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Consumer attitudes and preferences for seafood – What's the trend?

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Overview

- **Setting the scene – developments and consumption of seafood**
- **SEAFOODplus and CONSUMERSURVEY**
- **Methods and data collections**
- **Major results: What do consumers want – consumer trends with focus on seafood and aquaculture**
- **Convenience segments**
- **Food and seafood choices – new perspectives**
- **Conclusions and future challenges**

Development of World Fish production: source and use (Million tons)

	1994	1996	1998	2000	2002	2004
Inland capture	6.7	7.4	8.1	8.7	8.7	9.2
Marine capture	84.7	86.1	79.6	86.8	84.5	85.8
Aquaculture	20.8	26.7	30.6	35.5	39.8	45.5
Total	112.3	120.2	118.2	131.0	133.0	140.5
Fish as Food	79.8	88.0	93.6	96.8	100.7	105.6
Population	5.6	5.7	5.9	6.1	6.2	6.4
Kg/caput	14.3	15.3	15.8	15.9	16.2	16.6

Consumption of seafood in Europe

Major differences in European seafood consumption:

- **Varies a lot across Europe**
- **Varies within countries (regional habits)**
- **Varies between segments: from fish lovers to light users**
- **Elderly people (app. > 50 years) consume more fish compared to younger people**

Project 'CONSUMERSURVEY' in SEAFOODplus

- **Aim: to explain attitudes, preferences and eating habits across consumer segments in Europe**
- **In order to determine motives and barriers for seafood consumption**
- **And to analyse perceived problems from a consumer point of view in order to increase seafood consumption**
- **Social science research approach**
- **Partners: MAPP (Denmark), UGent (Belgium), Nofima, UoT (Norway)**

Methods and data collections

- **Qualitative and quantitative methods applied in several countries**
 - **Focus group discussions in Belgium and Spain (3 groups in each country)**
 - **Survey in Spain, Belgium, the Netherlands, Poland and Denmark in 2004 (N = 4786)**
 - **Second survey in Spain, France and Poland in 2008 (N = 2400)**
 - **Experimental choice study in UK and Germany in 2008 (N = 1196)**

Results from focus group discussions

Light and heavy users in Belgium and Spain

- *Motives for fish consumption are dominated by taste and health related issues – drivers are universal across segments*
- *Barriers for fish consumption are price, smell, not filling, children and preparation skills – barriers varies across segments with light users experiencing more barriers*
- *Consumers are not really aware of farmed versus wild fish and attitudes are formulated only when probed for; not spontaneously*
- Wild fish: freedom, happiness, but also better texture
- Farmed fish: artificial, but also cheaper / affordable
- Animal welfare and sustainability issues not spontaneously mentioned – but when probed heavy users are more balanced in their views

Results from survey 2004 (N = 4786)



