



STRAT7

**incite**

# Role of country of origin in consumers' appetite for Alaska Pollock

Research conducted for GAPP

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CONFIDENTIAL

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# Background



# Background



## Your challenge

Demand for US sourced Wild Alaska Pollock is in decline across the EU and UK, while imports of pollock from Russia and China have increased.

To address the commercial threat to Alaska Pollock sourced in the US, GAPP wishes to understand the role of country of origin in consumer's fish purchase consideration.

## Research question

This study explores:

What role does country of origin play in consumers' appetite for Wild Alaska Pollock?

What is the appeal of Alaska Pollock from specific places of origin - notably Alaska, Russia, and China?

## What we have done

15-minute quantitative survey

400 interviews in each market: UK, France, Germany and Spain

Consumers who have eaten fish in any format in the past 3 months

Representative of the general population, aged 18 - 70 years

# Headlines

A photograph of a fishing boat on the ocean at sunset. The sky is a mix of orange and grey, with many birds flying in the air. In the background, there are dark, jagged mountains. The boat is in the lower right foreground, and the water is dark with some whitecaps.

# Headlines



## **Country of origin is important**

The majority of fish eaters care from where their fish is sourced.

Country of origin has the most importance in France, Germany and Spain.

## **There is a tendency to avoid fish from Russia and China**

Few actively seek to buy fish from either Russia or China, with substantial percentages actively avoiding fish from these countries.

Geopolitical issues and food safety concerns drive consumer rejection of fish sourced from these countries.

## **Few expect Alaska Pollock to come from Russia or China**

The fish species has an inherent association with Alaska - driven by the species name.

The association to Alaska is strongest in the UK and Spain.

Few believe Alaska Pollock is sourced from Russia or China.

## **Consumers prefer Alaska Pollock sourced from Alaska**

Most would prefer Alaska Pollock to come from Alaska, not Russia or China.

To learn that Alaska Pollock is from Alaska is to feel informed, interested and reassured.

## **There is little desire for Alaska Pollock from Russia or China**

Rejection levels of Alaska Pollock known to come from Russia or China are high. But UK consumers are more open to buying fish originating from these markets.

Consumers would feel confused, worried and misled to find out Alaska Pollock is from Russia or China.

Twice frozen processing (from Russia through China) further suppresses consumer purchase interest.



# Detailed Findings

Consumers care about  
country of origin when it  
comes to fish.



# Country of origin is important - the majority in all markets rate country of origin as important when buying fish for their household.

Importance buying fish - Top 2 Box (very important or slightly important)

Knowing country of origin / what country the product is from

53%

UK



80%

France



67%

Germany



67%

Spain



The majority of those who consider country of origin to be important also claim to actively seek out this information when purchasing fish at the grocery store.

Information sought out when buying fish: Amongst those who say country of origin is important  
Knowing country of origin / what country the product is from

