Sustainability is moving up in the minds of consumers and has evolved beyond certifications from credible organizations. It is no longer enough to place a seal/certification on packaging or on the website.
- Consumer-friendly language such as 'wild-caught' must be incorporated into communication channels as it increases likelihood to purchase. Terms such as 'wild-caught' will continue to set Wild Alaska Pollock apart from other animal proteins which use terms like organic.



Thank you!