Consumption of fish - average times per week

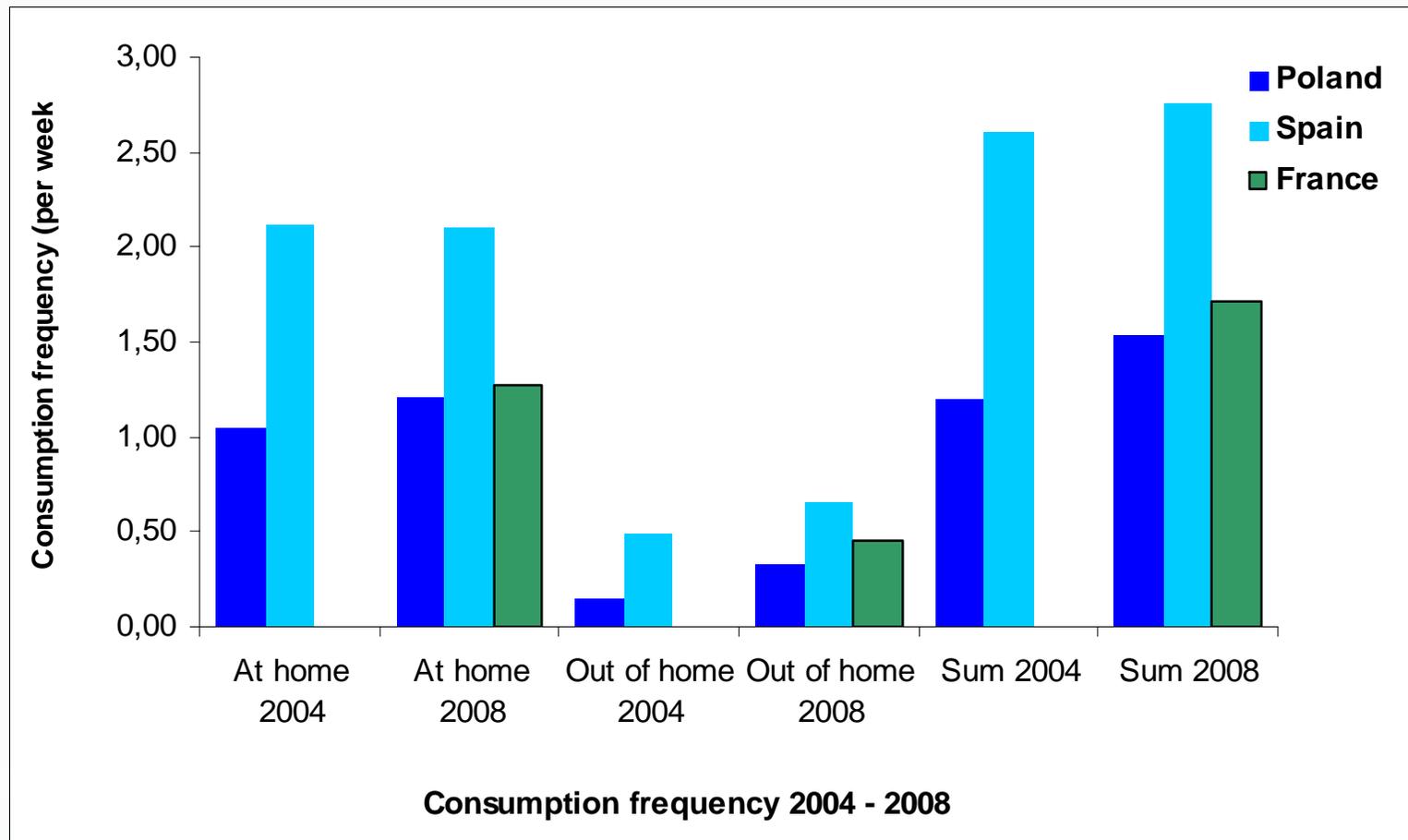
‘Home’ versus ‘out of home’

	Belgium	Denmark	Netherlands	Poland	Spain
Home	0.88	1.12	0.69	1.05	2.12
Out	0.22	0.31	0.26	0.15	0.49
Sum	1.10	1.43	0.95	1.20	2.61

