Headline Findings
Pan European Crab Omnimas

Prepared by Caroline Hughes & Andy Fraser

January 2014

FS84_01_14

What has prompted the need for research?

Seafish are a key partner in a pan-European project to maximise the market value of Brown Crab

What we know already about the market?

- The live brown crab trade is showing growth in emerging SE Asian markets but there is a lack of progress in existing European markets
- The added value brown crab trade is showing growth in some European markets such as the UK
- The existing markets for brown crab in Europe are generally held by an older demographic group, whereas there appears to be potential growth in added value processing amongst a younger demographic group
- October 2013 rdsi conducted research into views of crab , in under 35s across 7 European markets, so countries of interest have been identified

Where do we want to be?

Have a greater understanding of the markets with the greatest potential for crab based products, with a particular focus on over 35s to see where the interest lies

rdsi

Approach and sample

2016 interviews across 4 markets

Sample size per market

UK
503

France
511

Spain
505

Italy
497

- Aged 35 - 50
- All to be in work and at least partly responsible for the household grocery shopping
- All to either consume or be open to consuming seafood
- Representative of regions and gender within each country
- Conducted between 6th Dec and 11st Dec 2013

Comparisons have been made in this report with the previous research, comprising of 1000 interviews per market, targeting under 35s only. Significant differences between the 2 different age groups have been noted in this report.

Headline Findings By Market

Ordered by interest in consuming crab products in the future

France…

- Low claimed consumption of crab, especially out of the home with 51% claiming to never eat crab in restaurants, bars etc.
- In line with under 35s, prepared crab in particular is seen as poor value
- Cost is a significant barrier to this audience

Spain….

- In line with the under 35s, there are a variety of crab products being consumed both in/out of the home, and Spain has the highest frequency of current consumption of the 4 markets

Italy….

- A wide range of crab products are being consumed in home – particularly high consumption of crab meat and claws
- Consumers more likely than other markets to see crab as good value

UK….

- The variety of crab being eaten by over 35s is lower than under 35s with the exception of dressed crab
- Frequency of consumption and the perceived value of crab is lower in this over 35 category
- For those open to crab – information & knowledge on how to prepare/cook is required
- Most interest in already prepared products in-home – potential to increase consumption in this age group

Across all markets, over 35s report fewer barriers to consumption than under 35s

Headline findings by question

Crab meat used as a starter is the main way crab is consumed, especially in France

% crab based products eaten at home

	Total	UK	France	Spain	Italy
Base	**2016**	**503**	**511**	**505**	**497**
Crab meat as part of a seafood starter (e.g. fruit de'mer)	***33%***	*16%*	*38%*	*30%*	*49%*
Crab claws	***25%***	*9%*	*17%*	*25%*	*50%*
Crab pate	***23%***	*36%*	*13%*	*32%*	*12%*
Crab meat as part of a seafood meal (pasta, risotto, pizza)	***23%***	*19%*	*18%*	*26%*	*31%*
Dressed crab	***20%***	*28%*	*11%*	*12%*	*29%*
Whole crab	***17%***	*13%*	*20%*	*23%*	*11%*
Another crab product	***17%***	*8%*	*19%*	*32%*	*7%*
Sandwiches with crab	***16%***	*19%*	*13%*	*30%*	*2%*
Sushi with crab	***16%***	*11%*	*17%*	*19%*	*17%*
Crab soup	***11%***	*12%*	*11%*	*15%*	*8%*
Pot of meat	***9%***	*11%*	*17%*	*8%*	*1%*
None – I have never bought or eaten crab-based products at home	***11%***	*21%*	*8%*	*4%*	*9%*

*** Top answer per market highlighted**

ITALY – Crab claws & starter crab meat claimed to be consumed far more than other markets
UK – over 35s consuming significantly less crab products than under 35s at home

Significantly higher than under 35s

Significantly lower than under 35s

Q1: What type of **crab-based** products have you bought or **eaten at home?** Multicode
Base: All

rdsi

Out of the home, starters with crab meat has the highest consumption, followed by dressed crab