55%

UK



70%

France



62%

Germany



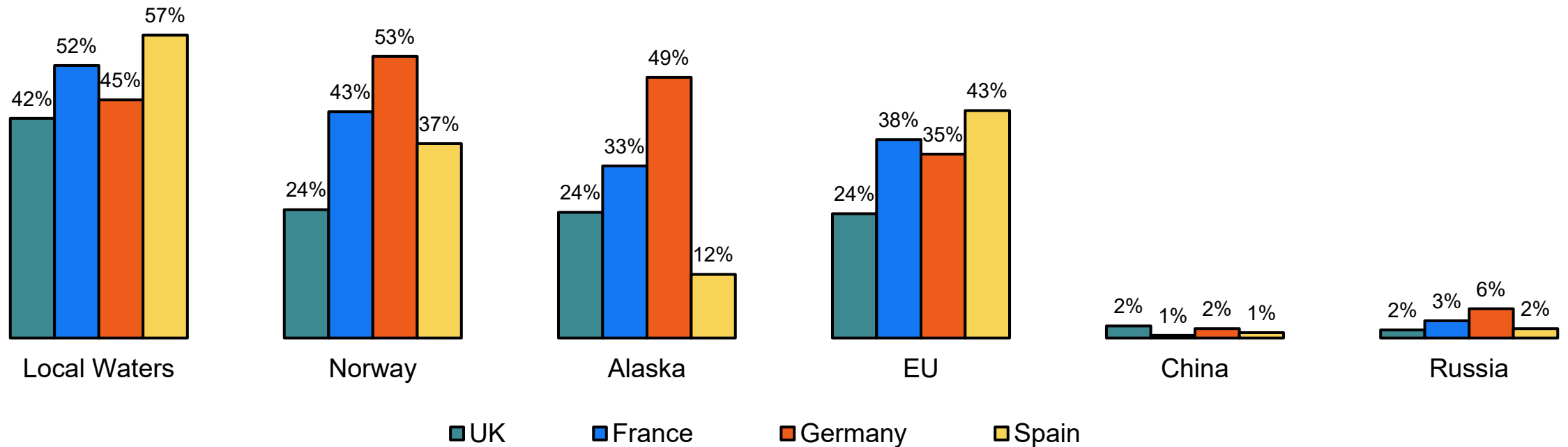
70%

Spain



# Consumers are most likely to seek out fish from local waters, Norway, Alaska, and the EU. Not China or Russia.

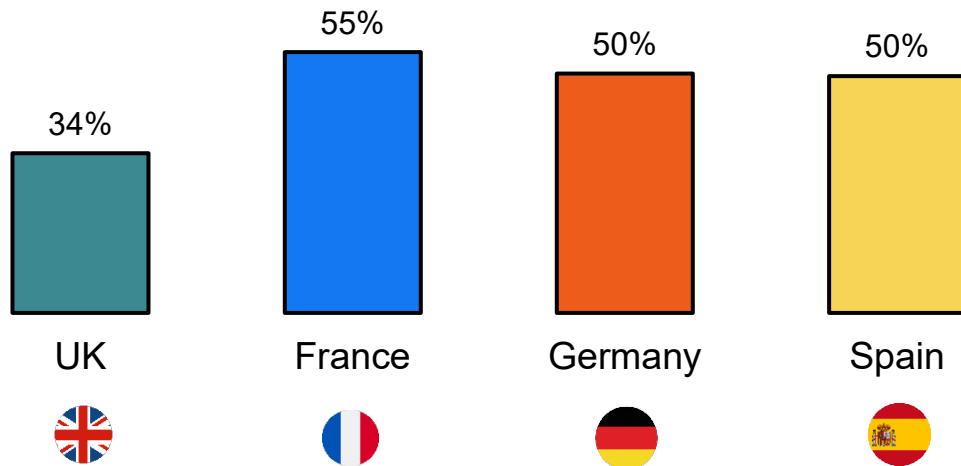
## Locations consumers like / try to buy fish from:



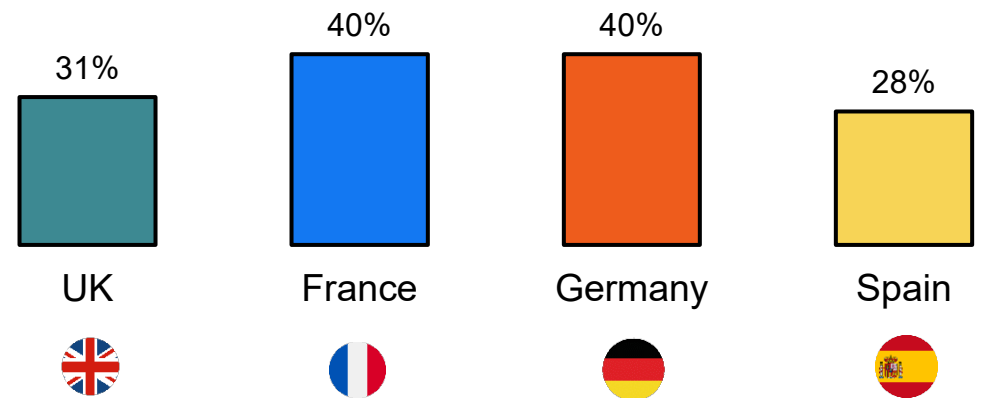
# Conversely, a significant proportion of consumers try to avoid buying fish that comes from either China or Russia.

Locations consumers try to avoid buying fish from:

