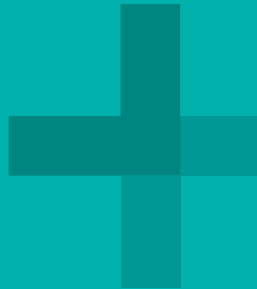




Emerge smarter.



U.S. CONSUMER IMITATION CRAB A&U STUDY

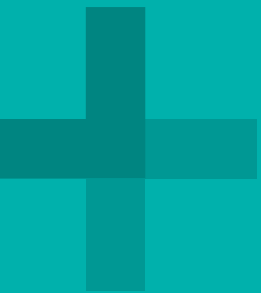
Full Report
May 2021



Table of Contents

	Page
Background & Methodology	3
Background & Objectives	4
Methodology & Sample	6
Key Findings & Implications	7
Purchaser Behaviors & Drivers	17
Consumption Behaviors	40
Last Occasion	48
Out-of-Home Experience	56
Innovation/New Products	60
Non-Purchasers	67
Hispanic Purchasers	71
Asian-American Purchasers	92
Appendix	112
Purchaser Profiles	113
Additional Detailed Findings	116





BACKGROUND & METHODOLOGY

C+R
RESEARCH

EMERGE SMARTER.



Background & Objectives



BACKGROUND

The Genuine Alaska Pollock Producers association is interested in learning about current consumer awareness, usage practices, occasions, needs and attitudes about imitation crab seafood in the US.

To that end, GAPP has undertaken a three-part research study to size and dimensionalize the U.S. imitation crab consumer market.

This report pulls each of those stages together in summary, lead by quantitative research findings to **provide a comprehensive overview of U.S. consumer/purchasers attitudes, behaviors, usage and needs about and for imitation crab.**

OBJECTIVES

- Understand consumers' imitation crab awareness, familiarity and perceptions
- Assess purchase and consumption frequency, occasions and dishes/recipes, as well as changes in consumption patterns now and in the future
- Explore opportunities to drive greater demand of imitation crab products among target segments
- Explore how different cultural and ethnic groups view and approach imitation crab seafood consumption

Research Phases

Given the objectives of this initiative, a multimodal approach that combines Qualitative and Quantitative methodologies was used:



1

INCIDENCE CHECK

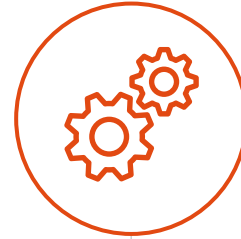
- ✓ Online survey determined what percent of consumers have purchased in this category and key targets to include in the following phases.



2

ONLINE CONSUMER EXPLORATION

- ✓ We conducted an asynchronous Online Discussion with 14 consumers from across the different target groups. The main purpose of this phase of the study was to generate hypothesis to feed into the quantitative survey



3

POST-QUAL WORK SESSION

- ✓ Alignment and transition between the Qual and Quant pieces



4

ONLINE QUANTITATIVE SURVEY

- ✓ Understand consumers' imitation crab awareness, familiarity and perceptions
- ✓ Assess purchase and consumption frequency, occasions and dishes/recipes, as well as changes in consumption patterns now and in the future
- ✓ Explore opportunities to drive greater demand of imitation crab products among target segments
- ✓ Explore how different cultural and ethnic groups view and approach imitation crab seafood consumption

Methodology & Sample

METHODOLOGY

C+R Research conducted a 30-minute online quantitative survey from February 2-16, 2021.

N=650 consumers:

- n=503 Frequent Purchasers (purchased imitation crab in the past 3 months), with a boost to reach:
 - n=203 Bicultural/Unacculturated Hispanics
 - n=159 Bicultural Hispanics
 - n=100 Unacculturated Hispanics
 - n=76 Asian-American consumers
- n=153 Infrequent/Lapsed Purchasers
 - n=63 Infrequent Purchasers (purchased imitation crab 3 months to less than a year ago)
 - n=90 Lapsed Purchasers (purchased imitation crab more than a year ago)

N=1342 Non-Purchasers (i.e., have never purchased imitation crab) were asked a subset of questions to understand market sizing, purchase barriers, and to get a read on concept description (including mention of Wild Alaska Pollock) and its impact on future purchase.

SCREENING CRITERIA

- Mix of females/males
- Ages 18+
- Primary or equally shared responsibility for grocery shopping and meal decisions
- Consumer (both purchased and personally consumed) of imitation crab (or lobster) in any form
- Non-rejector of future purchasing
- Sensitive industry screen
- Hispanics: self-identified as Hispanic, acculturation defined by our acculturation model
- Asian-Americans: excluding Chinese, Indian, or Pakistani
- Click balancing for age, gender, ethnicity, and region

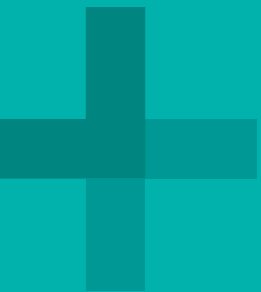
SIGNIFICANCE TESTING

Significance testing at 90% confidence level between groups of interest is indicated by:

- Up/down arrows to indicate Frequent Purchasers vs. Infrequent/Lapsed Purchasers
- Letters A/B/C/D to indicated differences across purchaser groups
- Letters A/B/C to indicate differences by form (Chunk vs. Flake vs. Leg/Stick/ Alaskan Snow Leg). Shred is excluded due to small sample size (n<30)



Indicates specific learnings from the qualitative phase of the study.



KEY FINDINGS & IMPLICATIONS

C+R
RESEARCH

Emerge smarter.



Key Findings



Among the general population, imitation crab is not widely purchased and only a quarter purchase it frequently.



- Most consumers are aware of imitation crab, though only about 1/3 have ever purchased it.
- Among those who have purchased imitation crab, most buy it monthly.
- About half of these Frequent Purchasers report an increase over the past two years, consistent with COVID-19 related retail increases and virtually all plan to continue purchasing it.
- Conversely, Infrequent or Lapsed Purchasers are twice as likely to report a decline in purchases over the past two years.



Demographic profiles differ by purchaser types: Frequent Purchasers are young, full-time employees, while Infrequent/Lapsed Purchasers are older, retired with lower incomes.



- Compared to the general U.S. population, Frequent Purchasers are younger, highly educated, full-time workers with kids in their household.
- Infrequent/Lapsed Purchasers, however, tend to be older (55+ yrs.), retired, and with lower household incomes, compared to Frequent Purchasers.
- Non-Purchasers have lower incomes and are more polarized in age (slightly younger and older) than Frequent Purchasers.

Key Findings



Imitation crab is typically purchased in a branded package from the grocery store.



- Frequent Purchasers are buying imitation crab at a much wider variety of retailers than their less frequent counterparts, including mass merchandisers, specialty stores and club stores.
 - Frequent Purchasers typically plan their imitation crab purchases as they like to keep it on hand and feel it's a good value.
- While branded packages are most common, almost half of Frequent Purchasers have also purchased from the fish counter and deli section.
- Purchasers do not appear to differentiate between the smaller pieces available: chunk and flake styles. As such, these smaller pieces are the most popular form of imitation crab, followed by legs/sticks.



A lack of saliency and limited occasions and recipes for imitation crab hinder more frequent purchasing among category users.



- All purchasers, even Frequent Purchasers, are looking for more ways/ recipe ideas for which to use imitation crab.
- Additionally, imitation crab is not top-of-mind among Infrequent/Lapsed Purchasers, and they have very limited uses for it.
 - For these consumers, the decision to purchase is often impulse, while in the store rather than planned with a recipe in mind.
- Non-Purchasers agree, but their lack of interest is more likely due to preferring fresh vs. imitation seafood; as such, they may be more difficult to convert.

Key Findings



Consumers place the greatest importance on the taste and quality of imitation crab that they purchase.



- Overall taste, tasting like crab and being high quality are most important to buyers and also drive satisfaction.
- Being a good value, known brand, and product availability are also important drivers and are the key to success at the point of purchase.
- Secondary attributes that consumers value are product naturalness, U.S. origin, and the health benefits of Omega 3s and high protein.



However, it appears buyers are relatively unfamiliar with imitation crab and don't know a lot about.



- Infrequent/Lapsed Purchasers associate imitation crab with 'unnatural', 'processed', 'fake', 'artificial' and 'plain' traits.
- Consumers define high quality imitation crab based on its ingredients, price, nutritional content, and brand.
- Natural, clean ingredient products, made in the U.S. and MSC certification are desired by consumers and most have no idea that these types of products are available for them.
- Consumers fail to differentiate between Conventional and the new Clean imitation crab products in the market today, indicating a disconnect with what could be compelling offerings versus consumer understanding of the benefits of the new entries.

Key Findings



Sustainability, origin and source are not drivers today, but could become compelling, if linked to what consumers care about.



- Specific attributes, such as a product of Alaska, MSC certified, made with Wild Alaska Pollock, and made from wild, sustainably sourced fish, are not currently drivers for purchase; however, they could be compelling reasons to believe in support of taste, quality, and naturalness messaging.
- Consumers are not knowledgeable about how and from what imitation crab is made, but it could be beneficial to educate them.
- For example, while made with Wild Alaska Pollock is not a top driver, it elicited great interest and positive impact on purchase once consumers understood WAP's role within the imitation crab story.



Although viewed as easy to use and versatile, imitation crab usage appears limited to specific occasions/recipes and consumers desire more ideas.



- Most find imitation crab to be easy to use and prepare, versatile and goes well with many kinds of foods.
- However, purchasers, even Frequent Purchasers, are looking for more recipe ideas to increase their imitation crab usage. Lack of recipe ideas hinders almost a third of Infrequent/Lapsed Purchasers from buying imitation crab more often.
- Adults (and many children) consume imitation crab in a variety of ways, but most often for dinner, followed by lunch and special occasions.
- Most consume imitation crab year-round, yet usage rises slightly in summer as part of refreshing dishes.
- Imitation crab is currently used both an ingredient in dishes for dinner and lunch and is often eaten by itself as a snack.

Imitation Crab in the U.S. today is a low involvement, low-risk product.

- ✓ Purchasers don't think too much about imitation crab in general, or at purchase, as it is inexpensive and, for Infrequent/Lapsed Purchasers, it is often an impulse buy.
- ✓ Due to retail dynamics, stores typically only stock one brand and often not the full accompaniment of that brand's offerings.
- ✓ Therefore, there is little risk to the consumer in product selection and not much differentiation (brand and product) that needs to be considered.

GAPP and its members need to break through the low involvement paradigm together in order to increase consumer consideration and purchase of imitation crab products.

As an association and as surimi manufacturers, you can use the weight of your collective voices to drive consistent and impactful product messages that can breakthrough existing consumer habits and beliefs.

In turn, a united front can help increase consumer consideration and purchase of imitation crab products.



Implications

GAPP should consider re-introducing imitation crab to consumers, working with the industry to create relevant product *nomenclature*, *positioning*, *messaging* and *retail activation*.

NOMENCLATURE

The industry needs to **determine what type of crab this product should be called** (crab surimi, crab alternative, etc.) and **collectively use the name to change consumer expectations**.



While the industry has branded imitation crab various ways (including surimi), **consumers primarily call it (and identify it as) imitation crab**.



However, **imitation products drives negative impressions** among less frequent and non-users, outweighing important influencers of taste and quality.

POSITIONING

New positioning and messaging that emphasizes relevant attributes and addresses consumer needs **is needed to change beliefs and educate the consumer**.



Consumers **do not know much about imitation crab** (product forms, ingredients, benefits, etc.), and **need additional information** to buy into the category.

MESSAGING

The imitation crab story must **reinforce and strengthen the great/crab taste and quality messaging** to support purchasers' choice.



Product optimization to enhance crab taste/texture **should be explored**. If formulas/taste is improved, **promote and sample to drive renewed trial**.



Improved taste could drive reconsideration among less frequent purchasers **and increase satisfaction** among current users.

Implications

MESSAGING

To improve imitation crab saliency and relevancy, messaging should be developed to promote and support purchaser drivers.



Focus health messaging on the consumer desired benefit of **high protein and Omega 3's**.



Feature hero products for communication that deliver on consumer's desire for **an all-natural crab alternative without artificial ingredients or preservatives**.



Tie sustainability, origin, and source elements into relevant messaging to further encourage consideration.

Sustainability, origin, and source traits could be compelling reasons to believe in support of taste, quality, and naturalness messaging.

For example, 'made with Wild Alaska Pollock' is not a top driver, yet it elicits great consumer interest once connected to Wild Alaska Pollock's role within the imitation crab story.

POSITIONING/MESSAGING

The industry must continue to give consumers reasons to break out of their imitation crab routines and drive purchase frequency with new recipes and usage occasions.



Consider in-store displays, sampling of complete recipes and providing on-package recipe ideas to inspire impromptu purchases in-store (influencing Infrequent/Lapsed Purchasers in particular).



Showcase imitation crab on popular recipe/meal sites to get imitation crab on shopping lists ahead of store visits and inspire new occasions for consumption.



Leverage on-screen personalities, food influencers and popular food focused TV shows more often to highlight recipe ideas.



Consider developing imitation crab protein snacks (with appropriate condiments) that can be stocked with other fresh protein snacks, gaining new locations in store and interrupting consumer path.

RETAIL ACTIVATION

Retail activation is key to increasing awareness and driving traffic to imitation crab.



Each manufacturer **must ensure brand and key SKU availability as well as value/price promotion** are consistently maintained in store.



Consider analyzing store sales data to determine optimal price, promotion and SKU availability to identify optimal sales configuration for retailers and bring consumer relevancy to the brand set.

Today, consumers do not seem to differentiate between flake and chunk; therefore, the need for both SKUs should be investigated.



In-store signage may help to increase saliency (a top barrier to purchase) and **stir impromptu purchases** particularly among Infrequent/Lapsed users.

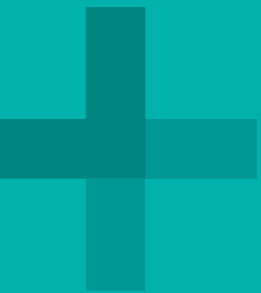


Leverage online real estate to reinforce the new imitation crab story and key messages.

This is particularly relevant as Imitation crab is an ideal product for the new online purchasing world, pre-packed and seemingly less perishable than fresh shellfish.



Product packaging must communicate clearly and speak to the values that consumers are seeking.



PURCHASE BEHAVIORS & DRIVERS

C+R
RESEARCH

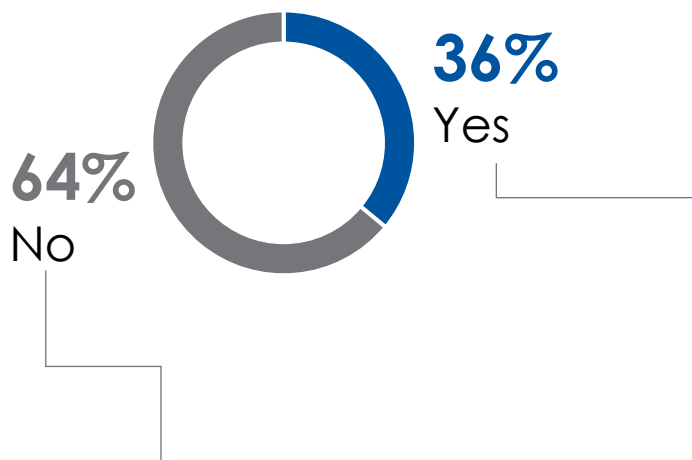
Emerge smarter.



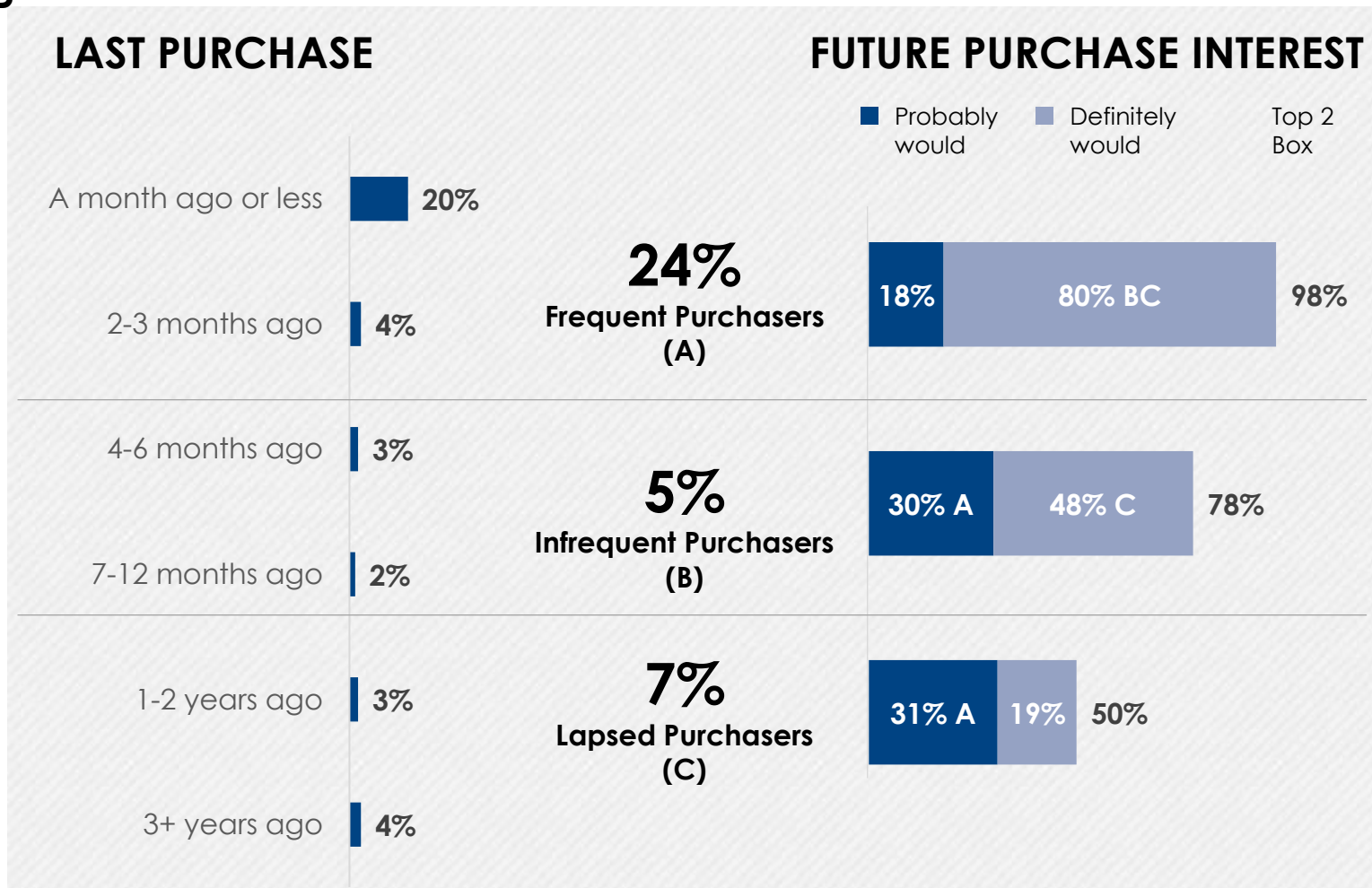
One third of U.S. consumers have ever purchased imitation crab with a quarter of consumers being Frequent (past 3 month) Purchasers. Future purchase interest aligns with purchase recency, with the most recent purchasers having the highest intent to repurchase.

EVER PURCHASED IMITATION CRAB

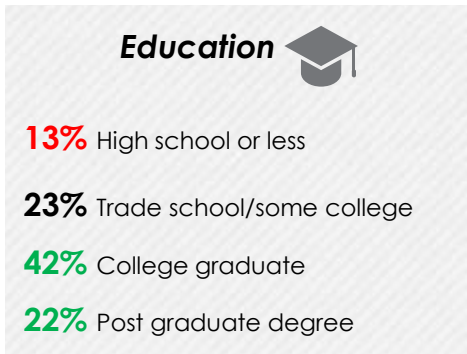
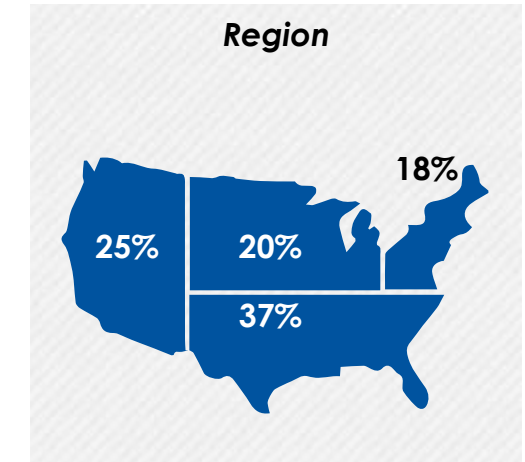
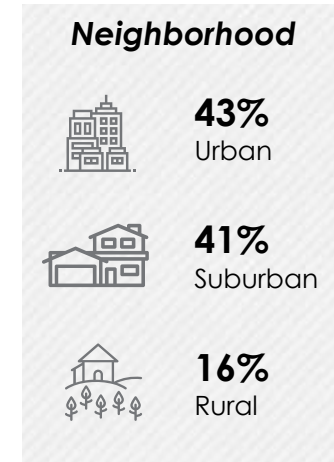
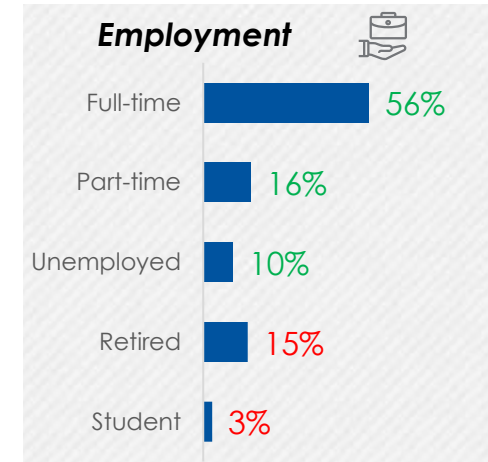
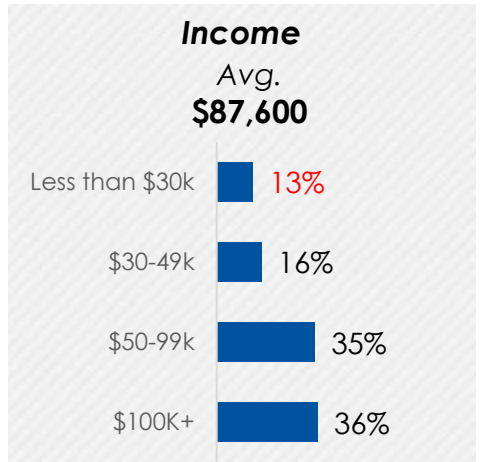
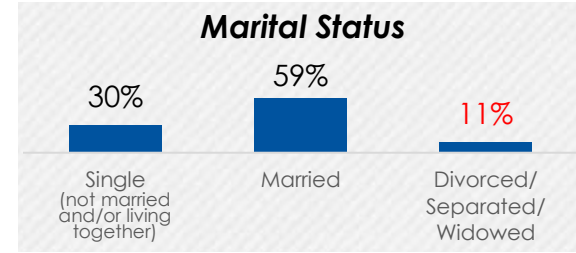
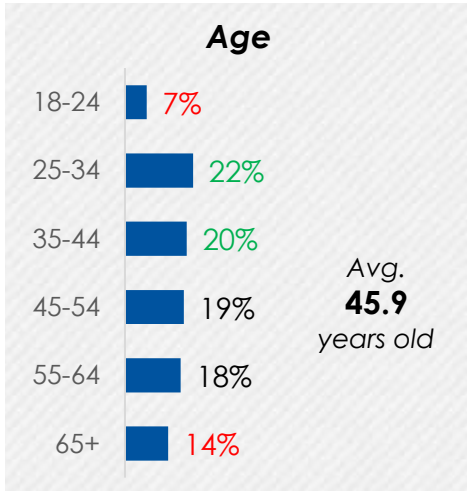
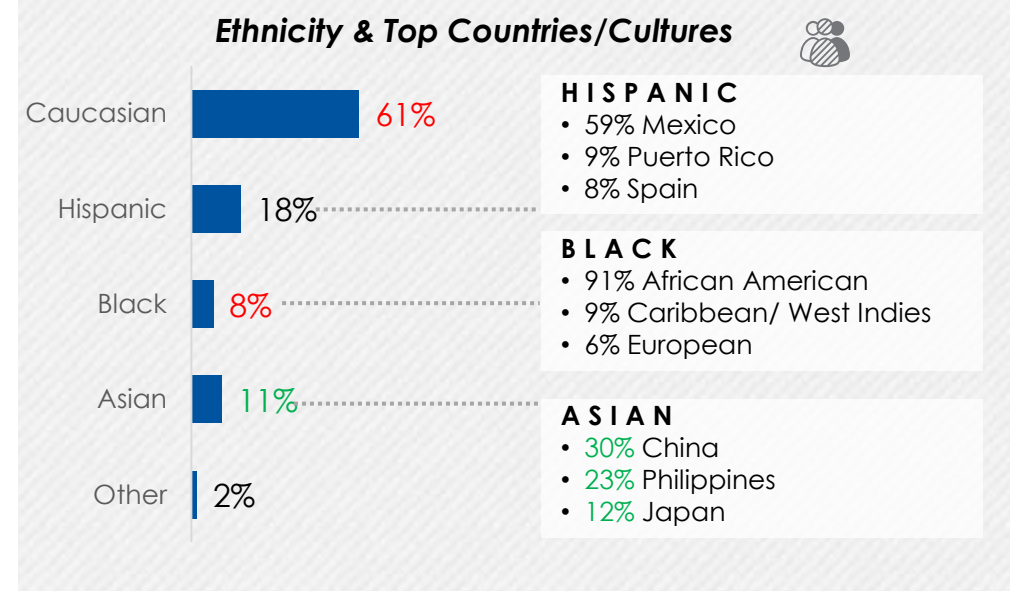
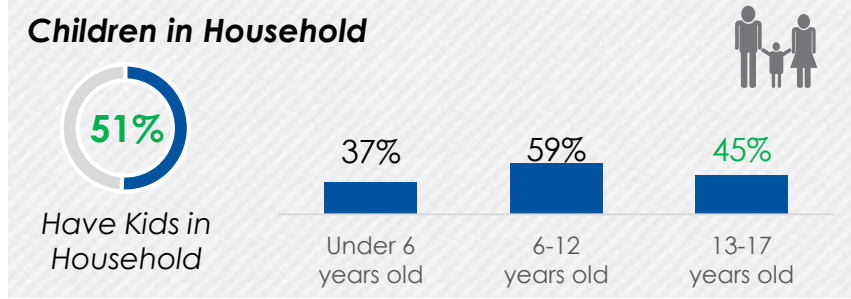
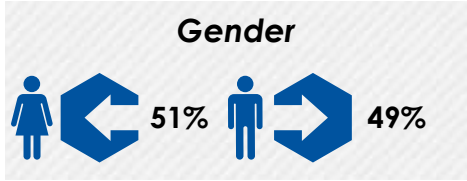
(shown with imagery below)



However, **72%** of non-purchasers have heard of imitation crab when prompted by package imagery.



Compared to Gen Pop, Frequent Purchasers are younger, highly educated, full-time workers with kids in their household.

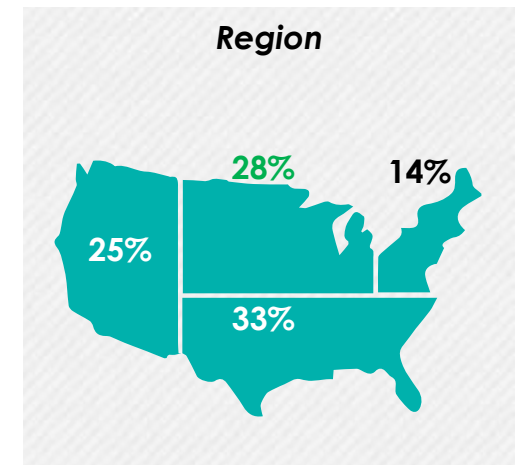
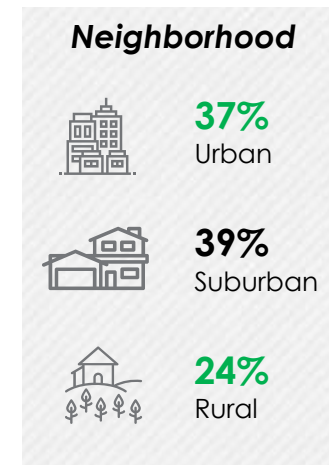
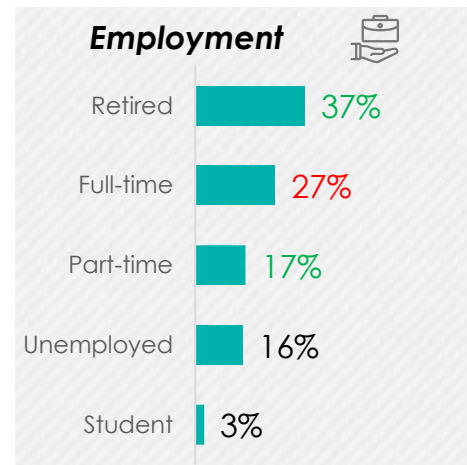
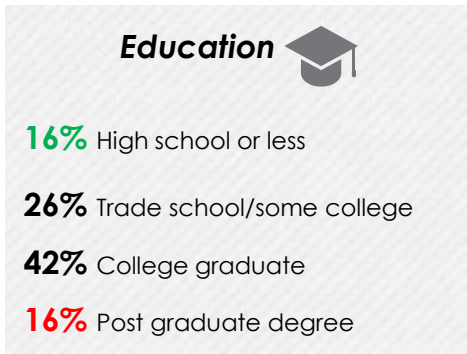
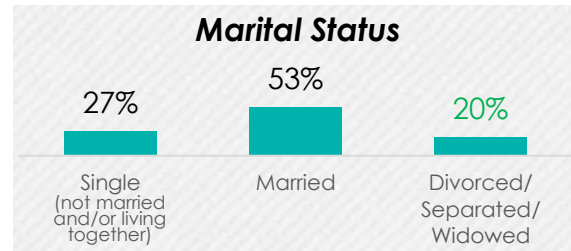
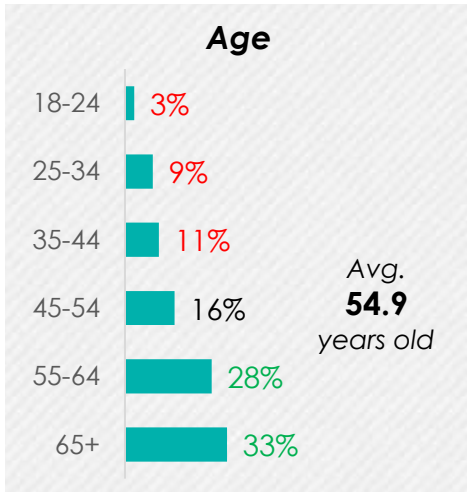
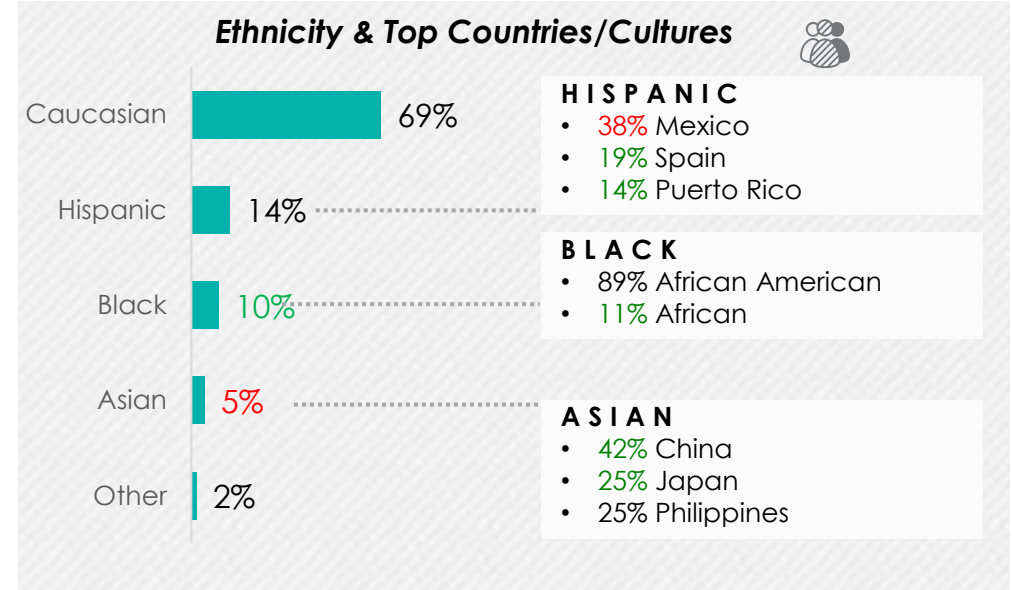
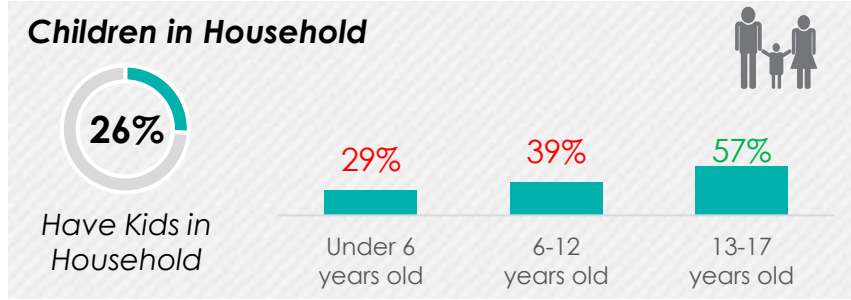
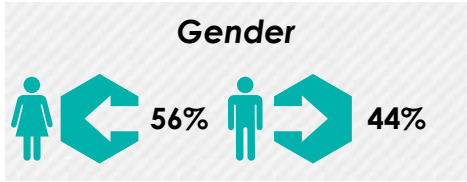


Green = Overindexes (120+) to census
Red = Underindexes (<80) to census

*Indexing shown to census when data is available

Compared to Frequent Purchasers, Infrequent/Lapsed Purchasers are older (55+ yrs.) and retired with lower incomes.

Infrequent/Lapsed Purchasers

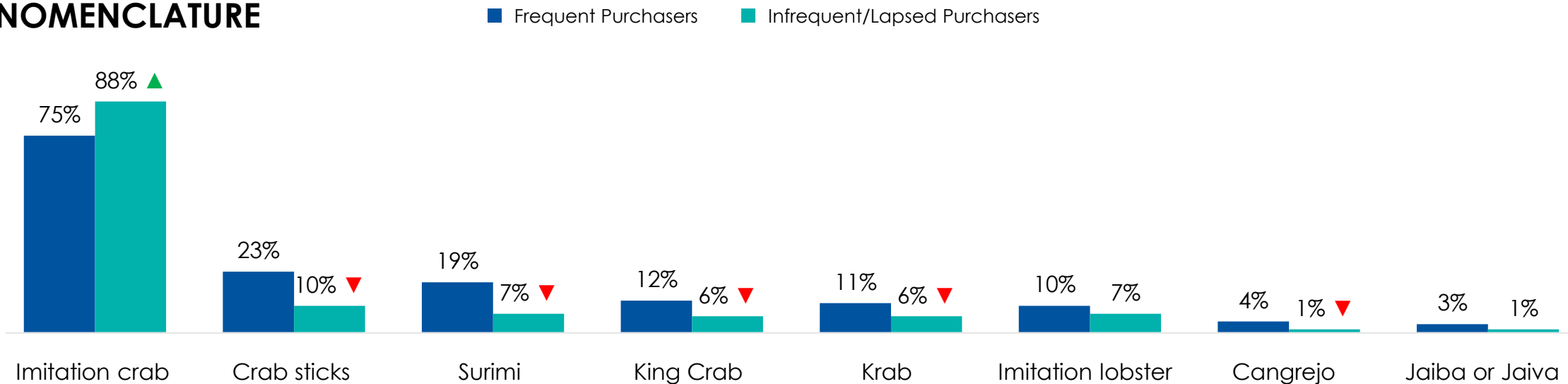


Green = Overindexes (120+) to Frequent Purchasers
Red = Underindexes (<80) to Frequent Purchasers

*Indexing shown to Frequent Purchasers when data is available

'Imitation crab' is widely used to identify this product, particularly among Infrequent/Lapsed Purchasers. Frequent Purchasers are more apt to use a variety of terms.

NOMENCLATURE



"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."

"It means food that tastes seafood-y. It's obviously not real crab, but it should remind you of crab. For me, having grown up with it, it doesn't feel or sound weird at all. It suggests to me that it's something versatile to use like spam or egg tofu."

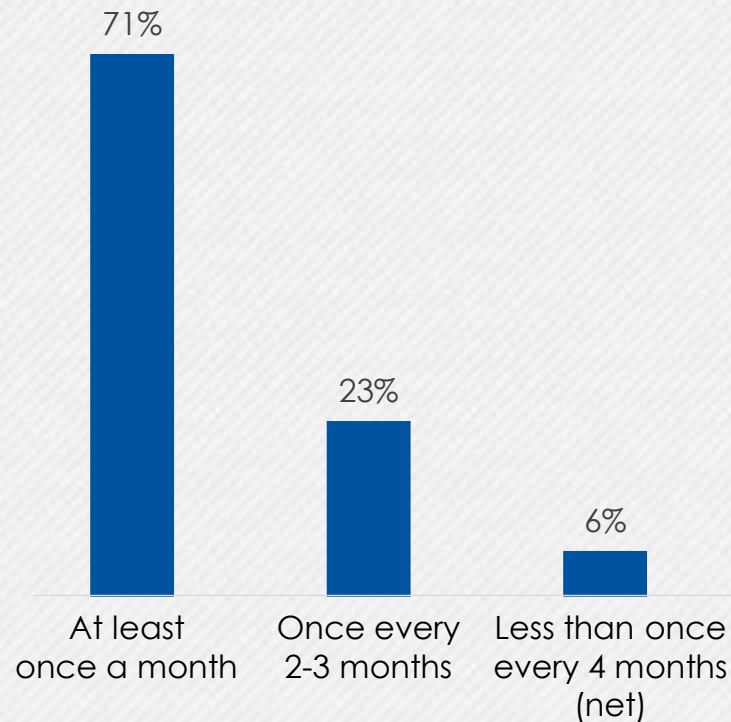
"I compare it to American cheese. It is not legally cheese, but it's good."

▲=significantly higher than Frequent Purchasers
▼=significantly lower than Frequent Purchasers

Most Frequent Purchasers buy imitation crab at least once a month. Grocery stores are the most common retailer for all purchasers, though Frequent Purchasers are more apt to purchase at a variety of retailers compared to Infrequent/Lapsed Purchasers.

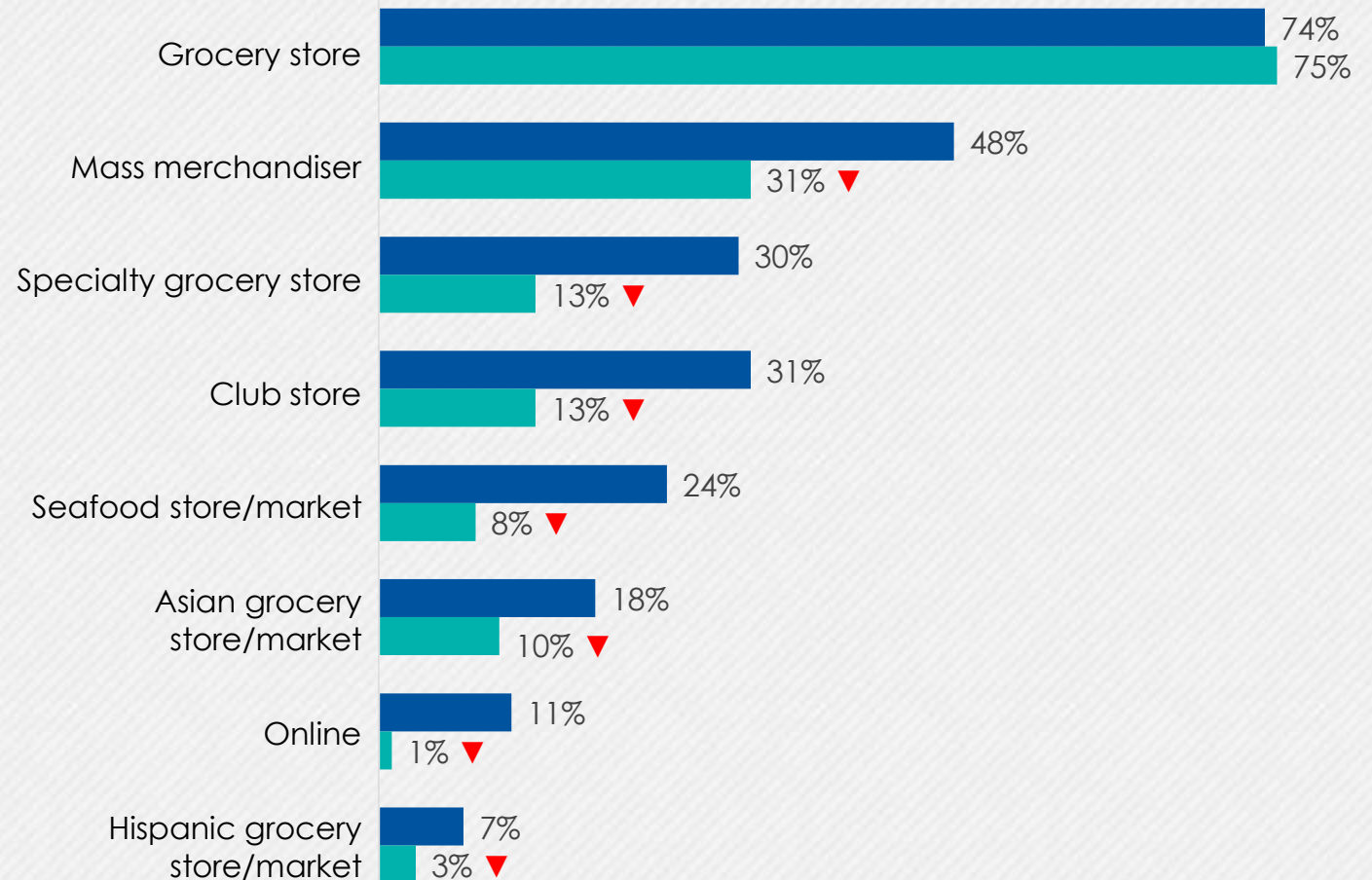
PURCHASE FREQUENCY

(among Frequent Purchasers)



RETAILERS PURCHASED

■ Frequent Purchasers
■ Infrequent/Lapsed Purchasers



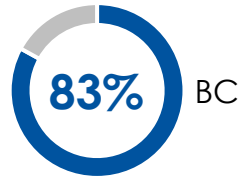
▲ = significantly higher than Frequent Purchasers
▼ = significantly lower than Frequent Purchasers

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.

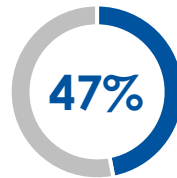
DEPARTMENT PURCHASE FREQUENCY

(% purchase at least every 3 months - among Frequent Purchasers)

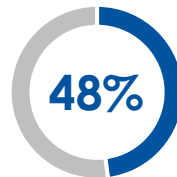
In a branded package
(A)



From the fish counter
(sold by the lbs.)
(B)



In bulk/Deli section
(C)



Within the qualitative research, most consumers also purchase imitation crab packaged within the refrigerated section.

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

"The packages they have refrigerated by the 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 in here all of the time. I don't have a big preference anyway."

DURABLE | 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 is been better handle and preserve of freshness is better. Besides I always try to have a few in stock so I rather get them in 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 rather buy it packaged rather 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."