% crab based products eaten out of the home

	Total	UK	France	Spain	Italy
Base	**2016**	**503**	**511**	**505**	**497**
Crab meat as part of a seafood starter (e.g. fruit de'mer)	***25%***	*21%* ↓	*15%*	*28%* ↑	*35%*
Dressed crab	***20%***	*23%*	*10%* ↓	*17%*	*29%*
Crab meat as part of a seafood meal (pasta, risotto, pizza)	***18%***	*17%* ↓	*7%*	*15%*	*32%*
Sushi with crab	***18%***	*13%* ↓	*15%*	*22%*	*22%* ↓
Whole crab	***16%***	*12%* ↓	*15%*	*25%*	*13%* ↓
Crab pate	***10%***	*14%* ↓	*4%*	*14%*	*9%* ↓
Crab soup	***8%***	*9%*	*6%*	*12%*	*6%* ↓
Sandwiches with crab	***8%***	*10%* ↓	*4%*	*16%*	*3%* ↓
Another crab product	***7%***	*5%*	*4%*	*12%*	*6%*
None – I have never eaten crab based products in a restaurant, hotel or bar	***32%***	*37%* ↑	*51%*	*21%*	*19%*

*** Top answer per market highlighted**

UK – Significantly more over 35s have not eaten crab out of the home, compared with under 35s
FRANCE – least likely to have eaten crab out of home

↑ Significantly higher than under 35s
↓ Significantly lower than under 35s

Q2: What type of crab-based products have you eaten in a restaurant, hotel or bar? Multicode
Base: All

Those in Spain claim to buy and eat crab most often, particularly in-home

% Frequency buy crab products to eat at home – based on those who say they have eaten crab at home

	Total	UK	France	Spain	Italy
Base	**1799**	**395**	**468**	**486**	**450**
Every week	*9%*	*7%*	*7%*	*14%*	*9%*
Every two weeks	*17%*	*11%*	*11%*	*26%*	*18%*
Monthly	*25%*	*21%*	*23%*	*32%*	*24%*
Every couple of months	*17%*	*20%*	*20%*	*11%*	*19%*
Less often	*30%*	*37%*	*37%*	*17%*	*29%*
Never	*2%*	*4%*	*2%*	*1%*	*2%*

*** Highlights high scores for infrequent consumption**

% Frequency buy crab out of home – based on those who say they have eaten crab at a restaurant

	Total	UK	France	Spain	Italy
Base	**1369**	**318**	**249**	**398**	**404**
Every week	*4%*	*3%*	*3%*	*5%*	*3%*
Every two weeks	*11%*	*6%*	*7%*	*15%*	*12%*
Monthly	*20%*	*18%*	*18%*	*23%*	*22%*
Every couple of months	*22%*	*27%*	*22%*	*22%*	*20%*
Less often	*41%*	*45%*	*48%*	*35%*	*40%*
Never	*2%*	*1%*	*2%*	*1%*	*3%*

Frequency of consuming crab out of the home is low across all markets especially in the UK & France, which is also significantly lower for the under 35 category

Significantly higher than under 35s

Significantly lower than under 35s

Q3: How frequently do you buy crab based products from a supermarket to eat at home, or eat in a restaurant, hotel or bar?
Base: Those who eat crab at home or in a restaurant

Crab is seen as similar VFM as other seafood when consuming in-home

Whole crab is most likely to be seen as better value

% Crab considered better or worse VFM when comparing with other seafood products consumed AT HOME

		Total	UK	France	Spain	Italy
	Base	2016	503	511	505	497
Whole crab meat that has not had preparation e.g. crab claws, pot of meat						
	Worse value	*17%*	*20%*	*20%*	*17%*	*10%*
	The same value as other seafood	*41%*	*35%*	*35%*	*46%* ↑	*47%* ↑
	Better value	*26%*	*17%* ↓	*26%*	*28%*	*32%*
	Don't know	*17%*	*27%*	*19%*	*10%*	*11%*
Whole crab						
	Worse value	*16%*	*23%*	*18%*	*13%* ↓	*9%*
	The same value as other seafood	*35%*	*30%*	*30%*	*41%*	*39%* ↑
	Better value	*30%*	*20%* ↓	*34%*	*36%*	*32%*
	Don't know	*19%*	*28%*	*18%*	*11%*	*20%*
Crab which has been prepared e.g. pate, dressed crab						
	Worse value	*18%*	*17%*	*26%*	*18%* ↓	*11%*
	The same value as other seafood	*41%*	*39%*	*37%*	*42%*	*48%* ↑
	Better value	*24%*	*19%* ↓	*18%*	*29%*	*29%*
	Don't know	*17%*	*25%*	*19%*	*11%*	*13%*

*** Highlights highest in each market per category**

UK – Less over 35s see crab as better value than other seafood products vs. under 35s.

