



**GENUINE ALASKA  
POLLOCK PRODUCERS**

**WILD ALASKA POLLOCK**

# ***SURIMI COMMUNICATIONS TOOLKIT***

Updated November 2021



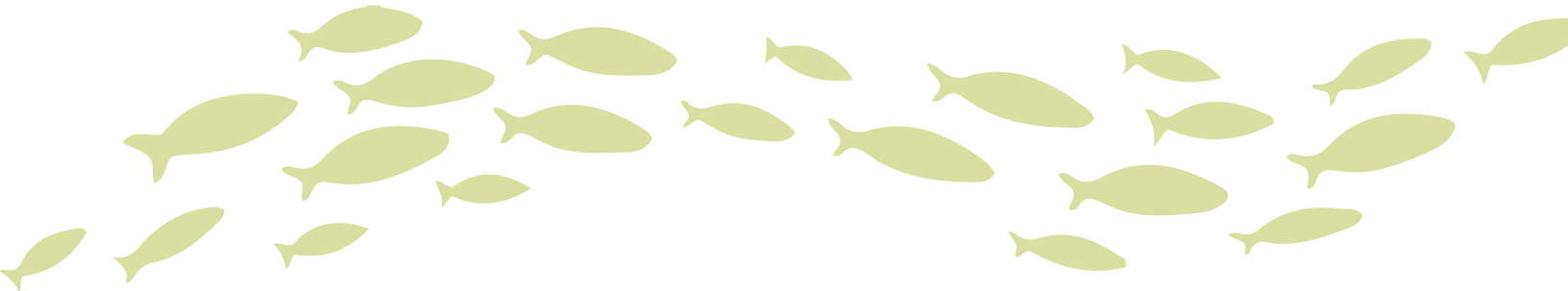


## OVERVIEW

Genuine Alaska Pollock Producers (GAPP) are advocates for one of the world's most sustainable and nutritious seafood products. Our mission is to educate customers and consumers, promote sales and best uses of Wild Alaska Pollock in all of its forms, and create awareness for product safety, traceability, health benefits, and the fishery.

Surimi seafood, also known as imitation crab, is a highly popular form of Wild Alaska Pollock that is found in sushi bar favorites like California rolls, poke bowls and is a delicious substitute for shellfish in salads and sandwiches. In an effort to better understand consumer awareness and perceptions of Wild Alaska Pollock surimi seafood, GAPP partnered with a third-party marketing research company to conduct a two-phased research project dedicated to uncovering valuable insights for how to best communicate this nutritious protein's valuable benefits.

The messages and resources presented in this toolkit will help you become an authority and go-to resource for information about how to best market Wild Alaska Pollock surimi seafood—no matter what consumer audience or key business channel you are speaking to. It represents our messaging focus as an organization as well as an industry.





# HOW TO USE THIS TOOLKIT

As you prepare for meetings, speaking opportunities, conferences and more, this toolkit is available as a resource. Throughout, you will find messages and insights grounded in research to help tailor communications to each audience.

The overview on page 4 provides key insights from audience market research, as well as overarching key messages to refer to when communicating about Wild Alaska Pollock surimi seafood. Audience-specific insights, beginning on page 6, offer valuable information about key audience perceptions and behaviors, as well as tailored messages to use when communicating with each audience.

All messages should be customized to reflect each member company’s brand guidelines and the specific circumstances in which communications occur.

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## OVERARCHING INSIGHTS & MESSAGES

### OVERVIEW

To better understand current consumer awareness, usage practices, occasions, needs and attitudes about imitation crab seafood in the United States, GAPP commissioned a three-part research study to size and dimensionalize the U.S. imitation crab consumer market.

Quantitative research evaluated two key audiences: **Frequent Purchasers** and **Infrequent/Lapsed Purchasers**.



#### FREQUENT PURCHASERS

Compared to the general population, Frequent Purchasers are younger, highly educated, full-time workers with children in their household.