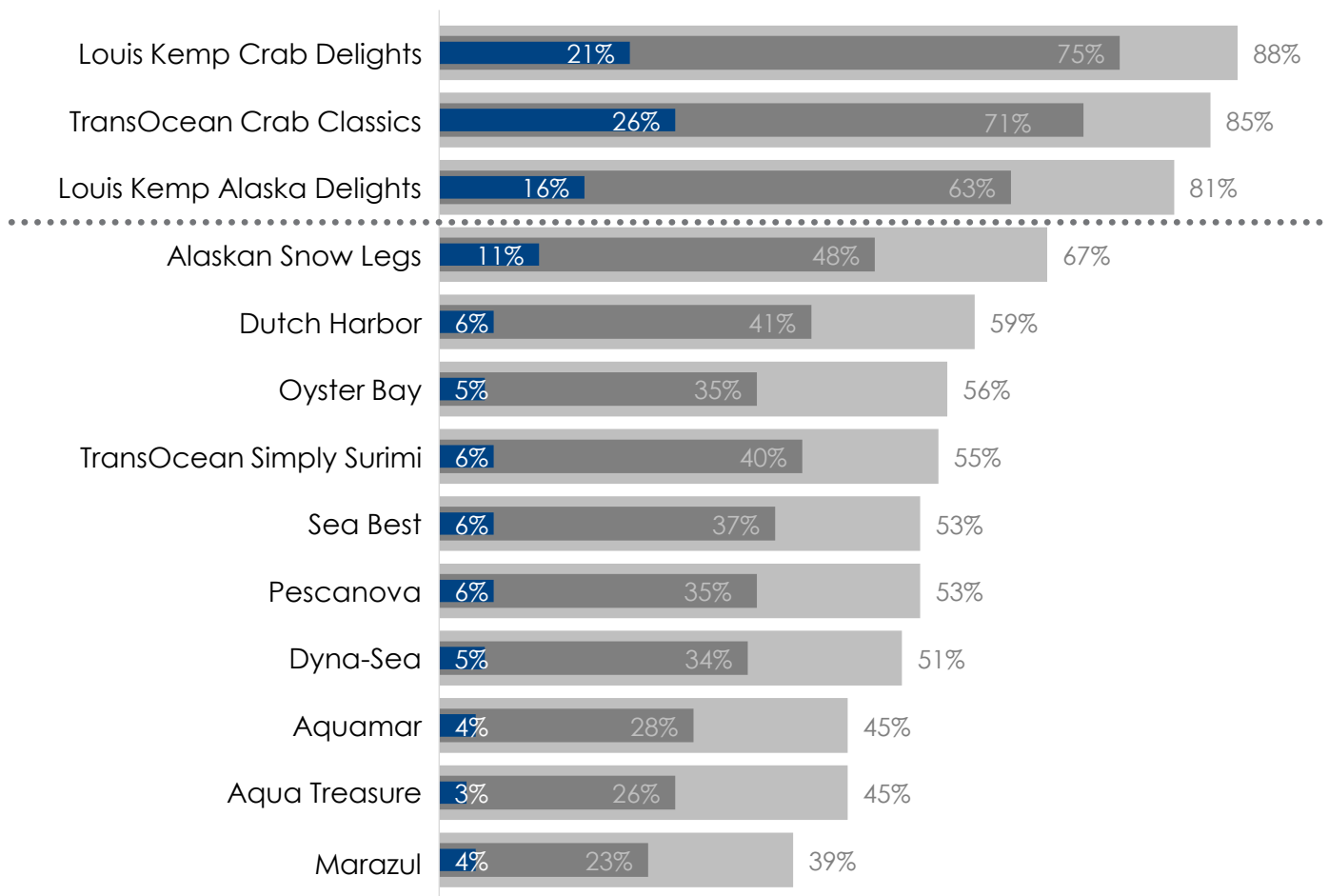
"I always have at least 6 to 8, 1 lb. Packages in my freezer."

TransOcean Crab Classics and the Louis Kemp brands receive highest awareness, purchase, and loyalty among brands.

BRAND RANKING

- Aware
- Ever Purchased
- Favorite

Frequent Purchaser



Brand is not a key purchase driver despite consumers being aware of several imitation crab brands: limited brand selection appears to be driven by availability rather than loyalty for most

“For me, the brand doesn’t really matter because my go to store only carries one brand and since we enjoy it, the brand doesn’t really come into play.”

“The brand isn’t super important to me. I figure they all have almost the same flavor.”

“The brand doesn’t matter as much as the quality and price, so essentially the value. I think often those go hand in hand with the brand though. The Osaka brand is often the highest quality Surimi at the Chinese supermarket, as well as the most expensive. I just want a quality product.”

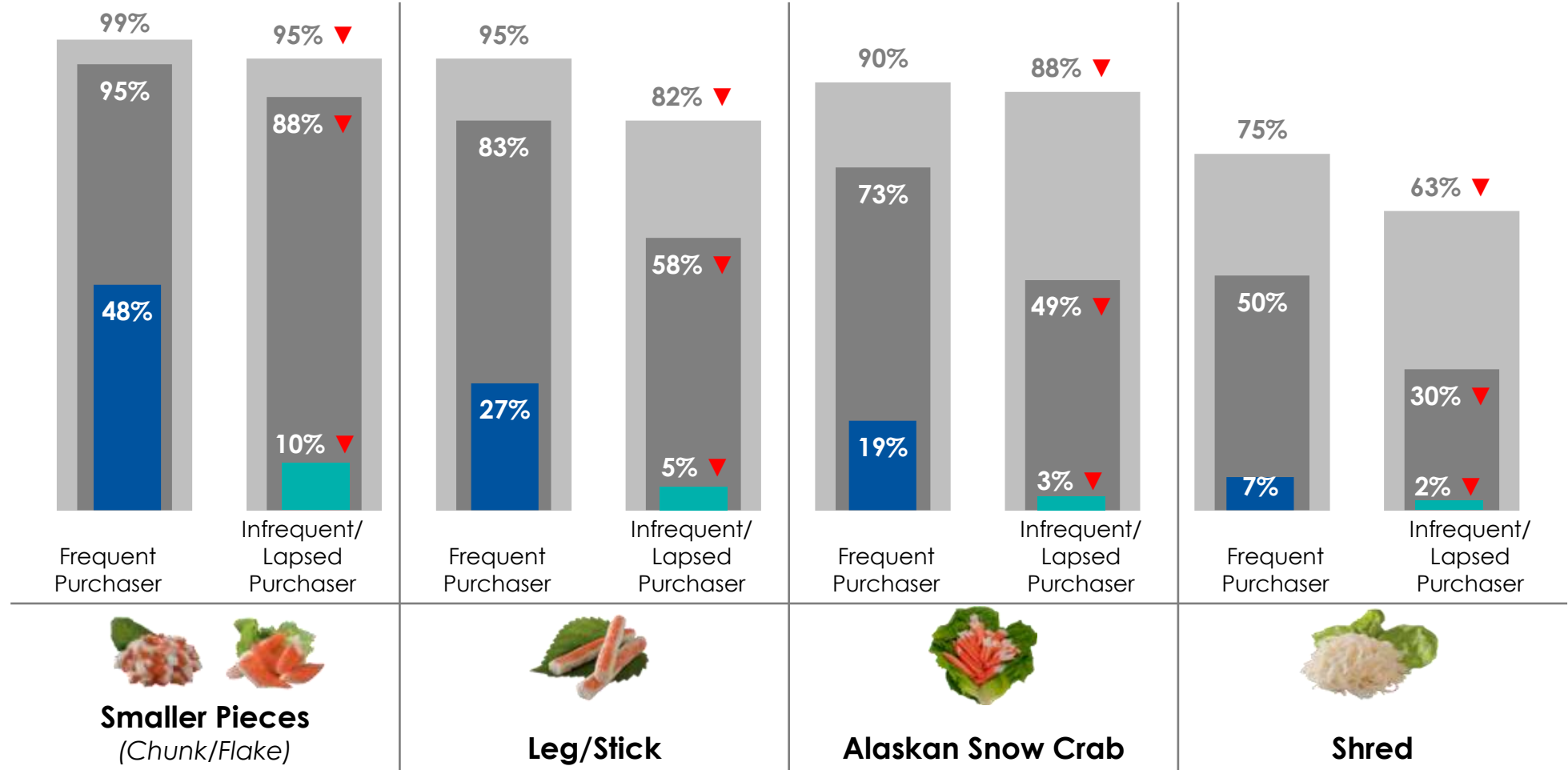
“To be honest I don’t really go after any particular brand as long as I see the product in a good condition, I get it.”

Consumers do not seem to differentiate between chunk and flake forms, and may instead view them collectively as 'smaller pieces'. These smaller pieces are the most recognized, purchased, and favored forms of imitation crab, followed by leg/stick style. Infrequent/Lapsed Purchasers are less familiar with all forms, particularly shred style.

FORM AWARENESS AND PURCHASE

Aware
 Ever Purchased
 Favorite

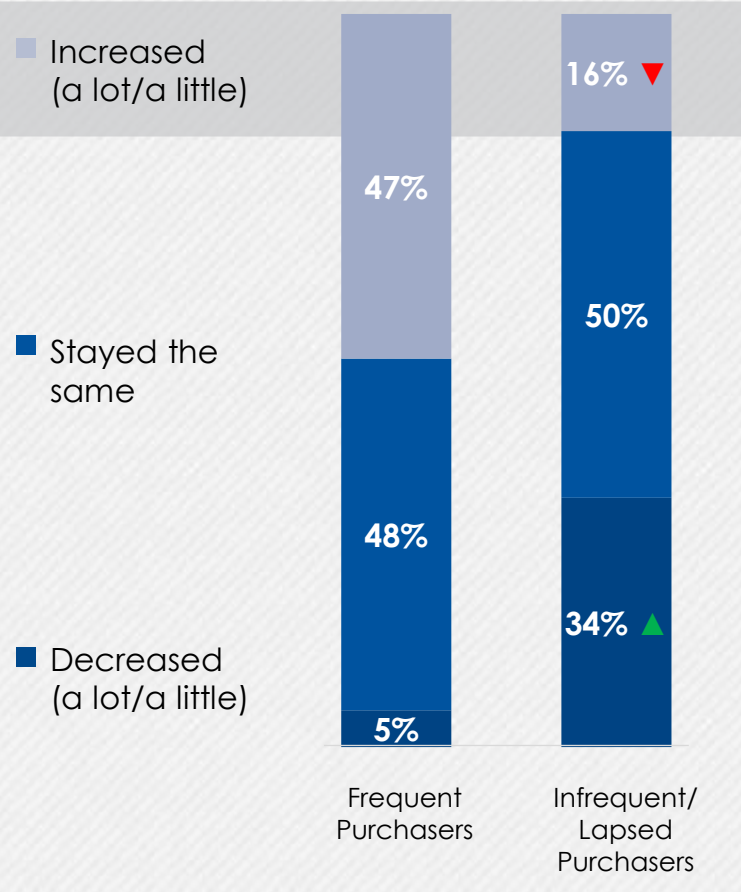
Reinforced by sales data, a lack of distinction between chunk and flake forms seems to exist among consumers, indicating they may view these within a single 'smaller pieces' category.



▲ = significantly higher than Frequent Purchasers
▼ = significantly lower than Frequent Purchasers

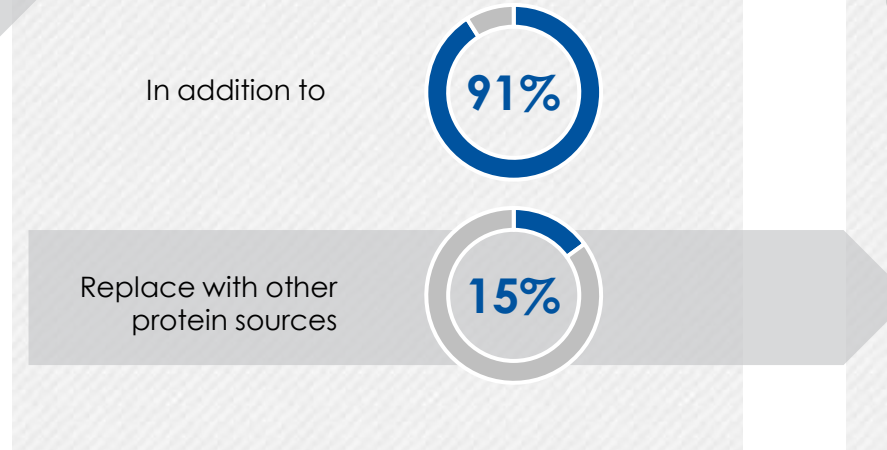
Over the past two years, imitation crab purchases have increased among Frequent Purchasers and decreased among Infrequent/Lapsed Purchasers. Most buy imitation crab in addition to other protein sources; if replacing another protein, it's typically fish, lobster or pork.

IMITATION CRAB PURCHASE CHANGES OVER PAST TWO YEARS



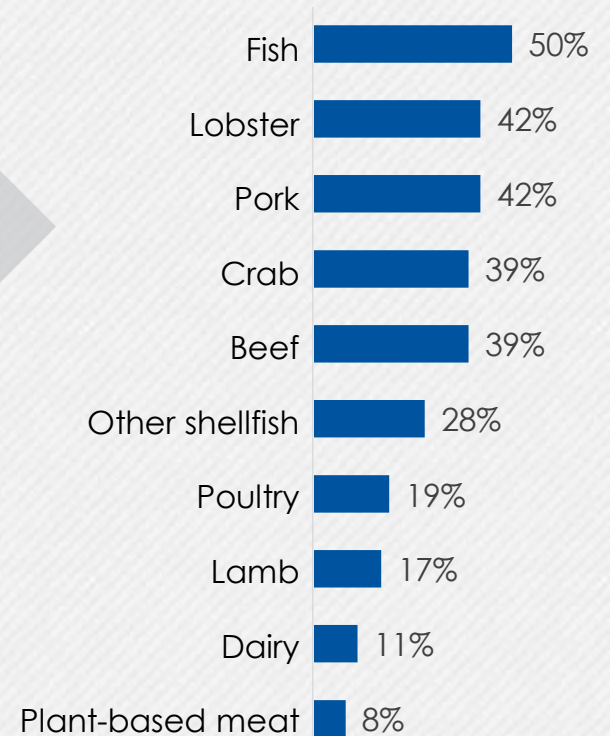
PURCHASE IN ADDITION TO VS. REPLACE

(among Frequent Purchasers)



FOODS REPLACED

(among Frequent Purchasers)

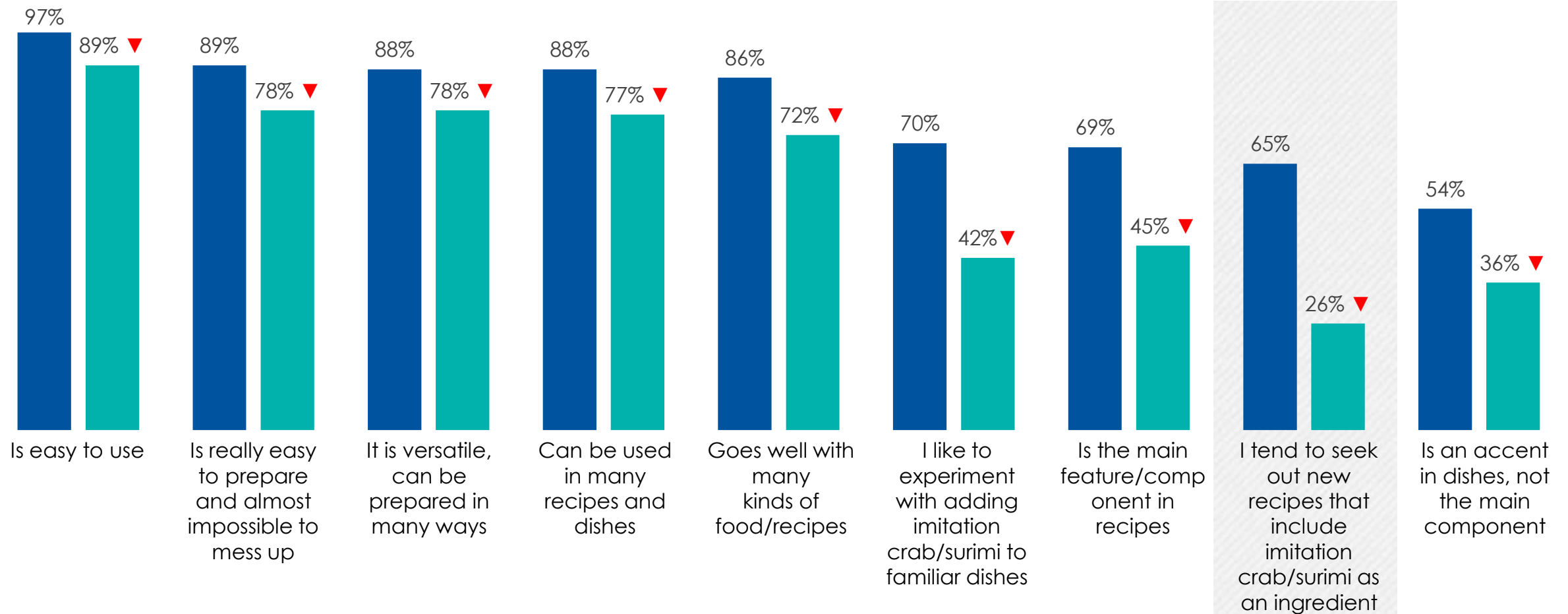


▲=significantly higher than Frequent Purchasers
▼=significantly lower than Frequent Purchasers

Consumers find imitation crab to be easy to use/prepare and versatile, yet consumers, especially Infrequent/Lapsed Purchasers, do not actively seek out new uses or recipes, creating the potential for a cooking rut.

CATEGORY ATTITUDES ON USAGE (% Agree completely/somewhat)

■ Frequent Purchasers ■ Infrequent/Lapsed Purchasers

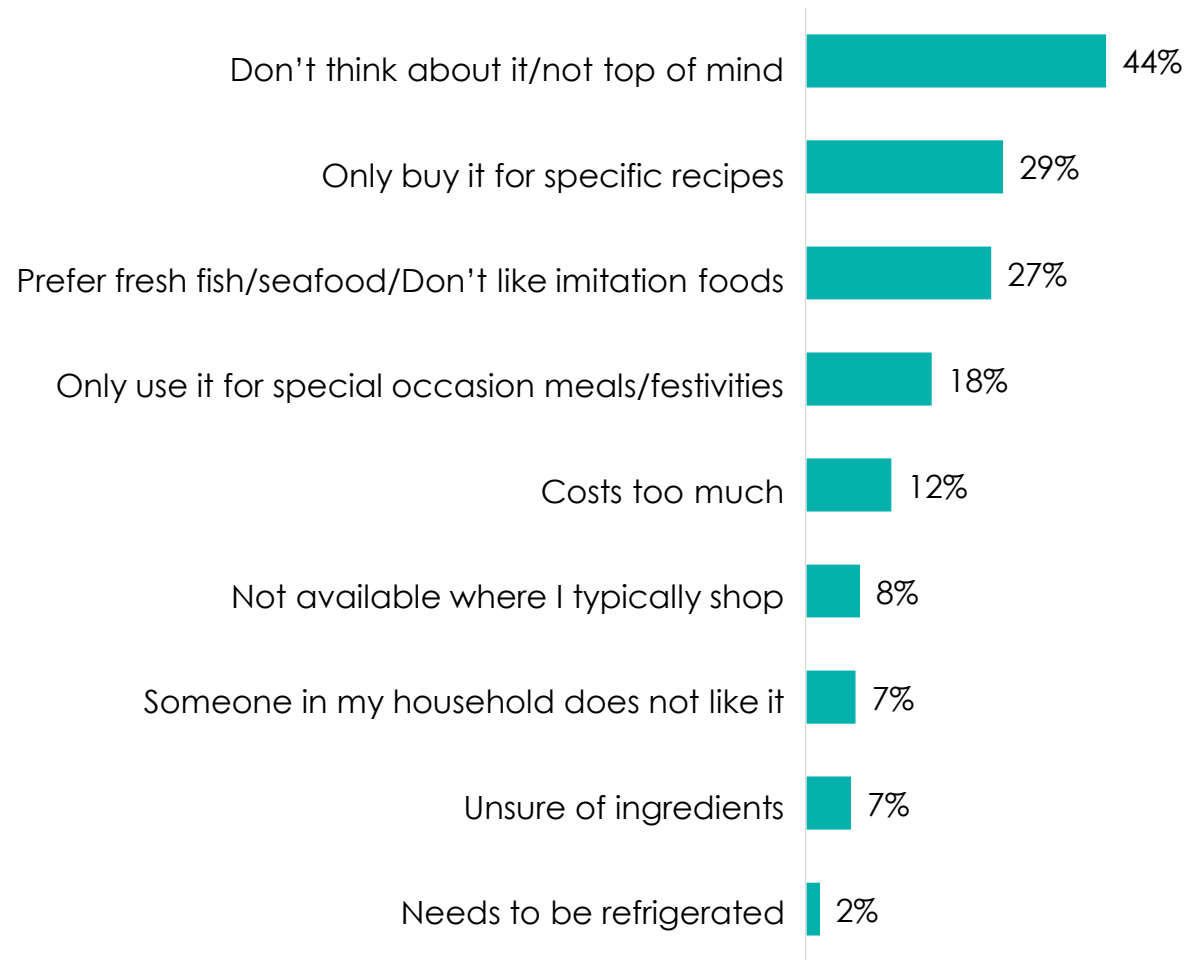


▲=significantly higher than Frequent Purchasers
▼=significantly lower than Frequent Purchasers

A lack of saliency is the top purchase barrier for Infrequent/Lapsed Purchasers. Limited use for specific recipes and preference for fresh fish/seafood are also common barriers.

PURCHASE BARRIERS

(among Infrequent/Lapsed Purchasers)



"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 to unless we're making sushi. We usually get sushi from a restaurant, so we don't buy the product often."

"I usually don't think to purchase it unless I'm over by the seafood counter. We don't eat seafood as often as chicken and beef."

"I don't have a use for it in a lot of my meals as an ingredient."

"I don't like the taste. I'd rather spend more for real crab."

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

"We consider it a special treat."

Purchasers are looking for improved taste and recipe ideas to increase their imitation crab purchases.

HOW TO INCREASE PURCHASE (3%+ mentions)

	Frequent Purchasers	Infrequent/ Lapsed Purchasers
Product Improvements (net)	46%	22% ▼
Better taste/flavor	18	6 ▼
Knowledge of health/nutrition	7	3
Improved quality	5	1 ▼
Tastes more like real crab	4	3
Knowledge of source/ingredients	3	5
More/New Use Occasions (net)	23	40 ▲
More recipe ideas	12	20 ▲
Ideas for versatility/use in meals/dishes	5	4
Satisfy a craving	3	4
Requested by family	2	4 ▲
Entertaining/Special occasions	0	4 ▲
Available in store	7	5
Better prices/Coupons (net)	5	7
Easy to use/prepare	3	0 ▼
More advertisements/promotions	0	5 ▲
Don't Know/Nothing (net)	17	18

Click to hear
in their own
words:



“Higher quality products, clean and simple ingredients. They make great snacks as main dish.”

“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.”

“If it could taste more and more like crab, I would totally be buying a lot more.”

“Maybe if I heard is healthy or other benefits that could interest me.”

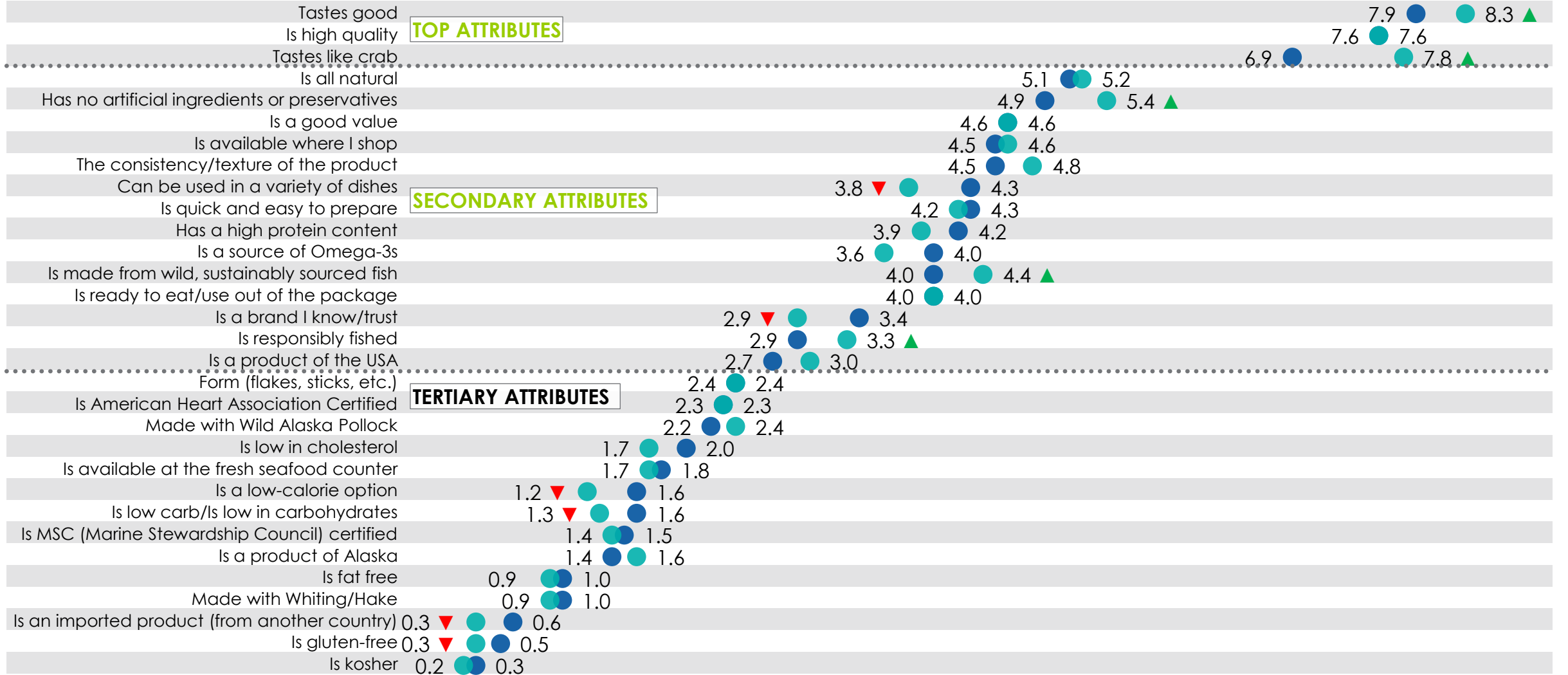
“Mostly, it needs to be more readily available where I shop. Sometimes it's out of stock, and sometimes it's down to the last package, so it's not the freshest.”

▲=significantly higher than Frequent Purchasers
▼=significantly lower than Frequent Purchasers

Consumers value taste (good and crab-like) and quality above all else when purchasing imitation crab. Less consideration is given to what imitation crab is made of and its health benefits.

ATTRIBUTE IMPORTANCE

● Frequent Purchasers ● Infrequent/Lapsed Purchasers



▲=significantly higher than Frequent Purchasers
▼=significantly lower than Frequent Purchasers

With consumers' focus on taste and quality, imitation crab's composition (i.e., what it is made from) and brand are of lesser importance during purchase decisions.



MADE FROM

Many are unsure of what imitation crab is made of, but do not seem to mind not knowing.

"I guess I never really thought about what it was made of. I just kind of think of it is seafood."

"No, I don't know what it's made of and, to be honest, I don't want to know either. Cause I know myself and if it's made with something I don't like or looks or sounds nasty, I won't eat it again. So [no] thank you, [I] don't need to know."

"I don't know what it's made of exactly. Without looking up the ingredients online I would say it uses various fish with coloring and flavoring added to make it appear as crab meat."

Consumers generally think of imitation crab/surimi as vaguely resembling seafood.

"To me, it means other fish made to look like crab with some crab flavoring. It makes me feel like I can eat any kind of seafood if I want to. It actually conjures the image of crabs crawling around in the ocean. It suggests that it is a good food for people than need an alternative to crab meat."

"It means food that tastes seafood-y. It's obviously not real crab, but it should remind you of crab. For me, having grown up with it, it doesn't feel or sound weird at all. It reminds me of hot pot and DIY sushi nights. It reminds me of the familiar packaging of it in a supermarket freezer. It suggests to me that it's something versatile to use like spam or egg tofu."

Upon learning of Wild Alaska Pollock in imitation crab, many are not surprised, nor does it change their perceptions.

"I feel like I knew that in the back of my mind. It doesn't change my thoughts about the surimi. The benefits for me as a consumer is that I can have something acceptable that is similar to the real thing."

"As a consumer, I knew it was made from a fish, no surprises there. I've been eating surimi since I was younger, and I will continue to consume. It does not change my thoughts about Surimi at all. Personally, I would put surimi in any of my dishes. On the positive note, Wild Alaska Pollock are very nutritious, and I am happy to consume."

BRAND

Brand plays a secondary role in purchases as other aspects (quality, availability, price, etc.) drive decision-making.

"The brand isn't super important to me. I figure they all have almost the same flavor."

"To be honest, I don't really go after any particular brand. As long as I see the product in a good condition, I get it."

"The brand doesn't matter as much as the quality and price, so essentially the value. I think often those go hand in hand with the brand though. The Osaka brand is often the highest quality Surimi at the Chinese supermarket, as well as the most expensive. I just want a quality product."

Frequent Purchasers perceive imitation crab as many traits ('good-for-you', 'healthy', 'approachable', 'delicious', etc.). 'Unnatural' and 'processed' come to mind for Infrequent Purchasers, while Lapsed Purchasers find it to be 'fake', 'frugal', 'plain', 'artificial', and 'mild'.

PERSONALITY TRAITS

Frequent Purchasers

Infrequent Purchasers

Lapsed Purchasers



The size of each word corresponds to how closely associated it is with each group, with larger words indicating that the trait has a stronger association with that group. Words that appear in color are uniquely associated with that group based on a correspondence analysis. Please note that some words may not appear in each image.

When comparing Hispanic, Asian-American and Gen Pop Frequent Purchasers, different attributes of imitation crab are uniquely associated with each target: 'Pure', 'mild', 'affordable', and 'sweet' come to mind for the general population; 'authentic', 'dependable', 'filling', 'indulgent' and others rise to the top among Hispanic purchasers; 'nostalgic' and 'familiar' are primary terms for Asian-American purchasers.

PERSONALITY TRAITS – Among Frequent Purchasers

Gen Pop



Total Hispanic Purchasers



Asian-American Purchasers



The size of each word corresponds to how closely associated it is with each group, with larger words indicating that the trait has a stronger association with that group. Words that appear in color are uniquely associated with that group based on a correspondence analysis. Please note that some words may not appear in each image.

Satisfying basic needs (taste, quality, value, etc.) is a top driver for satisfaction, particularly among Infrequent/Lapsed Purchasers. Origin, naturalness and sustainability is equally important among Frequent Purchasers. Nutrient profiles and additional product details have less influence.

DRIVERS OF SATISFACTION (Derived Importance)

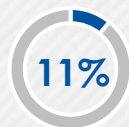
Least Important Drivers

Most Important Drivers

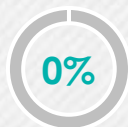
Imported, Whiting/Hake or Certified Kosher or MSC

- **MSC (Marine Stewardship Council) certified**
- Available at the fresh seafood counter
- Kosher
- Imported product
- Made with Whiting/Hake

Importance of Factor



Frequent Purchasers

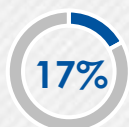


Infrequent/Lapsed Purchasers

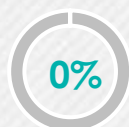
Health-Oriented Attributes

- **A source of Omega-3s**
- **A high protein content**
- Fat free
- Low in cholesterol
- A low-calorie option
- Low carb/low in carbohydrates
- Gluten-free

Importance of Factor



Frequent Purchasers

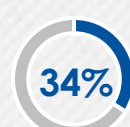


Infrequent/Lapsed Purchasers

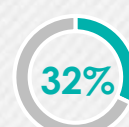
Origin, Naturalness & Sustainability

- **No artificial ingredients or preservatives**
- **All natural**
- **A product of the USA**
- Made from wild, sustainably sourced fish
- Responsibly produced
- A product of Alaska
- Made with Wild Alaska Pollock
- American Heart Association Certified

Importance of Factor



Frequent Purchasers

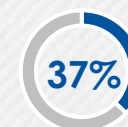


Infrequent/Lapsed Purchasers

Core Purchase Drivers

- **Tastes good**
- **High quality**
- **Tastes like crab**
- **A good value**
- **A brand I know/trust**
- **Consistency/texture of the product**
- **Available where I shop**
- Can be used in a variety of dishes
- Form (flakes, sticks, etc.)
- Ready to eat/use out of the package
- Quick and easy to prepare

Importance of Factor

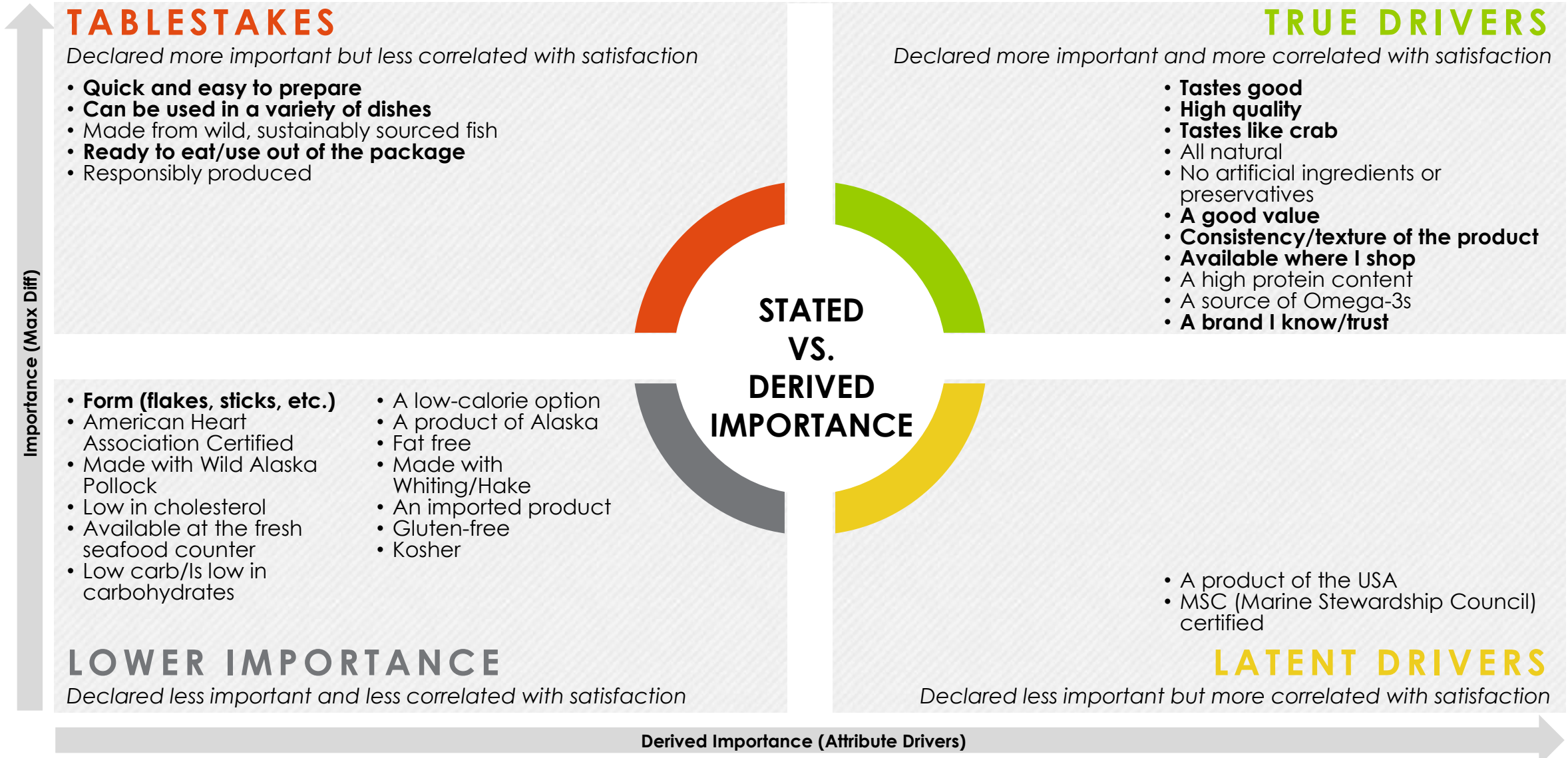


Frequent Purchasers



Infrequent/Lapsed Purchasers

Taste and quality, alongside ingredients/nutrients, value, texture, availability, and brand, are truly important to consumers. Consumers may overstate the value they place on convenience (easy to prepare, versatility, etc.) while understating the importance of origin. Sustainability is important, but how this resonates varies.



Specific mention of Wild Alaska Pollock in the concept description is well-liked, though 'typically made from' text causes some confusion. Frequent Purchasers also particularly like nutritional inclusion of 'high protein,' more so than Infrequent/Lapsed Purchasers.

CONCEPT DESCRIPTION

As you may know, surimi/imitation crab is typically made from Wild Alaska Pollock, a mild, sustainably sourced whitefish which is made into an affordable, high protein alternative to crab and other shellfish and is sold as pre-cooked flakes, stick/legs, or chunks in the refrigerated seafood section of the grocery store.

LIKES

"is typically made from Wild Alaska Pollock"

Frequent Purchasers

48%

Infrequent/Lapsed Purchasers

48%

"Because it makes me believe it's more real and authentic fish with more flavor."

"high protein"

30%

20% ▼

"I like the health benefit."

"which is made into an affordable"

20%

24%

"I like that is consistently affordable, I do not have to wait for a sale to make something that feels like a splurge."

CONFUSING

Didn't find anything confusing about this description

73%

72%

"is typically made from Wild Alaska Pollock"

5%

3%

"Typically means sometimes. What are they using other times?"

"sustainably sourced"

4%

3%

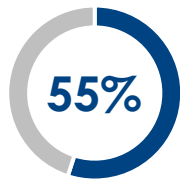
"I am not sure what sustainably sourced means."

Awareness of Wild Alaska Pollock in imitation crab increases with purchase frequency and positively impacts interest for more than a third of consumers.

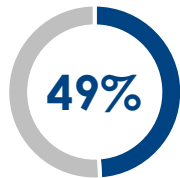
AWARE IMITATION CRAB IS MADE FROM WILD ALASKA POLLOCK

(% Yes)

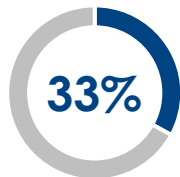
Frequent Purchasers
(past 3 months)
(A)



Infrequent Purchasers
(4-12 months)
(B)



Lapsed Purchasers
(12+ months)
(C)



IMPACT OF IMITATION CRAB MADE FROM WILD ALASKA POLLOCK

■ More interested in purchasing
(much/somewhat more)
■ Just as interested in purchasing
 ■ Less interested in purchasing
(much/somewhat less)



Across ethnicities and cultures, **most do not know exactly what imitation crab is made of**; knowing it is Wild Alaska Pollock elevates impressions and raises new questions.

POLLOCK IS A PLUS

"I am neutral regarding the use of Wild Alaska Pollock. Surimi is a great source of protein. Initially I am 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."

OKAY WITH 'IMITATION'

"It means food that tastes seafood-y. It's obviously not real crab, but it should remind you of crab. For me, having grown up with it, it doesn't feel or sound weird at all. It suggests to me that it's something versatile to use like spam or egg tofu."

Building the Imitation Crab Story.



Purchasers place the greatest importance on the taste and quality of imitation crab.

- Reinforce & strengthen great/crab taste and quality messaging to support purchasers' choice.
- Investigate if product optimization is warranted to enhance crab taste/texture experience which may help to drive reconsideration among infrequent users and increase satisfaction among Frequent Purchasers.



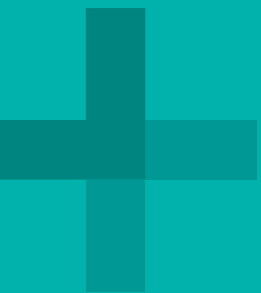
Other high value purchase drivers pinpoint opportunities to improve imitation crab saliency and relevancy.

- Ensure that product and key SKU availability and value are consistently maintained in store.
- Give consumers reasons to breakout of their imitation crab routines and drive purchase frequency with new recipes and usage occasions.
- Educate consumers on the most desirable health benefits of imitation crab- high protein and Omega-3s.
- Feature products that can deliver on consumer's desire for an all-natural crab alternative without artificial ingredients or preservatives.



Sustainability, origin, and source are not drivers today, but could become compelling, if linked to what consumers care about

- Specific attributes, such as a product of Alaska/US, MSC certified, made with Wild Alaska Pollock and made from wild, sustainably sourced fish, are not currently drivers for purchase but could be compelling reasons to believe in support of taste, quality, and naturalness messaging.
- Consumers are not knowledgeable about how and from what imitation crab is made, but it could be beneficial to educate them.
- For example, while made with Wild Alaska Pollock is not a top driver, it elicited great interest and impact once purchasers understood WAP's role within the imitation crab story.



CONSUMPTION BEHAVIORS

C+R
RESEARCH

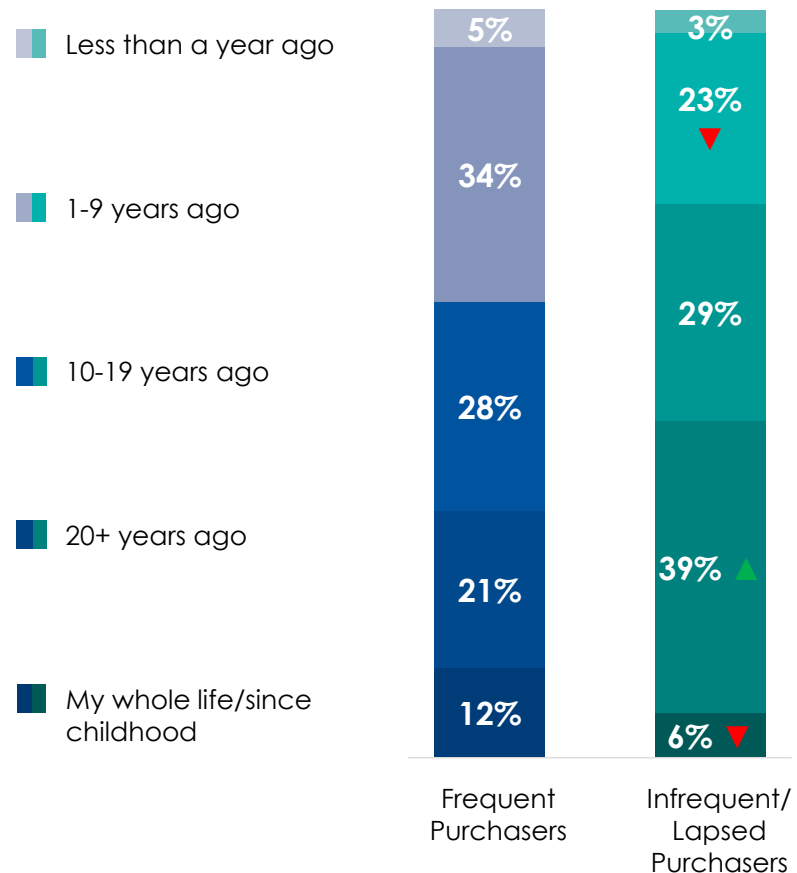
Emerge smarter.