Avoid fish from China

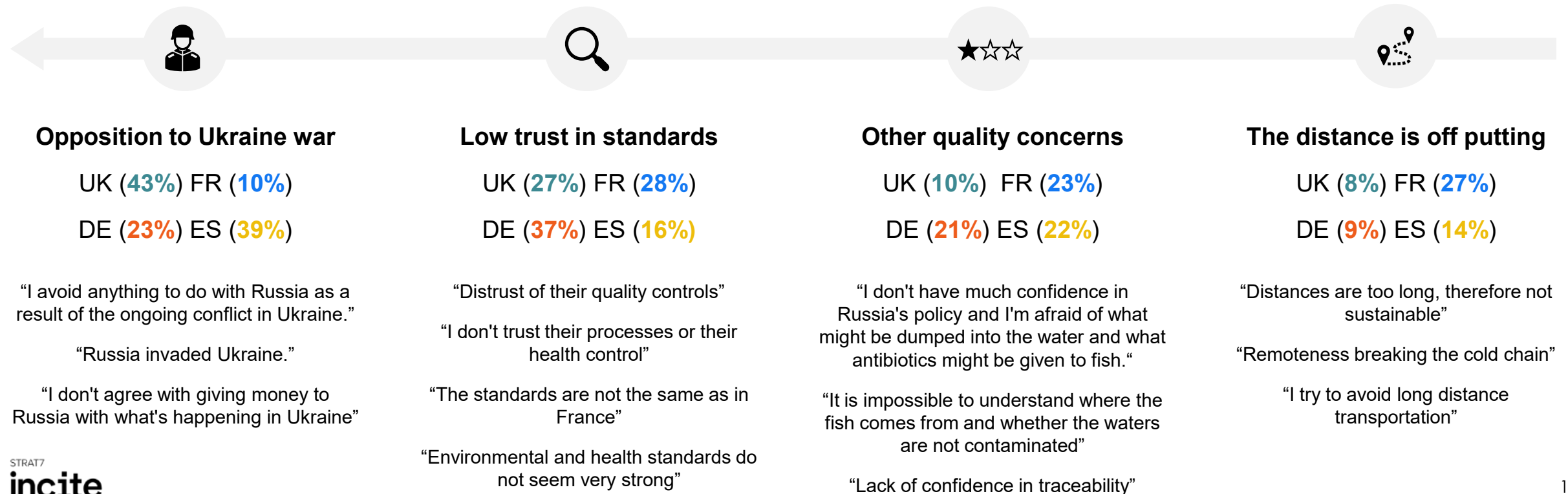


Avoid fish from Russia



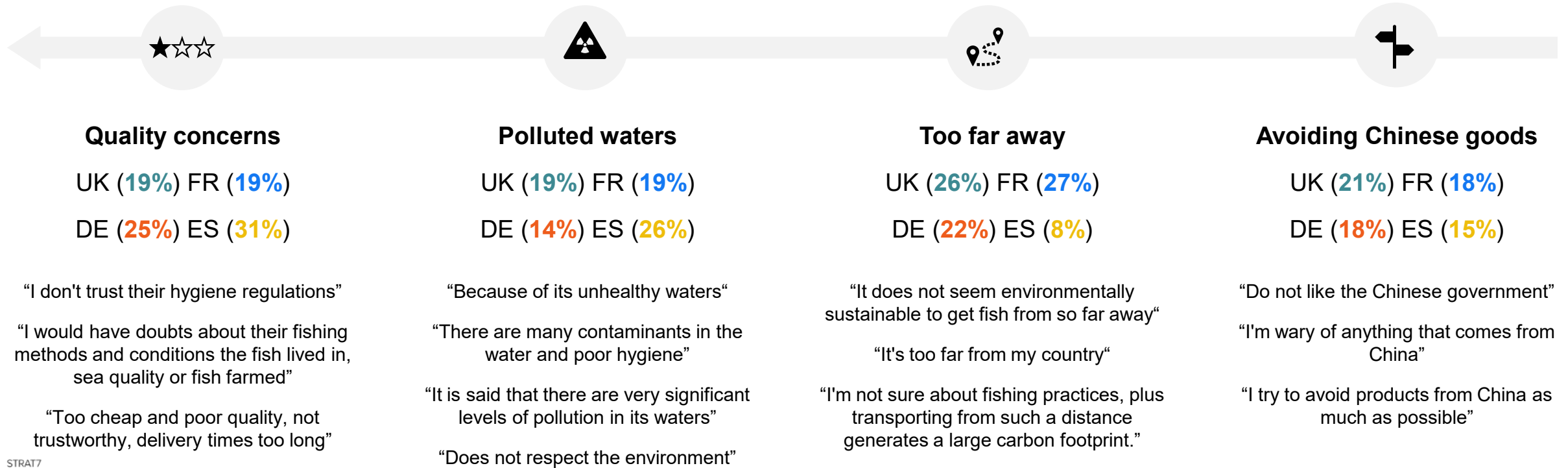
# Avoidance of Russian sourced fish is due to Ukraine invasion boycotting and distrust of Russian processes and standards.

## Reasons for country avoidance: Russia - Coded up open-end response



# Avoidance of Chinese sourced fish is primarily due to an overall distrust of China's quality, hygiene and fishery practices and standards.

## Reasons for country avoidance: China - Coded up open-end response

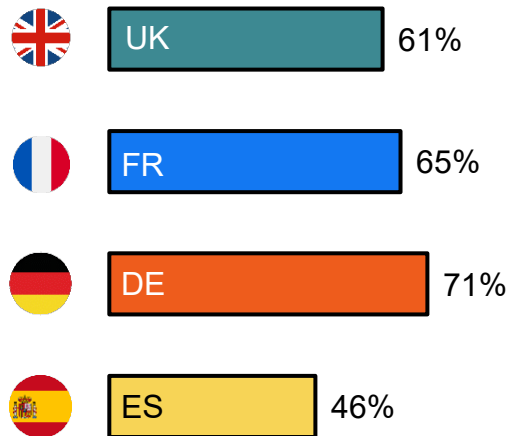


**Consumers expect and prefer Alaska Pollock to be sourced from Alaska.**

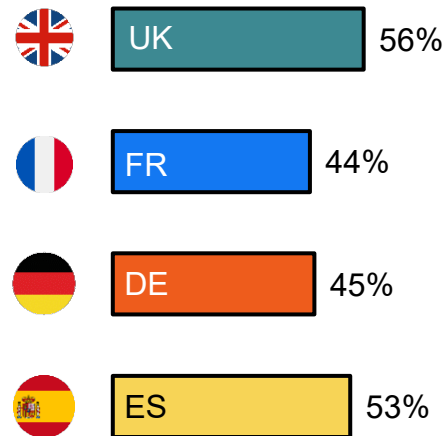
# Alaska Pollock's name telegraphs much information about the fish – it's specie, it's catch location and the environment in which it was caught.