#### INFREQUENT/LAPSED PURCHASERS

Compared to Frequent Purchasers, Infrequent/Lapsed Purchasers are primarily over the age of 55 and are retired with lower incomes.

Overarching insights offer useful information to reference when communicating about Wild Alaska Pollock surimi seafood. Key messages provided below will help you best communicate its unique benefits and differentiators and may be combined with supporting messages by audience to support their unique preferences and purchasing habits.

### OVERARCHING INSIGHTS

- Among the general population, imitation crab is not widely purchased. While most consumers are aware of imitation crab, only about **one third have ever purchased it**.
- Wild Alaska Pollock surimi seafood is typically purchased in a branded package from the grocery store and is often referred to as imitation crab. Purchasers do not appear to differentiate between formats, and **chunk/flake styles** are the most popular, followed by **legs/sticks**.
- Although imitation crab is viewed as easy-to-use and versatile, it is also perceived as having **limited usage occasions**, and a lack of saliency hinders more frequent purchasing among category users. Purchasers are looking for more ways in which to use imitation crab and seek recipe inspiration for ideas.
- Consumers greatly value **taste and quality** in the imitation crab that they purchase.
- Consumers are not knowledgeable about how imitation crab is made or what ingredients it has, and often associate imitation crab with being **unnatural, processed, and artificial**. Awareness of Wild Alaska Pollock in imitation crab elevates purchase frequency and positively impacts interest for more than a third of consumers.





## OVERARCHING INSIGHTS & MESSAGES

### OVERARCHING MESSAGES



Wild Alaska Pollock surimi seafood is a delicious, high-quality protein found in sushi bar favorites like California rolls, poke bowls and is a delicious substitute for shellfish in salads and sandwiches.



Surimi seafood is made from wild-caught Wild Alaska Pollock and offers superior seafood flavor.



Surimi seafood is a real seafood product and is verified by a Life Cycle Assessment (LCA) as a climate-smart protein source.



Wild Alaska Pollock surimi seafood, also known as imitation crab, is an excellent source of complete, high-quality protein that can be used in a variety of healthy dinner favorites the whole family will love.

#### AREAS OF OPPORTUNITY:

- **Education:** Communicating surimi seafood as a premium-quality seafood product made from sustainably sourced Wild Alaska Pollock reassures consumers about its quality and source.
- **Recipe Content:** On-trend recipe inspiration that offers new usage occasion ideas may inspire consumers to incorporate Wild Alaska Pollock surimi seafood in more applications.
- **Messaging:** Reinforcement of Wild Alaska Pollock surimi seafood's characteristics—including high-quality, climate-friendly, and superior nutritional content—is an opportunity to strengthen perceptions and favorability of imitation crab as a great protein choice.





## MESSAGE MAP BY AUDIENCE: FREQUENT PURCHASERS



### FREQUENT PURCHASERS

Over the past two years, imitation crab purchases have increased among Frequent Purchasers. This group perceives imitation crab as “good for you,” “healthy,” “approachable,” “delicious,” and “classy.” Purchasers place the greatest importance on the taste and quality of imitation crab.

Other high-value purchase drivers pinpoint opportunities to improve imitation crab saliency and relevancy. Sustainability, origin, and source are helpful drivers to encourage consideration and purchase intent.

### AUDIENCE PRIORITIES



They find surimi to be versatile and easy-to-prepare, and largely refer to it as imitation crab.



Interest in surimi is positively impacted when they know that it is made with Wild Alaska Pollock.



They value longevity and prefer packaged/ resealable surimi that lasts longer. Most also prefer packaging that is transparent, allowing them to see the product before purchasing.



Most first experience imitation crab at home with family, and few recall consuming it at a restaurant. It is consumed both as a main protein, and as additions to side dishes.