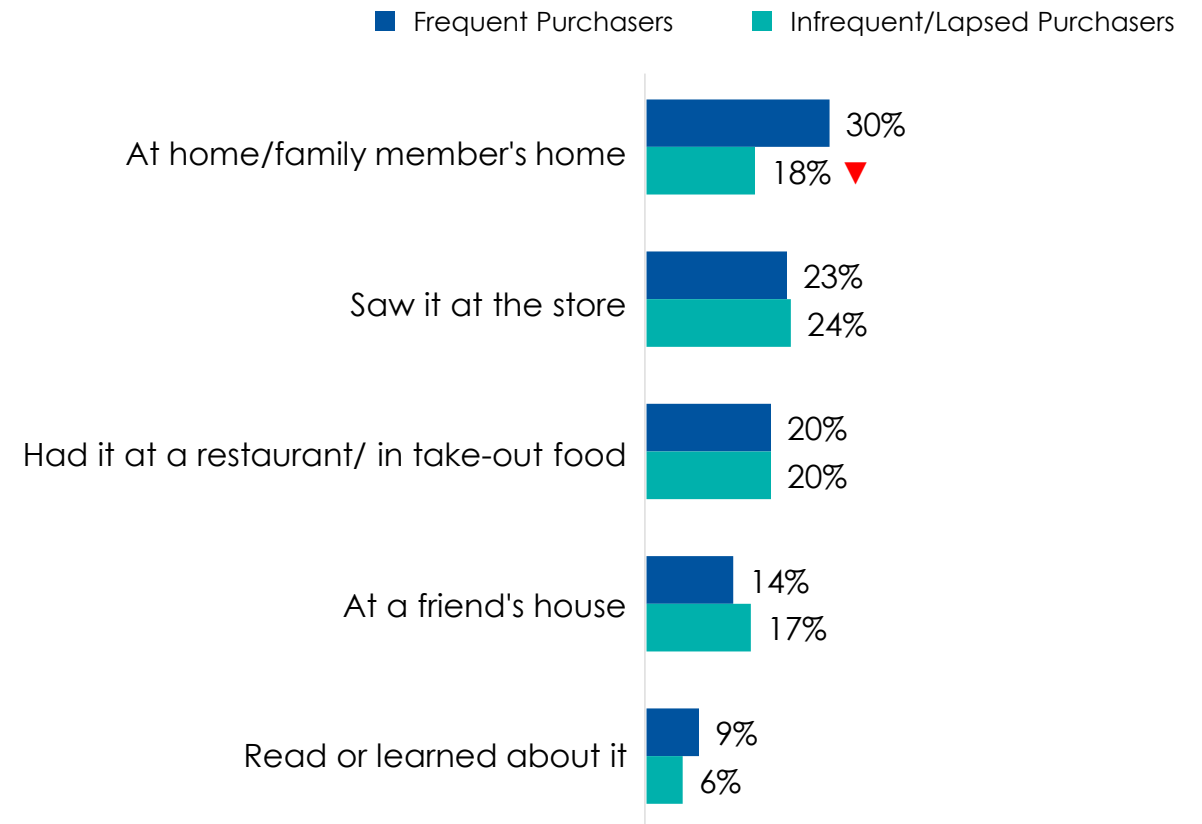
Length of history with imitation crab alone does not indicate present day frequency. Rather, the experience itself may be more telling, as Frequent Purchasers often first experience imitation crab with family.

FIRST EXPERIENCES WITH IMITATION CRAB

TIME SINCE FIRST EXPERIENCE



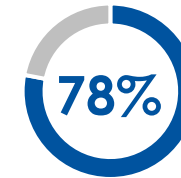
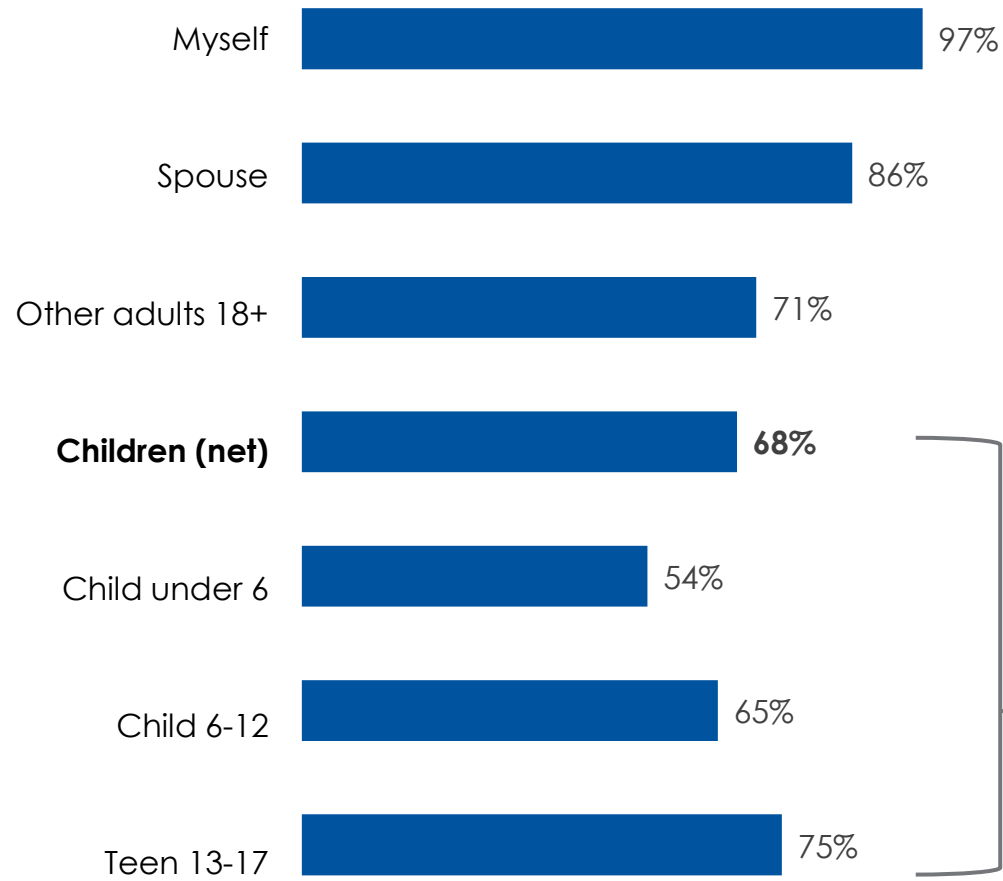
FIRST EXPERIENCE



▲=significantly higher than Frequent Purchasers
▼=significantly lower than Frequent Purchasers

Within Frequent Purchaser households, adults are the main consumers of imitation crab yet over two-thirds of children also eat imitation crab.

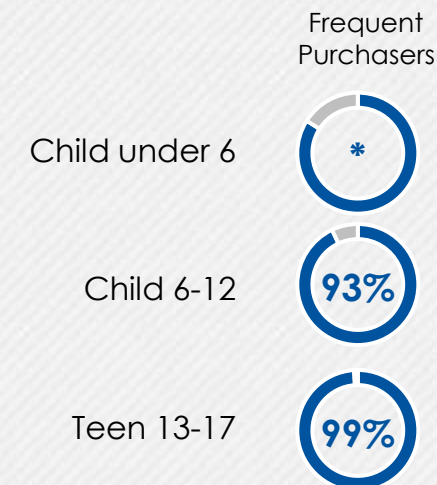
WHO CONSUMES *(among those in Frequent Purchaser households)*



agree (completely/somewhat) that 'Everyone in my household enjoys imitation crab/surimi'

CHILDREN CONSUMPTION DIFFERS OR SAME AS HOUSEHOLD

% Same as the rest of the household

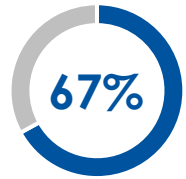


*Results for directional use only; small sample size (n<50)

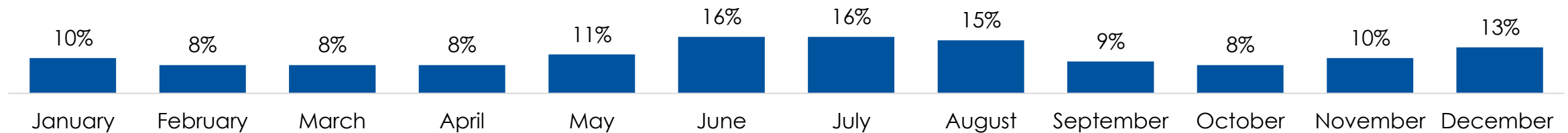
Consumption does not differ much throughout the year, though some consumers tend to eat more imitation crab during the summer months as a refreshing meal or during the holiday season as part of special occasion dishes.

MONTHLY CONSUMPTION

(among Frequent Purchasers)



Eat imitation crab consistently throughout the year



Summer months call for refreshing dishes:

*"I feel the summer heat brings out my hunger for more types of seafoods."
- May*

*"It is summertime and it is when the most delicious and delicious tastes and refreshes. [es tiempo de verano y es cuando mas rico y delicioso sabe y refresca]."
- July*

"It's a great and refreshing summer dish for us." - August

Holiday festivities warrant special occasion dishes:

*"We have Thanksgiving food and make sushi platters with the crab meat a lot."
- November*

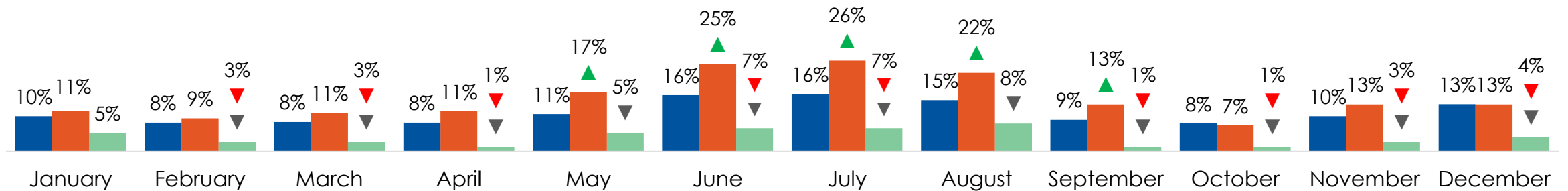
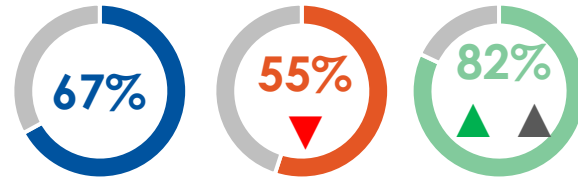
*"My family and I tend to make more meals together during the holiday season and prepare dishes that we don't prepare as often throughout the year."
- December*

Monthly consumption differs by ethnicity: Hispanic purchasers eat more imitation crab during the summer; Asian-American purchasers consistently consume imitation crab year-round.

MONTHLY CONSUMPTION

■ Frequent Purchasers ■ Total Hispanic ■ Asian-American

Eat imitation crab consistently throughout the year



Summer months:

"We eat sushi more often in summertime." May, Asian

"During this month we have warmer weather and the dishes I make with the crab are fresh go well with BBQ." June, Bicultural Hispanic

"It's a great and refreshing summer dish for us." -July, Bicultural Hispanic

"Great for summertime BBQs." – July, Asian

Holiday festivities:

"Thanksgiving and Christmas hotpot." –Asian, November & December

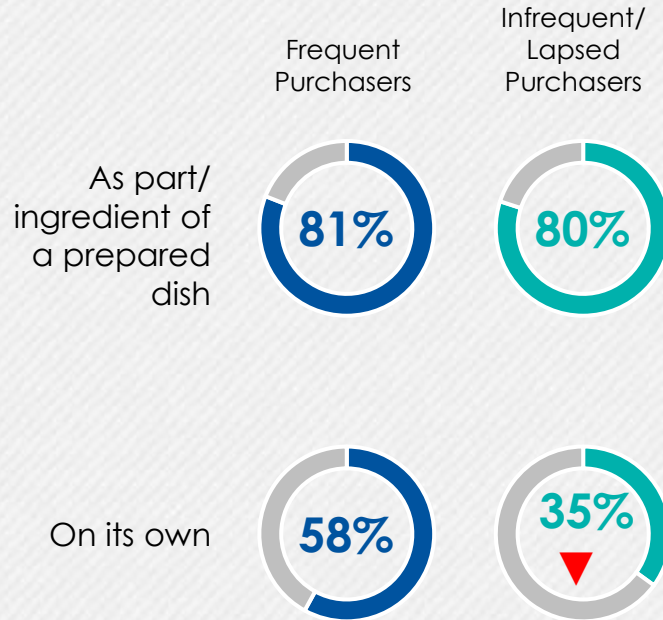
"My family and I tend to make more meals together during the holiday season and prepare dishes that we don't prepare as often throughout the year." –Bicultural Hispanic, December

▲=significantly higher than Frequent Purchasers
▼=significantly lower than Frequent Purchasers

▲=Asian-American is significantly higher than Total Hispanic
▼=Asian-American is significantly lower than Total Hispanic

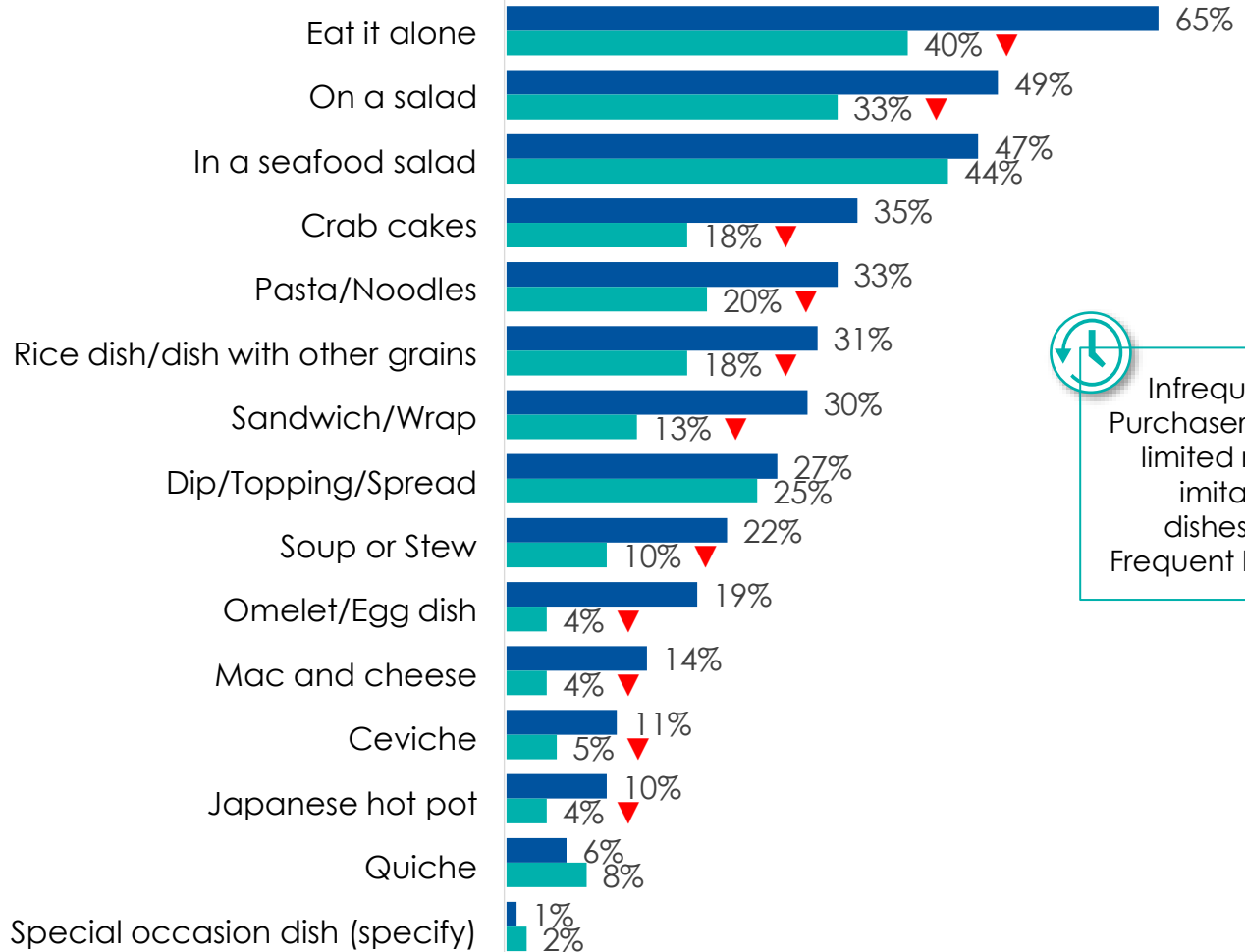
Most add imitation crab into dishes, though over half of Frequent Purchasers will eat it alone. Salad and seafood salad are top dishes made with imitation crab.

CONSUMPTION TYPE



RECIPES

■ Frequent Purchasers
■ Infrequent/Lapsed Purchasers



Infrequent/Lapsed Purchasers have a more limited repertoire of imitation crab dishes/uses than Frequent Purchasers do.

▲ = significantly higher than Frequent Purchasers
▼ = significantly lower than Frequent Purchasers

Consumers use imitation crab in a variety of different recipes, either passed down through family or by discovery/trial and error.

RECIPES

CULTURALLY-ANCHORED



EXPLORATORY



Click to hear
in their own
words:



WIDE VARIETY OF DISHES & OCCASIONS

- **CULTURALLY-ANCHORED** | Hispanic and Asian-American consumers make traditional dishes like ceviche, spring rolls, fried rice and soup/noodle dishes
- **VALUE** | Other consumers use imitation crab as a low-cost seafood alternative in crab cakes, salads, pastas and dips

SOME RECIPES PASSED DOWN, OTHERS WING IT

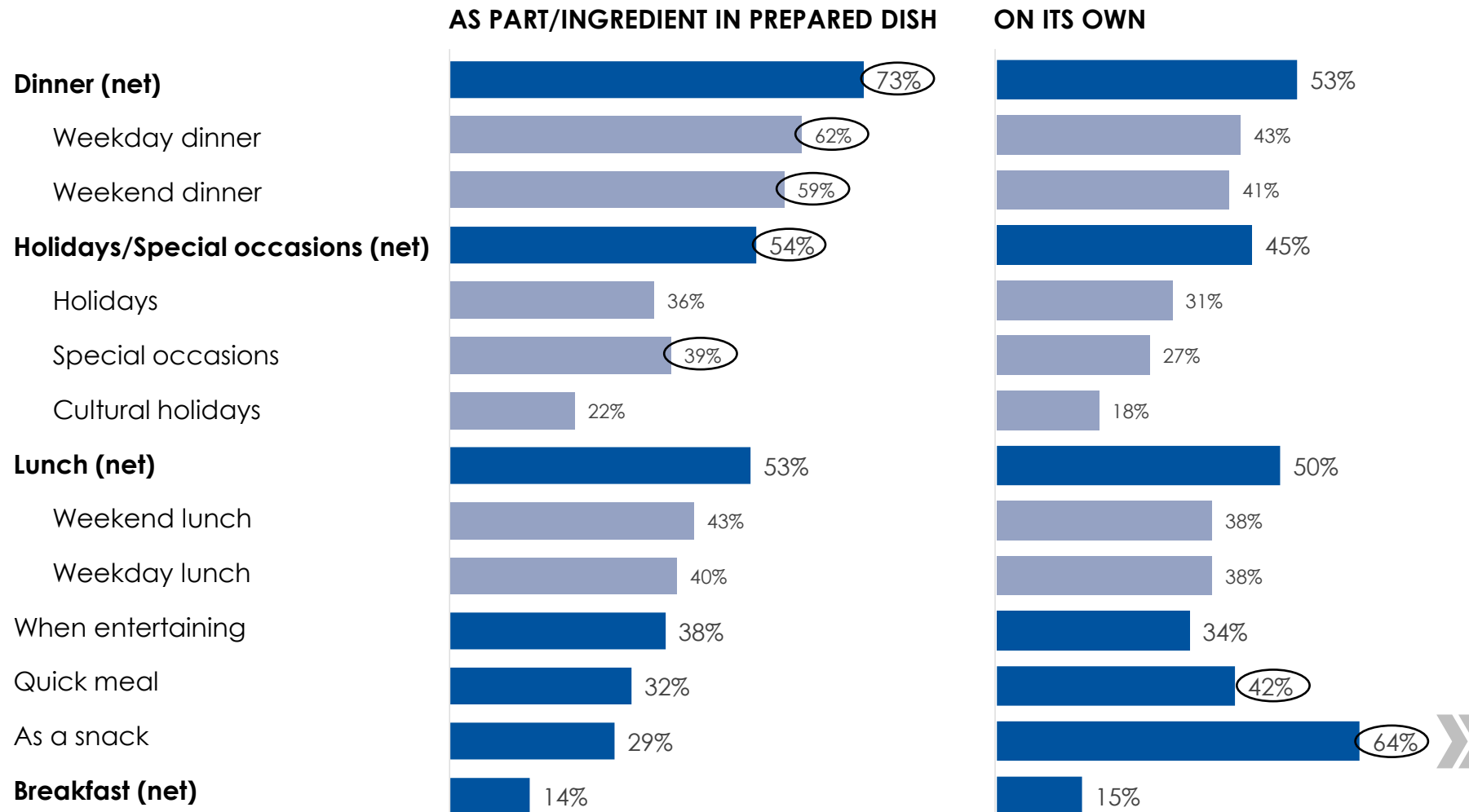
- **HERITAGE CUISINE** | For Asian-American/Hispanic consumers, the cultural use of imitation crab in recipes is passed down by older generations
- **EXPLORATORY** | Others lean on typical recipe resources like cooking websites, Pinterest, word-of-mouth and trial and error

“Diría que es como pollo suavcito y con sabor a mar! y múltiples maneras de preparar! para ensaladas, ceviches y hasta caldos! O simplemente frío con pepinos como botanas! [I would describe it to others] as being tender like chicken, but with a taste of the sea, with multiple ways of making it... [it is] for salads, ceviche's and even soups, or simply cold with cut up cucumber as a snack. ~Angel (Hispanic)

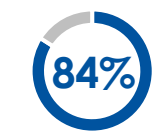
“Coming from my Asian-American culture, it is pretty common to use Surimi in cooking. It is almost a staple in the fridge. If you were to buy the lower quality sticks, it's pretty cheap and can be used very easily. Also, it's already cooked, so it's basically dumb-dumb proof. My inspirations comes from mix of my cultural upbringing and what I feel like eating.” ~Evelyn (Asian-American)

Dinner, followed by special occasions and lunch, are the most common consumption occasions when imitation crab is used as part of dish/recipe. Snacking is most common when imitation crab is eaten on its own, though meal occasions are also quite common.

CONSUMPTION OCCASIONS (among Frequent Purchasers)

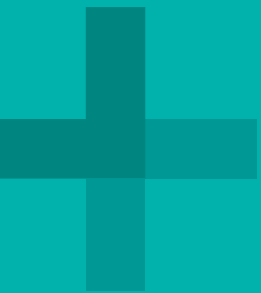


"Surimi can fit most meals and occasions. It's so versatile. You can make salads, wraps, pastas, crab cakes at any time with Surimi. I prefer to have it for lunch or dinner. Surimi doesn't fit breakfast foods. You can also serve it as a treat. I make a killer crab salad! When you serve seafood such as Surimi rather than serving the usual meats, it feels more luxurious especially when you have guests over. It's not everyday that people eat or get to taste Surimi!"



Most agree (completely/somewhat) that imitation crab 'is a good snack'

○ =indicates occasion is higher based on how surimi was consumed (i.e., as a part/ingredient in prepared dish or on its own)



LAST OCCASION

C+R
RESEARCH

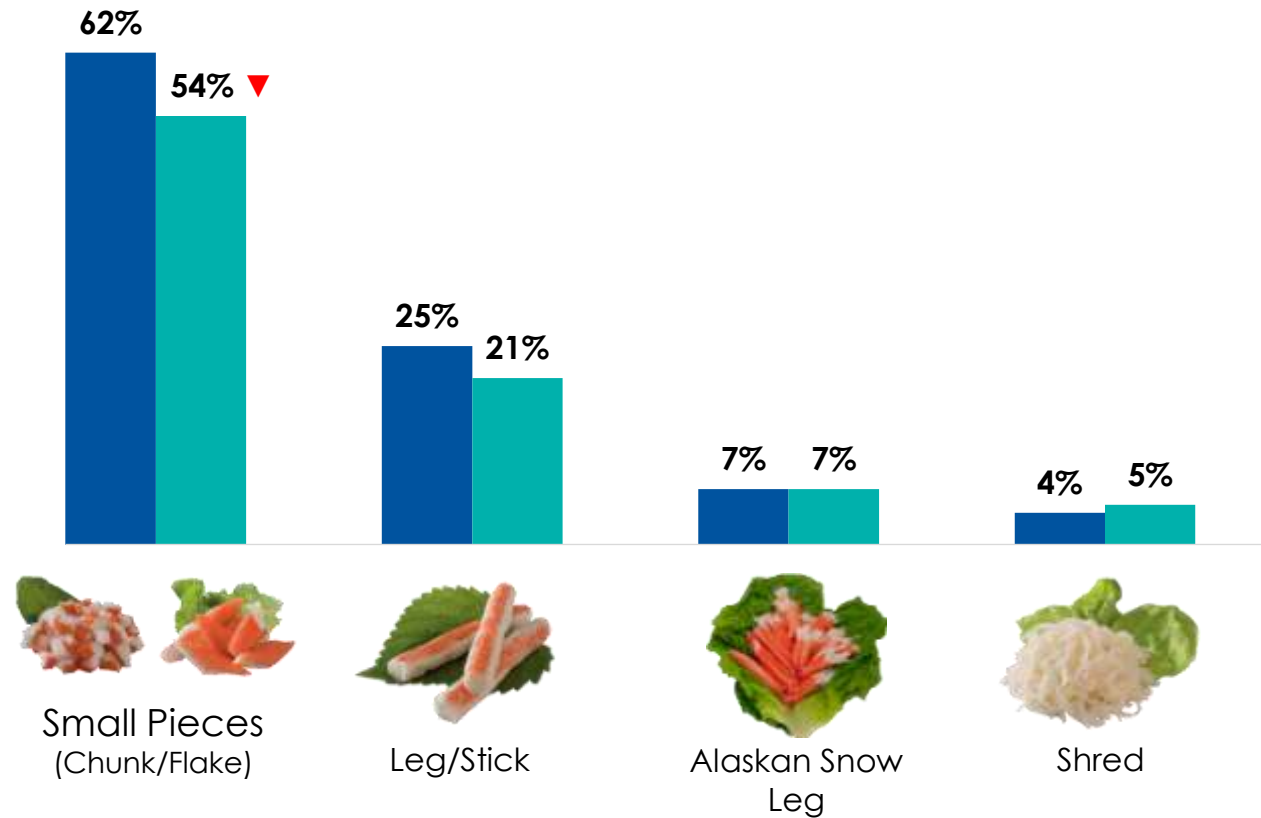
EMERGE SMARTER.



Over half of last purchases are small pieces (chunk/flake), followed by leg/stick. Adults and children alike consumed imitation crab within Frequent Purchasers' households.

FORM

■ Frequent Purchasers ■ Infrequent/Lapsed Purchasers



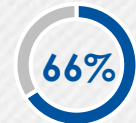
WHO CONSUMED *(within household)*

Frequent Purchasers

Other adults 18+



Children (net)



Child under 6



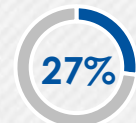
Child 6-12



Teen 13-17



No one else

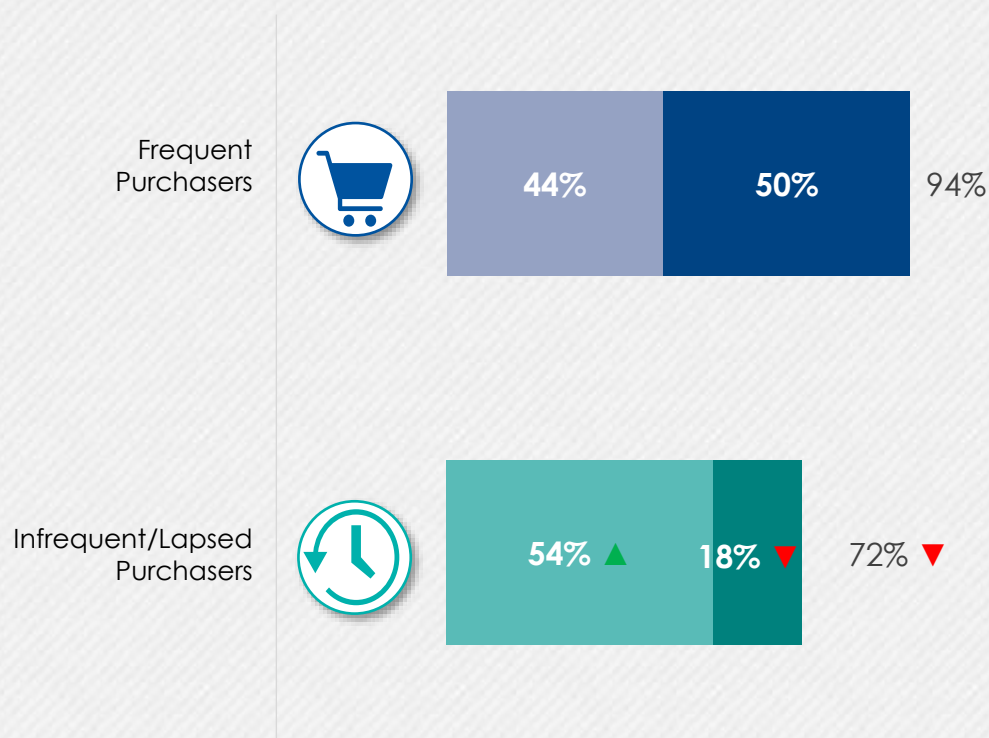


▲ = significantly higher than Frequent Purchasers
▼ = significantly lower than Frequent Purchasers

Purchasers, particularly Frequent Purchasers, are highly satisfied with their most recent imitation crab purchase.

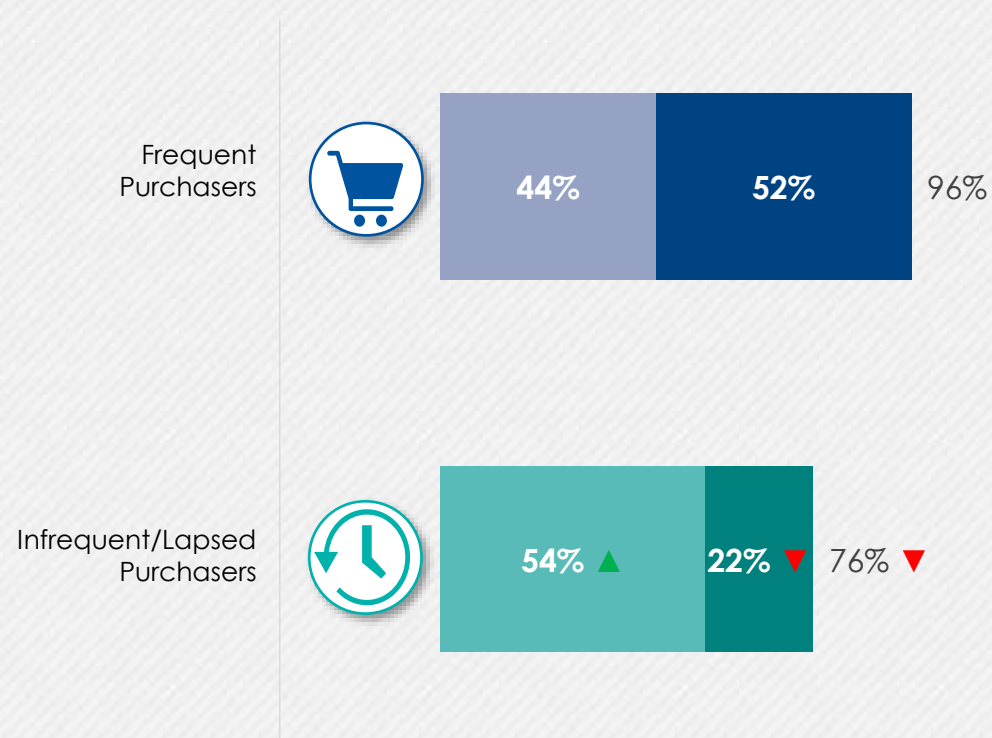
IMITATION CRAB RATING

Very good Excellent Top 2 Box



IMITATION CRAB SATISFACTION

Very satisfied Extremely satisfied Top 2 Box



▲=significantly higher than Frequent Purchasers
▼=significantly lower than Frequent Purchasers

Purchasers like imitation crabs' taste, texture, and easy preparation; though some feel the taste doesn't quite match the real thing and find it to be expensive.

IMITATION CRAB RATING



LIKES (10%+)

	Frequent Purchasers	Infrequent/Lapsed Purchasers
Good taste/flavor	52	45
Tastes like real crab	11	16 ▲
Texture/Like the texture	17	18
Easy to use/prepare/cook with	15	14
Usage	17	20

“I like how tasty it is and how it gives my dishes a different flavor and it also allows me to make more of my dishes. I love to eat like snack just with lemon.”

“I had a salty taste much like the real thing. The texture stringy and soft. The sweet flavor is satisfying.”

“Easy to use in recipes. Tastes good. Easy to find at my local store.”



DISLIKES (5%+)

	Frequent Purchasers	Infrequent/Lapsed Purchasers
Don't Know/Nothing	75%	66%
Taste/Flavor	5	11 ▲
Expensive/High price	5	2 ▼

“Doesn't taste like the real thing.”

“The price. I can't afford to buy it as much as I want because it's not within my budget.”

“Hard to reseal the package afterwards for saving.”

IMITATION CRAB SATISFACTION



WHY SATISFIED (10%+)

	Frequent Purchasers	Infrequent/Lapsed Purchasers
Good taste/flavor	44	37
Good/Like it/Eat it often	24	12 ▼
Usage (Subnet)	21	25
Good for meals/dishes/recipes	13	15
Everyone/Family likes it	10	8

“Because it was enjoyable and tasted almost the same as a real crab.” – Extremely satisfied

“Everyone like it and it was a healthy choice. Very easy to make.” – Extremely satisfied

“It had really good flavor, worked wonderful in the quick meal that I made, and was very tasty.” – Extremely satisfied



WHY DISSATISFIED (5%+)

	Frequent Purchasers	Infrequent/Lapsed Purchasers
Don't Know/Nothing	3%	5%
Imitation/Fake/Prefer real crab	1	7 ▲
Negative Taste/Flavor	1	6 ▲

“It did not accentuate the dish at all, I spent more time removing the crab than I did eating.” – Not at all satisfied

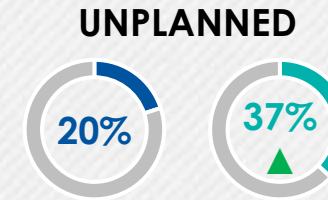
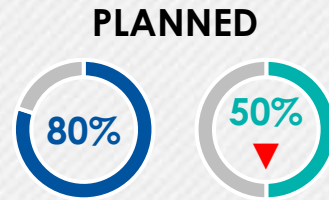
“I didn't like that it was fake. And the taste was not real crab taste.” – Not at all satisfied

“You can tell it is not the real thing by its taste.” – Somewhat satisfied

Most Frequent Purchasers plan their purchase because they often keep it on hand, it fits into their budget, or is needed for a recipe. Unplanned purchases (more common among Infrequent/Lapsed Purchasers) often occur after seeing it in store.

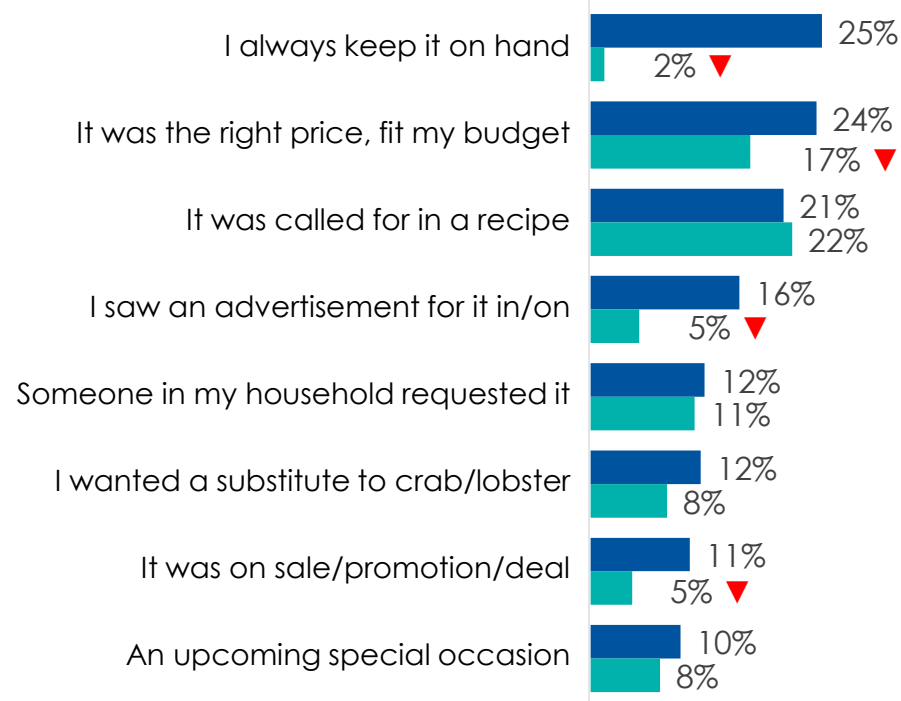
PURCHASE TYPE

- Frequent Purchasers
- Infrequent/Lapsed Purchasers

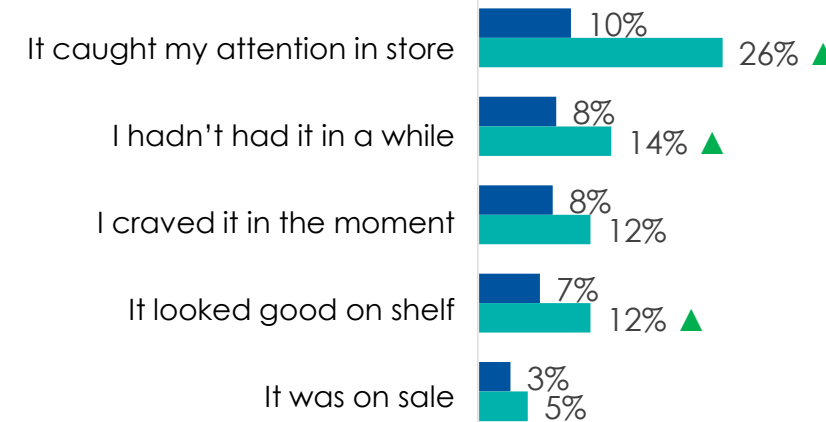


PURCHASE PROMPTS

PLANNED PURCHASE (10%+)



UNPLANNED PURCHASE



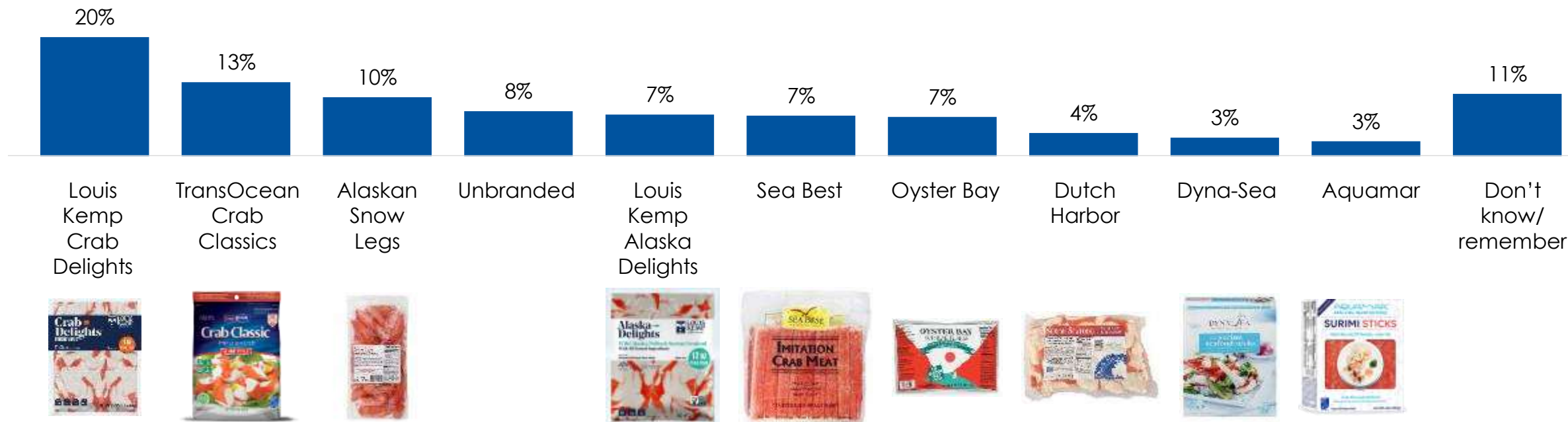
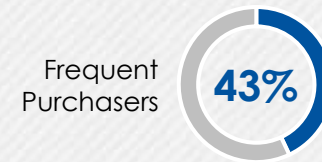
Bar charts shown to scale of 0-75% to showcase results

▲=significantly higher than Frequent Purchasers
▼=significantly lower than Frequent Purchasers

The two biggest brands (Louis Kemp Crab Delights and TransOcean Crab Classics) lead in recent purchases.

BRAND (3%+ - among Frequent Purchasers)

READ NUTRITIONAL LABEL ON LAST OCCASION % Yes

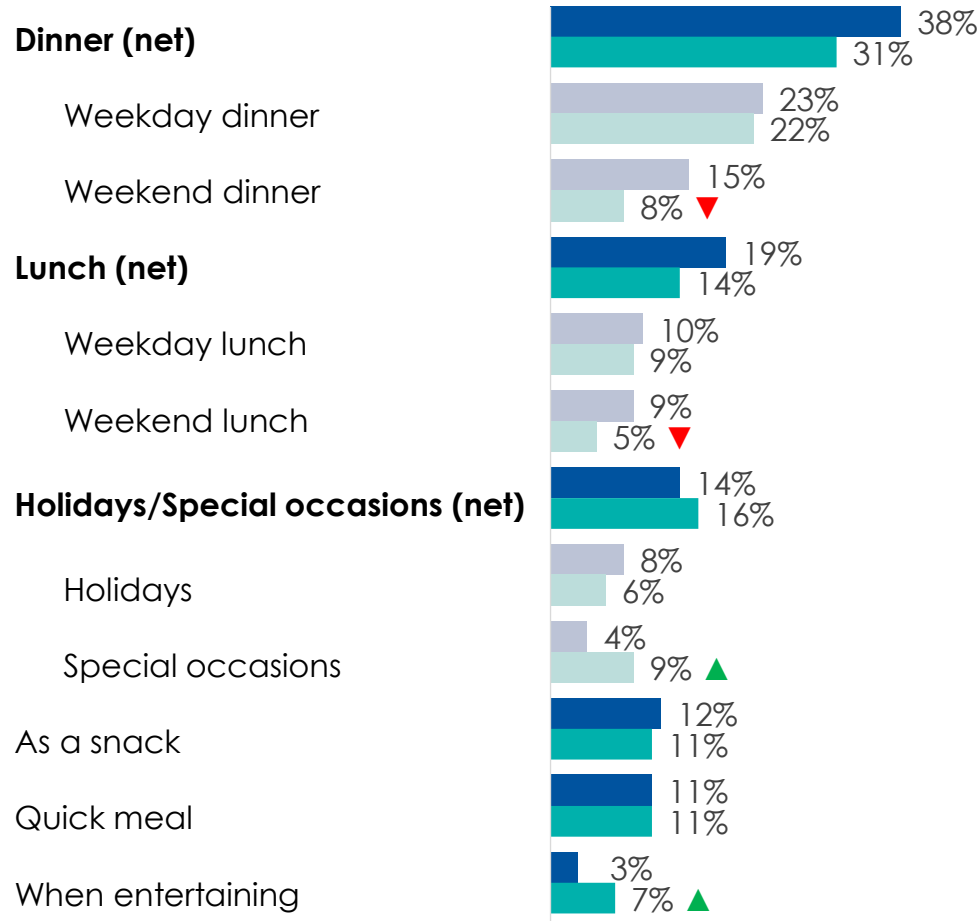


Column chart shown to scale of 0-75% to showcase results

During their most recent occasion, imitation crab was commonly consumed at dinner and most often on a weeknight. While a quarter of Frequent Purchasers consumed imitation crab on its own, seafood salad, on a salad, and with pasta/noodles are the top preparations.