## What the 'Alaska Pollock' name says about the fish:

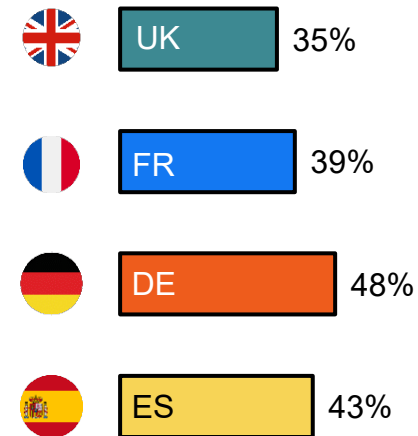
### It tells me the specie



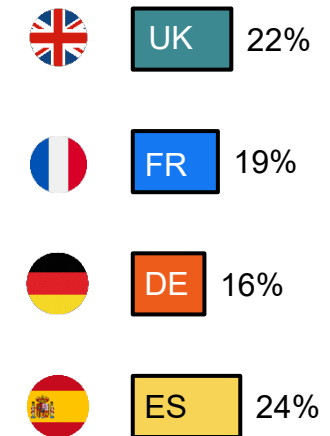
### It tells me where it was caught



### It tells me about the environment in which it was caught



### It tells me where it was processed

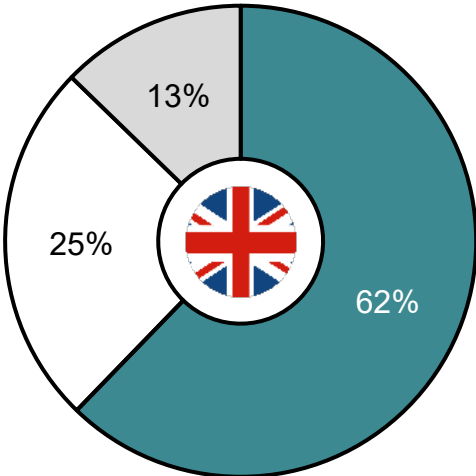




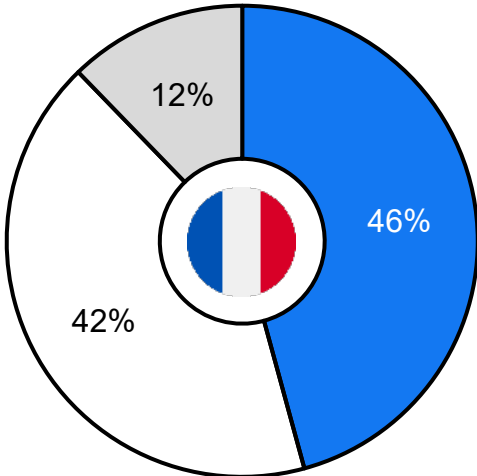
# Consumers in the UK and Spain are the most likely to believe that Alaska Pollock comes only from Alaska.

## Where consumers think Alaska Pollock comes from:

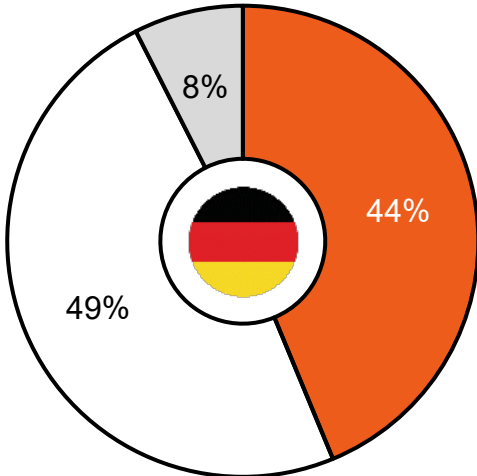
UK:



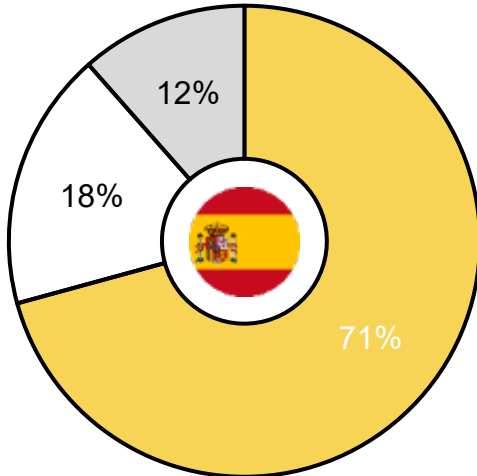
France:



Germany:



Spain:

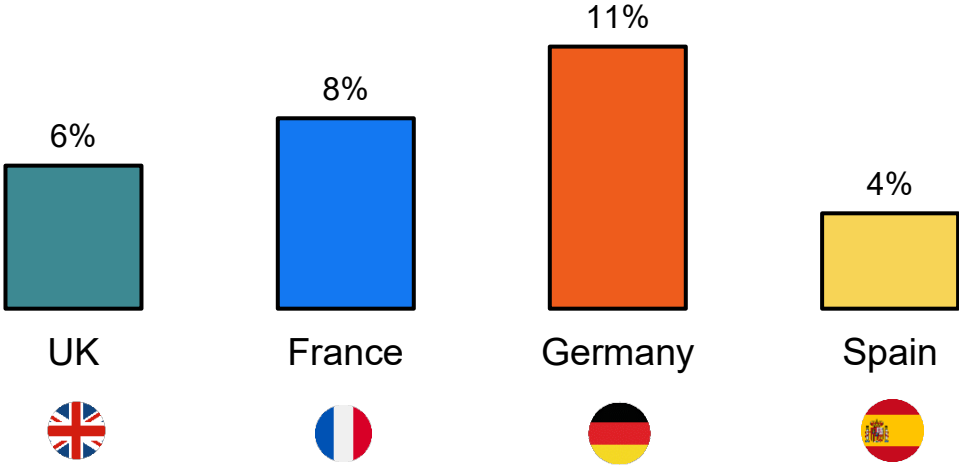


■ Only from Alaska    □ From many different countries and places    ■ Don't know

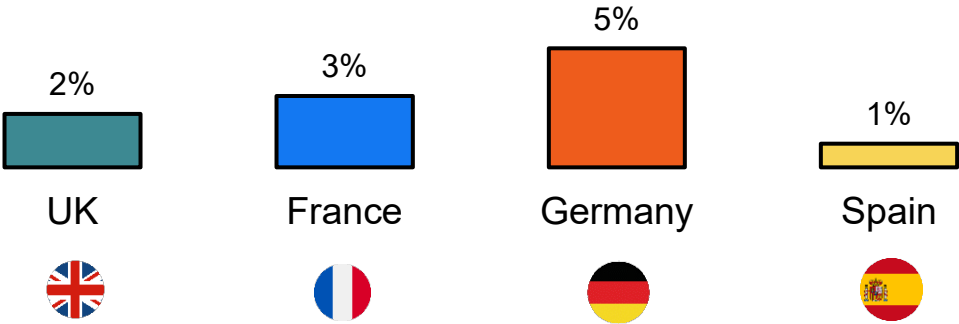
# Few consumers believe that Alaska Pollock comes from Russia or China.