### KEY WORDS TO USE

- Versatile
- Easy-to-prepare
- High-quality
- Nutritious
- Delicious

### BEST MESSAGES TO USE WHEN COMMUNICATING

- Wild Alaska Pollock surimi seafood is a versatile, climate-friendly protein found in sushi bar favorites like California rolls, poke bowls and is a delicious substitute for shellfish in salads and sandwiches.
- Made from Wild Alaska Pollock, surimi seafood is easy-to-prepare and provides a highly nutritious source of complete, high-quality protein and omega-3 fatty acids.
- Wild Alaska Pollock surimi seafood is made from real, wild-caught Wild Alaska Pollock, and offers an affordable, high-protein alternative to crab and other shellfish.
- Wild Alaska Pollock surimi seafood is a delicious protein choice that offers craveable seafood flavor and can be prepared in a variety of dishes, making it a great grocery staple.



## MESSAGE MAP BY AUDIENCE: FREQUENT PURCHASERS

### AUDIENCE INSIGHTS

#### ATTITUDES ABOUT IMITATION CRAB



Consumers find imitation crab to be easy to use/prepare and versatile and largely refer to surimi

as imitation crab. Ingredient list, price, nutritional label, and brand best indicate 'high-quality' to frequent purchasers.

- 97% say it is easy to use
- 89% say it is really easy to prepare and almost impossible to mess up
- 88% say it is versatile and can be prepared in many ways
- 88% say it can be used in many recipes and dishes
- 86% say it goes well with many kinds of food/recipes

#### TOP NOMENCLATURE

How do you typically refer to surimi/imitation crab?

- 75% Imitation crab
- 23% Crab sticks
- 19% Surimi
- 12% King Crab

*"I always called it imitation crab. I think if you call it "imitation" it has negative connotations. Calling it surimi would certainly change people's perceptions about it."*

#### TOP ATTRIBUTES ASSOCIATED WITH HIGH-QUALITY IMITATION CRAB

What does "high-quality" surimi/imitation crab mean to you? What do you associate with high-quality surimi/imitation crab?

- Ingredient list (45%)
- Price (38%)
- Nutritional label (34%)
- Brand (33%)
- Flavored with real crab or lobster (31%)
- Made with sustainably sourced fish (31%)

#### WILD ALASKA POLLOCK INGREDIENT AWARENESS



Interest in surimi is positively impacted when consumers know that it is made with Wild Alaska Pollock.

#### 55% OF FREQUENT PURCHASERS ARE AWARE IMITATION CRAB IS MADE FROM WILD ALASKA POLLOCK

- 50% are more interested in purchasing because they know it is made with Wild Alaska Pollock
- 49% are just as interested in purchasing because of this

*"I am neutral regarding the use of Wild Alaska Pollock. Surimi is a great source of protein. Initially I was not aware of the health benefits of Wild Alaska Pollock, but I feel much better about it."*

*"I originally thought of surimi as imitation crab. But knowing it's made with real fish from Alaska changes my perception. I appreciate it more and it makes me more open to new uses for it."*



## MESSAGE MAP BY AUDIENCE: FREQUENT PURCHASERS

### AUDIENCE INSIGHTS

#### PURCHASE BEHAVIORS AND DRIVERS

Frequent Purchasers typically buy imitation crab at least once a month and grocery stores are the most common retailer. Most Frequent Purchasers buy imitation crab in addition to other protein sources, but if they are replacing another protein with surimi, it is often other types of fish, lobster, or pork. Imitation crab is primarily purchased in branded packages, often due to availability, durability, and a recognition that imitation crab does not need to be “fresh” given its processing.

##### PURCHASE FREQUENCY

- 71% purchase it at least once a month
- 23% purchase it once every 2–3 months

##### RETAILER PURCHASE

They typically purchase their imitation crab from:

- Grocery store (74%)
- Mass merchandiser (48%)

##### DEPARTMENT PURCHASE

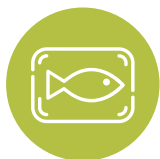
- 4 in 5 (83%) purchase surimi in a branded package
- Half (48%) purchase surimi in the bulk/deli section
- Nearly half (47%) purchase surimi from the fish counter

#### DEPARTMENT PURCHASE DRIVERS



**AVAILABILITY:** For many, the refrigerated section is the only place they know they can find imitation crab at their stores.