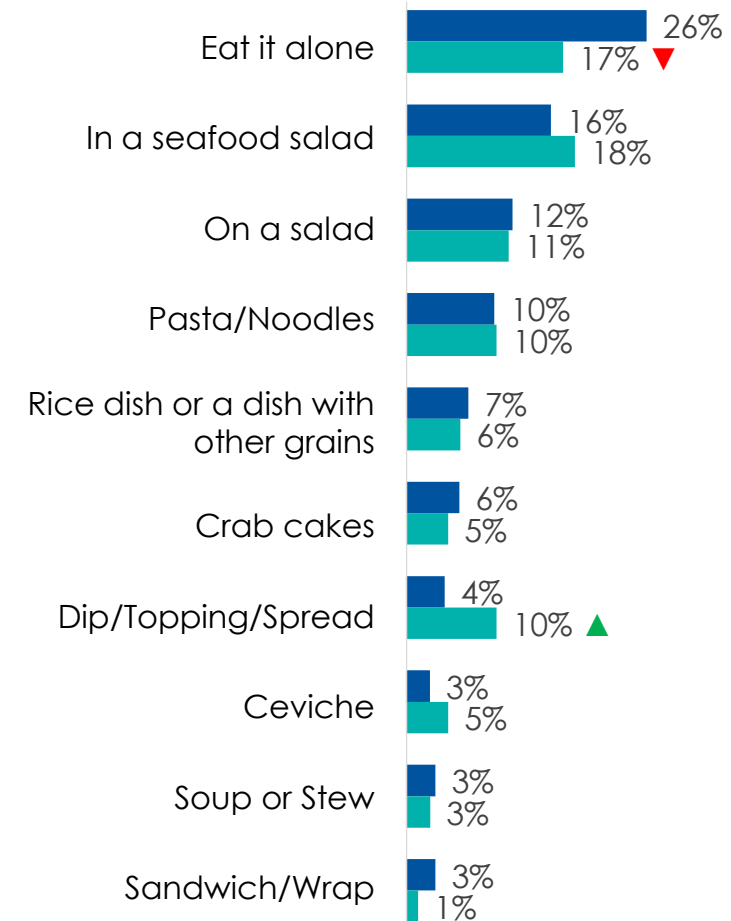
CONSUMPTION OCCASIONS (3%+)

■ Frequent Purchasers
■ Infrequent/Lapsed Purchasers



RECIPES (3%+)

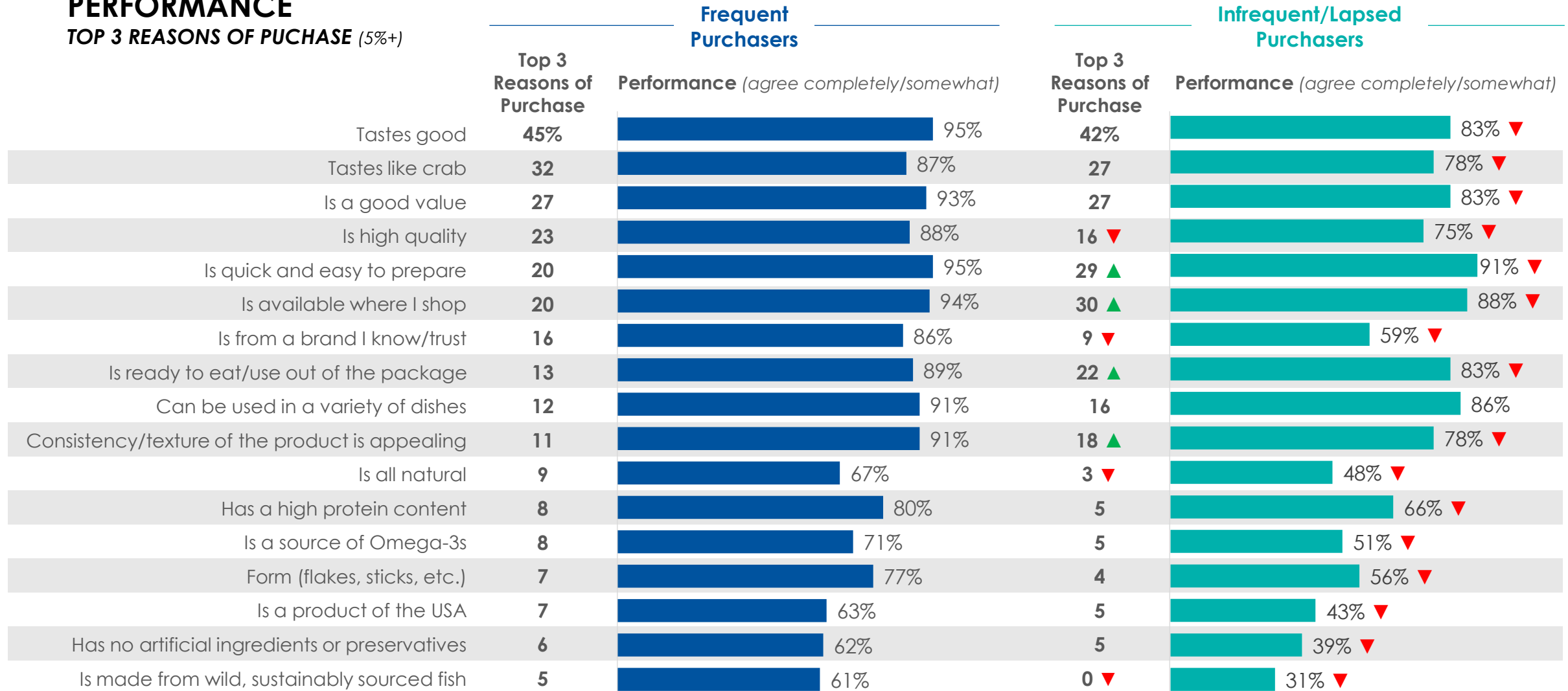
■ Frequent Purchasers
■ Infrequent/Lapsed Purchasers



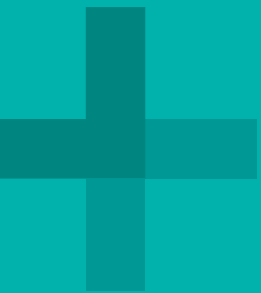
Taste is by far the top reason for purchase. Good value, high quality, ease to prepare, and availability also influence the imitation crab that they purchased last.

PERFORMANCE

TOP 3 REASONS OF PURCHASE (5%+)



▲=significantly higher than Frequent Purchasers
▼=significantly lower than Frequent Purchasers



OUT-OF-HOME EXPERIENCE

C+R
RESEARCH

Emerge smarter.

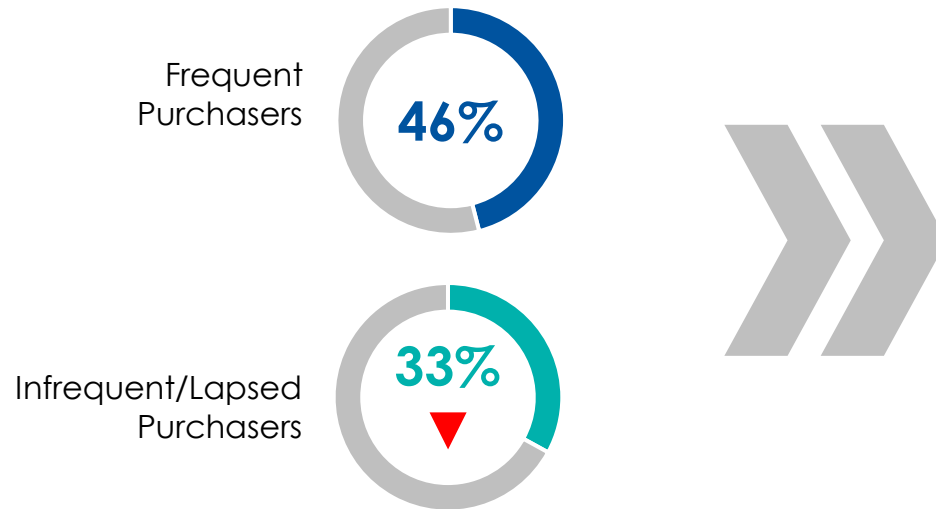


Less than half recall consuming imitation crab at a restaurant. Many purchasers are just as likely to eat imitation crab from a restaurant as to prepare at home.

IN VS. OUT OF HOME CONSUMPTION

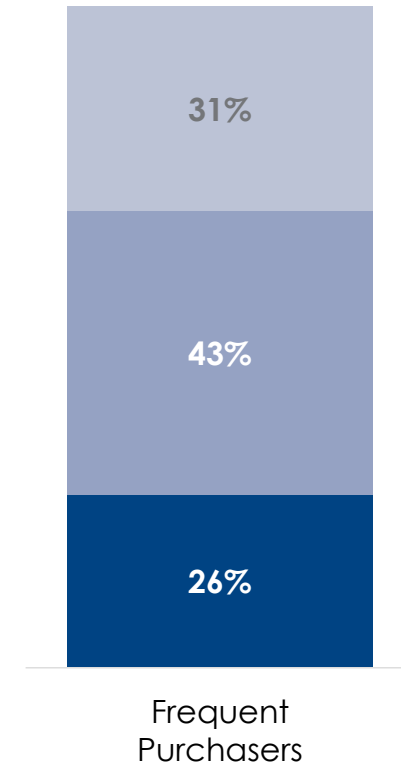
EVER CONSUMED IMITATION CRAB FROM A RESTAURANT (DINE IN OR TAKEOUT)

% Yes



INCLINATION TO EAT IMITATION CRAB

- More likely to eat from a restaurant (much/somewhat more)
- Just as likely to eat from restaurant as to prepare at home
- More likely to prepare at home (much/somewhat more)

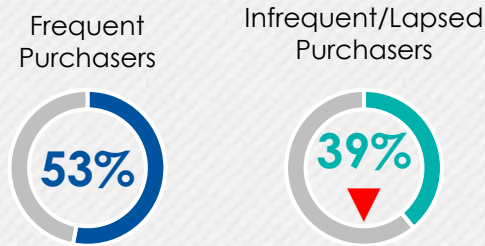


▲=significantly higher than Frequent Purchasers
▼=significantly lower than Frequent Purchasers

Most California Roll consumers (65%/63%) believe that the roll is made of imitation crab all the time or sometimes. For Frequent Purchasers, knowing that CA rolls are made from imitation crab makes a third more interested in them, while for Infrequent/Lapsed purchasers, interest does not change.

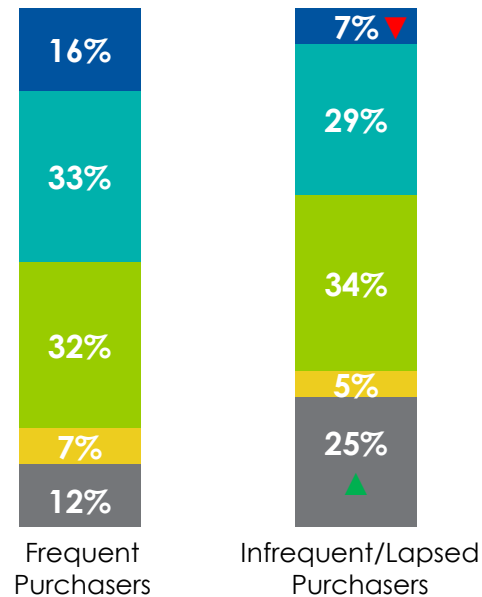
CALIFORNIA ROLL RESTAURANT CONSUMPTION

EVER HAD



THINK IT'S MADE FROM:

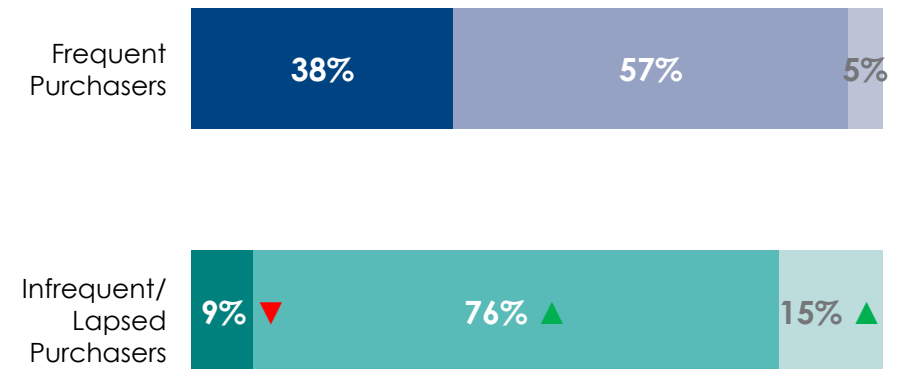
- 100% real crab
- 100% imitation crab
- Sometimes crab, sometimes imitation crab
- Combination of crab and imitation crab
- Other/Don't Know/Not Sure



California roll

INTEREST IN CALIFORNIA ROLLS (after learning often filled with imitation crab)

- More interested (much/somewhat more)
- Just as interested
- Less interested (much/somewhat less)



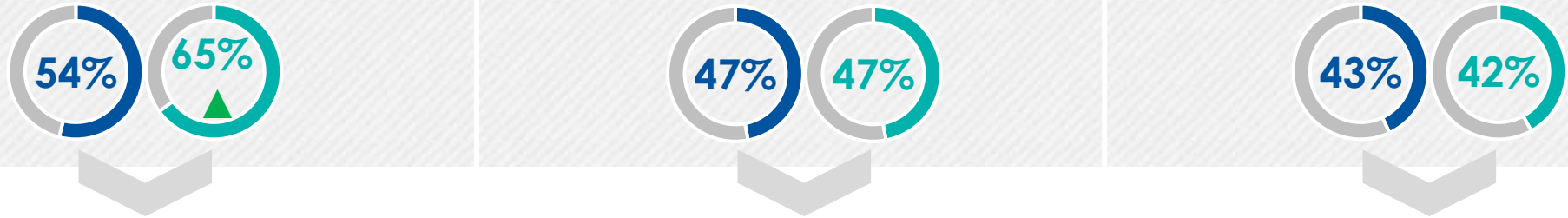
▲=significantly higher than Frequent Purchasers
▼=significantly lower than Frequent Purchasers

Crab cakes are most commonly consumed at a restaurant, with many believing they are made with 100% real crab. Crab/seafood salad and dips are generally expected to be sometimes real crab or imitation crab.

DISHES CONSUMED FROM RESTAURANT

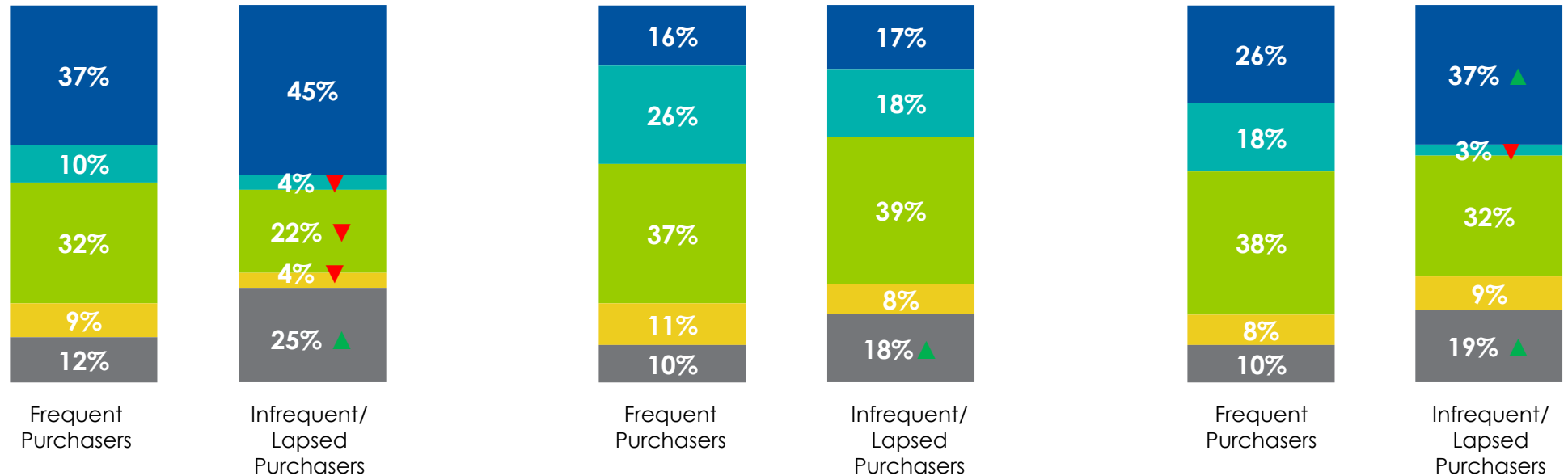
■ Frequent Purchasers ■ Infrequent/Lapsed Purchasers

EVER HAD



THINK IT'S MADE FROM:

- 100% real crab
- 100% imitation crab
- Sometimes crab, sometimes imitation crab
- Combination of crab and imitation crab
- Other/Don't Know/Not Sure

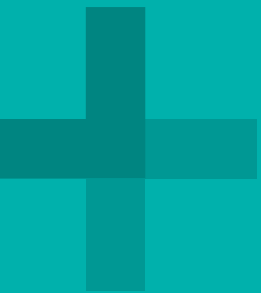


Crab cake

Crab or seafood salad

Crab or seafood dip

▲ = significantly higher than Frequent Purchasers
▼ = significantly lower than Frequent Purchasers



INNOVATION/NEW PRODUCTS

C+R
RESEARCH

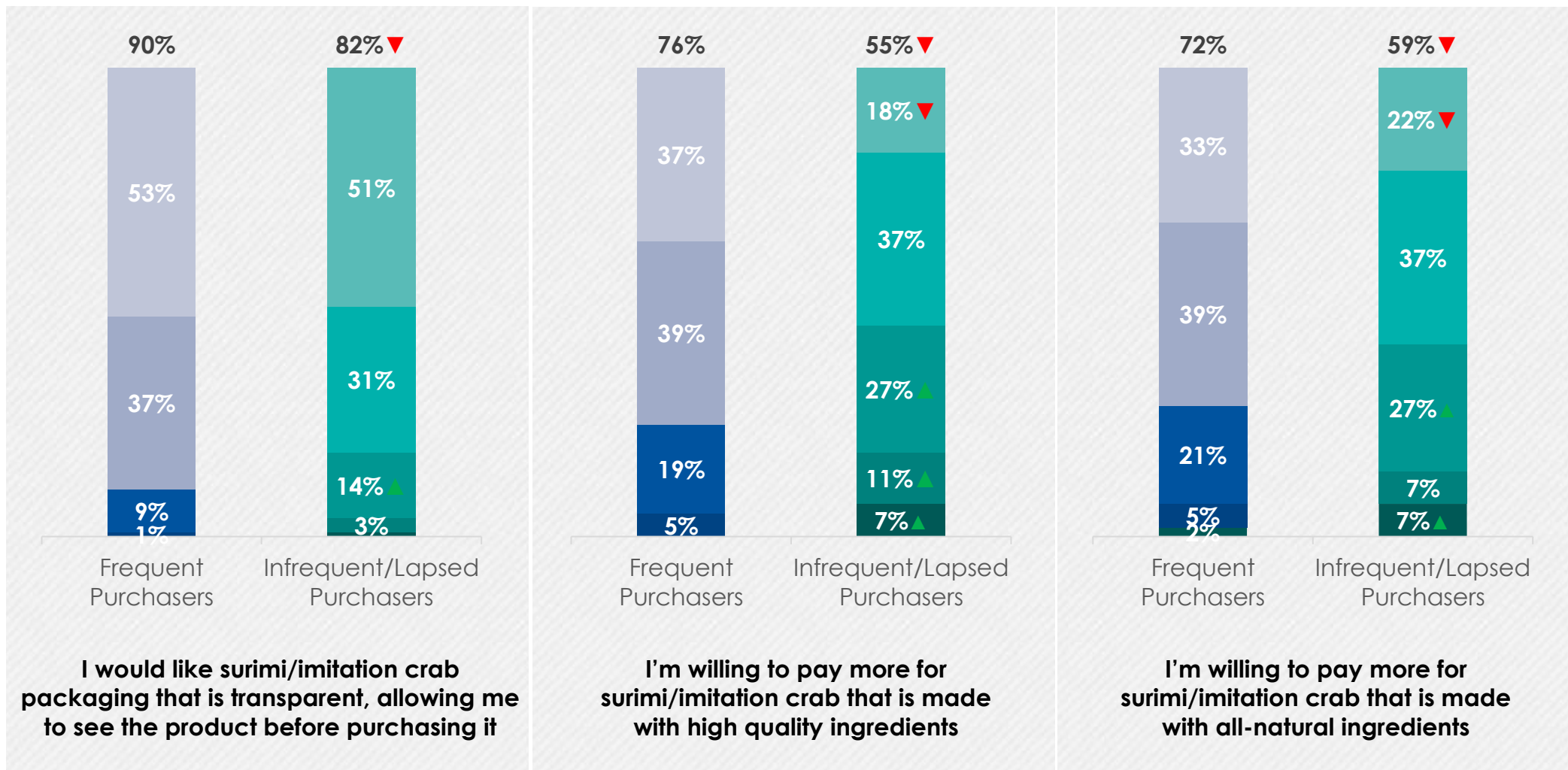
EMERGE SMARTER.



Purchasers are interested in being able to see the product they are buying and would pay more for an all natural and high-quality imitation crab.

PACKAGING CATEGORY ATTITUDES

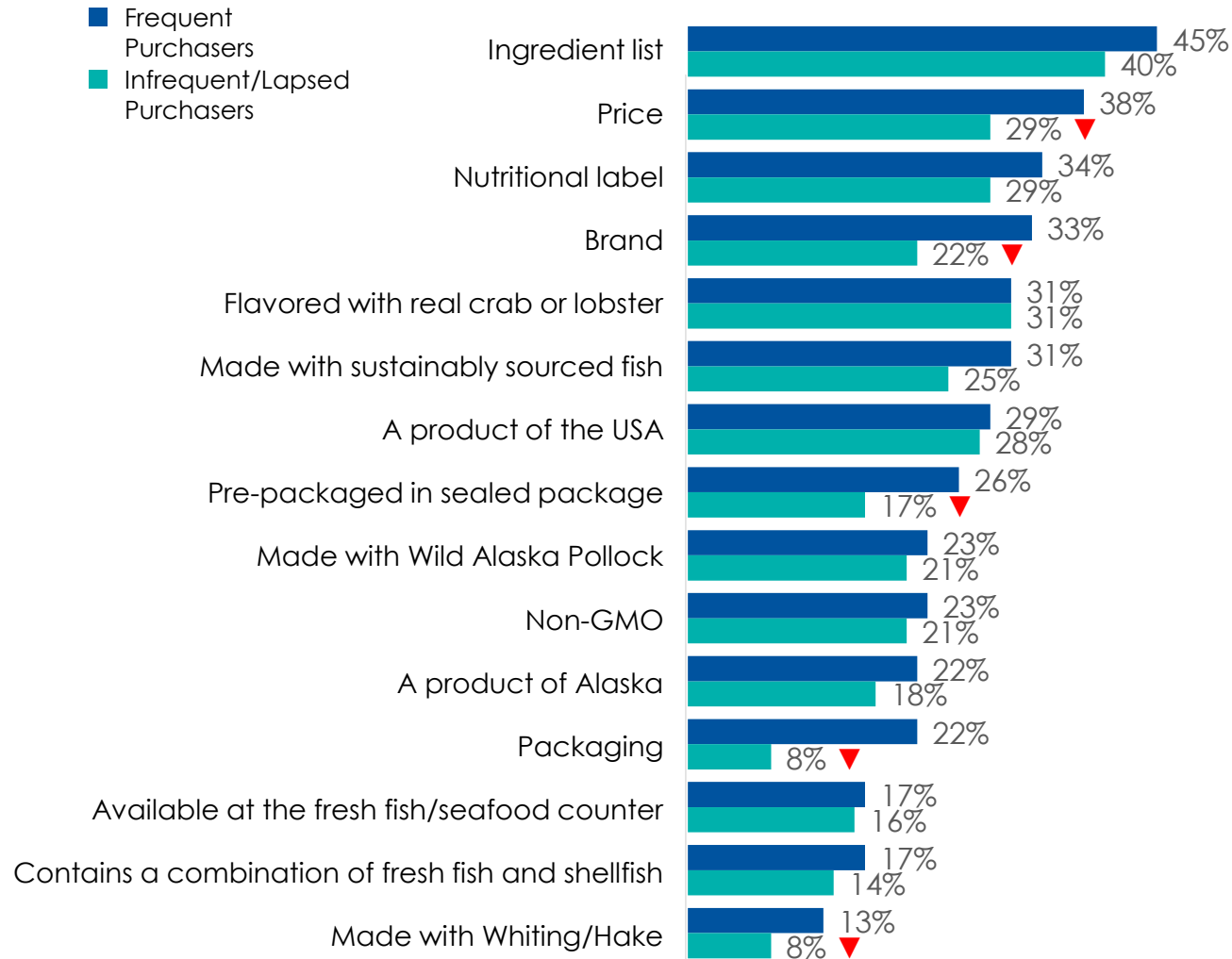
- Top 2 Box**
- Agree completely
 - Agree somewhat
 - Neither agree nor disagree
 - Disagree somewhat
 - Disagree completely



▲ = significantly higher than Frequent Purchasers
 ▼ = significantly lower than Frequent Purchasers

Ingredient list, price, nutritional label, and brand best indicate 'high quality' to purchasers.

'HIGH QUALITY' IMITATION CRAB ASSOCIATIONS



"Made of natural ingredients and ethically source."

"It means that's the ingredients are few and recognizable, high in protein, quality ingredients, low in calories, and comes from a well-known brand."

"Affordable and versatile that can be used in numerous dishes for a fair price."

"Natural ingredients, consistently tastes good and has good texture, informative and well labeled packaging."

"That it tastes like the real thing, but with a lower price."

▲=significantly higher than Frequent Purchasers
▼=significantly lower than Frequent Purchasers

Consumers were shown the two type of products in the market today: conventional and the new higher quality/more natural products.

CONVENTIONAL



Typically sold as an 8 oz. package for \$2.49-\$2.99

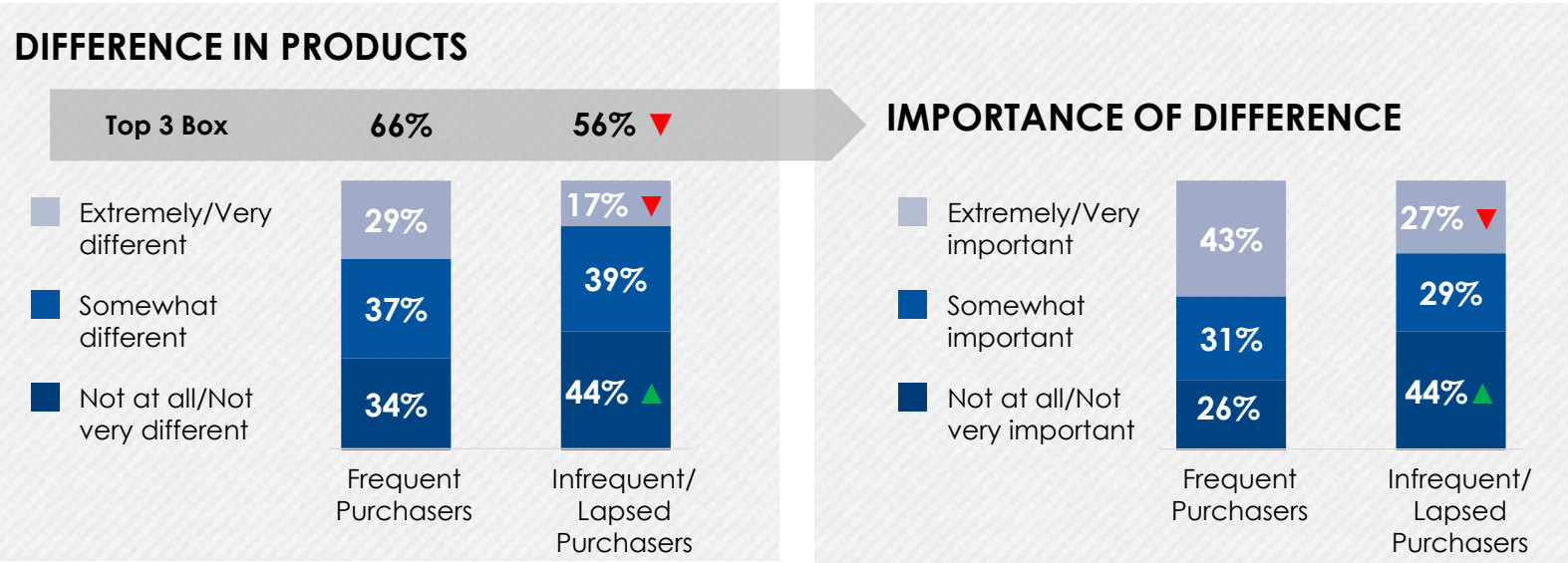
CLEAN



Typically sold as a 12 oz. package for \$3.99-\$4.49

Despite a desire for cleaner imitation crab products, consumers fail to notice differences between the two products aside from packaging visuals. Further refinement of packaging, naming, and messaging is needed to convey the new product offerings.

CONVENTIONAL VS. CLEAN PRODUCTS



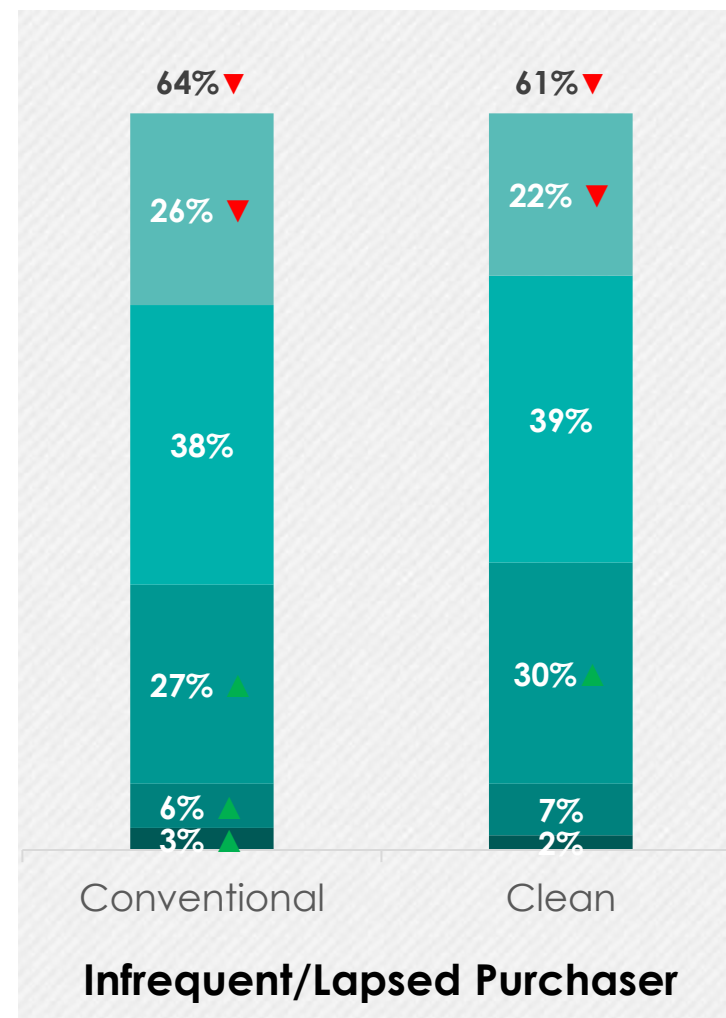
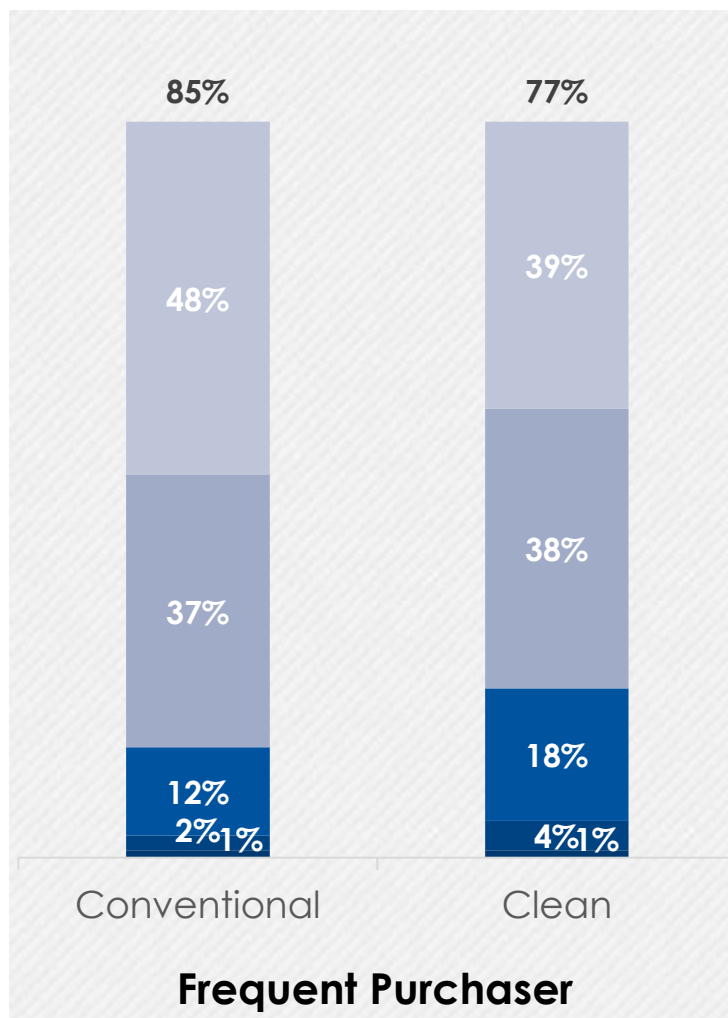
WHAT MAKES THEM DIFFERENT (7%+)	Frequency		
	Frequent Purchasers	Infrequent/Lapsed Purchasers	
Packaging (color scheme)	15%	12%	"The images of the crab on the packaging makes it more likely to choose the product as we can infer what is inside the packaging from that clear image."
One refers to product as "imitation crab" and the other as "surimi"	9	16 ▲	
Different brand/names	9	13	"Color of packaging, Crab Classic catches my eye and looks the best."
Looks good/one package makes product look more appetizing	8	6	
Visuals/imagery/can see inside package	7	8	
Color/Colorful packaging (dark color scheme vs. lighter color scheme)	7	7	
Differences in quality (one looks more premium)	7	5	
"Clean" package emphasizes source of fish (Alaska)	6	15 ▲	

▲=significantly higher than Frequent Purchasers
▼=significantly lower than Frequent Purchasers

As such, consumers express higher interest in the conventional product than the clean product.

PURCHASE INTENT

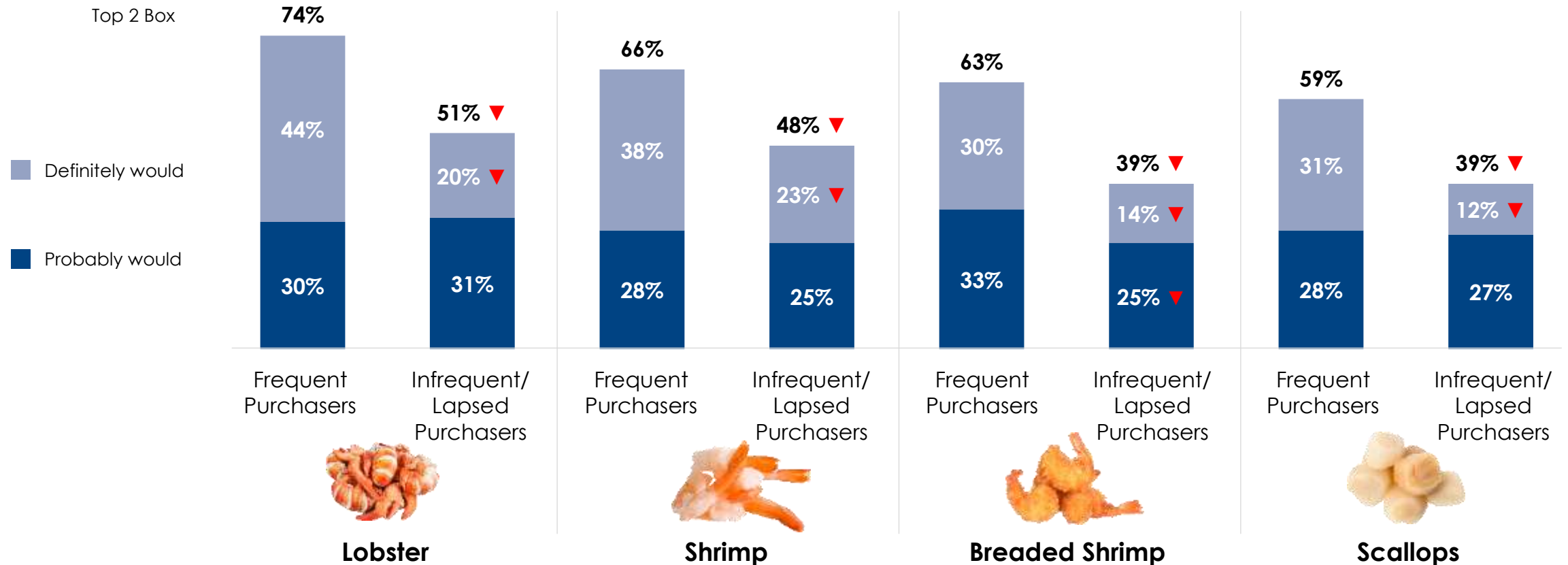
- Top 2 Box**
- Definitely would
 - Probably would
 - Might or might not
 - Probably would not
 - Definitely would not



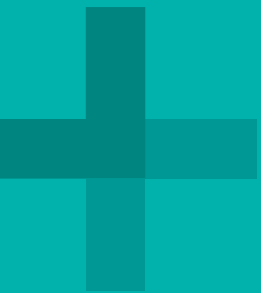
▲ = significantly higher than Frequent Purchasers
▼ = significantly lower than Frequent Purchasers

While lobster made from imitation crab is of highest interest, particularly among Frequent Purchasers, few purchasers find the new forms compelling.

NEW FORM PURCHASE INTEREST



▲ = significantly higher than Frequent Purchasers
 ▼ = significantly lower than Frequent Purchasers



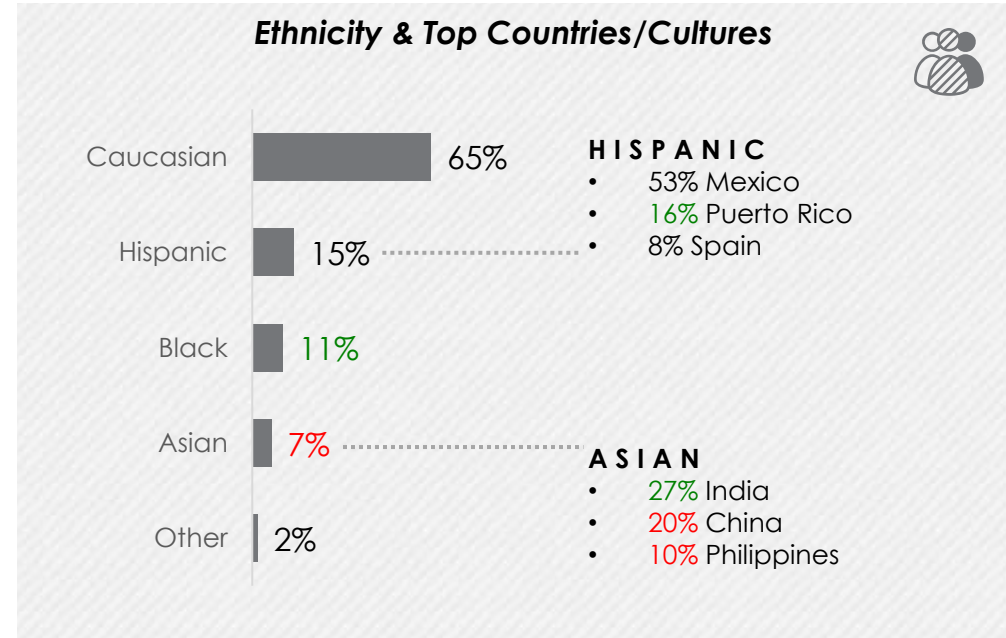
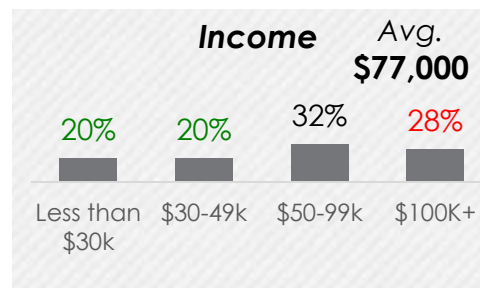
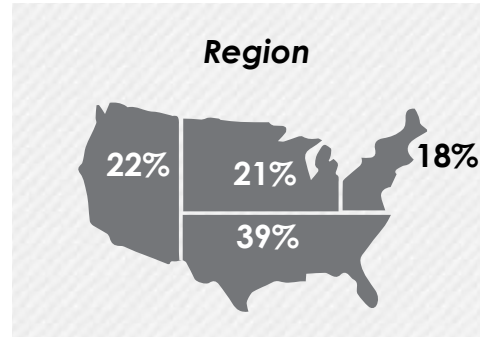
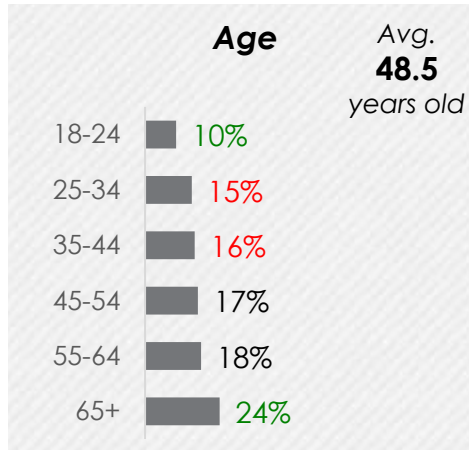
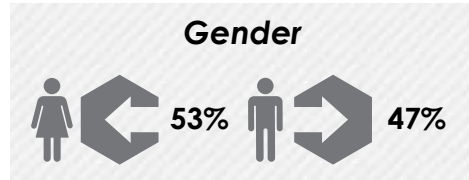
NON-PURCHASERS

C+R
RESEARCH

EMERGE SMARTER.