Q4: Considering the value for money of crab-based products, do you think they offer better or worse value for money than comparable seafood products…. at home
Base: All

↑ Significantly higher than under 35s
↓ Significantly lower than under 35s

Italy are again likely to see crab out of the home as better value than other markets

<u>% Crab considered better or worse VFM when comparing with other seafood products in A RESTAURANT</u>

		Total	UK	France	Spain	Italy
	Base	2016	503	511	505	497
Whole crab meat that has not had preparation e.g. crab claws, pot of meat etc	Worse value	*18%*	*24%*	*20%*	*17%* ↓	*9%* ↓
	The same value as other seafood	*38%*	*31%*	*33%*	*43%*	*46%* ↑
	Better value	*24%*	*16%* ↓	*21%*	*26%*	*31%*
	Don't know	*21%*	*29%* ↑	*26%*	*14%*	*13%*
Whole crab	Worse value	*17%*	*24%*	*19%*	*16%* ↓	*10%*
	The same value as other seafood	*35%*	*30%*	*31%*	*40%*	*40%* ↑
	Better value	*26%*	*17%* ↓	*24%*	*30%*	*32%*
	Don't know	*22%*	*29%* ↑	*26%*	*14%*	*19%*
Crab which has been prepared e.g. pate, dressed crab etc	Worse value	*17%*	*17%*	*23%*	*17%* ↓	*11%*
	The same value as other seafood	*40%*	*38%*	*33%*	*43%*	*45%* ↑
	Better value	*22%*	*17%* ↓	*17%*	*25%*	*30%*
	Don't know	*21%*	*27%*	*26%*	*15%*	*14%*

*** Highlights highest in each market per category**

<u>UK</u> – consumers are least sure about the value of crabs, with a high proportion saying they don't know. This is more so for this over 35 age category

Q4: Considering the value for money of crab-based products, do you think they offer better or worse value for money than comparable seafood products….In a restaurant?
Base: All

↑ Significantly higher than under 35s
↓ Significantly lower than under 35s

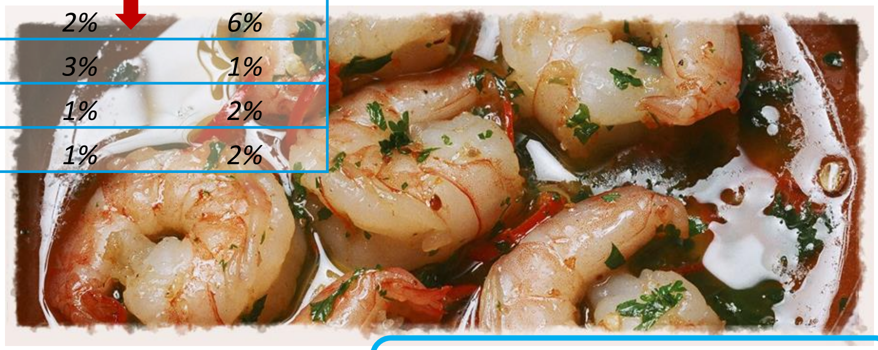
Prawns are the preferred alternative to crab if it's not available, for eating at home

<u>% Which would be chosen *at home* if crab wasn't available</u>

	Total	UK	France	Spain	Italy
Base	**2016**	**503**	**511**	**505**	**497**
Prawns	***37%***	*40%*	*42%*	*28%*	*37%*
Langoustine	***17%***	*4%*	*13%* ↑	*32%* ↑	*20%* ↑
Salmon, trout	***10%***	*11%*	*16%*	*5%* ↓	*7%* ↓
Lobster	***8%***	*6%*	*5%*	*13%*	*6%*
Other shellfish	***7%***	*5%*	*5%*	*8%* ↑	*9%*
Cod, haddock or whitefish	***6%***	*13%*	*5%*	*3%*	*4%*
Other fish	***4%***	*4%*	*4%*	*3%*	*5%*
Chicken or pork	***4%***	*7%* ↓	*3%* ↓	*2%* ↓	*6%*
Beef or lamb	***3%***	*4%*	*4%*	*3%*	*1%*
Mackerel, herring	***2%***	*4%*	*2%*	*1%*	*2%*
Vegetarian	***1%***	*3%*	*	*1%*	*2%*

*** 1st place answer per market highlighted**

Langoustine is mentioned more by over 35s than younger in France, Spain & Italy



↑ Significantly higher than under 35s

↓ Significantly lower than under 35s

Q5: If you wanted to have crab but it wasn't available, what product you have instead, if you were buying it to have…at home?
Base: All