Where consumers think Alaska Pollock comes from:

Alaska Pollock comes from Russia







Alaska Pollock comes from China



# The overwhelming preference is for Alaska Pollock that comes from Alaska.

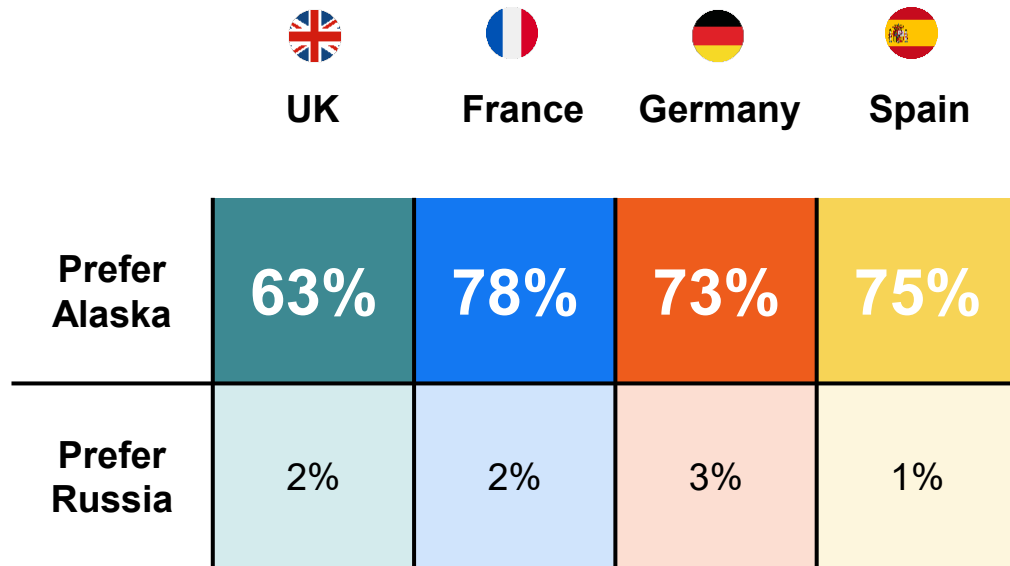
## Preference for where Alaska Pollock should come from:

	UK 	France 	Germany 	Spain 
Prefer Alaska	73%	93%	83%	81%
Alaska Pollock should only come from Alaska	44%	50%	45%	41%
I recognise it can come from other places, but would prefer for it to come from Alaska	29%	43%	38%	40%
I don't mind where Alaska Pollock comes from	27%	7%	17%	20%

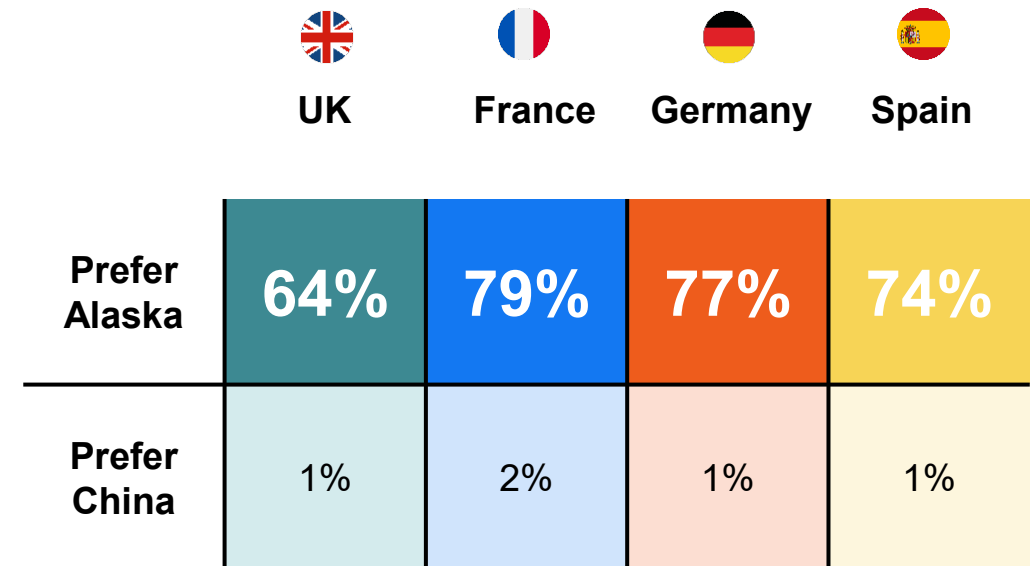
# Consumers overwhelmingly prefer Alaska Pollock to come from Alaska rather than Russia or China.

Where would prefer Alaska Pollock to come from (comparing markets):