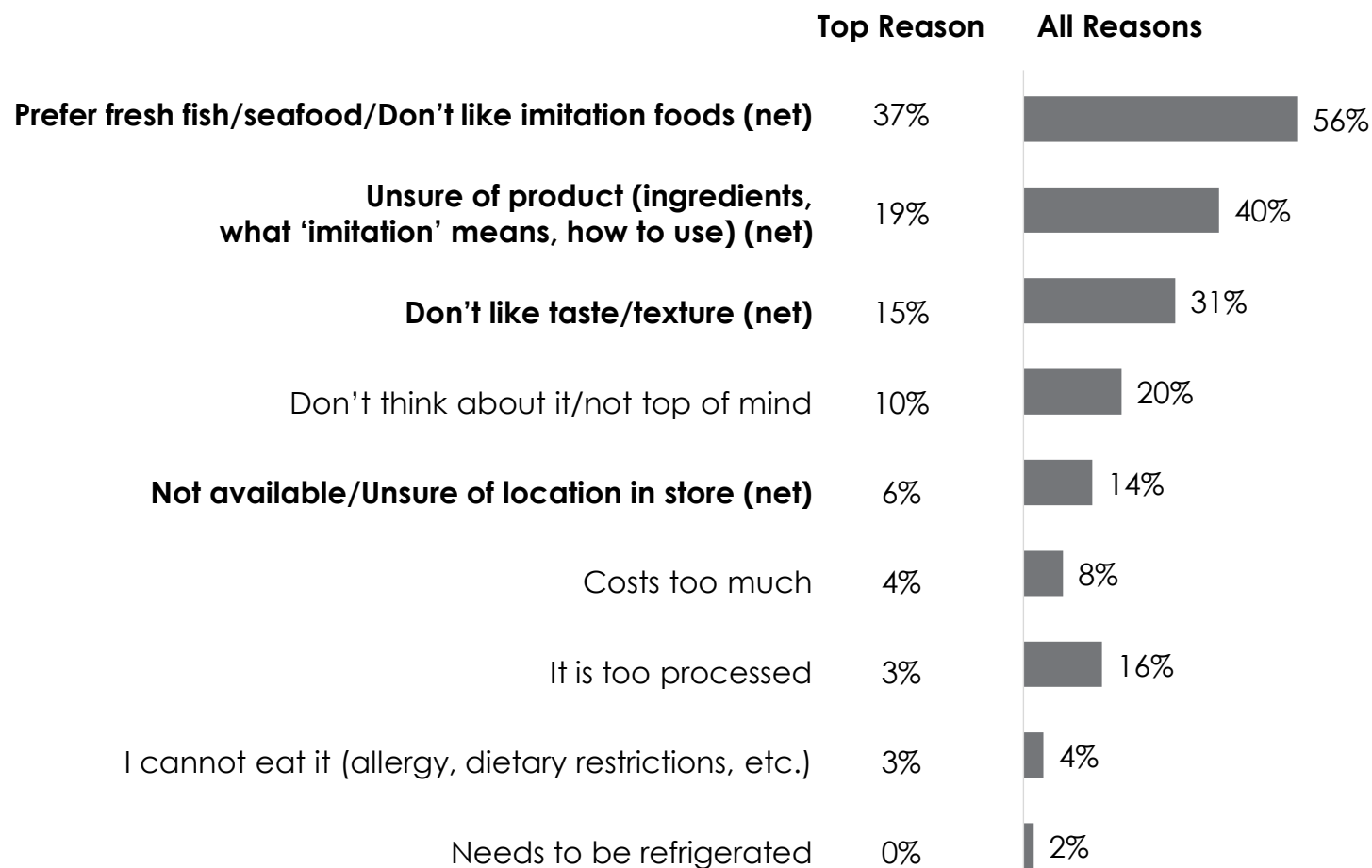
Compared to Frequent Purchasers, Non-Purchasers have lower incomes and are more polarized in age (slightly younger and older).



Roughly half of Non-Purchasers reject imitation crab due to food preferences, dislike of taste/ texture, and dietary restrictions. However, opportunity exists to capture a quarter of consumers via product information (how to use, ingredients, etc.) and in-store availability and promotion.



PURCHASE BARRIERS (among Non-Purchasers)



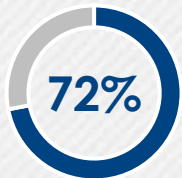
“I'd rather have the real thing. Imitation crab doesn't taste the same as actual crab.”

“I don't know how to prepare meals with it. I would eat it in a restaurant though.”

“I haven't purchased imitation crab because I have never wanted to try it. Crab is not something I crave to eat whether real or imitation.”

“My family and the people I prepare food for don't enjoy seafood, and the items sold at my grocery stores are usually quite expensive so it is hard to justify buying it if no one will enjoy it.”

Non-Purchasers are aware of imitation crab (though not that it is made with Wild Alaska Pollock) and positioning work will need to be done to understand which messages and benefits resonant with these consumers to drive purchase consideration.



Aware of Imitation crab
(when prompted by package imagery)

CONCEPT DESCRIPTION

As you may know, surimi/imitation crab is typically made from Wild Alaska Pollock, a mild, sustainably sourced whitefish which is made into an affordable, high protein alternative to crab and other shellfish and is sold as pre-cooked flakes, stick/legs, or chunks in the refrigerated seafood section of the grocery store.

FUTURE PURCHASE INTEREST

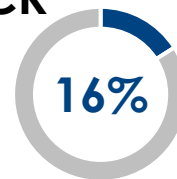
(after reviewing concept)

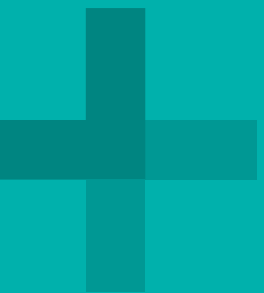
■ Probably would ■ Definitely would Top 2 Box



AWARE IMITATION CRAB IS MADE FROM WILD ALASKA POLLOCK

(% Yes)





HISPANIC PURCHASERS

C+R
RESEARCH

Emerge smarter.



Key Findings



Similar to Gen Pop, imitation crab is not widely purchased, though those purchasing buy it on a regular basis.



- 4-in-10 Hispanic shoppers have ever purchased surimi, though most refer to the product as imitation crab.
- Roughly a quarter of Unacculturated Hispanics refer to the product as Cangrejo or Jaiba/Jaiva.
- More than half report increased purchases over the past two years, with many purchasers buying imitation crab monthly.
- Compared to Gen Pop, Bicultural/Unacculturated Hispanic purchasers are younger urbanites with kids living on the West coast. Over half are from Mexico.



Hispanic purchasers shop for imitation crab in a broad array of retail types and in multiple locations within the store.



- While many shop for imitation crab at grocery stores, Hispanic purchasers are more apt to visit mass merchandisers, club stores, and Hispanic markets.
- Branded packages are most common, yet almost two-thirds of Hispanic consumers purchase from the fish counter and deli section, significantly more than Gen Pop Frequent Purchasers.
- Like Gen Pop, Hispanic purchasers appear to think of chunk and flake styles in combination, as 'smaller pieces', making them the most popular form to purchase.
- Brand awareness among Hispanic purchasers is higher for all brands, with a few exceptions, compared to Gen Pop.

Key Findings



Consistent with the general population, Hispanics place the greatest importance on the taste and quality of the imitation crab that they purchase.



- In addition to taste and quality, Hispanic purchasers, particularly Unacculturated Hispanics, value Omega-3s and high protein content.
- Compared to Gen Pop Frequent Purchasers, more Hispanic purchasers view imitation crab as a good source of protein, and a sustainably sourced one at that.
- Like Gen Pop, Hispanic purchasers associate 'high quality' with the ingredient list, nutritional label, brand, and price (though to a lesser extent).



Widespread household consumption (even among children), ties to cultural heritage, and holiday and lunch dishes are more prevalent in Hispanic households.



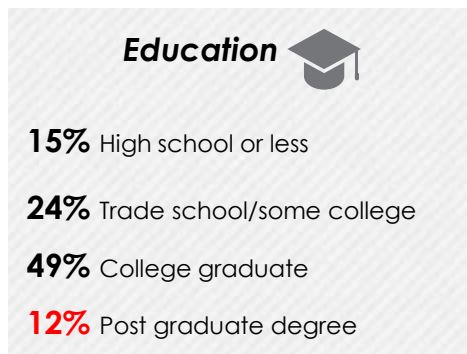
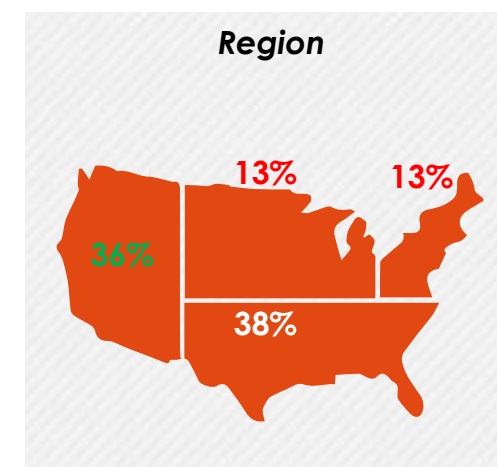
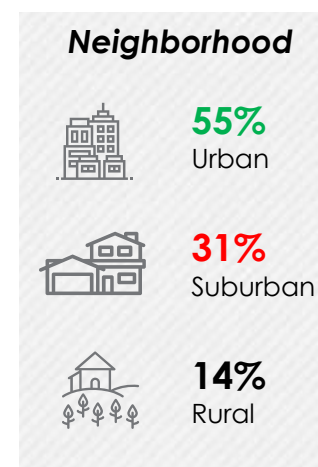
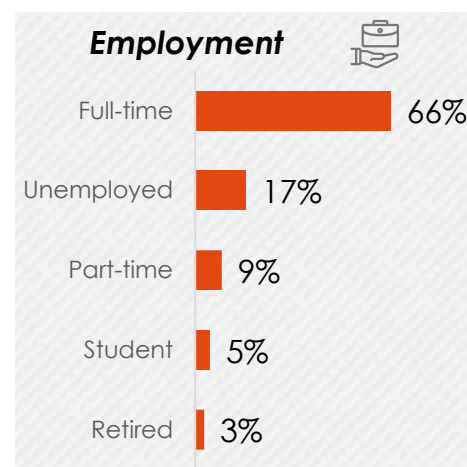
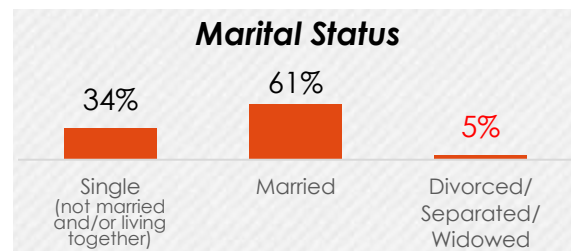
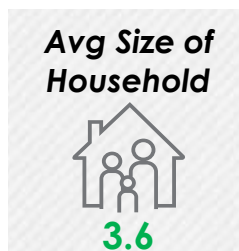
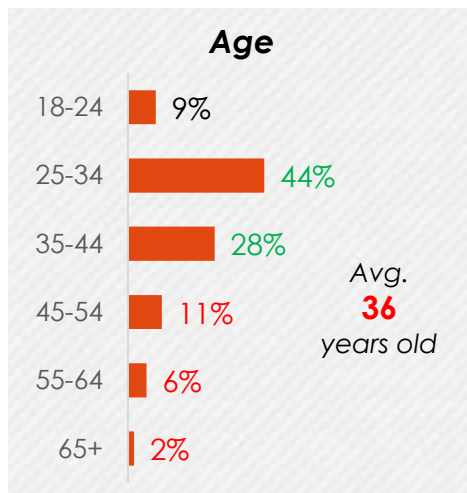
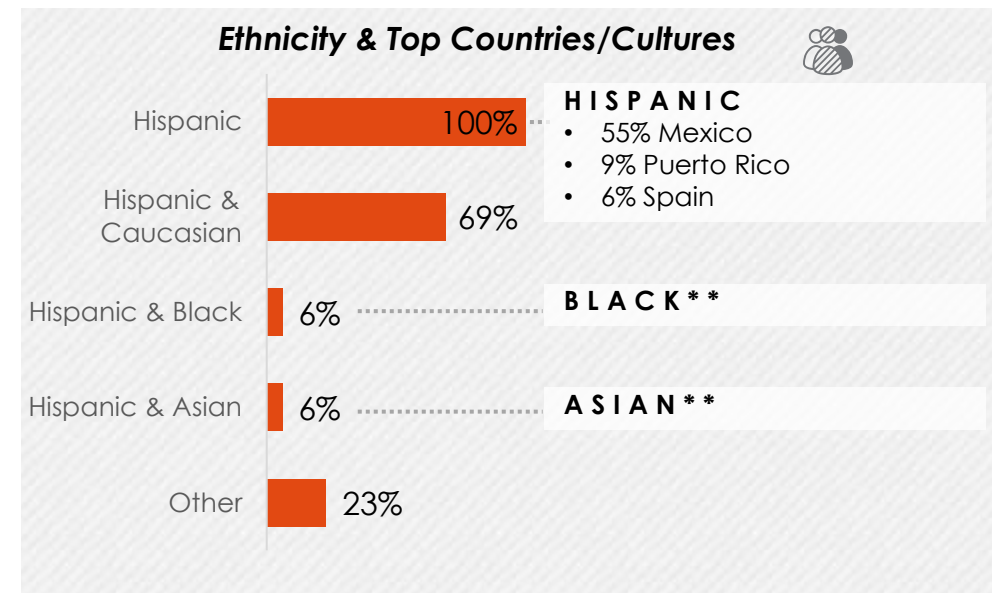
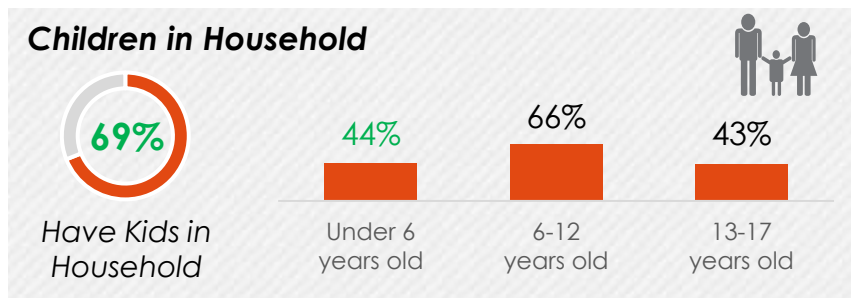
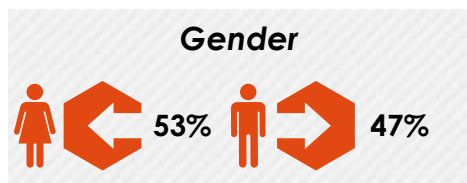
- Adults (and many children) consume imitation crab year-round though consumption during the summer rises significantly.
- Incorporating imitation crab into holiday and lunch occasions is more common among Hispanic consumers, though prepared dishes are largely aligned with the general population.
- Almost 2-in-3 Hispanic purchasers report eating imitation crab growing up and half feel their cultural heritage has influenced how they cook/serve it.

Compared to Gen Pop, Bicultural/Unacculturated Hispanic purchasers are younger urbanites with kids living on the West coast.

Bicultural/Unacculturated Hispanics



PROFILE



Green = Overindexes (120+) to Frequent Purchasers
Red = Underindexes (<80) to Frequent Purchasers

Indexing shown to Frequent Purchasers except for Ethnicity and Top Countries/Cultures as it defines the group

**Results not shown due to small sample sizes (n<50)

Hispanics purchase imitation crab more regularly than Gen Pop. Most call it imitation crab, though Cangrejo and Jaiba/Jaiva are more prevalent among Unacculturated Hispanics.

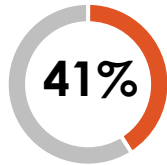
Bicultural/Unacculturated Hispanics



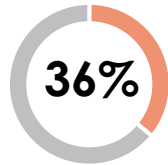
KEY FINDINGS: PURCHASE BEHAVIORS & DRIVERS

EVER PURCHASED IMITATION CRAB (% Yes)

(shown with imagery below)



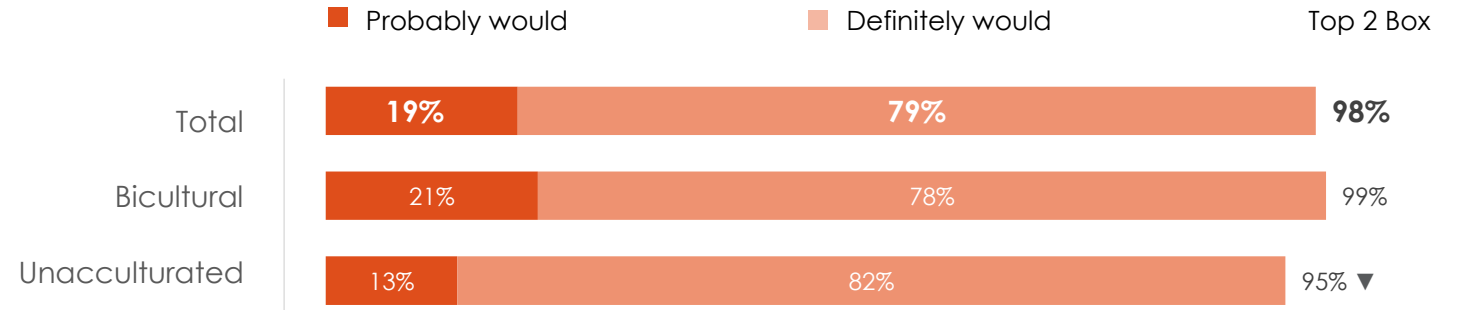
Total



Bicultural

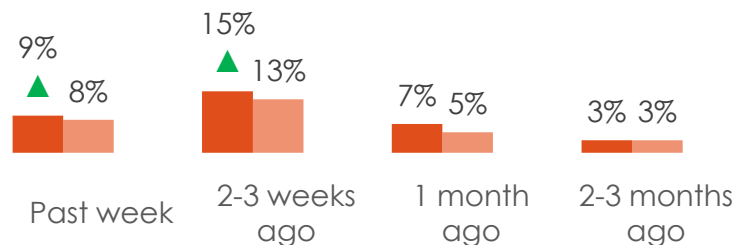
Unacculturated = **
too small to show

FUTURE PURCHASE INTEREST

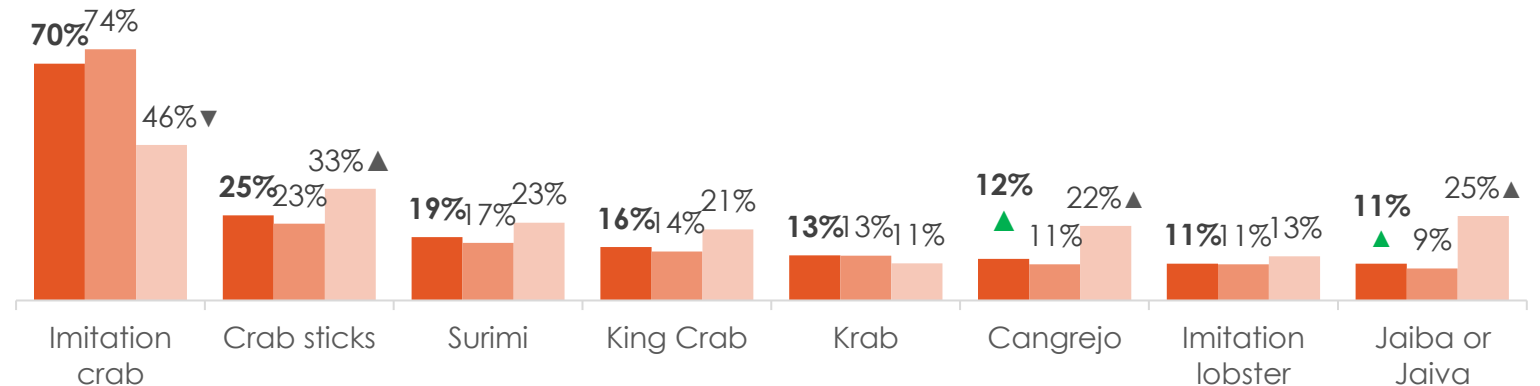


LAST PURCHASE

■ Total
■ Bicultural
■ Unacculturated**



NOMENCLATURE



**Unacculturated Results not shown due to small sample sizes (n<50)

▲=Total Hispanics are significantly higher than Frequent Purchasers
▼=Total Hispanics are significantly lower than Frequent Purchasers

▲=Unacculturated is significantly higher than Bicultural Hispanics
▼=Unacculturated is significantly lower than Bicultural Hispanics

Hispanic purchasers are more apt to purchase imitation crab monthly, and shop for it at mass merch, club, and Hispanic grocery stores as well as at various departments within a retailer.

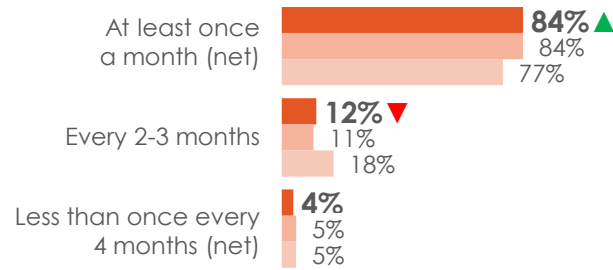
Bicultural/Unacculturated Hispanics



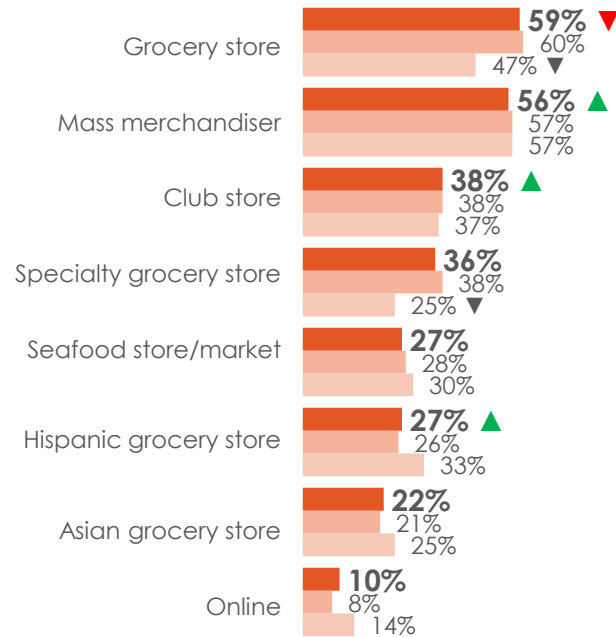
KEY FINDINGS: PURCHASE BEHAVIORS & DRIVERS

Key is as follows unless stated otherwise: ■ Total ■ Bicultural ■ Unacculturated

PURCHASE FREQUENCY

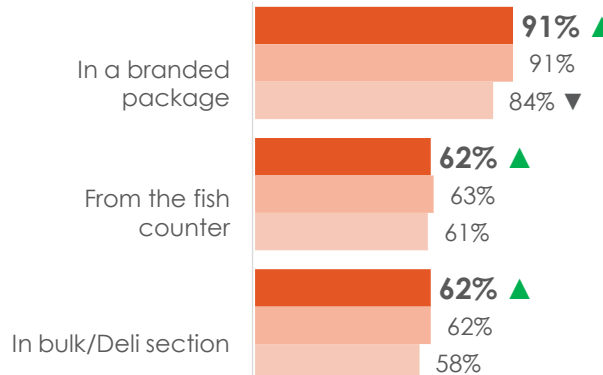


RETAILERS PURCHASED

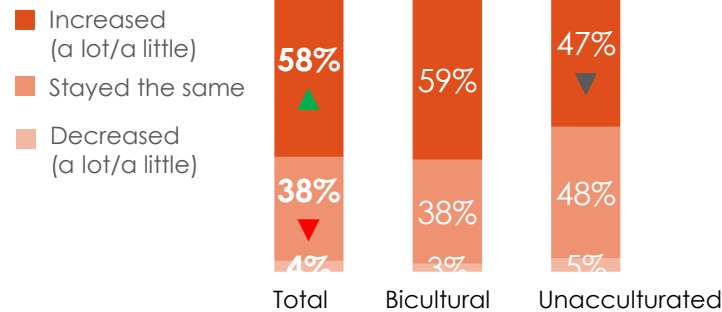


DEPARTMENT PURCHASES

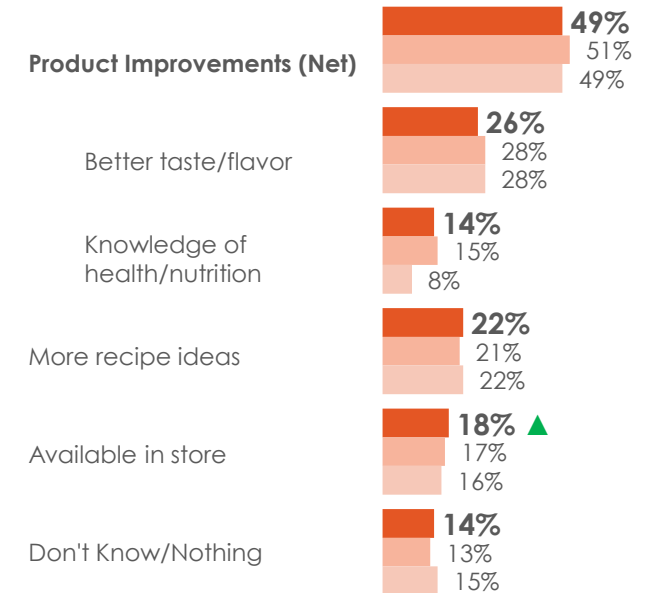
(% purchase at least every 3 months)



IMITATION CRAB PURCHASE CHANGES OVER THE PAST TWO YEARS



HOW TO INCREASE PURCHASE (10%+)



"Knowing that it will taste the same every time." - Bicultural
 "If I knew more recipes that were easy and tasted good." - Bicultural
 "Nutrition information, as well as less processed food, is good for health." - Unacculturated

▲=Total Hispanics are significantly higher than Frequent Purchasers
 ▼=Total Hispanics are significantly lower than Frequent Purchasers

▲=Unacculturated is significantly higher than Bicultural Hispanics
 ▼=Unacculturated is significantly lower than Bicultural Hispanics

Hispanic consumers have higher brand awareness overall compared to Gen Pop Frequent Purchasers.

Bicultural/Unacculturated Hispanics







KEY FINDINGS: PURCHASE BEHAVIORS & DRIVERS

BRAND AWARENESS

	Total	Bicultural	Unacculturated
TransOcean Crab Classics	91% ▲	92%	89%
Louis Kemp Crab Delights	83	84	80
Louis Kemp Alaska Delights	79	80	79
Alaskan Snow Legs	78 ▲	79	69 ▼
TransOcean Simply Surimi	70 ▲	70	63
Dutch Harbor	69 ▲	69	70
Oyster Bay	66 ▲	67	63
Pescanova	66 ▲	64	69
Dyna-Sea	62 ▲	62	65
Sea Best	58	58	63
Aquamar	56 ▲	55	60
Aqua Treasure	55 ▲	54	54
Marazul	53 ▲	51	58

FORM FUNNEL

	Total	Bicultural	Unacculturated
 CHUNK / FLAKE			
Aware	100%	99%	100%
Ever Purchased	93	94	91
Favorite	56 ▲	55	46
 LEG / STICK STYLE			
Aware	97	97	94
Ever Purchased	88	88	81
Favorite	30	30	31
 ALASKAN SNOW LEG			
Aware	93	94	88 ▼
Ever Purchased	76	79	65 ▼
Favorite	17	18	17
 SHRED STYLE			
Aware	78	81	63 ▼
Ever Purchased	55	57	38 ▼
Favorite	6	7	2 ▼

▲=Total Hispanics are significantly higher than Frequent Purchasers
▼=Total Hispanics are significantly lower than Frequent Purchasers

▲=Unacculturated is significantly higher than Bicultural Hispanics
▼=Unacculturated is significantly lower than Bicultural Hispanics

Similar to Gen Pop, Hispanic purchasers place high importance on the quality and taste of imitation crab when purchasing.

Bicultural/Unacculturated Hispanics



KEY FINDINGS: PURCHASE BEHAVIORS & DRIVERS

ATTRIBUTE IMPORTANCE		Total	Bicultural	Unacculturated
TOP ATTRIBUTES	Is high quality	7.5	7.5	6.9 ▼
	Tastes good	7.4 ▼	7.5	6.5 ▼
	Tastes like crab	6.5	6.7	5.9 ▼
	Has no artificial ingredients or preservatives	5.0	5.0	4.9
	Is all natural	4.9	5.0	4.9
	Is a source of Omega-3s	4.6 ▲	4.4	5.4 ▲
	The consistency/texture of the product	4.5	4.6	3.9 ▼
SECONDARY ATTRIBUTES	Has a high protein content	4.5 ▲	4.4	4.9 ▲
	Can be used in a variety of dishes	4.3	4.4	4.3
	Is available where I shop	4.3	4.2	4.0
	Is quick and easy to prepare	4.2	4.3	4.0
	Is a good value	4.2 ▼	4.2	3.7
	Is made from wild, sustainably sourced fish	3.9	4.0	3.4 ▼
	Is ready to eat/use out of the package	3.5 ▼	3.5	3.2
	Is a brand I know/trust	3.2	3.2	3.0
	Is responsibly fished	3.1	3.2	3.0
	Is American Heart Association Certified	2.5	2.5	3.0
	Form (flakes, sticks, etc.)	2.4	2.5	2.3
	Is a product of the USA	2.4	2.5	2.1
	Made with Wild Alaska Pollock	2.3	2.3	2.2
Is available at the fresh seafood counter	2.2 ▲	2.2	2.4	
TERTIARY ATTRIBUTES	Is low in cholesterol	1.9	1.6	2.7 ▲
	Is low carb/Is low in carbohydrates	1.7	1.6	2.1 ▲
	Is MSC (Marine Stewardship Council) certified	1.7	1.7	2.0
	Is a low-calorie option	1.5	1.4	2.2 ▲
	Is a product of Alaska	1.5	1.5	1.4
	Is fat free	1.2	1.0	1.9 ▲
	Made with Whiting/Hake	1.0	1.0	1.1
Is an imported product (from another country)	0.8 ▲	0.8	0.9	
Is gluten-free	0.7 ▲	0.7	1.2 ▲	
Is kosher	0.5 ▲	0.5	0.7	

▲=Total Hispanics are significantly higher than Frequent Purchasers
▼=Total Hispanics are significantly lower than Frequent Purchasers

▲=Unacculturated is significantly higher than Bicultural Hispanics
▼=Unacculturated is significantly lower than Bicultural Hispanics

While Hispanic purchasers describe imitation crab in various ways, 'dependable', 'practical', 'classy', 'indulgent', 'filling', 'frugal', 'authentic' and 'environmentally-friendly' are unique associations that come to mind compared to Gen Pop Frequent Purchasers.



PERSONALITY TRAITS

Total



The size of each word corresponds to how closely associated it is with each group, with larger words indicating that the trait has a stronger association with that group. Words that appear in color are uniquely associated with that group based on a correspondence analysis. Please note that some words may not appear in each image.

Similar to Gen Pop, mention of Wild Alaska Pollock and high protein are well-liked in the description, while 'typically made from' text confuses some. Hispanic purchasers also gravitate toward sustainability claim, and find mention of 'surimi' and pre-cooked flakes confusing.

Bicultural/Unacculturated Hispanics



KEY FINDINGS: PURCHASE BEHAVIORS & DRIVERS

CONCEPT DESCRIPTION

As you may know, **surimi/imitation crab** is typically made from Wild Alaska Pollock, a mild, sustainably sourced whitefish which is made into an affordable, high protein alternative to crab and other shellfish and is sold as pre-cooked flakes, stick/legs, or chunks in the refrigerated seafood section of the grocery store.

LIKES (20% mentions shown)

	Total	Bicultural	Unacculturated
"is typically made from Wild Alaska Pollock" <i>"Knowing it's actually pollock and not something else." - Bicultural</i>	45%	45%	33% ▼
"high protein" <i>"High protein products are something I look for." -Bicultural</i>	29%	27%	25%
"sustainably sourced" <i>"It is a sustainable product and seems like it would be tasty." - Unacculturated</i>	23%	23%	15%

CONFUSING (5% mentions shown)

	Total	Bicultural	Unacculturated
Didn't find anything confusing about description	69%	68%	63%
"surimi" <i>"I've never used the word surimi to describe imitation seafood." -Bicultural</i>	5%	6%	1% ▼
"and is sold as pre-cooked flakes" <i>"Could be as not fresh." - Bicultural</i>	5% ▲	5%	3%
"is typically made from Wild Alaska Pollock" <i>"Using typically here doesn't bring me confidence when purchasing." -Unacculturated</i>	4%	4%	12% ▲
"sustainably sourced" <i>"I am confused how it would have a mix of both, wild-caught and sustainably sourced." - Unacculturated</i>	4%	4%	5%
"in the refrigerated seafood section of the grocery store." <i>"I never find it there." -Bicultural</i>	4%	4%	5%
"alternative to crab"	1%	1%	5% ▲

▲=Total Hispanics are significantly higher than Frequent Purchasers

▼=Total Hispanics are significantly lower than Frequent Purchasers

▲=Unacculturated is significantly higher than Bicultural Hispanics

▼=Unacculturated is significantly lower than Bicultural Hispanics

Knowledge of Wild Alaska Pollock in imitation crab increases interest among over half of Hispanic consumers, slightly more so than among Gen Pop Frequent Purchasers.

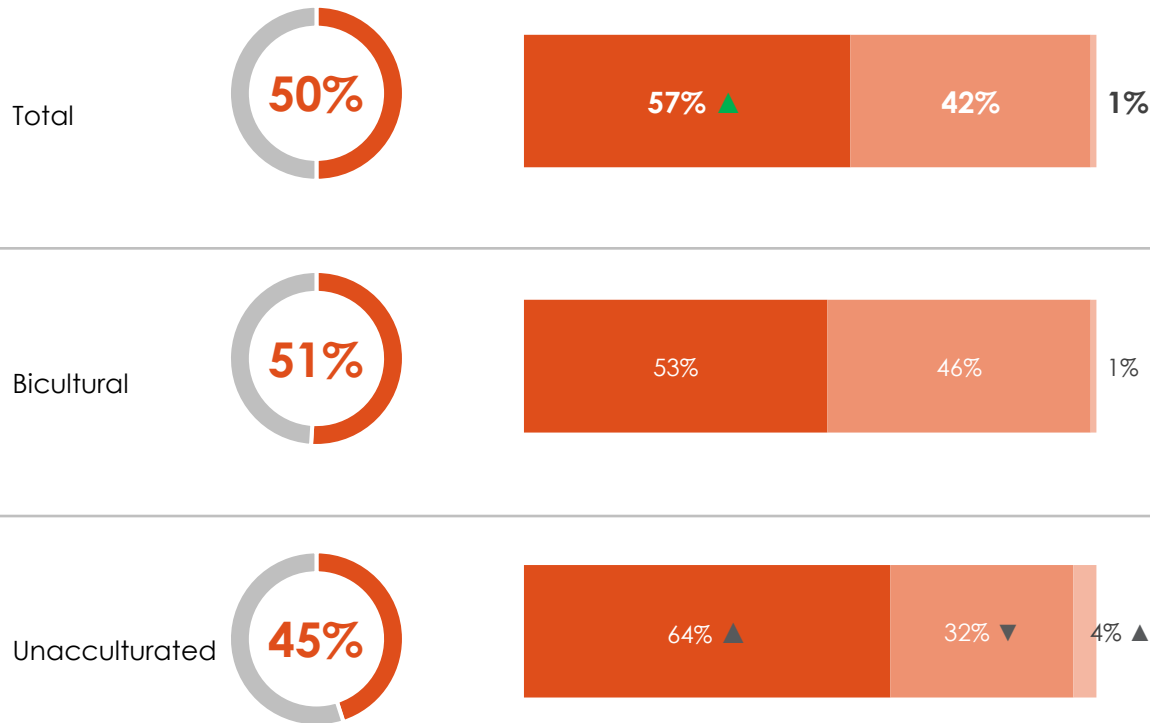


KEY FINDINGS: PURCHASE BEHAVIORS & DRIVERS

AWARE IMITATION CRAB IS MADE FROM WILD ALASKA POLLOCK
(% YES)

IMPACT OF IMITATION CRAB MADE FROM WILD ALASKA POLLOCK

- More interested in purchasing (much/somewhat more)
- Just as interested in purchasing
- Less interested in purchasing (much/somewhat less)



▲=Total Hispanics are significantly higher than Frequent Purchasers
▼=Total Hispanics are significantly lower than Frequent Purchasers

▲=Unacculturated is significantly higher than Bicultural Hispanics
▼=Unacculturated is significantly lower than Bicultural Hispanics

More children within Hispanic households consume imitation crab. Hispanic consumers are more prone to using imitation crab during summer months compared to Gen Pop.

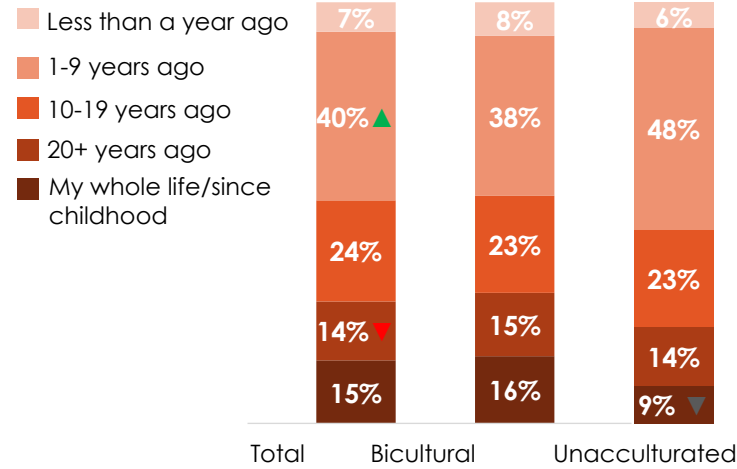
Bicultural/Unacculturated Hispanics



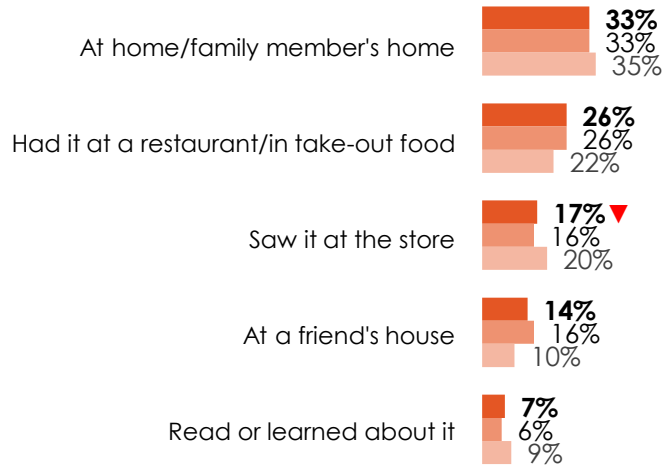
KEY FINDINGS: CONSUMPTION BEHAVIORS

Key is as follows unless stated otherwise: ■ Total ■ Bicultural ■ Unacculturated

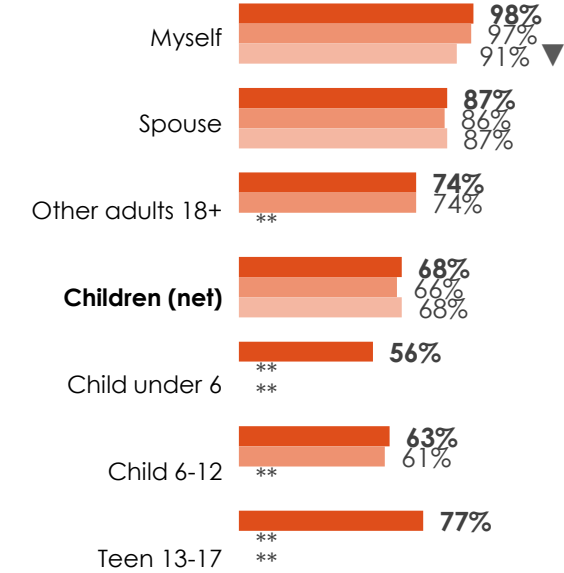
TIME SINCE FIRST EXPERIENCE



FIRST EXPERIENCE



WHO CONSUMES (within household)



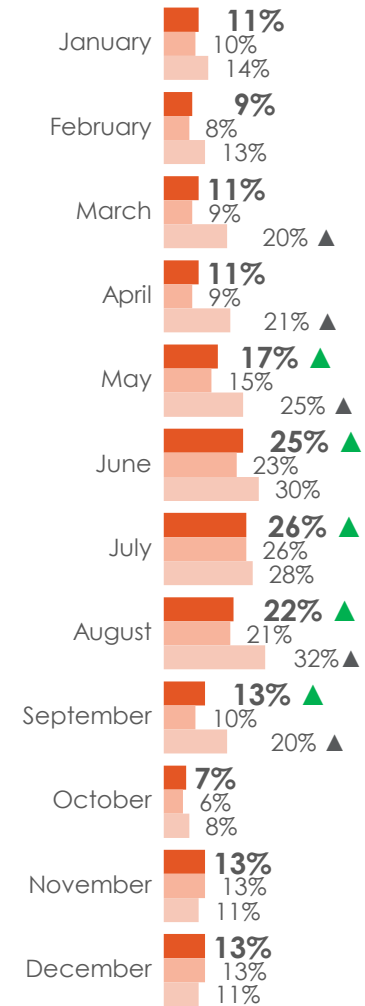
Family plays an important role in introducing imitation crab to children in Hispanic households.



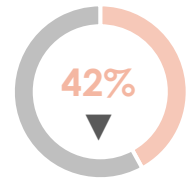
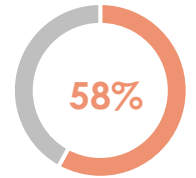
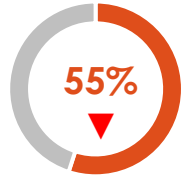
"When I was a little girl, my mom would make it and that's how I learned of it. My first impression was that I wouldn't like it, but with mom we had to eat what she made... thus I ate it and I liked it. Now as an adult, I make it for my family."

"My mother introduced me to imitation crab a long time ago. When she made it, I didn't want to try it I thought it was nasty but then I tried it and that was it I loved it from there."

MONTHLY CONSUMPTION



Eat imitation crab consistently throughout the year



**Results not shown due to small sample sizes (n<50)

▲=Total Hispanics are significantly higher than Frequent Purchasers
▼=Total Hispanics are significantly lower than Frequent Purchasers

▲=Unacculturated is significantly higher than Bicultural Hispanics
▼=Unacculturated is significantly lower than Bicultural Hispanics

Compared to Gen Pop, more Hispanic purchasers use imitation crab as an ingredient, particularly in dishes for holidays and lunches.