Although when at a restaurant, lobster becomes the most likely alternative

% Which would be chosen *at a restaurant* if crab wasn't available

	Total	UK	France	Spain	Italy
Base	**2016**	**503**	**511**	**505**	**497**
Lobster	***25%***	*26%*	*19%*	*27%*	*27%*
Langoustine	***18%***	*10%*	*19%*	*21%*	*22%*
Prawns	***17%***	*21%*	*16%*	*18%*	*13%*
Other shellfish	***11%***	*6%*	*10%*	*12%*	*17%*
Salmon, trout	***9%***	*9%*	*16%*	*6%*	*6%*
Other fish	***6%***	*4%*	*5%*	*6%*	*7%*
Cod, haddock or whitefish	***4%***	*9%*	*4%*	*5%*	*1%*
Beef or lamb	***4%***	*5%*	*5%*	*3%*	*2%*
Chicken or pork	***3%***	*7%*	*3%*	*1%*	*2%*
Vegetarian	***2%***	*2%*	*2%*	*1%*	*2%*
Mackerel, herring	***1%***	*1%*	*1%*	*1%*	*1%*

*** 1st place answer per market highlighted**

Q5: If you wanted to have crab but it wasn't available, what product you have instead, if you were buying it to have… At a restaurant
Base: All

Significantly higher than under 35s

Significantly lower than under 35s

rdsi

There are fewer barriers to eating crab in-home than for under 35s, although cost & not knowing how to prepare it are still top

% Barriers to eating crab at home

	Total	UK	France	Spain	Italy
Base	2016	503	511	505	497
It is too expensive	*18%*	*19%* ↓	*27%*	*9%* ↓	*16%*
I wouldn't know how to prepare or cook it	*17%*	*23%*	*14%* ↓	*8%* ↓	*22%* ↓
I don't know if I will like it	*10%*	*10%* ↓	*5%* ↓	*4%* ↓	*23%*
It wouldn't suit other people in my household	*9%*	*13%*	*9%*	*5%* ↓	*9%*
I don't know how to put together a meal with crab	*8%*	*12%*	*5%* ↓	*5%* ↓	*10%*
I don't think of buying it or choosing it	*7%*	*11%*	*10%*	*2%* ↓	*4%*
Difficult to eat	*6%*	*10%*	*8%*	*4%* ↓	*2%*
I don't like the taste of crab	*5%*	*9%*	*3%* ↓	*3%* ↓	*6%*
Not sure if it is sustainably sourced / sustainable fishing	*5%*	*5%*	*6%*	*2%* ↓	*5%* ↓
I haven't seen it before in store / in a restaurant	*3%*	*2%* ↓	*1%*	*1%*	*9%* ↓
I don't agree with eating crab	*1%*	*2%*	*2%*	*1%*	*1%* ↓
There are no barriers	*39%*	*31%* ↑	*33%* ↑	*64%* ↑	*28%* ↑

*** 1st place answer per market highlighted**

Spain – report significantly fewer barriers than any other market
UK – Main barrier is a lack of knowledge on how to prepare/cook crab

↑ Significantly higher than under 35s
↓ Significantly lower than under 35s

Q7: What are the barriers, if any, to eating crab products… at home
Base: All

Again, fewer barriers than under 35s to crabs when eating out, but expense comes through most strongly

% Barriers to eating crab in a restaurant

	Total	UK	France	Spain	Italy
Base	2016	503	511	505	497
It is too expensive	*29%*	*30%*	*41%*	*17%*	*26%*
I don't know if I will like it	*11%*	*11%*	*7%*	*5%*	*21%*
Difficult to eat	*8%*	*12%*	*11%*	*6%*	*2%*
Not sure if it is sustainably sourced / sustainable fishing	*6%*	*5%*	*6%*	*2%*	*9%*
I don't like the taste of crab	*5%*	*9%*	*3%*	*3%*	*4%*
I don't think of buying it or choosing it	*5%*	*8%*	*4%*	*3%*	*3%*
I haven't seen it before in store / in a restaurant	*5%*	*2%*	*2%*	*2%*	*12%*
It wouldn't suit other people in my household	*3%*	*3%*	*2%*	*3%*	*4%*
I wouldn't know how to prepare or cook it	*2%*	*3%*	*1%*	*2%*	*3%*
I don't know how to put together a meal with crab	*2%*	*1%*	*2%*	*2%*	*4%*
I don't agree with eating crab	*2%*	*2%*	*2%*	*1%*	*2%*
There are no barriers	*40%*	*35%*	*33%*	*62%*	*31%*

*** 2nd biggest barrier per market highlighted**

UK, Spain & France – Difficulty of eating crab appears to be an issue for consumers
Italy – Consumers being unsure on whether they will like it is the 2nd biggest issue

Significantly higher than under 35s

Significantly lower than under 35s

Q7: What are the barriers, if any, to eating crab products… in a restaurant?
Base: All

rdsi

VFM is the main motivator for in-home consumption across all the markets followed by inspiration and ease of eating