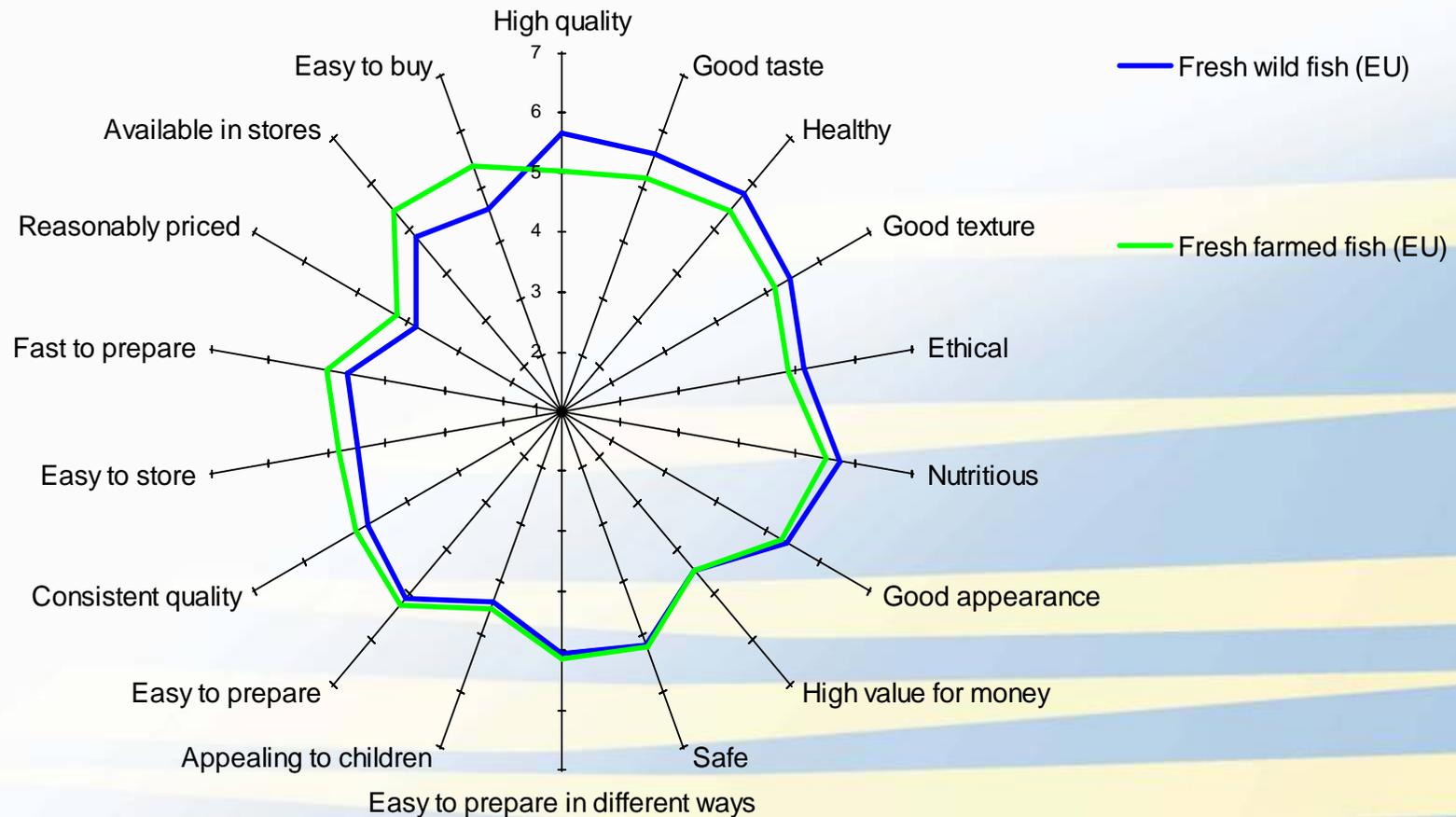
Widespread confusion

- Within the entire sample (n = 4,786):
 - **2.5% claim (almost) never to eat fish**
 - But : when asked specifically about farmed and wild fish consumption ...
 - **34.4% claim never to eat wild fish**
 - **33.6% claim never to eat farmed fish**
 - **24.8% claim neither to eat wild fish nor farmed fish**