## Alaska vs Russia



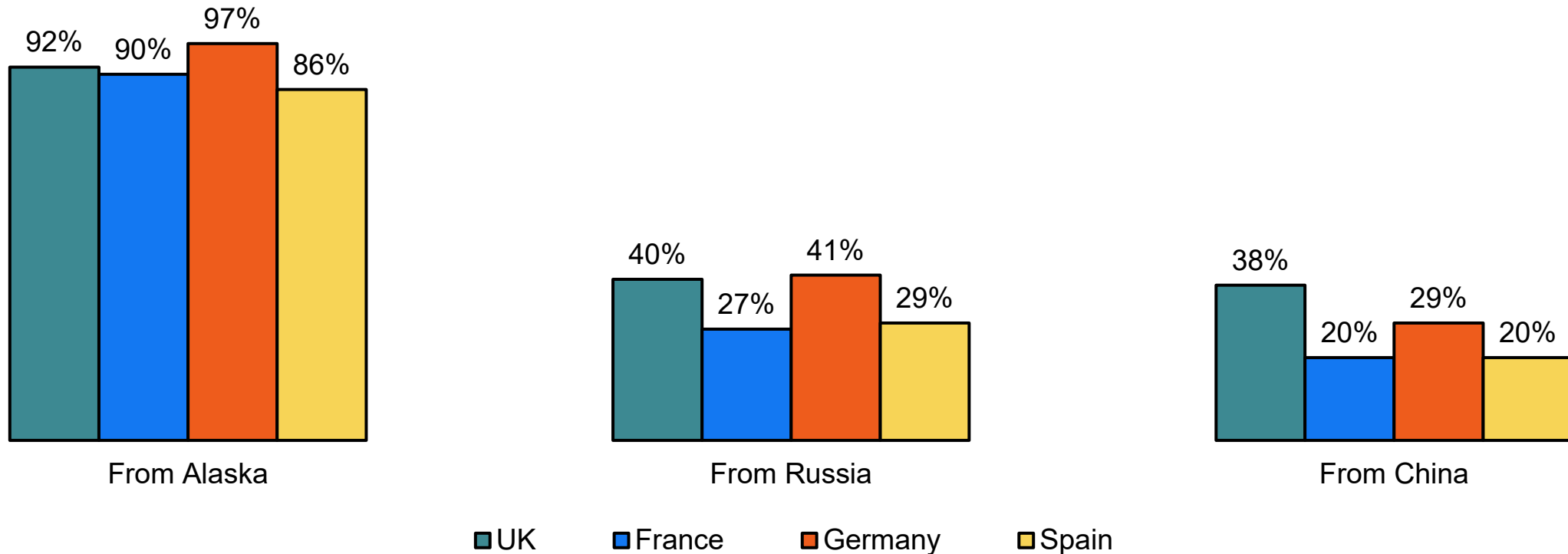
## Alaska vs China



**There is low consumer  
appetite for Russian or  
Chinese sourced Alaska  
Pollock.**

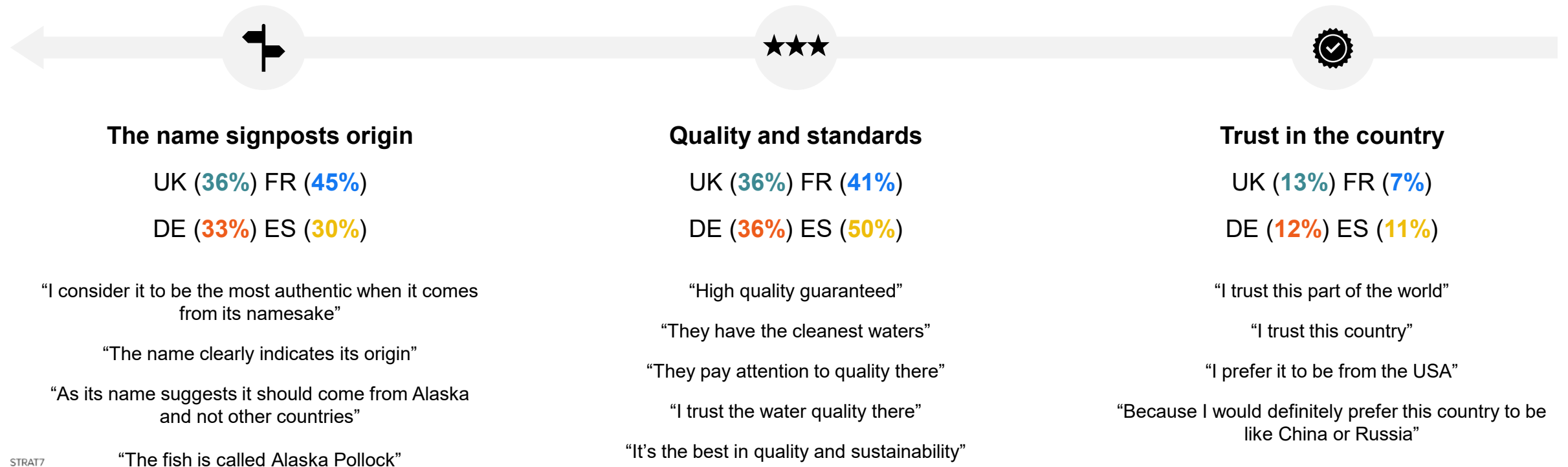
# Overwhelmingly, consumers are most interested in purchasing Alaska Pollock from Alaska.

Likelihood to buy Alaska Pollock from each location: Top 3 Box (extremely, very, somewhat likely)