% What would encourage them to purchase for home

	Total	UK	France	Spain	Italy
Base	**2016**	**503**	**511**	**505**	**497**
Reasonable price	***65%***	*65%*	*68%*	*69%*	*58%*
Recipe/meal combination	***25%***	*24%*	*22%*	*26%*	*30%*
Easy to eat	***22%***	*29%*	*25%*	*24%*	*11%*
Tips for how to prepare	***20%***	*23%*	*9%*	*21%*	*28%*
Health/nutrition	***19%***	*17%*	*18%*	*24%*	*19%*
Product has already been prepared / ready to eat	***19%***	*28%*	*17%*	*15%*	*17%*
For variety	***18%***	*15%*	*25%*	*20%*	*13%*
Seeing it in store	***17%***	*21%*	*11%*	*19%*	*18%*
Packaging format & imagery	***9%***	*7%*	*7%*	*9%*	*14%*
It's my favourite shellfish	***8%***	*10%*	*8%*	*7%*	*7%*
I wouldn't buy or eat it	***6%***	*13%*	*3%*	*2%*	*4%*
Other	***3%***	*2%*	*4%*	*2%*	*3%*

*** 2nd top answer highlighted**

After price, Inspiration for meal ideas and making crab easy to eat (Except Italy) could tempt more consumers to try crab at home

Significantly higher than under 35s

Significantly lower than under 35s

Q8: What would encourage you to purchase / consume crab products…. At home?
Base: All

Being a reasonable price is also top for encouraging consumption in a restaurant

% What would encourage them to purchase in a restaurant

	Total	UK	France	Spain	Italy
Base	**2016**	**503**	**511**	**505**	**497**
Reasonable price	***64%***	*67%* ↑	*66%* ↑	*68%* ↑	*56%*
Seeing it on the menu	***22%***	*25%*	*19%*	*23%* ↑	*19%*
Meal combination	***21%***	*23%*	*13%*	*23%* ↑	*25%*
Easy to eat	***20%***	*27%*	*19%*	*24%* ↑	*11%*
Menu information	***19%***	*17%* ↓	*13%*	*21%* ↑	*24%*
For variety	***18%***	*15%* ↓	*23%*	*18%*	*16%* ↓
Health/nutrition	***13%***	*14%* ↓	*12%*	*17%*	*12%* ↓
It's my favourite shellfish	***9%***	*8%*	*7%*	*11%*	*10%*
I wouldn't buy or eat it	***6%***	*14%* ↑	*3%* ↓	*2%*	*4%*
Other	***3%***	*1%*	*4%*	*3%*	*2%*

*** 2nd top answer per market highlighted**

<u>UK</u> – Least likely to be open to buying crab in-home or out of home

Q8: What would encourage you to purchase / consume crab products.... In a restaurant?
Base: All

↑ Significantly higher than under 35s
↓ Significantly lower than under 35s

Crab meat as part of a seafood starter or meal has most interest across the markets

* Top and bottom market highlighted per product type

Interest in eating or cooking each of the following in the future

Mean scores, where 1 is not interested, 4 is very interested

	Total	UK	France	Spain	Italy
Base	**2016**	**503**	**511**	**505**	**497**
Crab meat as part of a seafood starter (e.g. fruit de'mer)	**3.12**	2.86	3.31	3.11	3.21
Crab meat as part of a seafood meal (pasta, risotto, pizza)	**2.99**	2.79	3.02	3.02	3.13
Dressed crab (prepared and put back in the shell)	**2.87**	2.82	2.89	2.80	2.96
Crab claws	**2.83**	2.42	3.01	2.86	3.04
Crab pate	**2.79**	2.80	2.72	2.95	2.68
Whole cooked crab	**2.77**	2.62	2.95	2.85	2.64
Crab Soup	**2.69**	2.49	2.76	2.84	2.67
Crab in sandwiches	**2.61**	2.74	2.58	2.85	2.27
Pot of meat	**2.60**	2.58	2.76	2.67	2.37
Whole live crab to cook at home yourself	**2.38**	2.12	2.57	2.59	2.23
Average	**2.77**	**2.62**	**2.86**	**2.85**	**2.72**

Q9: How interested, if at all, would you be eating or cooking each of the following products in the future?
Base: All

UK– record the lowest interest in crab products, with lower scores for over 35s than under 35s

UK & ITALY – Over 35s less likely to be 'Very interested' in whole live crabs than under 35s

FRANCE – Over 35s more likely to be 'Very Interested' in crab meat in starters & Crap soup than under 35s

rdsi