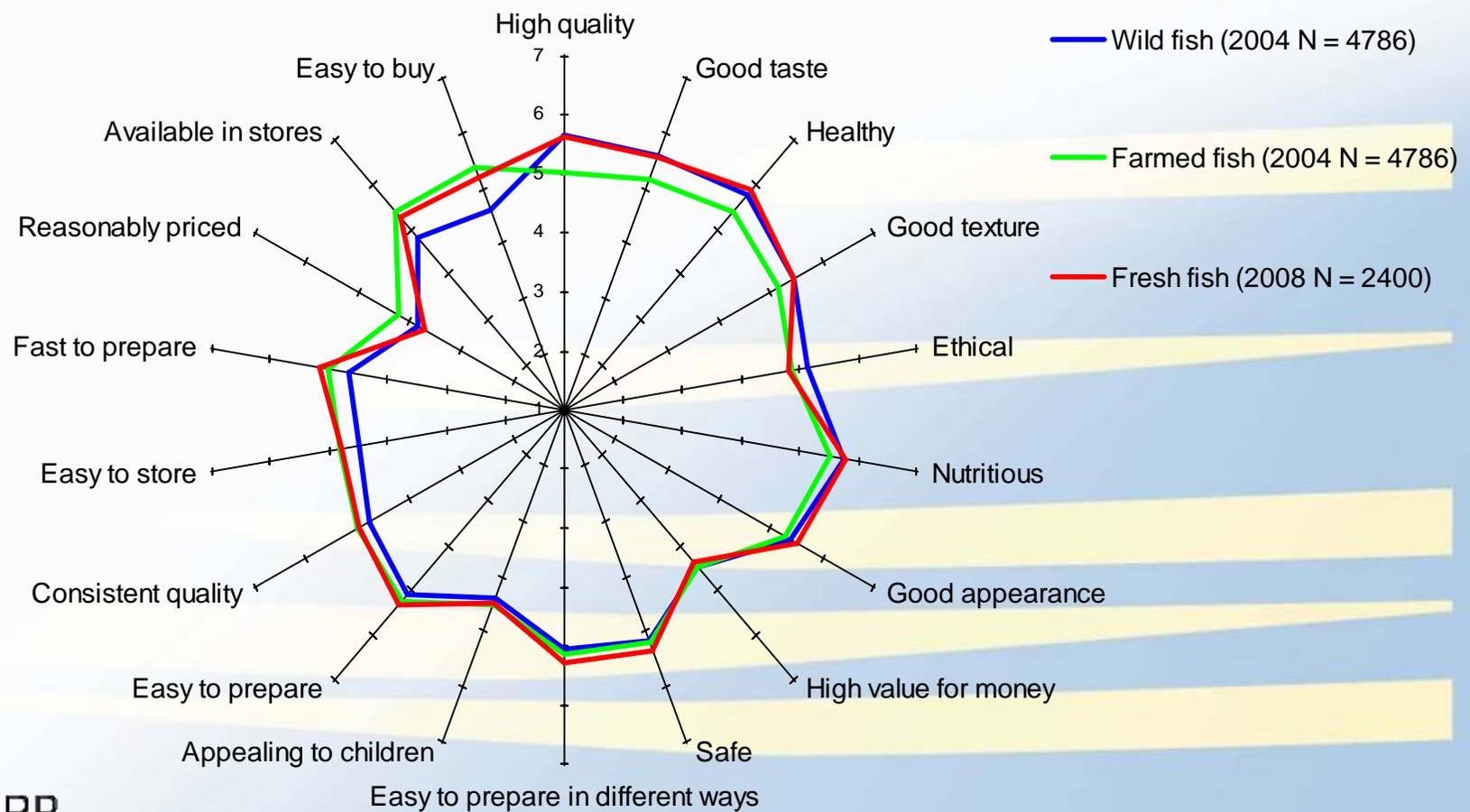
Results from survey 2004 and survey 2008 (N = 2400)