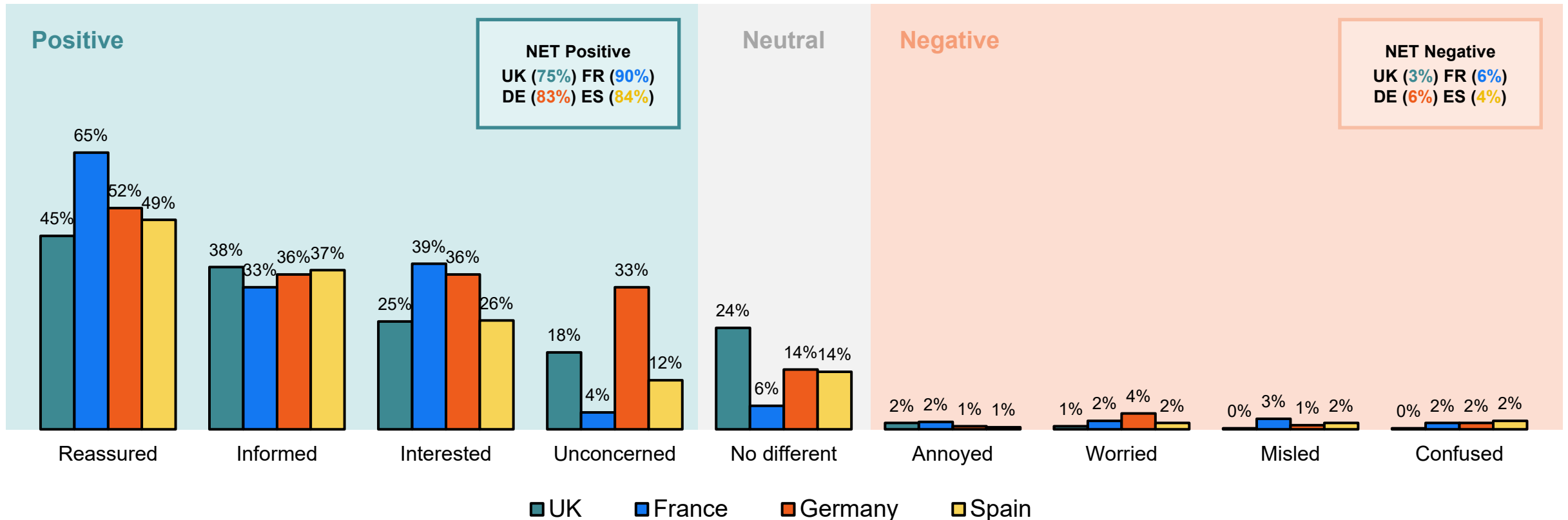
# Purchase interest in Alaska Pollock from Alaska is driven by authenticity, the origin-name connection and trust in the quality and standards of Alaska/the US.

Reasons would buy Alaska Pollock from Alaska (extremely / very likely to buy): Coded up open-end response



# Further, consumers would feel reassured and informed to learn the Alaska Pollock in their local store is from Alaska.

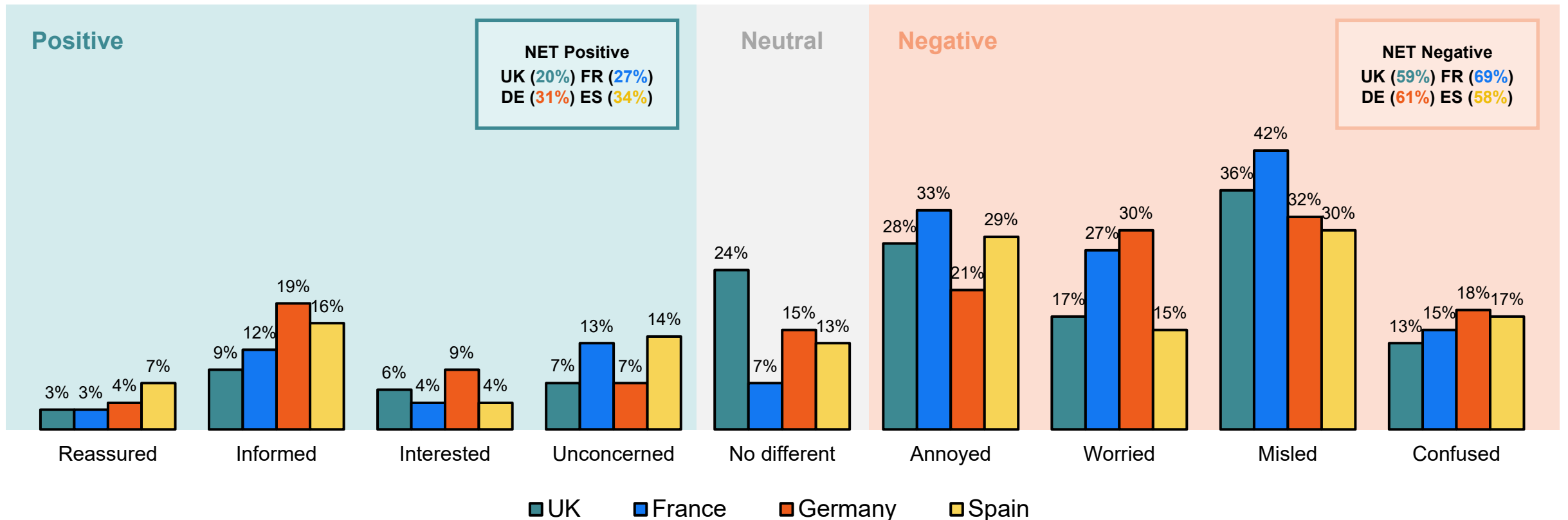
Feelings consumers would experience if they learned that the Alaska Pollock in their grocery store was a product of Alaska