*“The refrigerated seafood section is the only place I’ve ever seen it. I asked if there was any in the frozen section and was told no, so I just get it there all of the time. I don’t have a big preference anyway.”*



**DURABLE (LONG-LASTING):** The overarching perception is that in pre-packaged form, imitation crab will last longer. Many do not cook with it daily, thus its longevity and the resealable packaging contribute to its appeal.

*“I usually get it packed from the fridge. I just believe it is better handled and the freshness is better. Besides I always try to have a few in stock so I’d rather get them in the package.”*



**NO NEED FOR FRESH:** A consensus is that imitation crab is already “processed” so there is no need to buy it from a fresh seafood counter.

*“I’d rather buy it packaged than get it fresh from the seafood counter because it will last longer. It’s more convenient for me to buy it packaged and have it ready when I’m ready.”*

*“I always have at least 6 to 8, 1 lb. packages in my freezer.”*





## MESSAGE MAP BY AUDIENCE: FREQUENT PURCHASERS

### AUDIENCE INSIGHTS

#### PURCHASE BEHAVIORS AND DRIVERS

##### PURCHASE BEHAVIORS

- 91% Purchase imitation crab in addition to other protein
- 50% Purchase imitation crab to replace fish
- 42% Purchase imitation crab to replace lobster
- 42% Purchase imitation crab to replace pork

##### PURCHASE DECISION INFLUENCES

- Tastes good (95%)
- Is quick and easy to prepare (95%)
- Is available where I shop (94%)
- Is a good value (93%)
- Can be used in a variety of dishes (91%)



##### FORM OF LAST SURIMI PURCHASE

- 62% small pieces
- 25% leg/stick

##### PACKAGING PREFERENCES

- 90% would like surimi/imitation crab packaging that is transparent, allowing them to see the product before purchasing
- 75% are willing to pay more for surimi/imitation crab that is made with high-quality ingredients
- 72% are willing to pay more for surimi/imitation crab that is made with all-natural ingredients

##### INTEREST IN PURCHASING NEW FORMS OF IMITATION CRAB

- Lobster (74%)
- Shrimp (66%)
- Breaded Shrimp (63%)
- Scallops (59%)



## MESSAGE MAP BY AUDIENCE: FREQUENT PURCHASERS

### AUDIENCE INSIGHTS



#### CONSUMPTION IN THE HOME

The first experience and introduction to surimi may be telling, as Frequent Purchasers often first experience imitation crab at home with family. Most add imitation crab into dishes, although over half will eat it alone.

- Nearly a third (30%) of Frequent Purchasers first experienced surimi imitation crab at home or in a family member's home, while a quarter (25%) first saw it at the store.
- Within Frequent Purchaser households, adults are the main consumers of imitation crab, but over three-quarters (78%) agree that everyone in their household enjoys imitation crab/surimi.
- Imitation crab consumption is relatively stable, with two-thirds (67%) eating imitation crab consistently throughout the year.
- While most add imitation crab into dishes (81%), over half of Frequent Purchasers (58%) will eat it alone. Salad (65%) and seafood salad (49%) are the top dishes made with imitation crab, followed by crab cakes (35%), pasta/noodles (33%), and rice dishes/dishes with other grains (31%).



#### CONSUMPTION OUT OF THE HOME

Less than half recall consuming imitation crab at a restaurant and many purchasers are just as likely to eat imitation crab from a restaurant as they are to prepare at home. Knowing that California rolls are made from imitation crab has a positive or neutral effect on these consumers.

- Nearly half (46%) of Frequent Purchasers have ever consumed imitation crab from a restaurant, with 43% being just as likely to eat it from a restaurant as they are to prepare it at home.
- Imitation crab consumption from a restaurant increases with California rolls among Frequent Purchasers to over half (53%). However, there are mixed opinions on what ingredients are going into their California rolls.
- Learning that California rolls are often filled with imitation crab has only a positive impact (38%) or no impact (57%) on consumer interest in California rolls.
- Crab cakes are the most frequently consumed dish (54%) from restaurants, followed closely behind by crab or seafood salad (47%) and crab or seafood dip (43%).