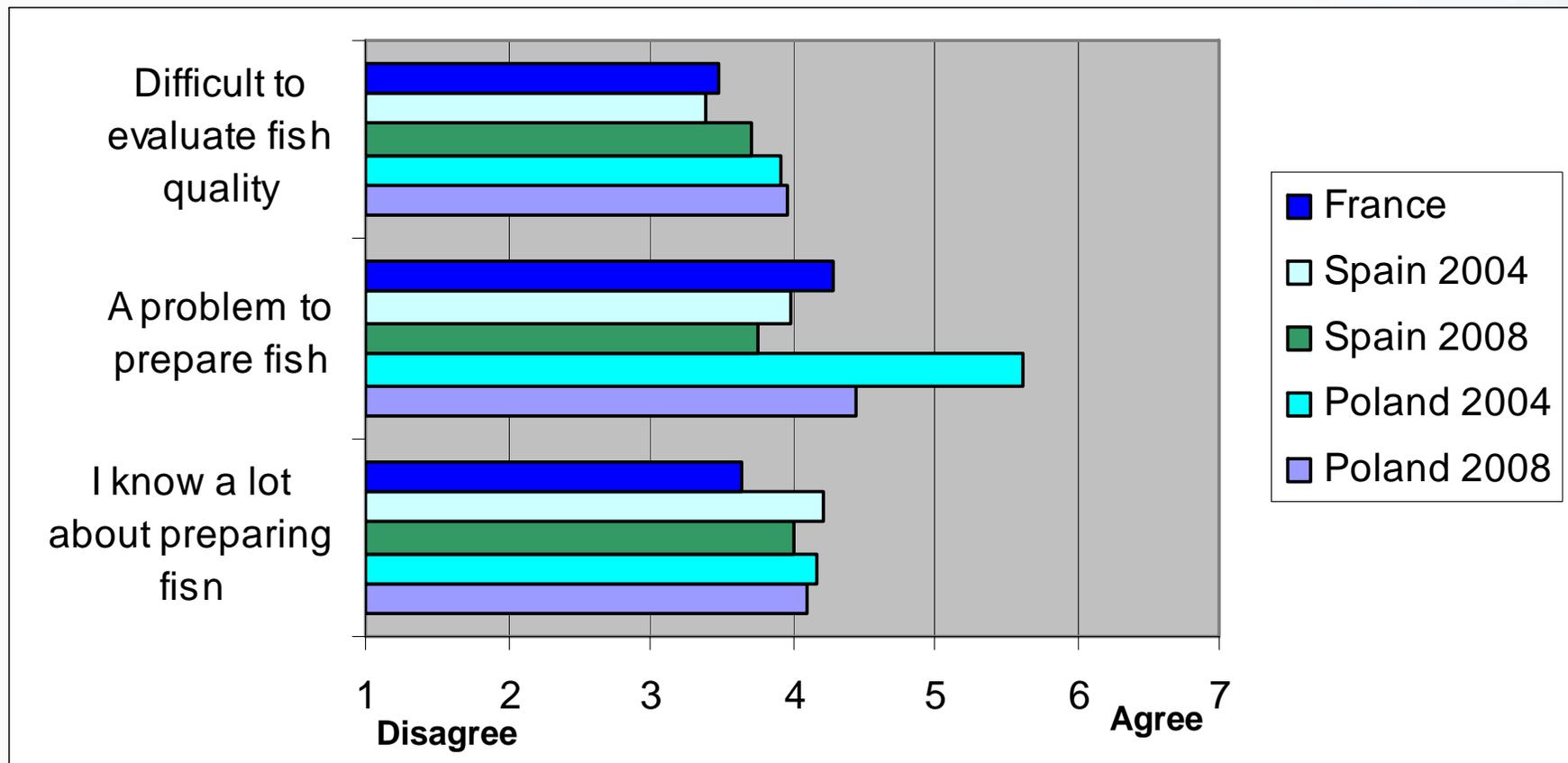
The image of seafood (2004)



Compared with results from 2008 survey



Problems with quality evaluation and preparation



Consumers feel uncertain

- Find it difficult to evaluate fish quality and to prepare fish
- Feeling of uncertainty and lack of confidence in own abilities
- Cause dependence on other people's evaluations and advices and a feeling of lack of control
- Use of brands, quality labels, information about origin, recipes and personal advice
- Need of convenient seafood products