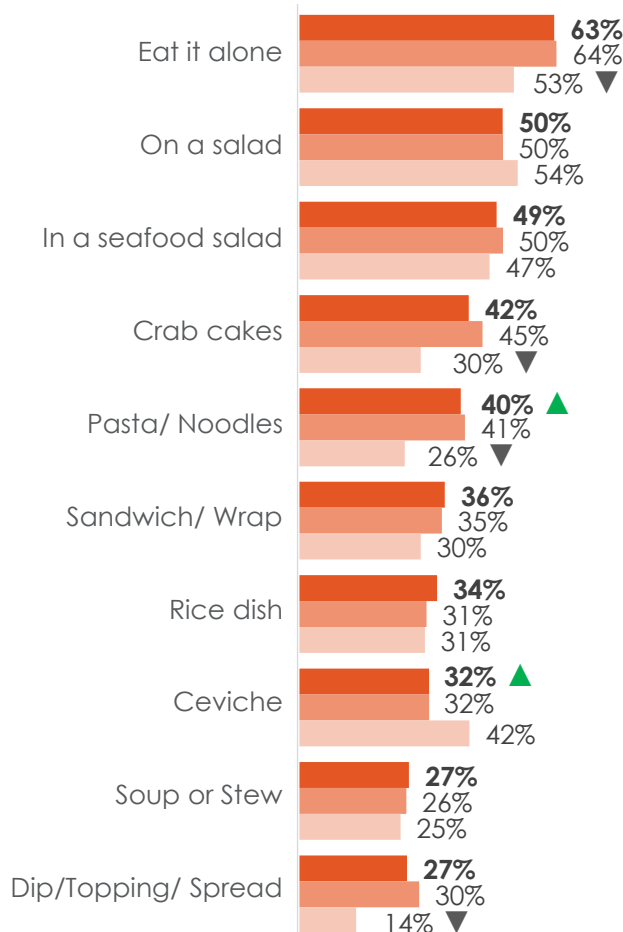
Bicultural/Unacculturated Hispanics



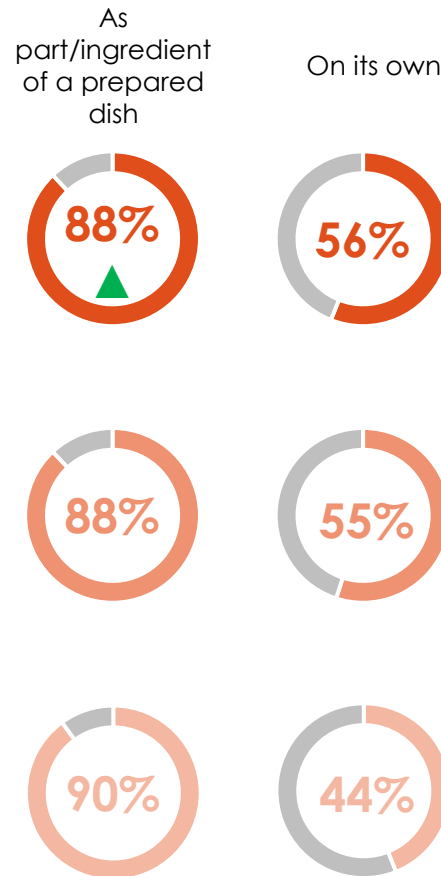
KEY FINDINGS: CONSUMPTION BEHAVIORS

Key is as follows unless stated otherwise: ■ Total ■ Bicultural ■ Unacculturated

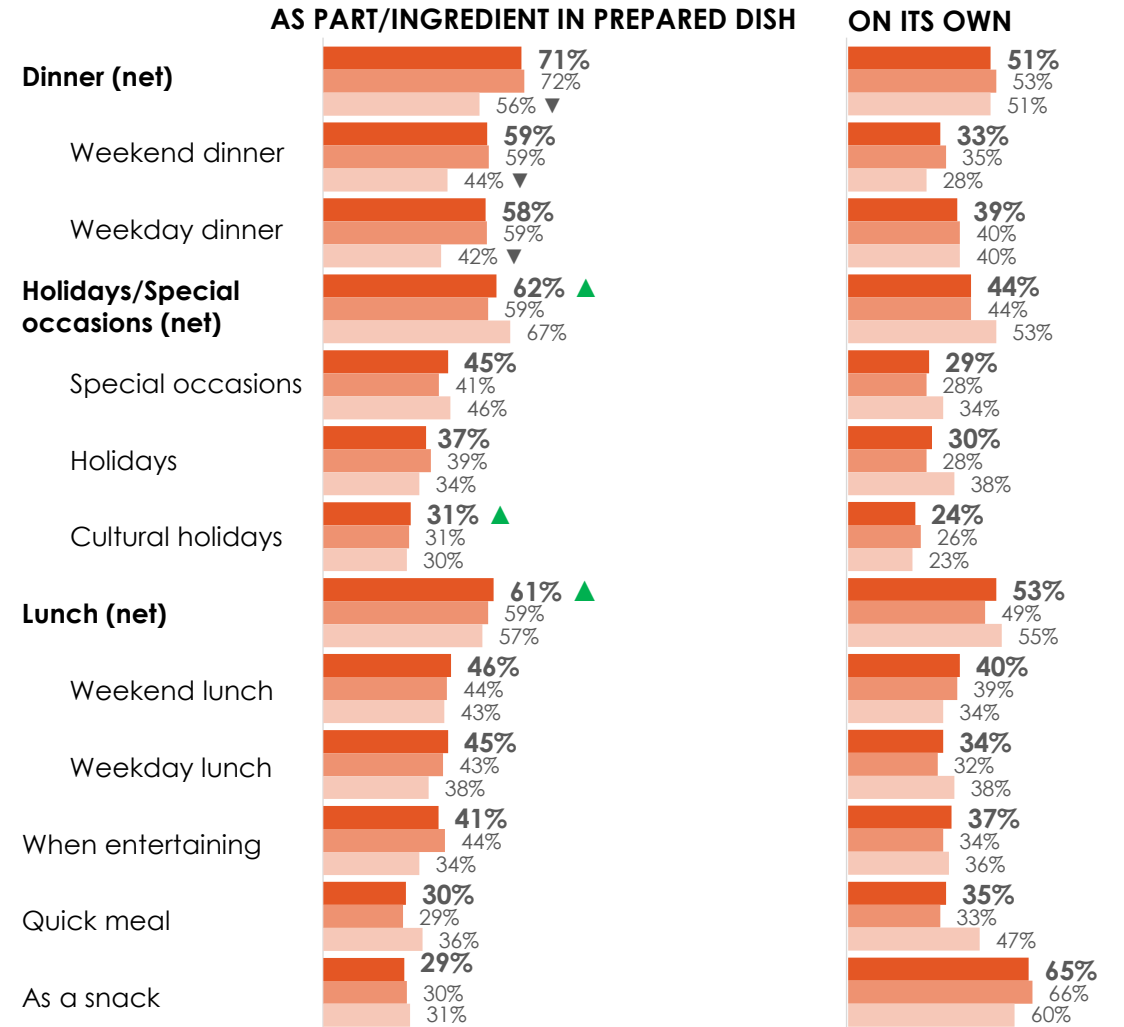
RECIPES



CONSUMPTION TYPE



CONSUMPTION OCCASIONS



▲=Total Hispanics are significantly higher than Frequent Purchasers
▼=Total Hispanics are significantly lower than Frequent Purchasers

▲=Unacculturated is significantly higher than Bicultural Hispanics
▼=Unacculturated is significantly lower than Bicultural Hispanics

During their most recent purchase occasion, Hispanic consumers bought chunk/flake styles. They were more apt to use it in ceviche than Gen Pop Frequent Purchasers.

Bicultural/Unacculturated Hispanics



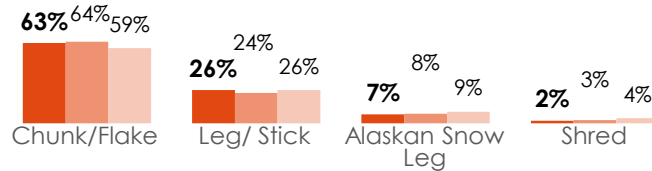
KEY FINDINGS: LAST OCCASION

Key is as follows unless stated otherwise: ■ Total ■ Bicultural ■ Unacculturated

PLANNED PURCHASE (10%+)

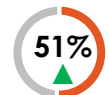
	Total	Bicultural	Unacculturated
Planned (net)	84%	84%	77%
I always keep it on hand	29	30	21
It was the right price, fit my budget	22	24	21
It was called for in a recipe	19	18	20
Someone in my household requested it	18 ▲	18	19
Saw an ad	15	16	19
I wanted a substitute to crab/lobster	11	10	15
It was on sale/promotion/deal	6 ▼	6	11
Unplanned	16	15	23

FORM



NUTRITION LABEL

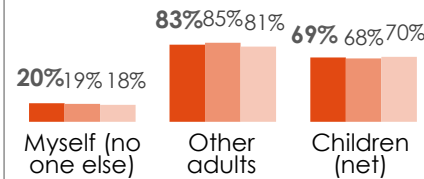
(% look at label)



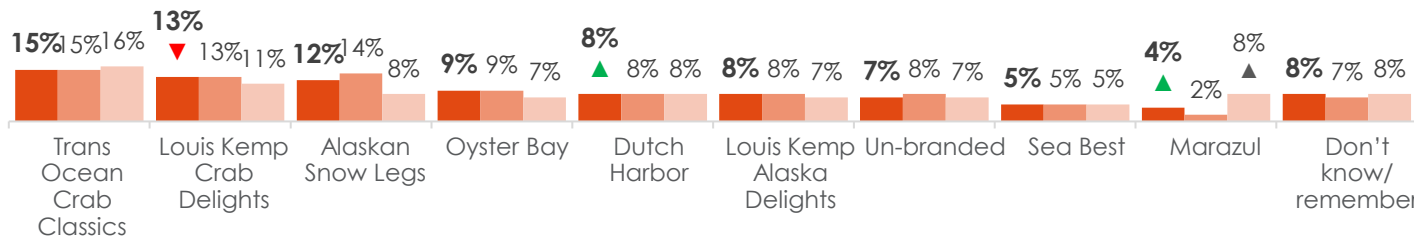
Bicultural = 50%
Unacculturated = 52%

WHO CONSUMED

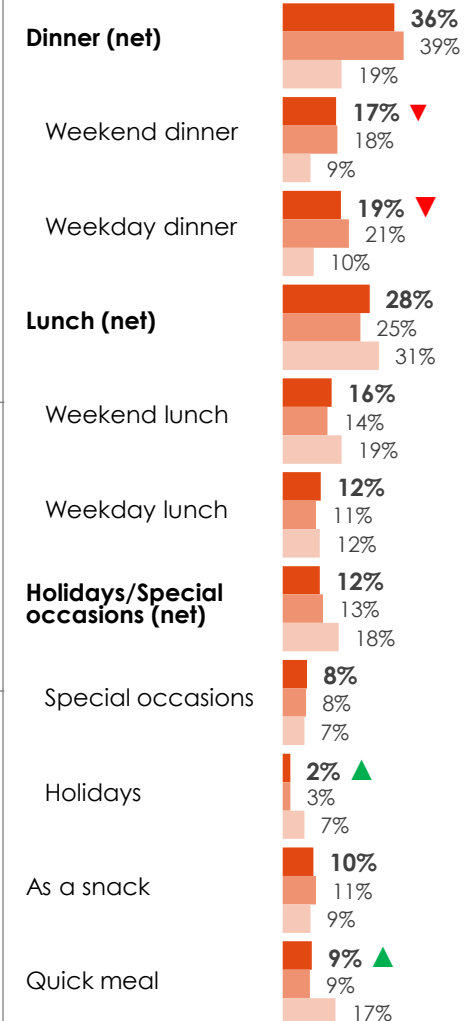
(within household)



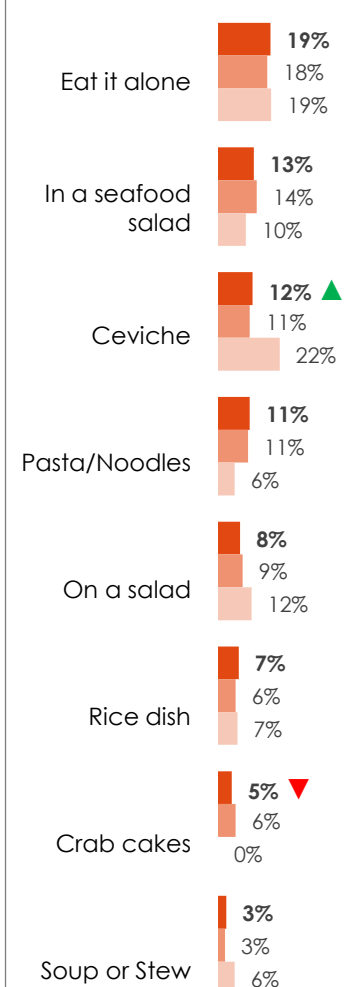
BRAND (5%+)



CONSUMPTION OCCASIONS (5%+)



RECIPES (5%+)



▲ = Total Hispanics are significantly higher than Frequent Purchasers
▼ = Total Hispanics are significantly lower than Frequent Purchasers

▲ = Unacculturated is significantly higher than Bicultural Hispanics
▼ = Unacculturated is significantly lower than Bicultural Hispanics

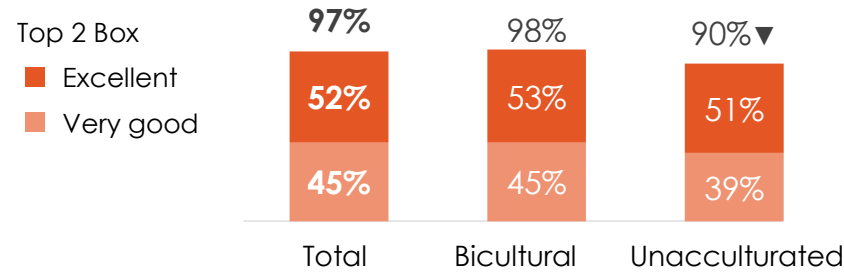
Hispanic consumers are similarly satisfied within their most recent imitation crab purchase, and primarily purchased it due to taste, value, quality, and availability.

Bicultural/Unacculturated Hispanics

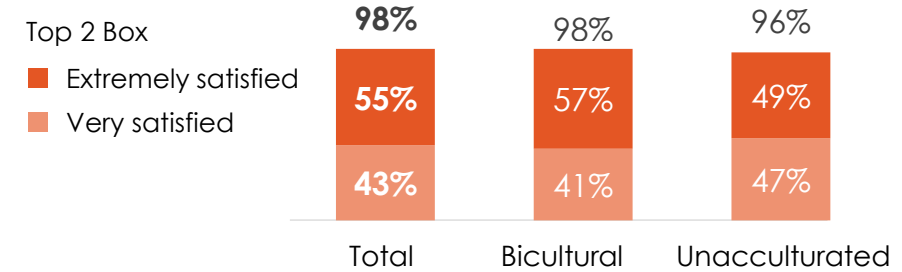


KEY FINDINGS: LAST OCCASION

IMITATION CRAB RATING



IMITATION CRAB SATISFACTION



PERFORMANCE

TOP 3 REASONS OF PURCHASE (20%+)

	Top 3 Reasons	Total			Bicultural			Unacculturated		
		Top 3 Reasons	All Traits	Top 3 Reasons	All Traits	Top 3 Reasons	All Traits			
Tasted good	44%	29% 68%	97%	48%	26% 71%	97%	35%	32% 61%▼	93%▼	
Tasted like crab	26%	40% 52%	92%▲	25%	38% 54%	92%	21%	40% 42%▼	82%▼	
Was a good value	24%	36% 56%	92%	25%	33% 60%	93%	19%	44%▲ 46%▼	90%	
Was high quality	23%	37% 55%	92%	25%	37% 56%	93%	22%	41% 44%▼	85%▼	
Was available where I shop	20%	29% 64%	93%	19%	28% 65%	93%	21%	36% 55%▼	91%	

▲=Total Hispanics are significantly higher than Frequent Purchasers
▼=Total Hispanics are significantly lower than Frequent Purchasers

▲=Unacculturated is significantly higher than Bicultural Hispanics
▼=Unacculturated is significantly lower than Bicultural Hispanics

Hispanic purchasers find imitation crab to be great tasting, easy to use, goes well with many kinds of recipes, and is an affordable alternative to crab.


Bicultural/Unacculturated Hispanics





KEY FINDINGS: OUT-OF-HOME EXPERIENCE


CATEGORY ATTITUDES (% Agree completely/somewhat)


■ Total ■ Bicultural ■ Unacculturated


 Ease of Use/Versatility	Total	Bicultural	Unacculturated
Is easy to use	93% ▼	94%	88% ▼
Goes well with many kinds of food/recipes	92 ▲	91	81 ▼
It is versatile, can be prepared in many ways	90	92	82 ▼
Is really easy to prepare and almost impossible to mess up	89	91	79 ▼
Can be used in many recipes and dishes	87	91	72 ▼
I like to experiment with adding imitation crab/surimi to familiar dishes	81 ▲	82	74
Is the main feature/component in recipes	74	74	66
I tend to seek out new recipes that include imitation crab/surimi as an ingredient	74 ▲	74	62 ▼
Is an accent in dishes, not the main component	67 ▲	66	68


 Taste	Total	Bicultural	Unacculturated
Is great tasting	95%	95%	90%
Is mild and sweet tasting	90	91	81 ▼
Tastes just like crab	82	84	68 ▼

 Nutrition	Total	Bicultural	Unacculturated
Is a good source of protein	90% ▲	91%	77% ▼
Is a healthy choice	86	85	73 ▼
Is heart healthy	82	81	68 ▼
Has Omega-3 fatty acids	73	74	63 ▼
Is just as natural as other fresh fish/seafood options	72	70	62
Is real seafood	62	65	52 ▼
Is healthier than shellfish	62 ▲	60	52

 Price	Total	Bicultural	Unacculturated
Is an affordable alternative for crab	91%	91%	85%
Is a good value for the money	90	91	82 ▼
Is inexpensive	75	75	75

 Usage	Total	Bicultural	Unacculturated
It fits into my cooking style	90%	89%	81% ▼
Is a good snack	87	89	81 ▼
Everyone in my household enjoys imitation crab/surimi	84 ▲	83	79
Is an everyday indulgence	71 ▲	72	55 ▼
I grew up eating imitation crab/surimi	67 ▲	67	58
Is something my children enjoy eating	64 ▲	63	63

 Source/Brand	Total	Bicultural	Unacculturated
Is a sustainably sourced protein	87% ▲	87%	69% ▼
Is a product of the USA	68	71	51 ▼
Is a product of Alaska	58 ▲	61	42 ▼
I prefer specific brand(s) of imitation crab/surimi	57 ▲	57	46 ▼
Is imported	43 ▲	42	46

 Cultural/Religious Ties	Total	Bicultural	Unacculturated
My cultural heritage influences how I cook/serve imitation crab/surimi	57% ▲	56%	53%
Is something important to my culture or in my culture's cuisine	55 ▲	57	46 ▼
Allows me to keep my religious dietary practices	46 ▲	44	46

▲=Total Hispanics are significantly higher than Frequent Purchasers
▼=Total Hispanics are significantly lower than Frequent Purchasers

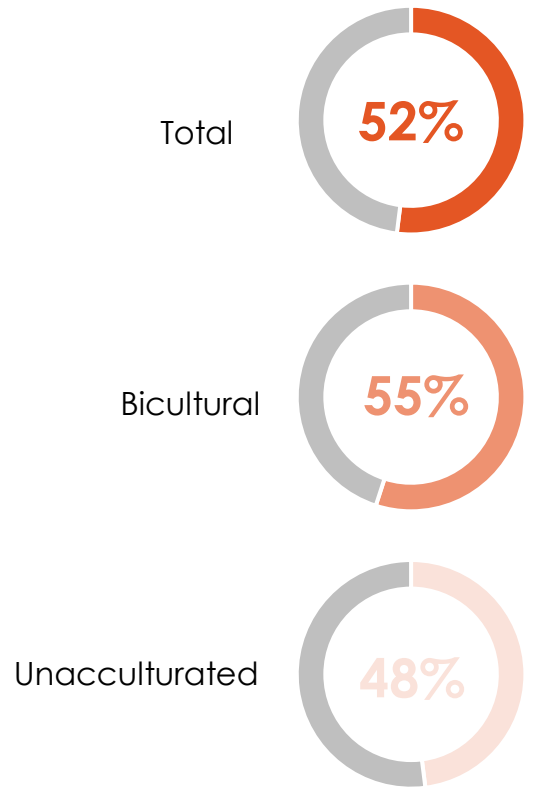
▲=Unacculturated is significantly higher than Bicultural Hispanics
▼=Unacculturated is significantly lower than Bicultural Hispanics

Roughly half of Hispanic purchasers have eaten imitation crab at a restaurant. They are equally inclined to consume at a restaurant or to prepare at home.



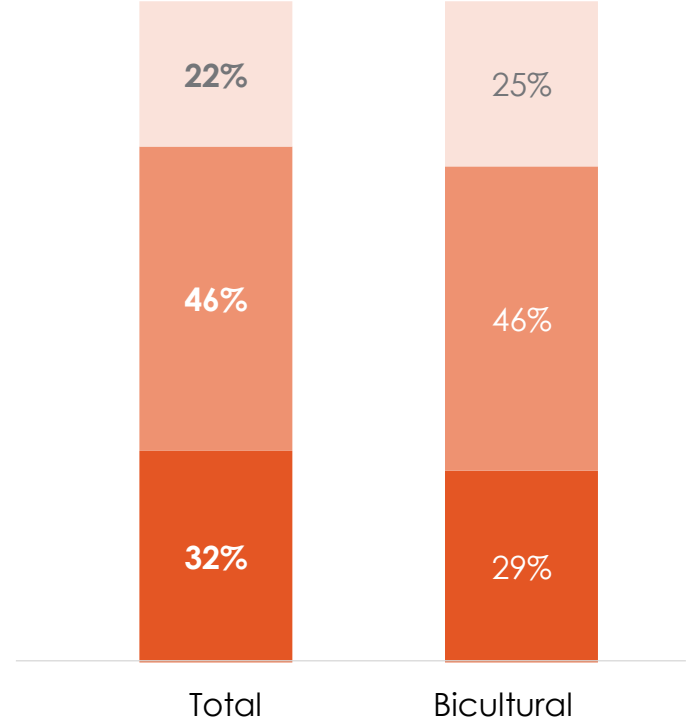
Key is as follows unless stated otherwise: ■ Total ■ Bicultural ■ Unacculturated

EVER CONSUMED IMITATION CRAB FROM A RESTAURANT (DINE IN OR TAKEOUT)
(% Yes)



INCLINATION TO EAT IMITATION CRAB

- More likely to prepare at home (much/somewhat more)
- Just as likely to eat from restaurant as to prepare at home
- More likely to eat from a restaurant (much/somewhat more)



**Unacculturated Results not shown due to small sample sizes (n<50)

▲=Total Hispanics are significantly higher than Frequent Purchasers ▲=Unacculturated is significantly higher than Bicultural Hispanics
▼=Total Hispanics are significantly lower than Frequent Purchasers ▼=Unacculturated is significantly lower than Bicultural Hispanics

Compared to Gen Pop, Hispanic purchasers consume more California rolls and ceviche, and less crab cakes and crab/seafood dips.

Bicultural/Unacculturated Hispanics



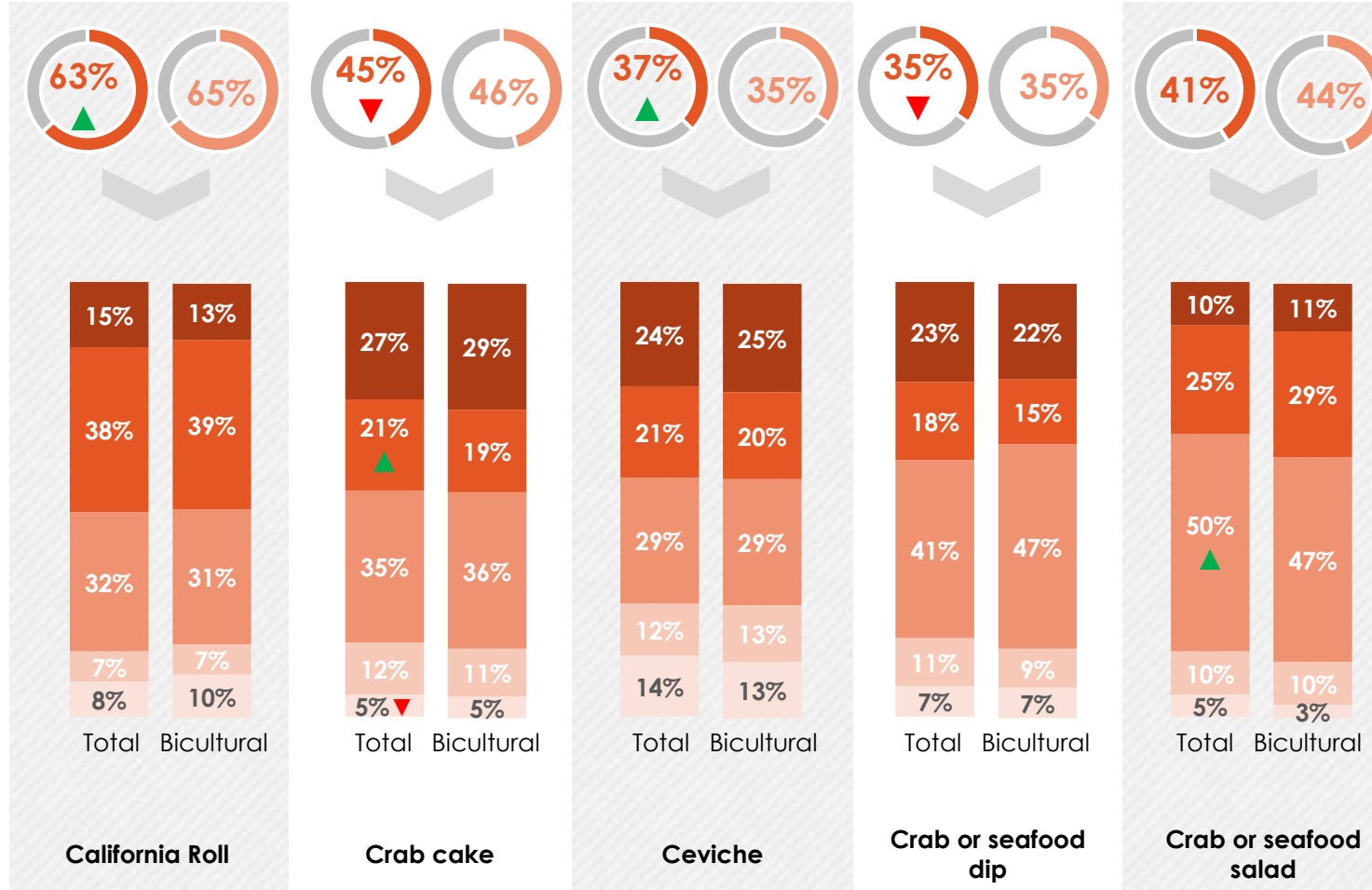
KEY FINDINGS: OUT-OF-HOME EXPERIENCE

DISHES CONSUMED FROM RESTAURANT

EVER CONSUMED:

THINK IT'S MADE FROM:**

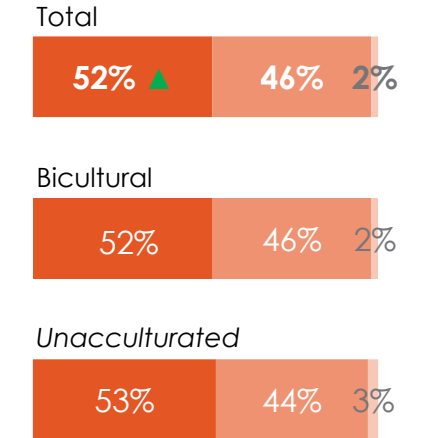
- 100% real crab
- 100% imitation crab
- Sometimes crab, sometimes imitation crab
- Combination of crab and imitation crab
- Other/Don't Know/Not Sure



INTEREST IN CALIFORNIA ROLLS

(after learning often filled with imitation crab)

- More interested (much/somewhat more)
- Just as interested
- Less interested (much/somewhat less)



**Unacculturated Results not shown due to small sample sizes (n<50)

▲=Total Hispanics are significantly higher than Frequent Purchasers
▼=Total Hispanics are significantly lower than Frequent Purchasers

▲=Unacculturated is significantly higher than Bicultural Hispanics
▼=Unacculturated is significantly lower than Bicultural Hispanics

Similar to Gen Pop Frequent Purchasers, Hispanic purchasers do not notice a clear distinction in conventional and clean products aside from packaging.

Bicultural/Unacculturated Hispanics

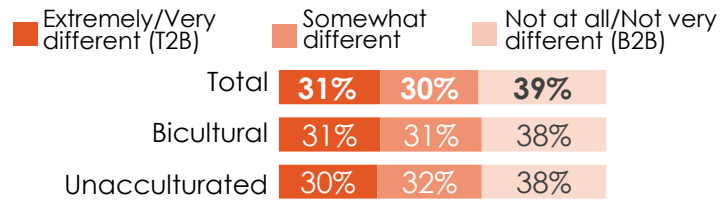


KEY FINDINGS: INNOVATION/NEW PRODUCTS

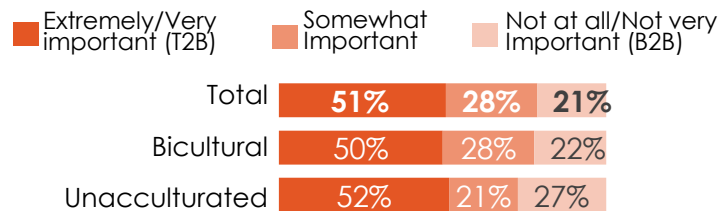
Key is as follows unless stated otherwise: ■ Total ■ Bicultural ■ Unacculturated



DIFFERENCE IN PACKAGING



IMPORTANCE OF DIFFERENCE



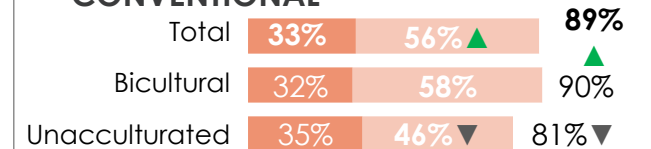
WHAT MAKES THEM DIFFERENT (10%+)

	Total	Bicultural	Unacculturated
Packaging (Net)	61% ▲	63%	48%
Appearance (Looks good/appetizing)	20	20	19
Packaging/Different packaging	19	21	11
Brand/Name/Different Brand/Name	15 ▲	15	13
Visuals/Images/Can see inside	10	12	2 ▼
Information/Details on package	11 ▲	11	6
Product Attributes (differences in quality, nutrition, fish type)	36	37	29

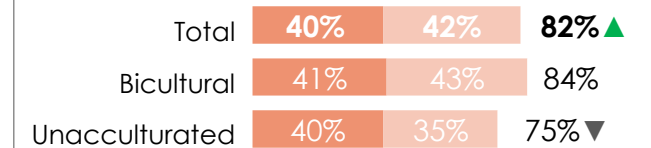
PURCHASE INTEREST

■ Probably would ■ Definitely would Top 2 box

CONVENTIONAL



CLEAN



▲=Total Hispanics are significantly higher than Frequent Purchasers
▼=Total Hispanics are significantly lower than Frequent Purchasers

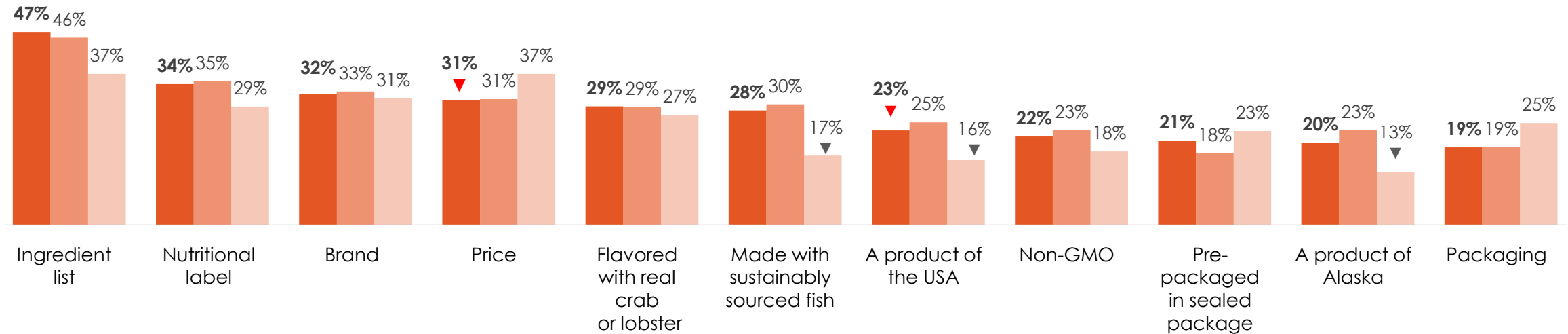
▲=Unacculturated is significantly higher than Bicultural Hispanics
▼=Unacculturated is significantly lower than Bicultural Hispanics

Hispanic purchasers associate 'high quality' with the ingredient list, nutritional label, brand, and price (though to a lesser extent than Gen Pop Frequent Purchasers).



Key is as follows unless stated otherwise: ■ Total ■ Bicultural ■ Unacculturated

'HIGH QUALITY' ASSOCIATIONS (20%+)



▲=Total Hispanics are significantly higher than Frequent Purchasers
▼=Total Hispanics are significantly lower than Frequent Purchasers

▲=Unacculturated is significantly higher than Bicultural Hispanics
▼=Unacculturated is significantly lower than Bicultural Hispanics

Like Gen Pop, Hispanic purchasers are interested in transparent packaging to see the product before purchase. Hispanic purchasers express more interest in new forms than Gen Pop.

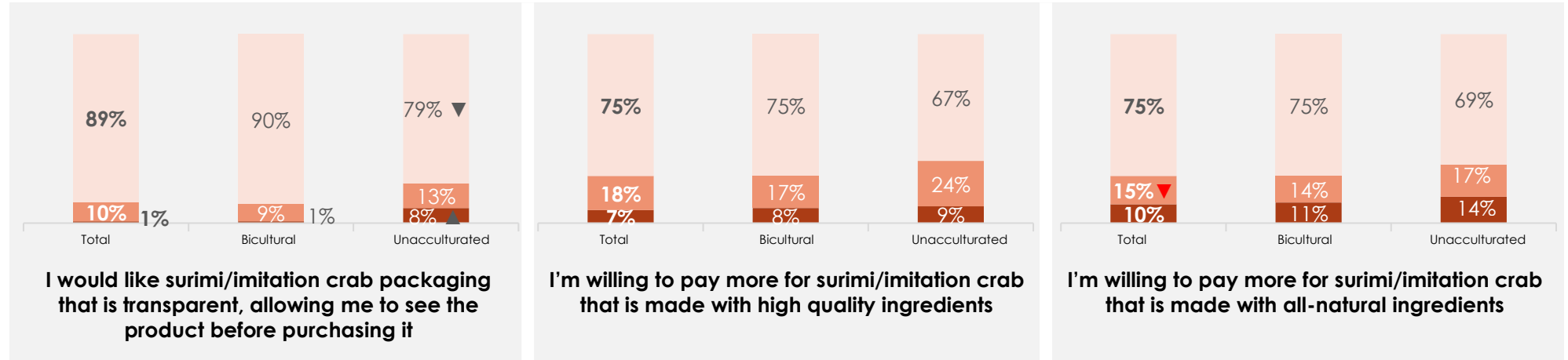
Bicultural/Unacculturated Hispanics



KEY FINDINGS: INNOVATION/NEW PRODUCTS

PACKAGING CATEGORY ATTITUDES

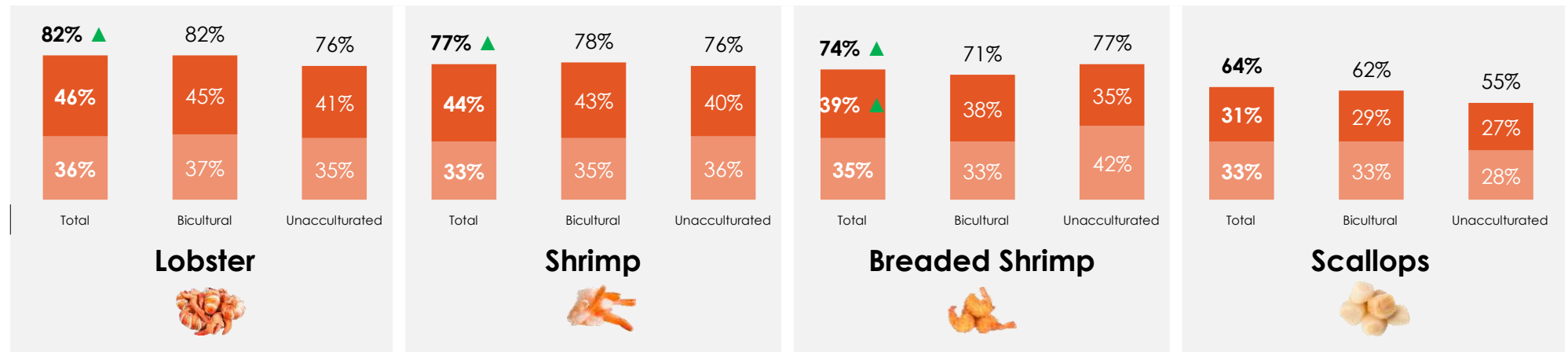
- Agree completely/somewhat
- Neither agree nor disagree
- Disagree completely/somewhat



NEW FORM PURCHASE INTEREST

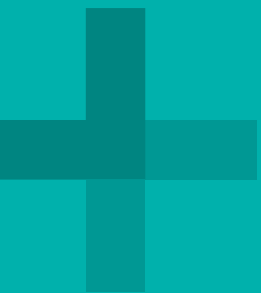
Top 2 Box

- Definitely would
- Probably would



▲=Total Hispanics are significantly higher than Frequent Purchasers
▼=Total Hispanics are significantly lower than Frequent Purchasers

▲=Unacculturated is significantly higher than Bicultural Hispanics
▼=Unacculturated is significantly lower than Bicultural Hispanics



ASIAN-AMERICAN PURCHASERS

C+R
RESEARCH

Emerge smarter.



Key Findings



Asian-American consumers have significantly higher imitation crab trial and repeat levels than the general population



- Almost half of Asian-American shoppers have ever purchased imitation crab, though most refer to the product as imitation crab and almost half use the term 'crab sticks', likely due to their high usage of leg/stick style imitation crab.
- Many consumers have retained their current level of purchasing over the past two years.



Asian markets are top retailer of choice, and while branded packages reign supreme, brand awareness of general market brands is limited.



- Two-in-three Asian-American purchasers shop for imitation crab at Asian markets; over half shop at mainstream grocery stores.
- Though most are buying imitation crab in branded packages, awareness of mainstream brands (Louis Kemp and TransOcean) is lower than Gen Pop Frequent Purchasers. It is hypothesized that they are buying Asian brands.
- Usage of the leg/stick style is much more prevalent among Asian-American purchasers.

Key Findings



Imitation crab made with clean ingredients and sustainably sourced are particularly valued among Asian-American consumers, yet current perceptions may indicate a disconnect between the ideal product and current offerings.



- In addition to ingredient list and price, Asian-American purchasers define 'high quality' imitation crab as being made with sustainably sourced fish.
- Over a third label imitation crab as 'processed' and fewer find it to be healthy or 'good for you' as compared to Frequent Purchasers.
- Fewer Asian-American purchasers are aware of Wild Alaska Pollock's use in imitation crab, and this knowledge elicits more interest in the product.

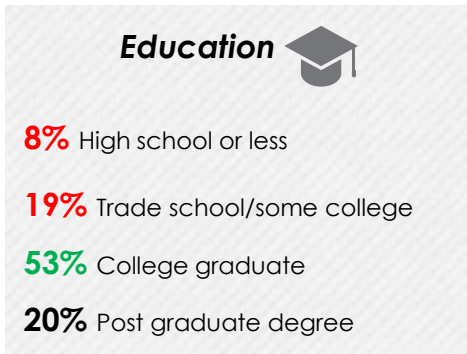
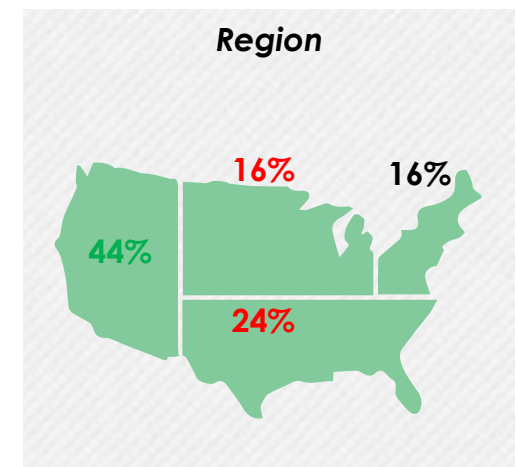
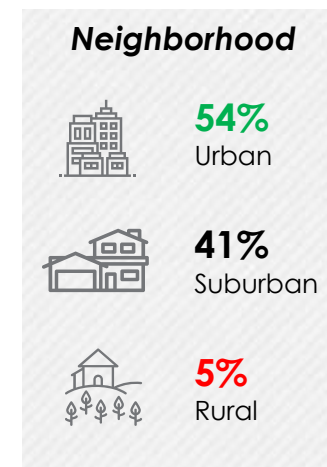
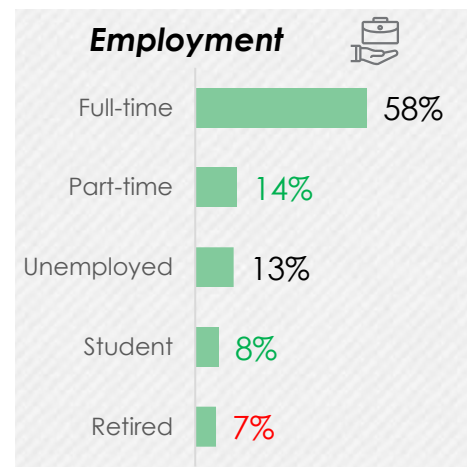
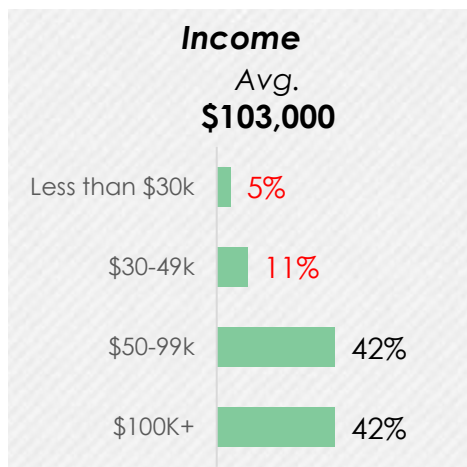
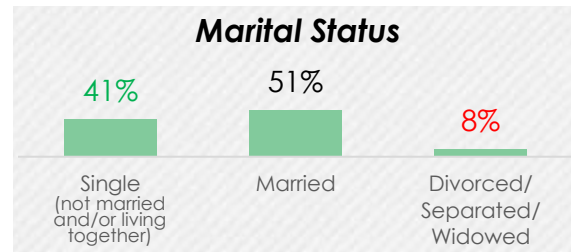
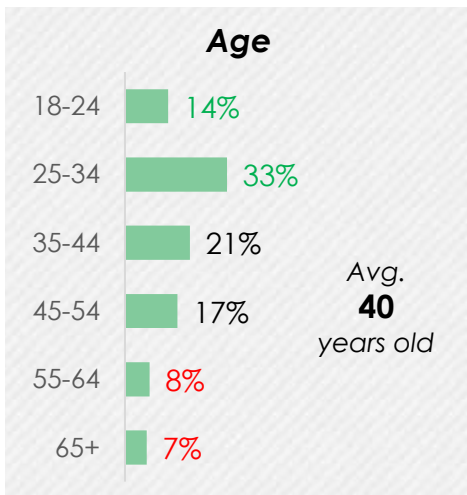
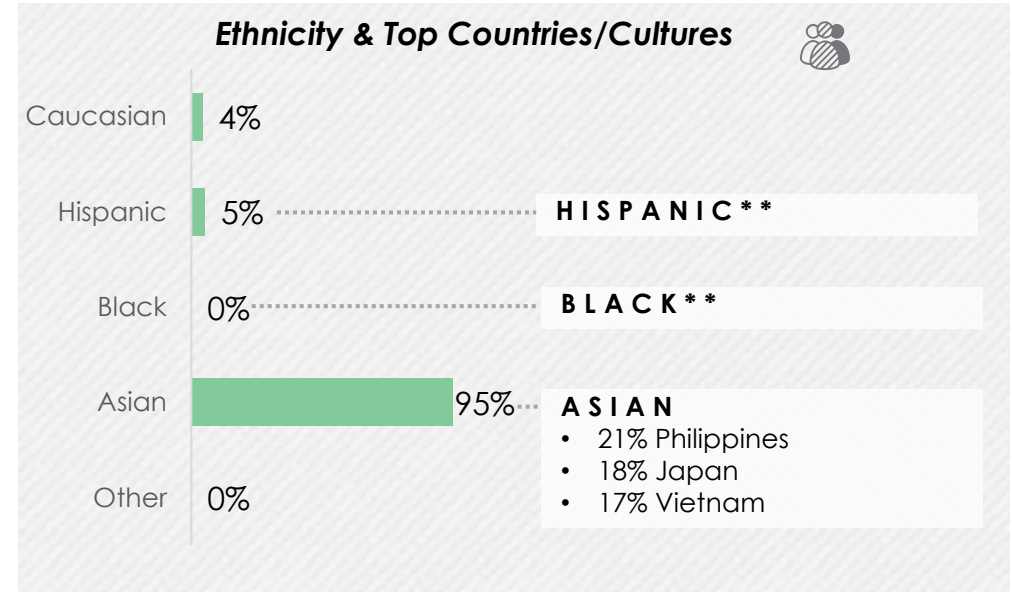
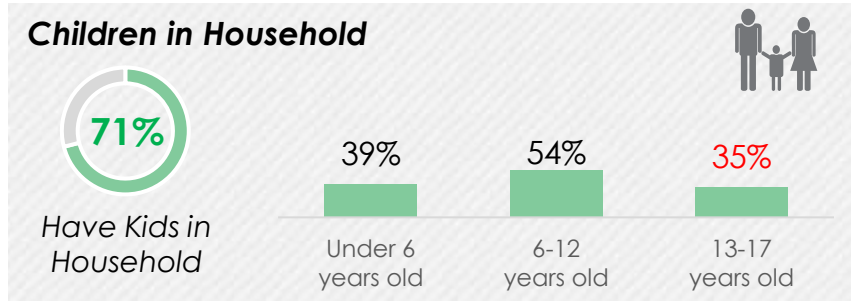
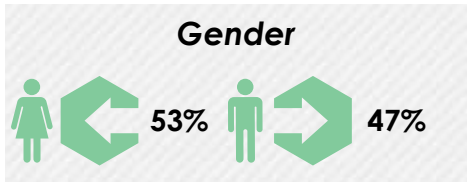


Imitation crab consumption is deeply engrained in the lives of Asian-American purchasers, often beginning in childhood, and is intertwined with their cultural heritage.