## MESSAGE MAP BY AUDIENCE: INFREQUENT / LAPSED PURCHASERS



### INFREQUENT / LAPSED PURCHASERS

Many Infrequent / Lapsed Purchasers are unsure what imitation crab is made of, but do not seem to mind not knowing. They generally think of surimi as vaguely resembling seafood. Upon learning of imitation crab made from Wild Alaska Pollock, many are not surprised, nor does it change their perception. Brand plays a secondary role in purchases as other aspects (quality, availability, price, etc.) drive decision-making.

Infrequent Purchasers are more likely to perceive imitation crab as “unnatural” and “processed,” while Lapsed Purchasers find it “fake,” “frugal,” “plain,” “artificial,” and “mild.”

### AUDIENCE PRIORITIES



Learning imitation crab is made from Wild Alaska Pollock has a positive or neutral effect on interest in purchasing.



Easy-to-prepare, availability, and versatility are among the top reasons for purchase, with most purchasing at a grocery store.



A lack of saliency is the top purchase barrier, along with limited use for specific recipes and preferences for fresh fish/seafood.



For consumers who have consumed California rolls from a restaurant, interest does not change upon learning that they are made from imitation crab.

### KEY WORDS TO USE

- Easy-to-prepare
- High-quality
- Great tasting
- Versatile
- Fresh

### BEST MESSAGES TO USE WHEN COMMUNICATING

- Wild Alaska Pollock surimi seafood is as delicious as it is versatile and is a great option for a variety of quick and easy recipes from salads, sandwiches, protein bowls and more.
- Wild Alaska Pollock surimi seafood is made from real, wild-caught Wild Alaska Pollock, and offers an affordable, high-protein alternative to crab and other shellfish.
- Wild Alaska Pollock surimi seafood is a delicious protein choice that offers craveable seafood flavor and is a highly nutritious source of complete, high-quality protein.
- As a certified climate-friendly protein, Wild Alaska Pollock surimi seafood is a fresh, great-tasting protein choice that can be used in a variety of nutritious recipes suitable for a range of different meal types.



## MESSAGE MAP BY AUDIENCE: INFREQUENT / LAPSED PURCHASERS

### AUDIENCE INSIGHTS

#### ATTITUDES ABOUT IMITATION CRAB



Infrequent Purchaser consumers find imitation crab to be easy-to-prepare and versatile and typically refer to surimi as imitation crab. Ingredient list, price, nutritional label, and brand best indicate “high-quality” to purchasers.

- 89% is easy to use
- 78% is really easy to prepare and almost impossible to mess up
- 78% it is versatile and can be prepared in many ways
- 77% can be used in many recipes and dishes
- 72% goes well with many kinds of food/recipes

#### TOP NOMENCLATURE

How do you typically refer to surimi/imitation crab?

- 88% Imitation crab
- 10% Crab sticks
- 7% Surimi
- 6% King Crab



#### TOP ATTRIBUTES ASSOCIATED WITH HIGH-QUALITY IMITATION CRAB

What does “high-quality” surimi/ imitation crab mean to you? What do you associate with high-quality surimi/imitation crab?

- Ingredient list (40%)
- Flavored with real crab (31%)
- Price (29%)
- Nutritional label (29%)
- A product of the USA (28%)
- Made with sustainably sourced fish (25%)

#### WILD ALASKA POLLOCK INGREDIENT AWARENESS



Learning imitation crab is made from Wild Alaska Pollock has a positive or neutral effect on interest in purchasing.