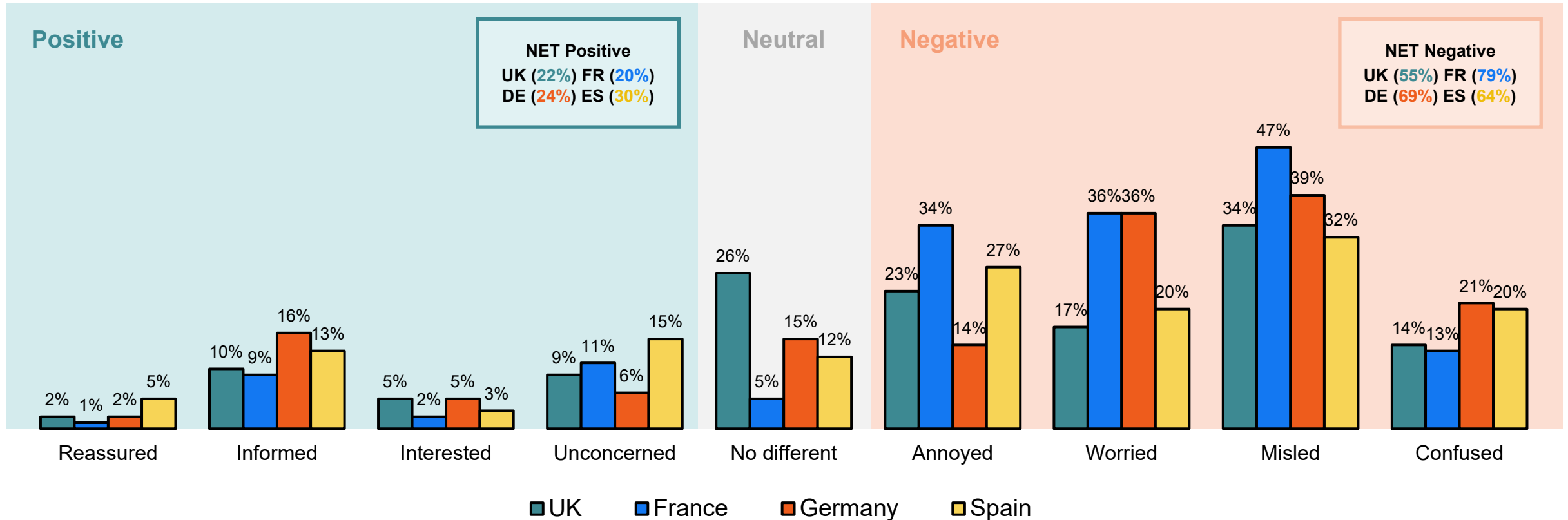
# Conversely, consumers would feel misled, annoyed and worried to learn that their Alaska Pollock is from Russia.

Feelings consumers would experience if they learned that the Alaska Pollock in their grocery store was a product of Russia



# ...or from China.

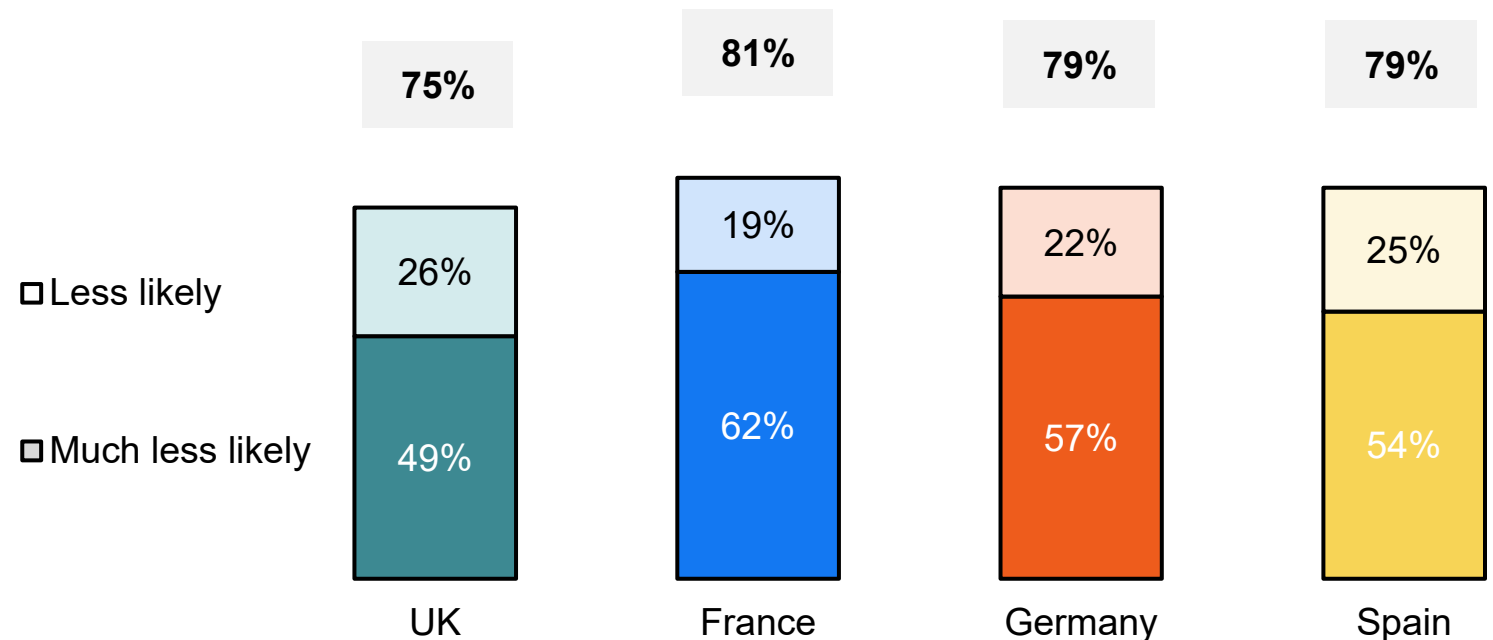
Feelings consumers would experience if they learned that the Alaska Pollock in their grocery store was a product of China



# When informed about the twice frozen processing of Alaska Pollock of Russia/China origin, consumer purchase interest decreases significantly, even in the UK which is not as origin focused as the other markets.

Impact of information on likelihood to purchase Alaska Pollock from Russia:

Alaska Pollock caught in Russian waters is partially processed, frozen and then shipped to China. In China, the Alaska Pollock is thawed, filleted, soaked in chemically treated water, refrozen and shipped to Europe for sale.





# In Summary

# In summary

**Country of origin is important**

**There is a tendency to avoid fish from Russia and China**

**Few expect Alaska Pollock to come from Russia or China**

**Consumers prefer Alaska Pollock sourced from Alaska**

**There is little desire for Alaska Pollock from Russia or China**

**The discovery that Alaska Pollock originates from Russia/ China leaves consumers feeling worried and misled**



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**Thank you**

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