- Initial experience often occurred over 20+ years ago (many since childhood). Even more report growing up eating imitation crab.
- Cultural heritage has influenced how Asian-American consumers cook and serve imitation crab, as imitation crab is important to their culture's cuisines.
- Holidays, particularly cultural holidays, are more common occasions of imitation crab consumption, compared to Gen Pop Frequent Purchasers.

Compared to Gen Pop, Asian-American purchasers are younger, college-educated urbanites with kids living on the West Coast.



Green = Overindexes (120+) to Frequent Purchasers
Red = Underindexes (<80) to Frequent Purchasers

Indexing shown to Frequent Purchasers except for Ethnicity and Top Countries/Cultures as it defines the group

**Results not shown due to small sample sizes (n<50)

Almost half of Asian-American shoppers have ever purchased imitation crab, significantly more (13 percentage points) than Gen Pop, and many current purchasers plan to do so again in the future. Many refer to it as imitation crab or crab sticks.

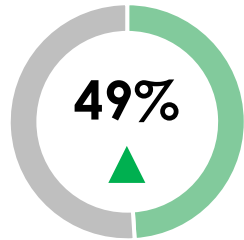
Asian-Americans



KEY FINDINGS: PURCHASE BEHAVIORS & DRIVERS

EVER PURCHASED IMITATION CRAB (% Yes)

(shown with imagery below)



FUTURE PURCHASE INTEREST

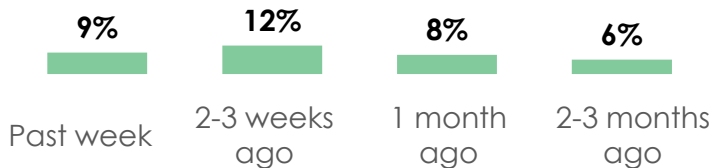
Probably would

Definitely would

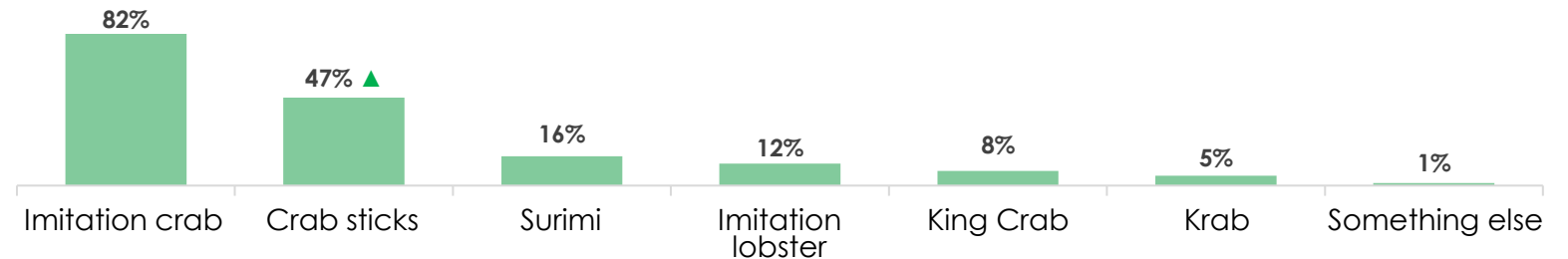
Top 2 Box



LAST PURCHASE



NOMENCLATURE



▲ = Asian-Americans are significantly higher than Frequent Purchasers
▼ = Asian-Americans are significantly lower than Frequent Purchasers

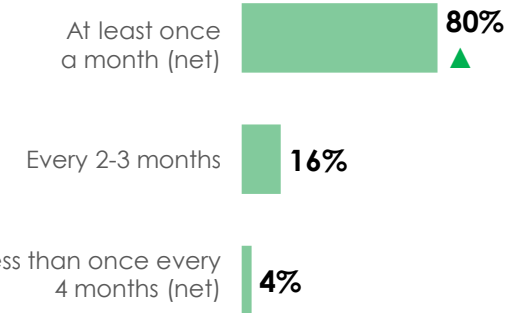
Compared to Gen Pop Frequent Purchasers, Asian-Americans buy imitation more often, primarily at Asian markets and purchase the leg/stick style. While they purchase branded imitation crab, they are less likely to purchase the larger mainstream brands.

Asian-Americans



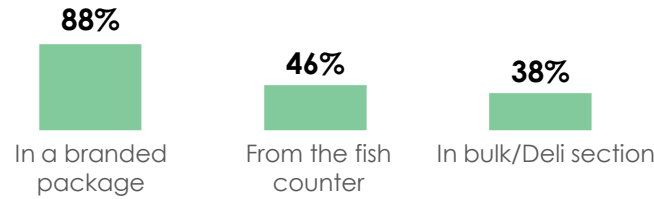
KEY FINDINGS: PURCHASE BEHAVIORS & DRIVERS

PURCHASE FREQUENCY

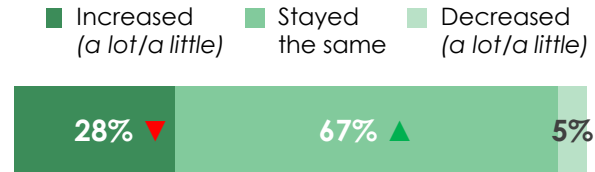


DEPARTMENT PURCHASES

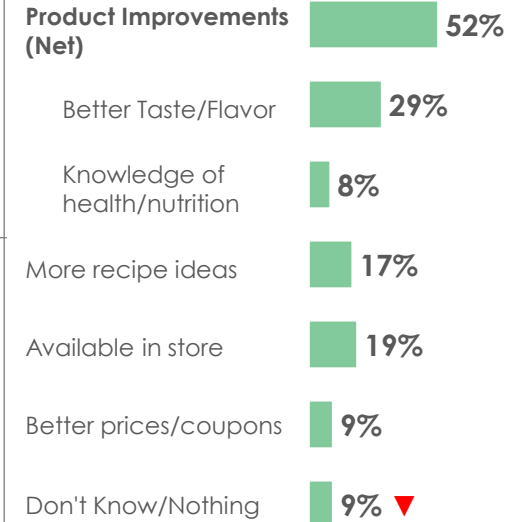
(% purchase at least every 3 months)



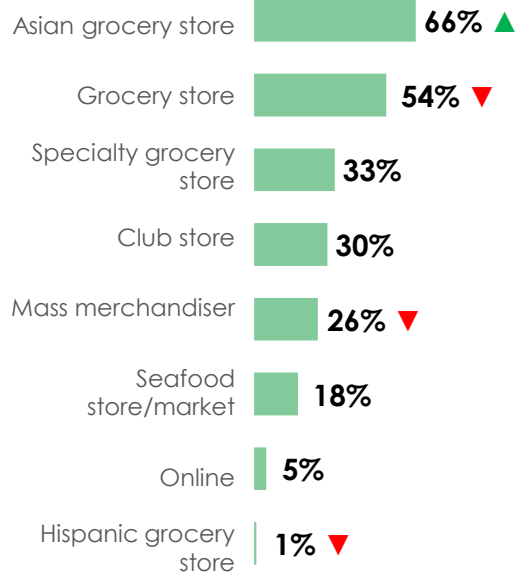
IMITATION CRAB PURCHASE CHANGES OVER THE PAST TWO YEARS



HOW TO INCREASE PURCHASE (7%+)

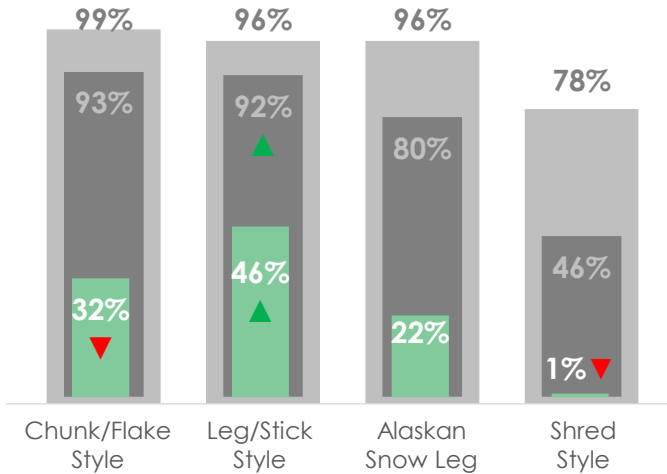


RETAILERS



FORM FUNNEL

■ Aware
■ Ever Purchased
■ Favorite



BRAND FUNNEL

	Aware	Ever Purchased	Favorite
Louis Kemp Crab Delights	78%	57%	8%
TransOcean Crab Classics	76%	62%	18%
Louis Kemp Alaska Delights	71%	54%	9%
Alaskan Snow Legs	70%	50%	11%
Sea Best	67%	46%	11%
Pescanova	62%	38%	4%
TransOcean Simply Surimi	58%	41%	11%
Dutch Harbor	57%	39%	4%
Dyna-Sea	55%	33%	3%
Aquamar	53%	33%	1%
Oyster Bay	53%	38%	11%
Aqua Treasure	49%	22%	1%
Marazul	46%	25%	0%

“I would like for it to taste more like crab.”

“I buy what I need to make the dishes that I do. If there are particular health benefits, I may buy/eat it more.”

“If I have more recipes that would need imitation crab in it.”

In addition to taste and quality, Asian-American purchasers highly value naturalness, more so than Gen Pop Frequent Purchasers.



KEY FINDINGS: PURCHASE BEHAVIORS & DRIVERS

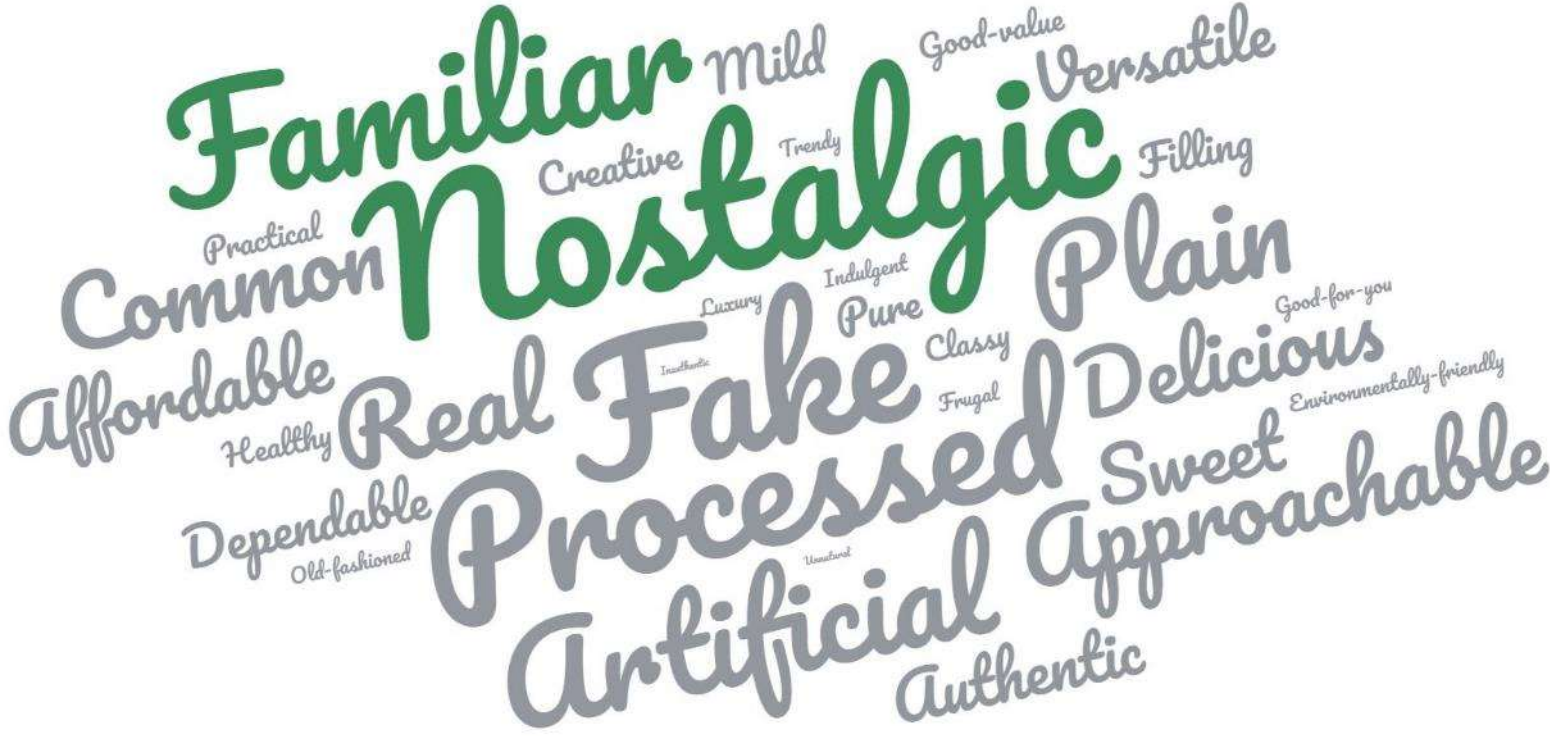
ATTRIBUTE IMPORTANCE		Asian
TOP ATTRIBUTES	Tastes good	7.7
	Is high quality	7.6
	Tastes like crab	6.5
	Has no artificial ingredients or preservatives	6.0 ▲
	Is all natural	5.6 ▲
SECONDARY ATTRIBUTES	The consistency/texture of the product	4.9
	Is a good value	4.8
	Is made from wild, sustainably sourced fish	4.7 ▲
	Is available where I shop	4.5
	Can be used in a variety of dishes	4.4
	Is quick and easy to prepare	4.2
	Is a source of Omega-3s	4.1
	Has a high protein content	4.0
	Is ready to eat/use out of the package	3.6
	Is responsibly fished	3.4 ▲
	Is a brand I know/trust	3.4
	Form (flakes, sticks, etc.)	2.2
	Is low in cholesterol	2.2
	Is American Heart Association Certified	2.1
	Is a product of the USA	2.1 ▼
Made with Wild Alaska Pollock	1.8	
Is low carb/Is low in carbohydrates	1.7	
Is MSC (Marine Stewardship Council) certified	1.7	
TERTIARY ATTRIBUTES	Is available at the fresh seafood counter	1.5
	Is a low-calorie option	1.4
	Is a product of Alaska	1.1
	Is fat free	0.9
	Made with Whiting/Hake	0.8 ▼
	Is an imported product (from another country)	0.6
	Is gluten-free	0.4
Is kosher	0.2	

▲ = Asian-Americans are significantly higher than Frequent Purchasers
 ▼ = Asian-Americans are significantly lower than Frequent Purchasers

Asian-American purchasers uniquely associate imitation crab with 'nostalgic' and 'familiar', compared to Gen Pop Frequent Purchasers.



PERSONALITY TRAITS



The size of each word corresponds to how closely associated it is with each group, with larger words indicating that the trait has a stronger association with that group. Words that appear in color are uniquely associated with that group based on a correspondence analysis. Please note that some words may not appear in each image.

Similar to Gen Pop, Asian-American purchasers like mentions of Wild Alaska Pollock and high protein, yet find ‘typically made’ text confusing. They are also drawn to sustainably sourced messaging but are unsure about pre-cooked flakes and whitefish.



CONCEPT DESCRIPTION

As you may know, surimi/imitation crab is typically made from Wild Alaska Pollock, a mild, sustainably sourced whitefish which is made into an affordable, high protein alternative to crab and other shellfish and is sold as pre-cooked flakes, stick/legs, or chunks in the refrigerated seafood section of the grocery store.

LIKES (20% mentions shown)

“is typically made from Wild Alaska Pollock” **41%**

“I am more interested to buy it after I know that it is made from Wild Alaska Pollock instead of some random fish in the ocean.”

“high protein” **33%**

“High protein alternative to crab that could satisfy for my diet.”

“sustainably sourced” **26% ▲**

“I am a big environment supporter, so I am interested in trying sustainable products.”

CONFUSING (4% mentions shown)

Didn’t find anything confusing about this description **76%**

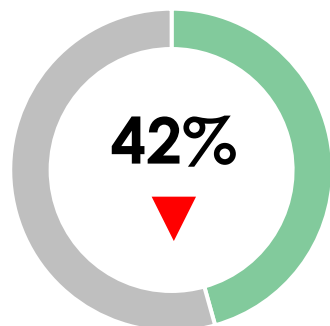
“and is sold as pre-cooked flakes” **4%**

Asian-Americans are significantly less aware that imitation crab is made with Wild Alaska Pollock compared to Frequent Purchasers but are similarly impacted by this knowledge.



AWARE IMITATION CRAB IS MADE FROM WILD ALASKA POLLOCK

(% YES)



IMPACT OF IMITATION CRAB MADE FROM WILD ALASKA POLLOCK

- More interested in purchasing (much/somewhat more)
- Just as interested in purchasing
- Less interested in purchasing (much/somewhat less)



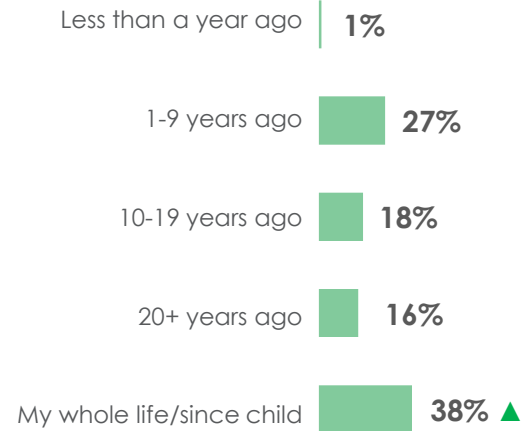
Asian-American purchasers have a much longer history (20+ years) with imitation crab than Frequent Purchasers, often experiencing it first with family. Consumption largely remains steady throughout the year.

Asian-Americans

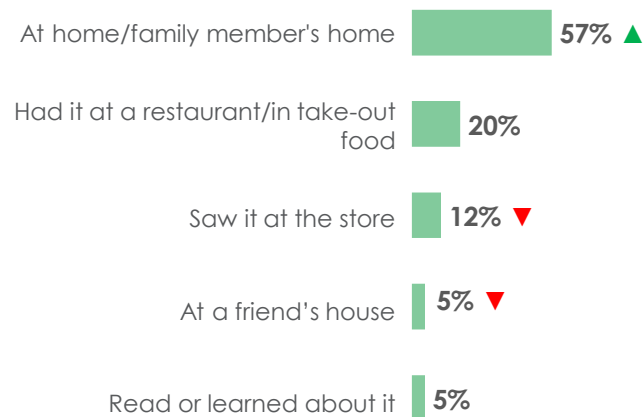


KEY FINDINGS: CONSUMPTION BEHAVIORS

TIME SINCE FIRST EXPERIENCE



FIRST EXPERIENCE



Family plays an important role in introducing imitation crab to children in Asian-American households.

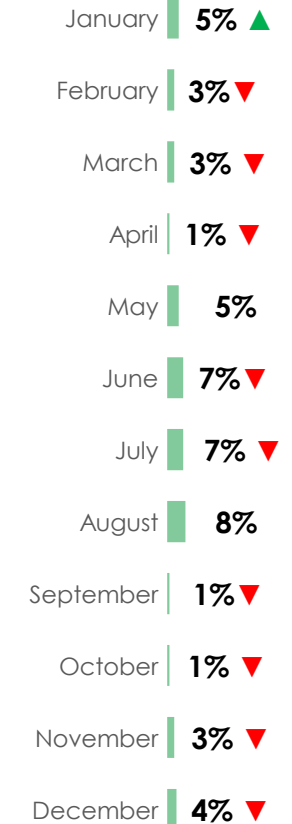
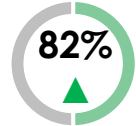


[I remember] the savory delicious taste of crab meat. I can't seem to get enough of it. I remember mom making imitation crab rolls for me to have it for lunch at school. I remember her awesome crab cakes! My mom taught me her recipes and I also learned from friends, and also research online. It's become a traditional weekly dish in my household." ! Mabel, Asian-American

"My parents introduced me to imitation crab as a child. I absolutely loved it and have wonderful memories associated with it. I don't remember my first impression since I was so little, but I remember eating hot pot and making DIY sushi with imitation crab. Through those family memories, I learned how to cook or use it as well. As I got older, I just made it with my own recipes with it, both for nostalgia and for convenience." Evelyn, Asian-American

MONTHLY CONSUMPTION

Eat imitation crab consistently throughout the year



**Results not shown due to small sample sizes (n<50)

▲ = Asian-Americans are significantly higher than Frequent Purchasers
▼ = Asian-Americans are significantly lower than Frequent Purchasers

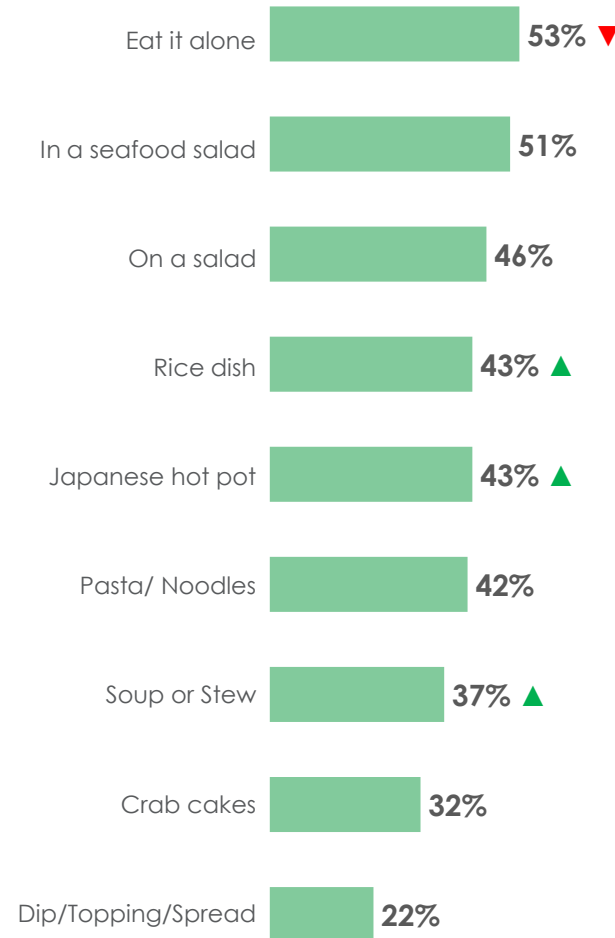
Asian Americans are more likely to consume imitation crab as an ingredient in traditional Asian dishes for daily meals and cultural holidays and are less likely to eat it as a snack/on its own.

Asian-Americans



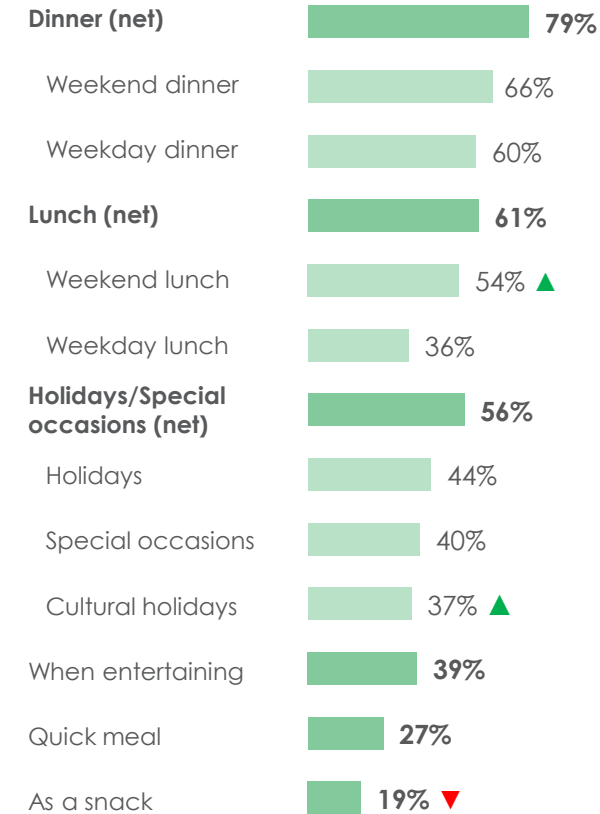
KEY FINDINGS: CONSUMPTION BEHAVIORS

RECIPES (20%+)



TYPICALLY CONSUMED...

OCCASION (19%+)



As part/ingredient of a prepared dish



On its own



Results not shown due to small sample size (n<50)

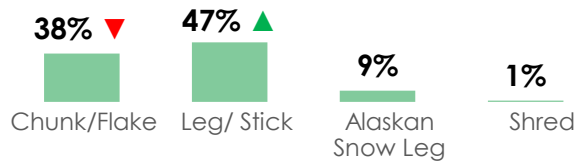
▲ = Asian-Americans are significantly higher than Frequent Purchasers
▼ = Asian-Americans are significantly lower than Frequent Purchasers

On their last occasion, imitation crab was a planned purchase of leg/stick style product, used primarily for dinner and lunch across a wide range of uses/recipes.

PLANNED PURCHASE (7%+)

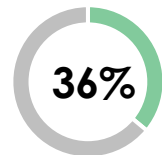
	Total
Planned (net)	82%
It was called for in a recipe	25
It was the right price, fit my budget	21
I always keep it on hand	18
Unplanned (net)	18
Someone in my household requested it	16
It was on sale/promotion/deal	13
I wanted a substitute to crab/lobster	11
An upcoming special occasion	7
It was on sale	9 ▲
It caught my attention in store	8

FORM



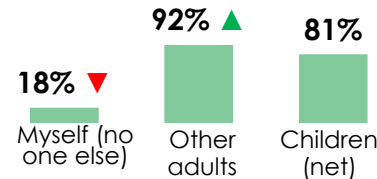
NUTRITION LABEL

(% look at label)

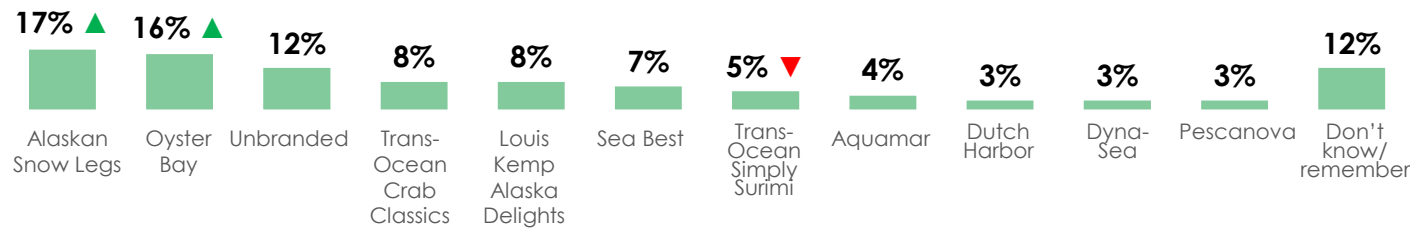


WHO CONSUMED**

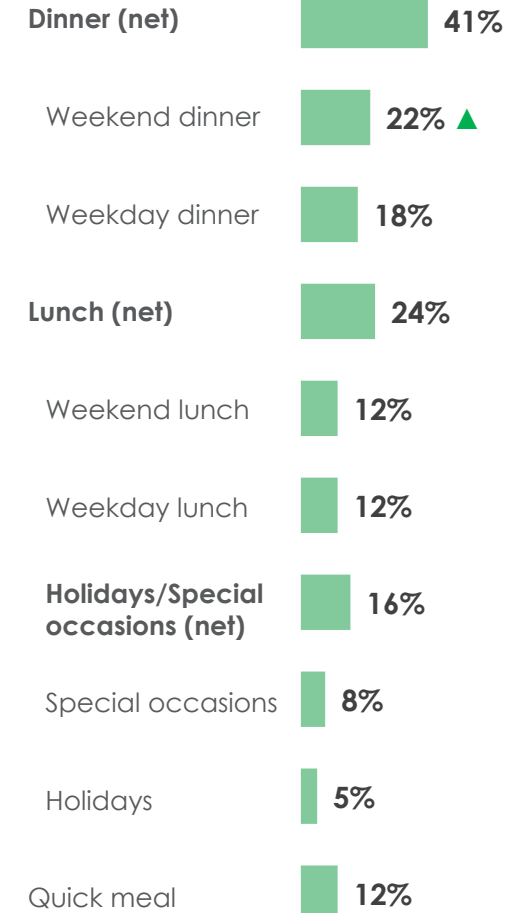
(within household)



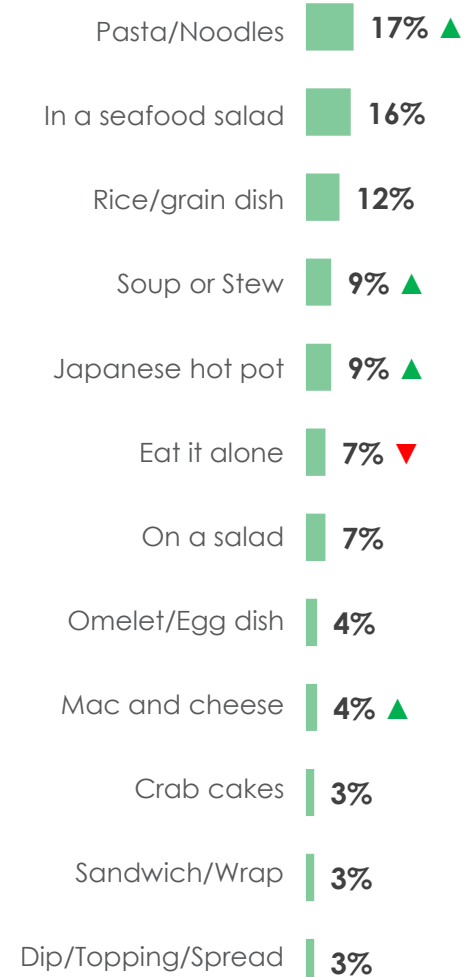
BRAND (3%+)



CONSUMPTION OCCASIONS (5%+)



RECIPES (3%+)

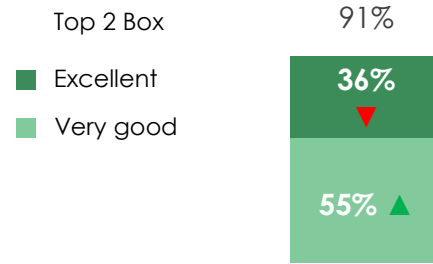


**Small sample sizes (n<30); for directional use only

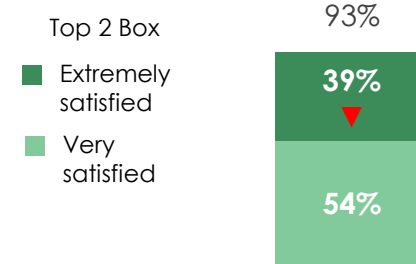
▲ = Asian-Americans are significantly higher than Frequent Purchasers
▼ = Asian-Americans are significantly lower than Frequent Purchasers

Asian-American purchasers are largely satisfied with their most recent purchase. They purchased due to taste, quality, good value, and quick preparation.

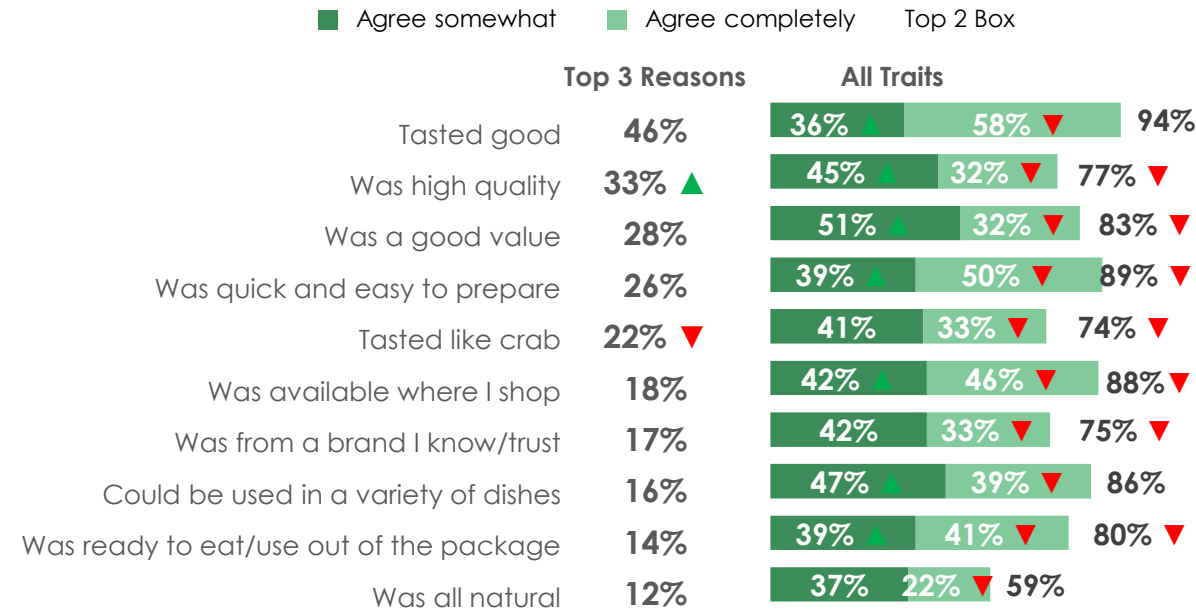
IMITATION CRAB RATING



IMITATION CRAB SATISFACTION



REASON FOR PURCHASE (10%+)



▲ = Asian-Americans are significantly higher than Frequent Purchasers
▼ = Asian-Americans are significantly lower than Frequent Purchasers

Compared to Frequent Purchasers, more Asian-American purchasers use imitation crab as an accent in dishes, grew up eating it, state that their children enjoy eating it, and find it to be tied to their cultural heritage.


Asian-Americans





KEY FINDINGS: OUT-OF-HOME EXPERIENCE


CATEGORY ATTITUDES (% Agree completely/somewhat)


 Ease of Use/Versatility		
Is easy to use	93%	
Is really easy to prepare and almost impossible to mess up	92	
Can be used in many recipes and dishes	89	
It is versatile, can be prepared in many ways	88	
Goes well with many kinds of food/recipes	80	
I like to experiment with adding imitation crab/surimi to familiar dishes	72	
Is an accent in dishes, not the main component	68 ▲	
Is the main feature/component in recipes	62	
I tend to seek out new recipes that include imitation crab/surimi as an ingredient	61	
 Taste		
Is great tasting	91%	
Is mild and sweet tasting	82	
Tastes just like crab	64 ▼	

 Nutrition		
Is a good source of protein	71% ▼	
Is a healthy choice	66 ▼	
Is heart healthy	63 ▼	
Has Omega-3 fatty acids	57 ▼	
Is just as natural as other fresh fish/seafood options	50 ▼	
Is real seafood	50 ▼	
Is healthier than shellfish	39	

 Price		
Is an affordable alternative for crab	88%	
Is a good value for the money	78 ▼	
Is inexpensive	66	

 Usage		
It fits into my cooking style	89%	
Everyone in my household enjoys imitation crab/surimi	83	
I grew up eating imitation crab/surimi	75 ▲	
Is a good snack	67 ▼	
Is something my children enjoy eating	62 ▲	
Is an everyday indulgence	55	

 Source/Brand		
Is a sustainably sourced protein	63% ▼	
I prefer specific brand(s) of imitation crab/surimi	53	
Is a product of the USA	45 ▼	
Is imported	43 ▲	
Is a product of Alaska	39	

 Cultural/Religious Ties		
My cultural heritage influences how I cook/serve imitation crab/surimi	64% ▲	
Is something important to my culture or in my culture's cuisine	62 ▲	
Allows me to keep my religious dietary practices	34	

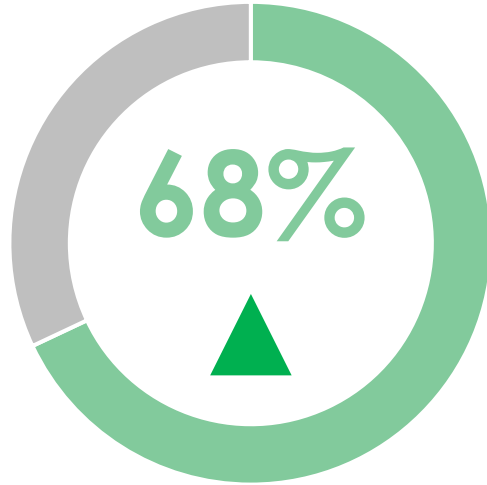
▲ = Asian-Americans are significantly higher than Frequent Purchasers
▼ = Asian-Americans are significantly lower than Frequent Purchasers

Over two-thirds of Asian-American purchasers have consumed imitation crab at a restaurant. They are equally inclined to eat imitation crab at a restaurant or prepare at home.



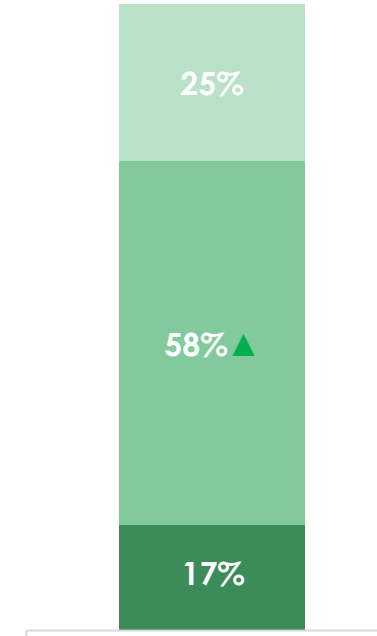
EVER CONSUMED IMITATION CRAB FROM A RESTAURANT (DINE IN OR TAKEOUT)

% Yes



INCLINATION TO EAT IMITATION CRAB

- More likely to eat from a restaurant (much/somewhat more)
- Just as likely to eat from restaurant as to prepare at home
- More likely to prepare at home (much/somewhat more)



▲ = Asian-Americans are significantly higher than Frequent Purchasers
▼ = Asian-Americans are significantly lower than Frequent Purchasers

75% of Asian-American purchasers have consumed California rolls at a restaurant, and few think it is made from 100% real crab.

Asian-Americans



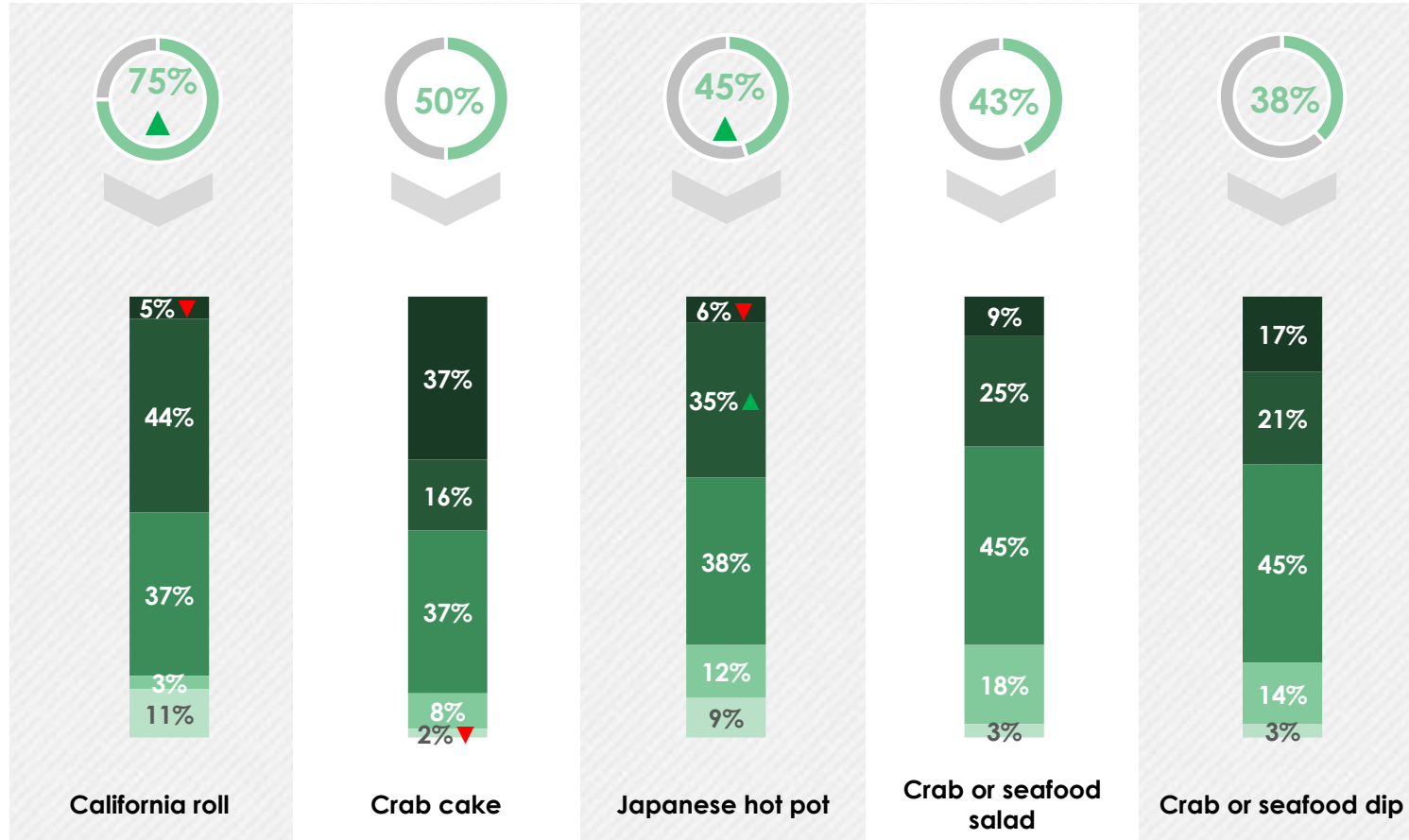
KEY FINDINGS: OUT-OF-HOME EXPERIENCE

DISHES CONSUMED FROM RESTAURANT

EVER CONSUMED:

THINK IT'S MADE FROM:

- 100% real crab
- 100% imitation crab
- Sometimes crab, sometimes imitation crab
- Combination of crab and imitation crab
- Other/Don't Know/Not Sure



INTEREST IN CALIFORNIA ROLLS

(after learning often filled with imitation crab)

- More interested (much/somewhat more)
- Just as interested
- Less interested (much/somewhat less)

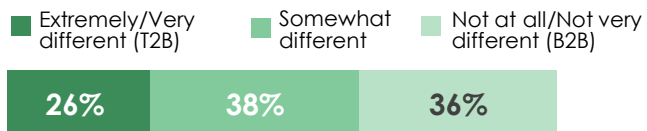


▲ = Asian-Americans are significantly higher than Frequent Purchasers
▼ = Asian-Americans are significantly lower than Frequent Purchasers

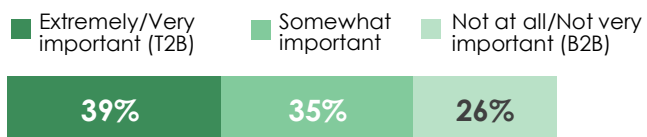
While many Asian Americans note a difference in packaging (colors/product name), few note differences between the conventional and clean products and, therefore, have identical purchase interest in both.