#### **49% ARE AWARE IMITATION CRAB IS MADE FROM WILD ALASKA POLLOCK**

- 50% are more interested in purchasing because they know it is made with Wild Alaska Pollock
- 49% are just as interested in purchasing because of this



## MESSAGE MAP BY AUDIENCE: INFREQUENT / LAPSED PURCHASERS

### AUDIENCE INSIGHTS

#### PURCHASE BEHAVIORS AND DRIVERS

Easy-to-prepare, availability, and versatility are among the top reasons for purchase, with most purchasing occurring at a grocery store.

##### RETAILER PURCHASE

- 75% Grocery store
- 31% Mass merchandiser

##### PACKAGING PREFERENCES

- 82% would like surimi/imitation crab packaging that is transparent, allowing them to see the product before purchasing
- 55% are willing to pay more for surimi/imitation crab that is made with high quality ingredients
- 59% are willing to pay more for surimi/imitation crab that is made with all-natural ingredients

##### PURCHASE INFLUENCE DECISION

1. Is quick and easy to prepare (91%)
2. Is available where I shop (88%)
3. Can be used in a variety of dishes (86%)
4. Tastes good (83%)
5. Is a good value (83%)

##### INTEREST IN PURCHASING NEW FORMS OF IMITATION CRAB

- Lobster (51%)
- Shrimp (48%)
- Breaded Shrimp (39%)
- Scallops (39%)







## MESSAGE MAP BY AUDIENCE: INFREQUENT / LAPSED PURCHASERS

### AUDIENCE INSIGHTS

#### PURCHASE BARRIERS

A lack of saliency is the top purchase barrier for Infrequent/Lapsed Purchasers. Limited use for specific recipes and preferences for fresh fish/seafood are also common barriers. However, these purchasers are looking for improved taste and recipe ideas to increase their imitation crab purchases.

#### BARRIERS TO PURCHASING IMITATION CRAB

- 44% Don't think about it/Not top of mind
- 29% Only buy it for specific recipes
- 27% Prefer fresh fish/seafood/Don't like imitation foods
- 18% Only use it for special occasion meal/festivities

*"I don't think about it as often as chicken or ground beef. I think of it as seafood, and we eat seafood seasonally—it's not a staple in our household."*

*"I never think of it unless we're making sushi. We usually get sushi from a restaurant, so we don't buy the product often."*

*"I use it in dishes for when I'm entertaining. I wouldn't buy it just for myself."*

#### HOW TO INCREASE PURCHASES

- 40% More/New use occasions
- 22% Product improvements

*"If there were recipes at the fish counter suggesting ways to cook with it, I might be inclined to buy it more. I make the same couple of dishes when I buy it."*





## MESSAGE MAP BY AUDIENCE: INFREQUENT / LAPSED PURCHASERS

### AUDIENCE INSIGHTS



#### CONSUMPTION IN THE HOME

Infrequent/Lapsed consumers were introduced to surimi/imitation crab in the grocery store, not in a home-cooked meal, and do not actively seek out new uses or recipes, creating the potential for a cooking rut.

- Nearly a quarter (24%) of Infrequent/Lapsed Purchasers first saw surimi/imitation crab at the store, while a fifth (20%) first had it a restaurant/in take-out food.
- Four in five eat surimi/imitation crab as part of a prepared dish, with 35% agreeing you can eat it on its own.
- Infrequent/Lapsed Purchasers have a more limited repertoire of imitation crab dishes and uses than Frequent Purchasers do. Under half (44%) eat it in a seafood salad, a third (33%) eat it on a salad, and a quarter (25%) eat it in dip/topping/spread form.



#### CONSUMPTION OUT OF THE HOME

For consumers who have consumed California rolls from a restaurant, interest does not change upon learning that they are made from imitation crab.

- Out of the 39% of Infrequent/Lapsed consumers who have consumed California rolls from a restaurant, a third think it's made sometimes from crab, sometimes imitation crab and a quarter don't know what it is made out of.
- Interest in California rolls isn't positively or negatively impacted by this knowledge, as 76% are still just as interested after learning they are often filled with imitation crab.
- Crab cakes (65%) are the most consumed imitation crab dishes from restaurants, followed by crab or seafood salad (47%) and crab or seafood dip (42%).



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