DIFFERENCE IN PACKAGING



IMPORTANCE OF DIFFERENCE



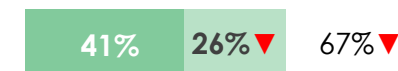
WHAT MAKES THEM DIFFERENT (10%+)

	Total
Packaging (Net)	57%
Appearance (Colorful)	35 ▲
Packaging/Different packaging	10
Brand/Name/Different Brand/Name	10
Product Attributes (Net)	47
Differences in quality (one looks more premium)	10
Taste/Flavor	10

PURCHASE INTEREST

Probably would Definitely would Top 2 Box

CONVENTIONAL



CLEAN



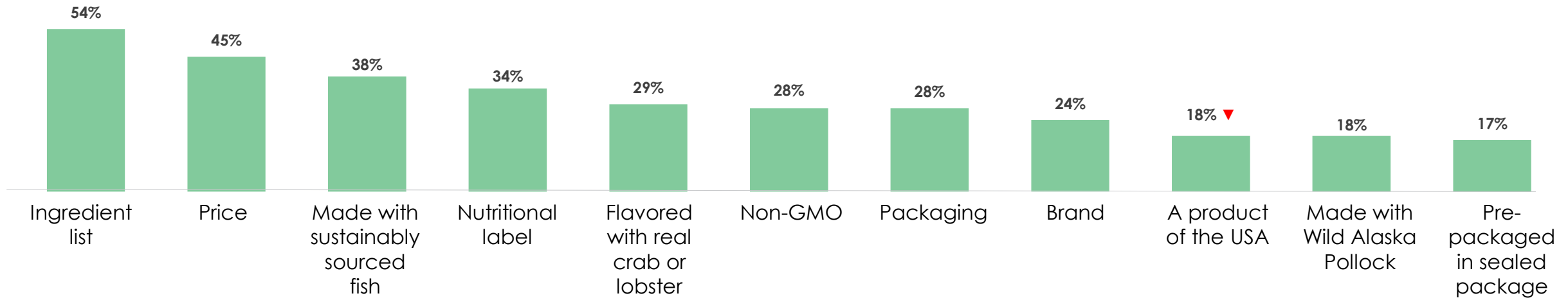
▲ = Asian-Americans are significantly higher than Frequent Purchasers
 ▼ = Asian-Americans are significantly lower than Frequent Purchasers

Ingredient list, price, and made with sustainably sourced fish best describe 'high quality' in the minds of Asian-American purchasers.



KEY FINDINGS:
INNOVATION/NEW PRODUCTS

'HIGH QUALITY' ASSOCIATIONS (15%+)



▲ = Asian-Americans are significantly higher than Frequent Purchasers
▼ = Asian-Americans are significantly lower than Frequent Purchasers

Many desire more transparent packaging and are willing to pay more for cleaner ingredients.

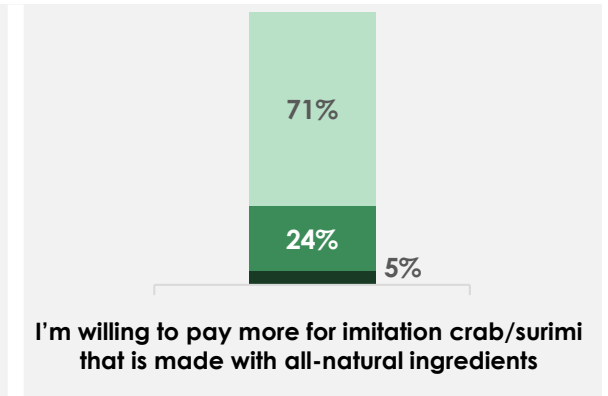
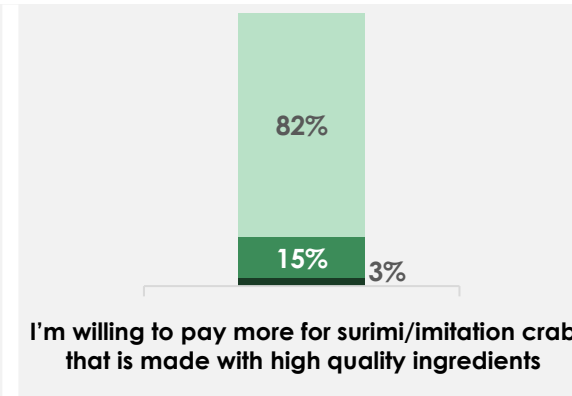
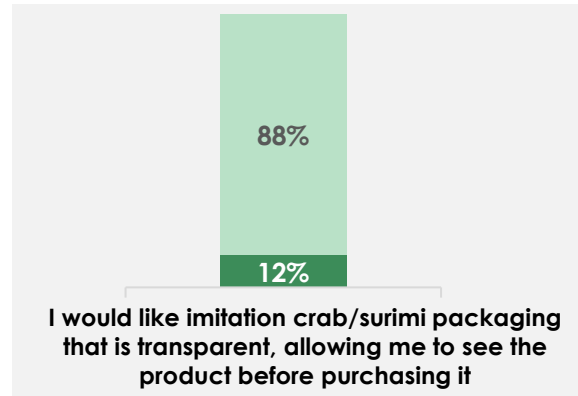
Asian-Americans



KEY FINDINGS:
INNOVATION/NEW PRODUCTS

PACKAGING CATEGORY ATTITUDES

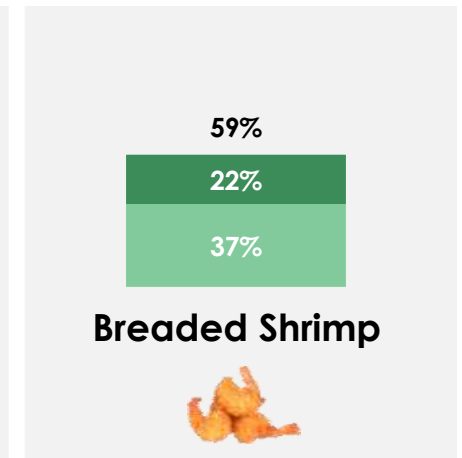
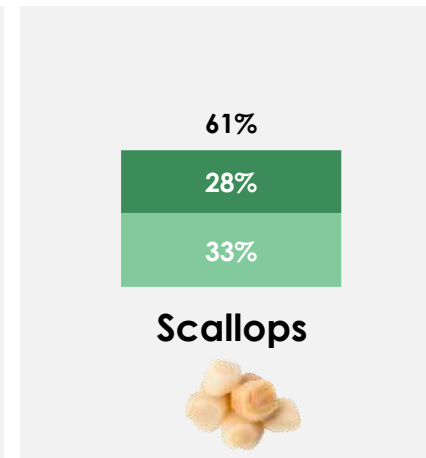
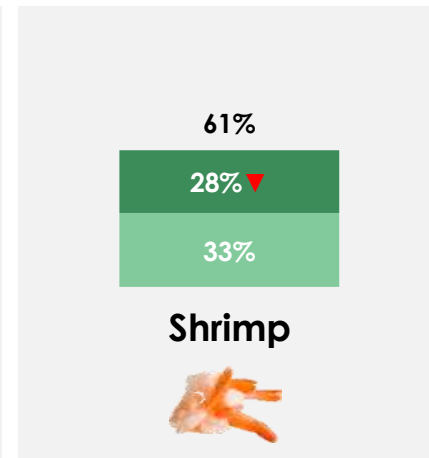
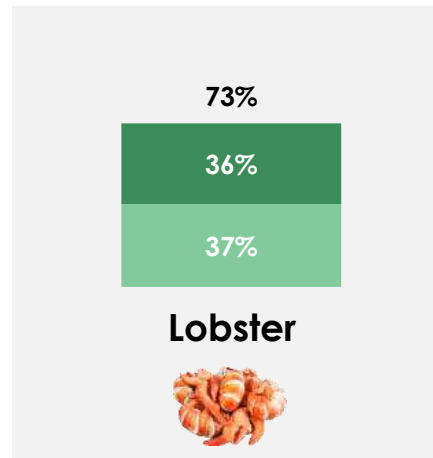
- Agree completely/somewhat
- Neither agree nor disagree
- Disagree completely/somewhat



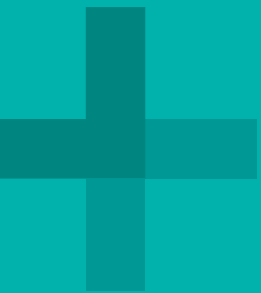
NEW FORM PURCHASE INTEREST

Top 2 Box

- Definitely would
- Probably would



▲ = Asian-Americans are significantly higher than Frequent Purchasers
▼ = Asian-Americans are significantly lower than Frequent Purchasers

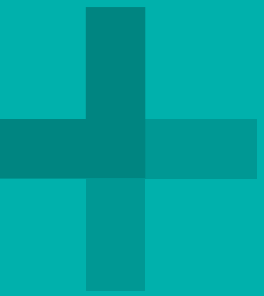


APPENDIX

C+R
RESEARCH

Emerge smarter.





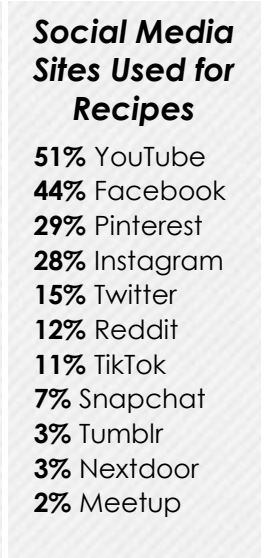
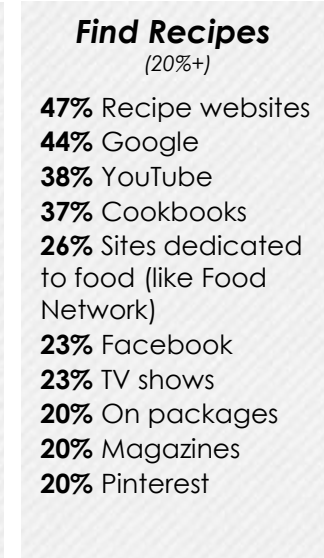
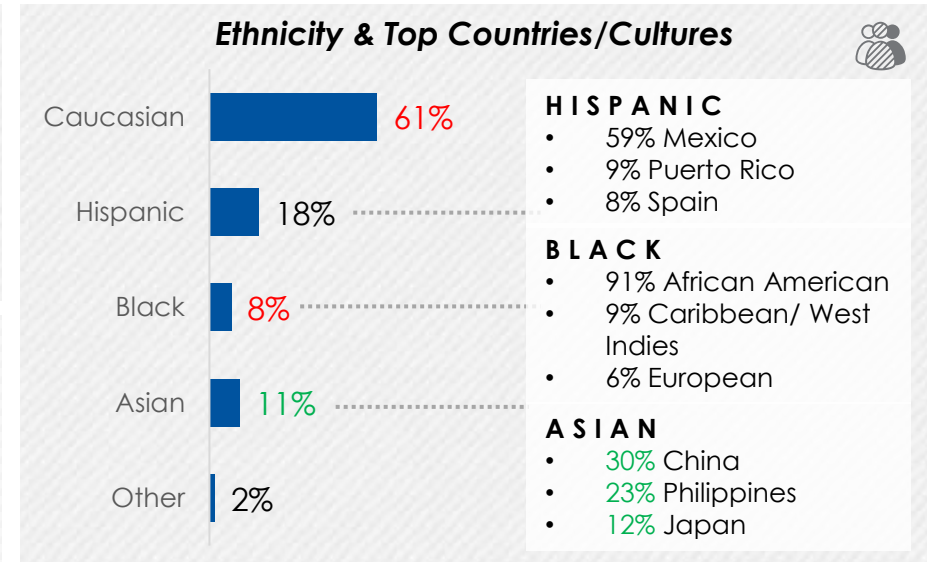
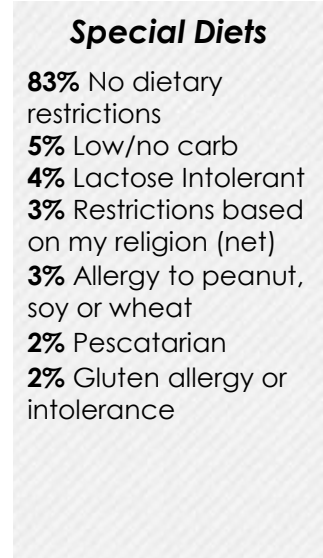
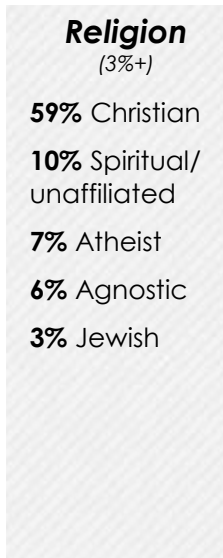
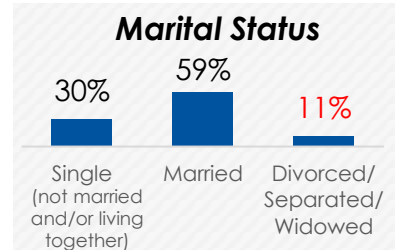
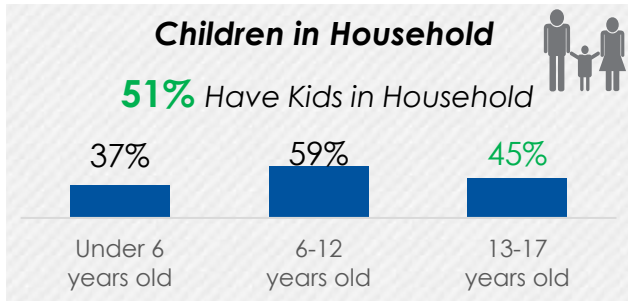
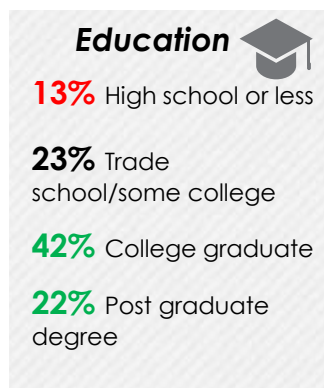
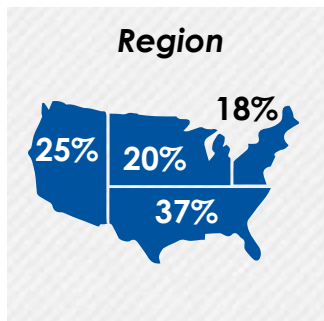
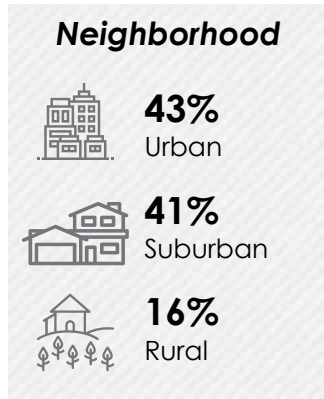
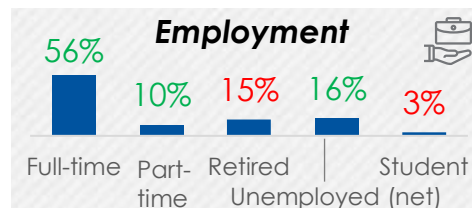
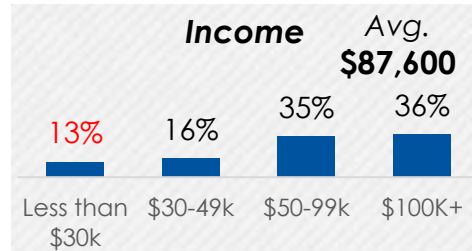
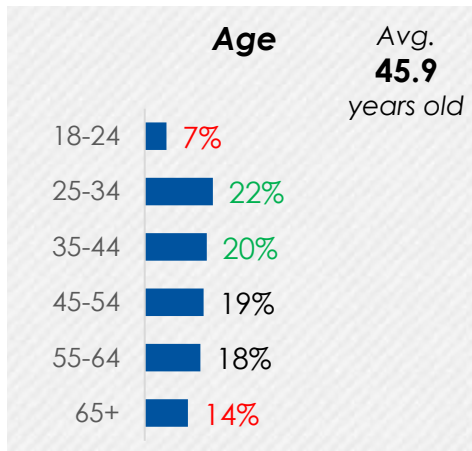
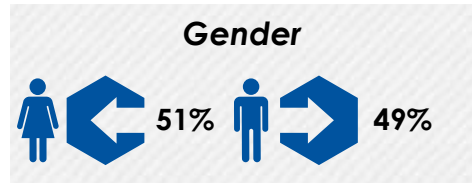
APPENDIX - PURCHASER PROFILES

C+R
RESEARCH

Emerge smarter.



Compared to Gen Pop, Frequent Purchasers are younger, highly educated, full-time workers with kids in their household.

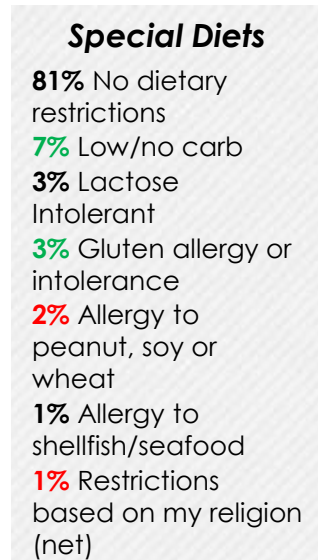
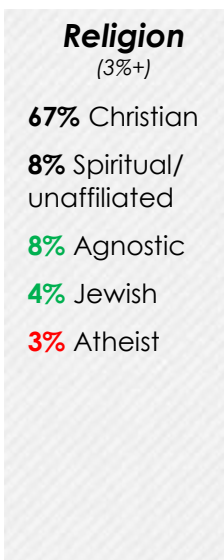
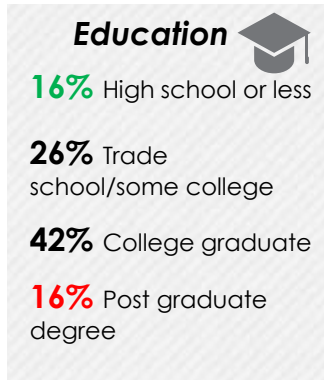
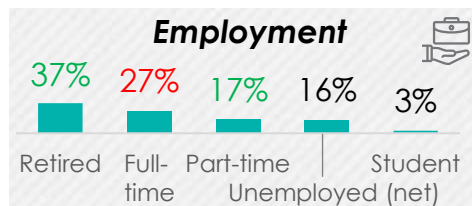
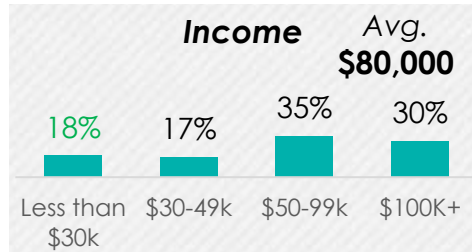
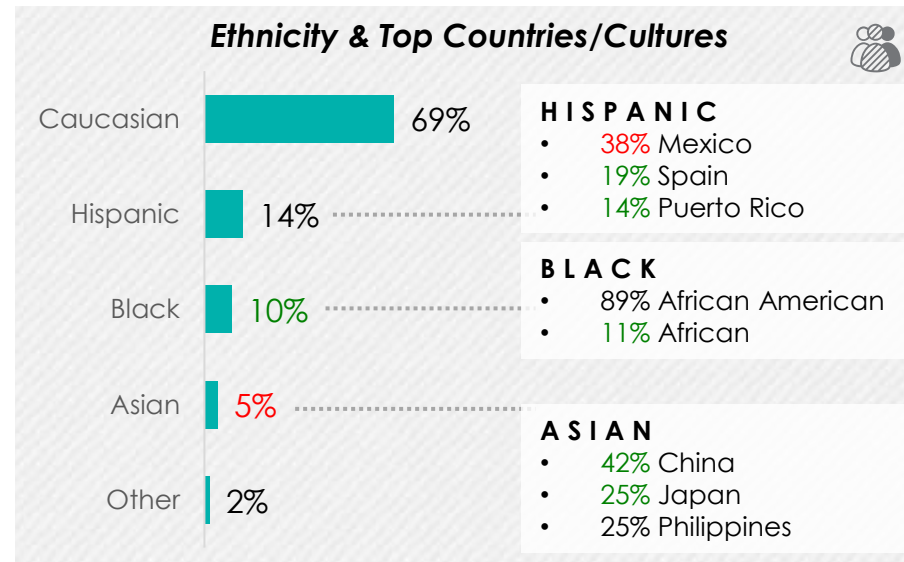
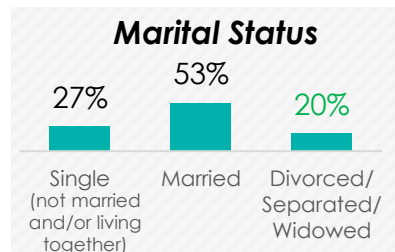
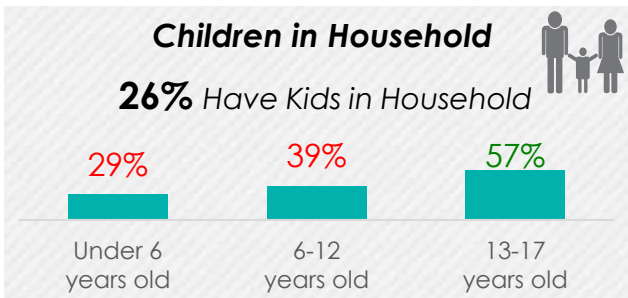
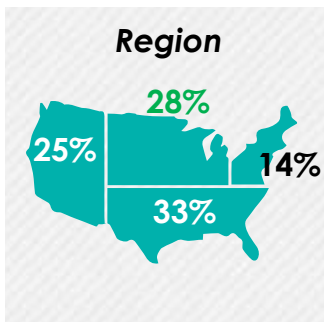
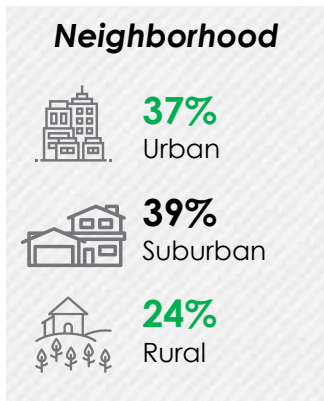
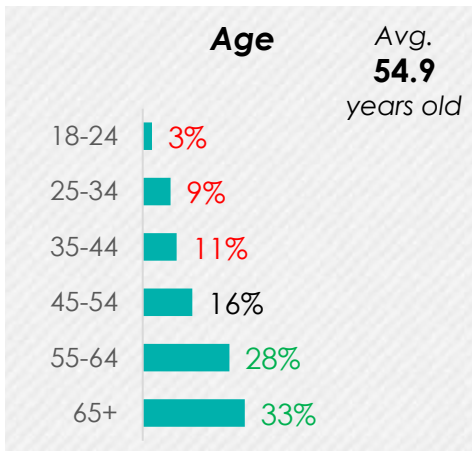
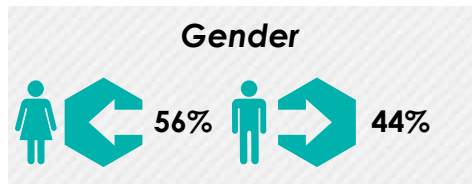


Green = Overindexes (120+) to census
Red = Underindexes (<80) to census

*Indexing shown to census when data is available

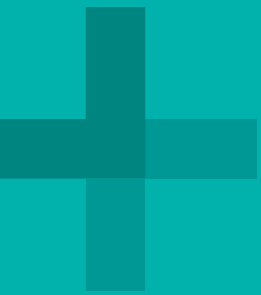
Compared to Frequent Purchasers, Infrequent/Lapsed Purchasers are older (55+ yrs.) and retired.

Infrequent/Lapsed Purchasers



Green = Overindexes (120+) to Frequent Purchasers
Red = Underindexes (<80) to Frequent Purchasers

*Indexing shown to Frequent Purchasers when data is available






APPENDIX – ADDITIONAL DETAILED FINDINGS






Frequent Purchasers find imitation crab to be easy to use, great-tasting, and affordable. Infrequent/Lapsed Purchasers agree (though to a lesser extent), indicating an opportunity to reinforce these attributes in messaging. A desire for transparent packaging exists, which may help consumers feel more confident in their purchase.

CATEGORY ATTITUDES (% Agree completely/somewhat)

■ Frequent Purchasers
■ Infrequent/Lapsed Purchasers

 Ease of Use/Versatility	Frequent Purchasers	Infrequent/Lapsed Purchasers
Is easy to use	97%	89% ▼
Is really easy to prepare and almost impossible to mess up	89	78 ▼
It is versatile, can be prepared in many ways	88	78 ▼
Can be used in many recipes and dishes	88	77 ▼
Goes well with many kinds of food/recipes	86	72 ▼
I like to experiment with adding surimi/imitation crab to familiar dishes	70	42 ▼
Is the main feature/component in recipes	69	45 ▼
I tend to seek out new recipes that include surimi/imitation crab as an ingredient	65	26 ▼
Is an accent in dishes, not the main component	54	36 ▼
 Taste	Frequent Purchasers	Infrequent/Lapsed Purchasers
Is great tasting	94	80 ▼
Is mild and sweet tasting	87	80 ▼
Tastes just like crab	79	62 ▼
 Price	Frequent Purchasers	Infrequent/Lapsed Purchasers
Is an affordable alternative for crab	91	84 ▼
Is a good value for the money	89	69 ▼
Is inexpensive	74	50 ▼

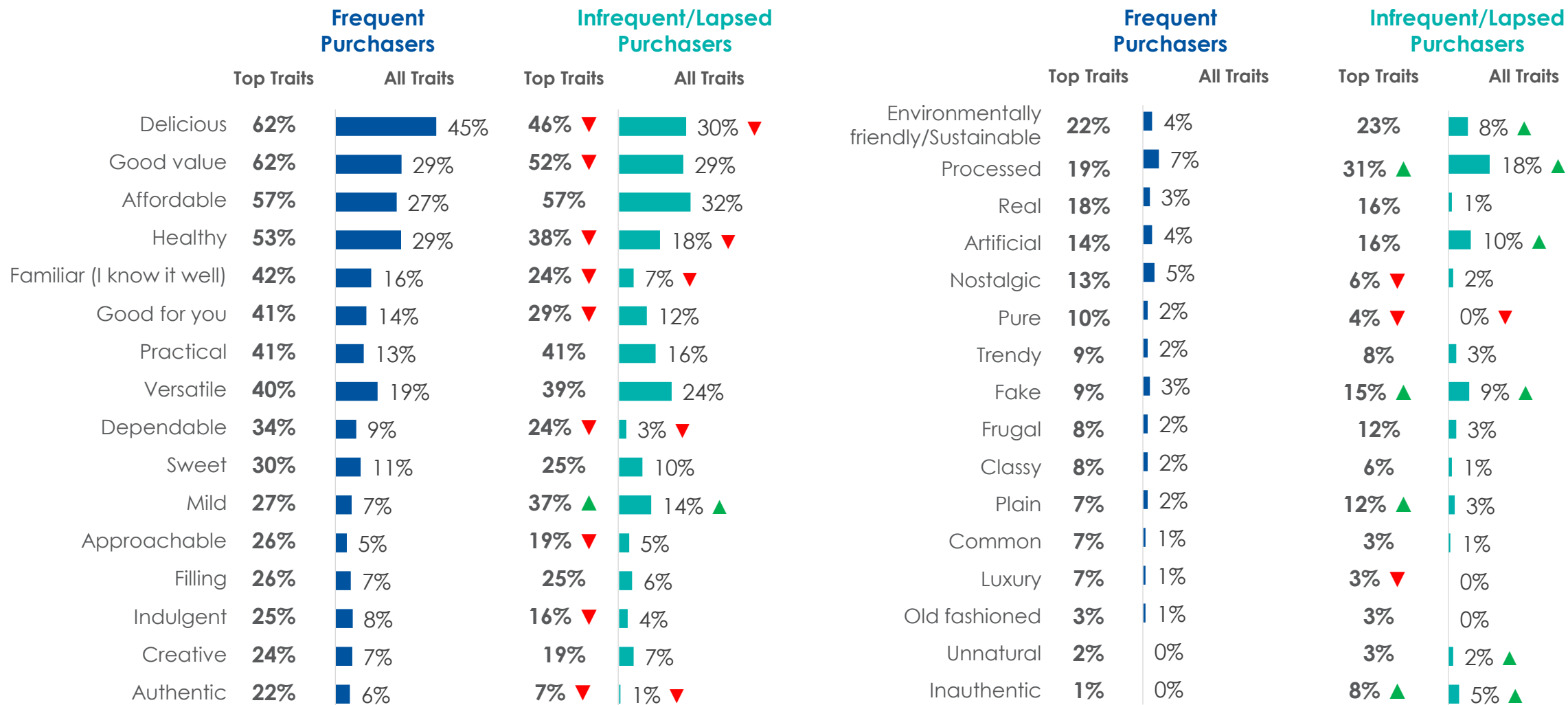
Packaging/Ingredients	Frequent Purchasers	Infrequent/Lapsed Purchasers
I would like imitation crab/surimi packaging that is transparent, allowing me to see the product before purchasing it	90%	82% ▼
I'm willing to pay more for imitation crab/surimi that is made with high quality ingredients	75	55 ▼
I'm willing to pay more for imitation crab/surimi that is made with all-natural ingredients	72	58 ▼
 Nutrition	Frequent Purchasers	Infrequent/Lapsed Purchasers
Is a healthy choice	86	67 ▼
Is a good source of protein	85	70 ▼
Is heart healthy	78	65 ▼
Is just as natural as other fresh fish/seafood options	67	44 ▼
Has Omega-3 fatty acids	67	44 ▼
Is real seafood	61	45 ▼
Is healthier than shellfish	45	27 ▼

 Usage	Frequent Purchasers	Infrequent/Lapsed Purchasers
It fits into my cooking style	85%	59% ▼
Is a good snack	84	60 ▼
Everyone in my household enjoys surimi/imitation crab	78	58 ▼
Is an everyday indulgence	57	27 ▼
I grew up eating surimi/imitation crab	54	31 ▼
Is something my children enjoy eating	50	27 ▼
 Source/Brand	Frequent Purchasers	Infrequent/Lapsed Purchasers
Is a sustainably sourced protein	73	56 ▼
Is a product of the USA	63	42 ▼
I prefer specific brand(s) of surimi/imitation crab	50	20 ▼
Is a product of Alaska	47	27 ▼
Is imported	33	20 ▼
Cultural/Religious Ties	Frequent Purchasers	Infrequent/Lapsed Purchasers
My cultural heritage influences how I cook/serve imitation crab/surimi	38	18 ▼
Is something important to my culture or in my culture's cuisine	36	19 ▼
Allows me to keep my religious dietary practices	33	20 ▼

▲=significantly higher than Frequent Purchasers
▼=significantly lower than Frequent Purchasers

Purchasers associate imitation crab with traits like 'delicious', 'good value', and 'affordable. However, Infrequent/Lapsed Purchasers also think of 'mild', 'processed', 'fake', 'plain', and 'inauthentic'.

PERSONALITY TRAITS



▲=significantly higher than Frequent Purchasers
▼=significantly lower than Frequent Purchasers

Top unaided purchase barriers include food preferences, imitation crab is not top of mind, dislike of imitation crab/seafood and cost.

UNAIDED PURCHASE BARRIERS (5%+)

	Infrequent Purchasers (A)	Lapsed Purchasers (B)		Non-Purchasers
Preference (net)	14%	9%		
Prefer other foods/meats	8	4	Dislike imitation crab/seafood/Prefer real crab	33%
Prefer/Eat other fish/shellfish	5	2	Don't know how to cook it/have recipe	7
Forget/Don't think about it	10	21 A		
Dislike imitation crab/seafood	10	20 A	Don't like seafood	6
Eat it occasionally/Not often	10	7		
Expensive	10	3	Don't like taste/flavor	5
Don't have a craving for it	10 B	0		
Not available/where I shop	6	9	Not interested/Don't have a need for it	5
Don't have many recipes	6 B	1		
Use in warmer months	6 B	1	Don't Know/Nothing (net)	11
Use for special occasions/holidays	5	4		
I'm the only one who eats it	2	6		
Don't Know/Nothing (net)	10	6		



"I'd rather have the real thing. Imitation crab doesn't taste the same as actual crab." – Non-Purchaser

"I don't know how to prepare meals with it. I would eat it in a restaurant though." – Non-Purchaser

"I haven't purchased imitation crab because I have never wanted to try it. Crab is not something I crave to eat whether real or imitation." – Non-Purchaser

"My family and the people I prepare food for don't enjoy seafood and the items sold at my grocery stores are usually quite expensive so it is hard to justify buying it if no one will enjoy it." – Non-Purchaser

"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." – Infrequent/Lapsed Purchaser

"We consider it a special treat." – Infrequent/Lapsed Purchaser

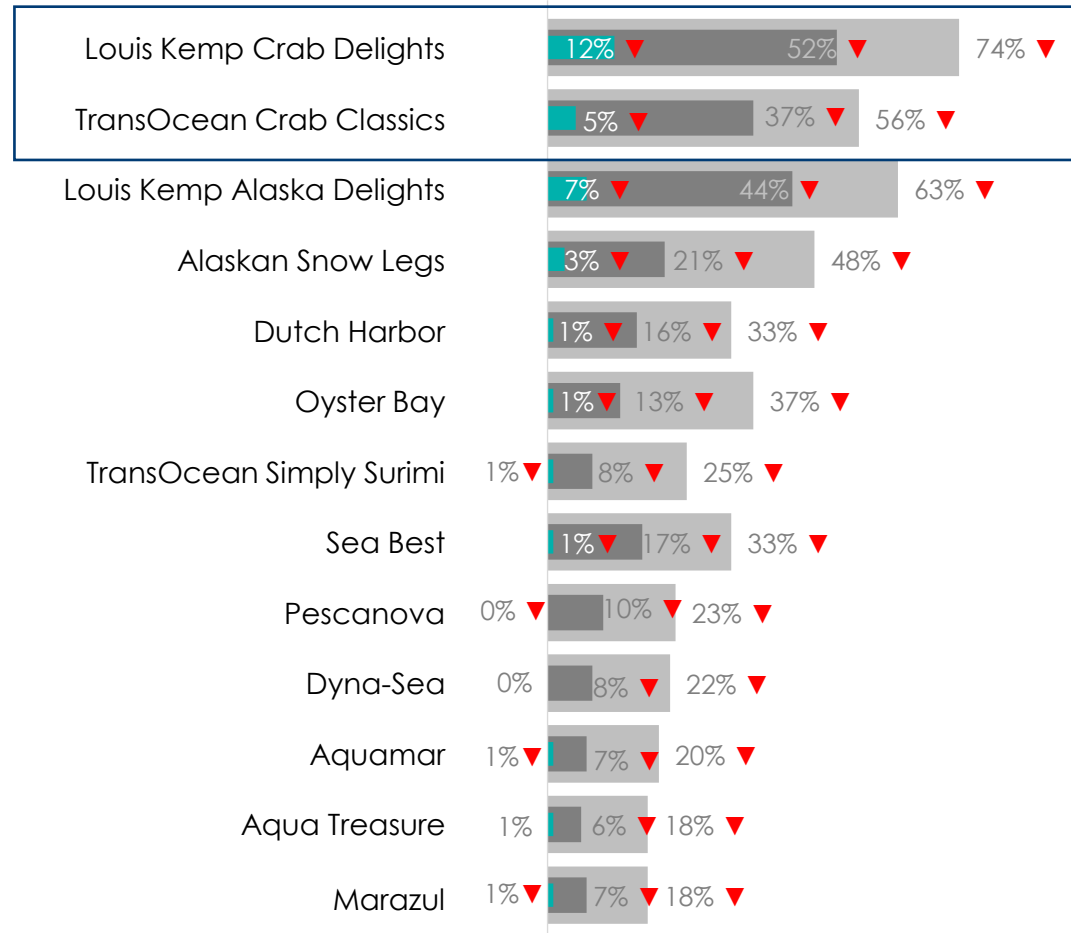
"I don't have a use for it in a lot of my meals as an ingredient." – Infrequent/Lapsed Purchaser

As expected, brand affinity metrics are lower among Infrequent/Lapsed Purchasers, though the same brands rise to the top.

BRAND RANKING

- Aware
- Ever Purchased
- Favorite

Infrequent/Lapsed Purchaser

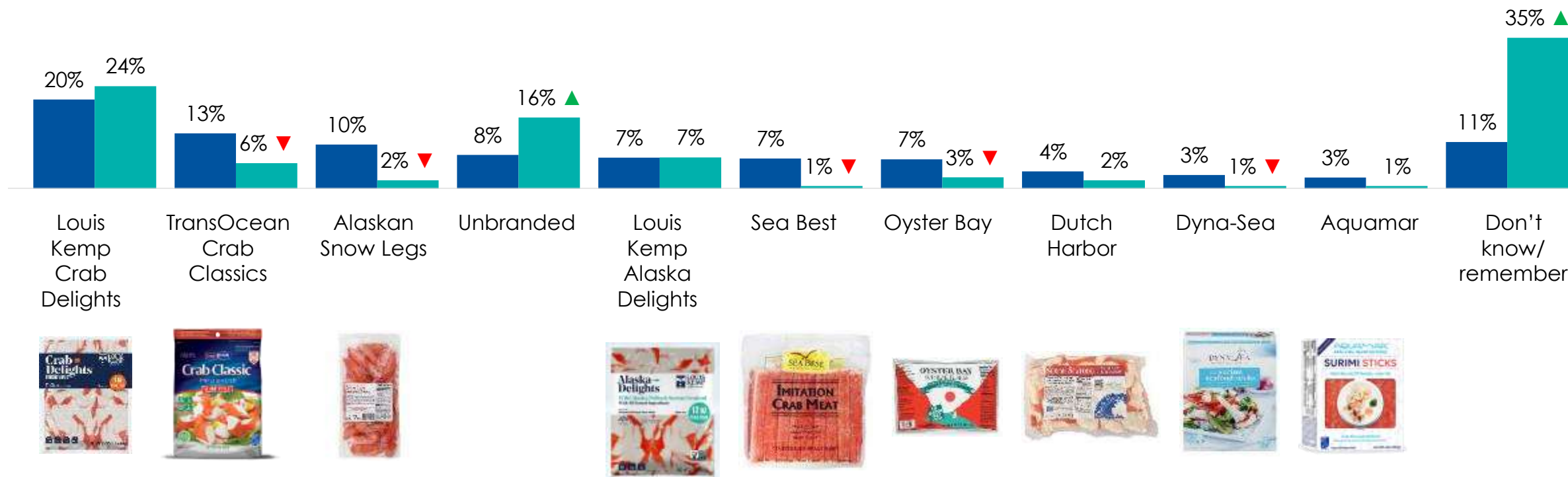


▲ = significantly higher than Frequent Purchasers
▼ = significantly lower than Frequent Purchasers

Crab-specific branding (via Louis Kemp Crab Delights and TransOcean Crab Classics) are most prevalent in most recent purchase.

BRAND (Last Occasion - 3%+)

- Frequent Purchasers
- Infrequent/Lapsed Purchasers

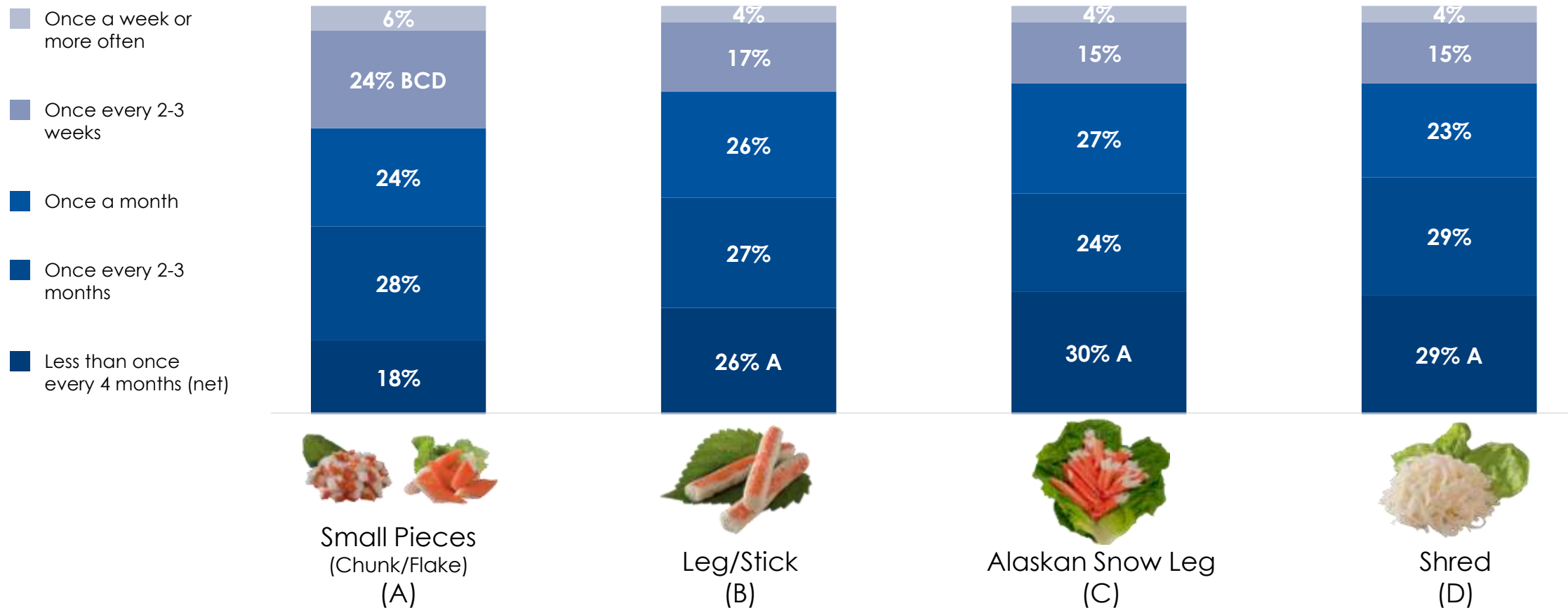


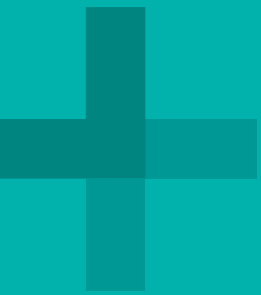
▲ = significantly higher than Frequent Purchasers
 ▼ = significantly lower than Frequent Purchasers

Small pieces (chunk/flake) are purchased at least monthly more so than other forms.

FORMS PURCHASE FREQUENCY

(among Frequent Purchasers)





THANKS FOR WORKING
WITH US!

Brenda Hurley

brendah@crresearch.com

Gina Sus

ginas@crresearch.com

Jerica Accetta

jericaa@crresearch.com

Jorge Martínez-Bonilla

jorgem@crresearch.com

Amelia Cox

ameliac@crresearch.com