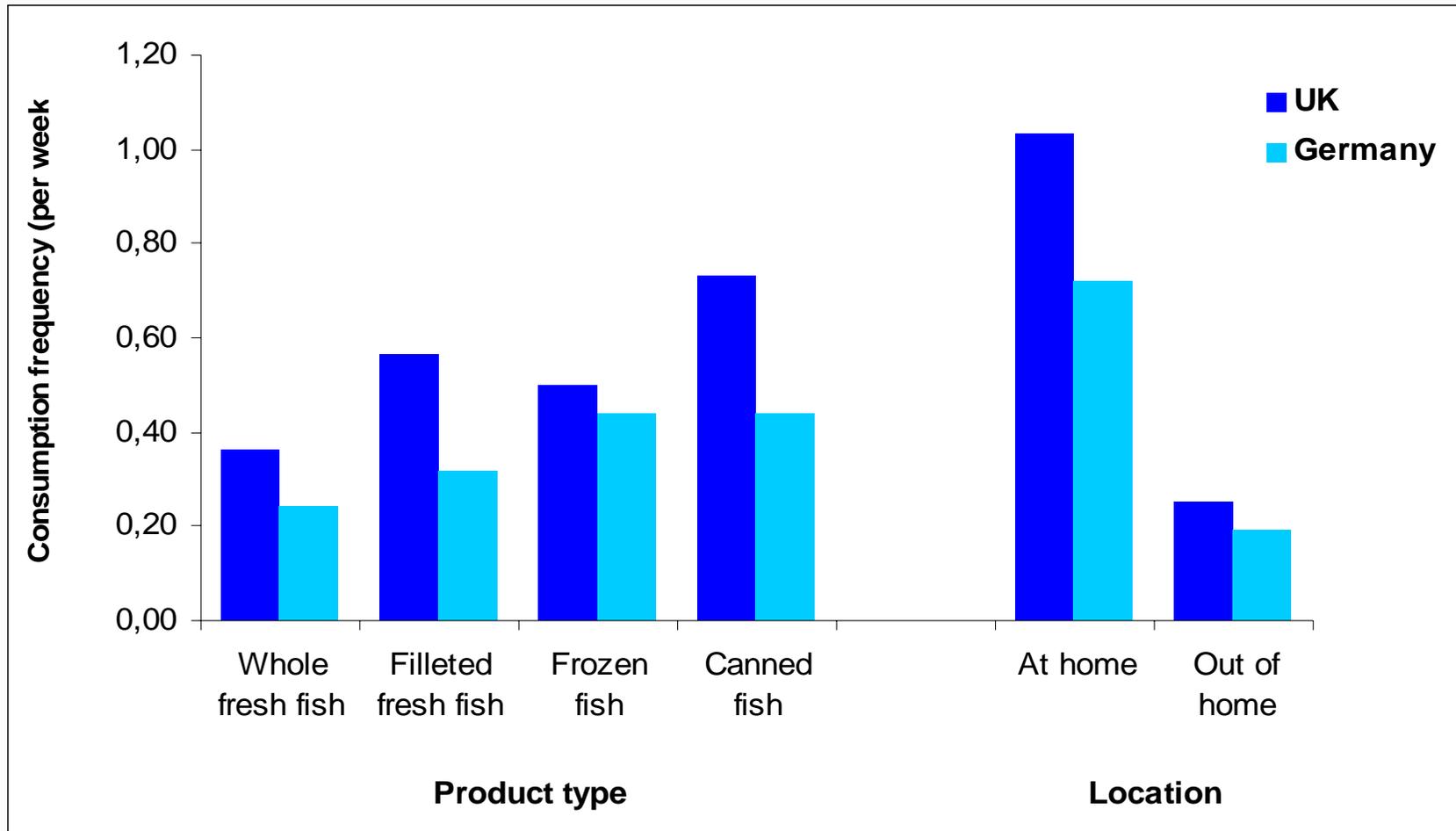
Convenience segments

- **Cross-cultural convenience segments (N = 4786):**
 - **The Convenience segment (29%)**
 - **The Independence segment (22%)**
 - **The Critical segment (23%)**
 - **The Traditional segment (26%)**

Experimental choice study - 2008

- **Data collected in UK and Germany**
- **Consumers have to choose between 'convenience' meal solutions**
 - Lasagne, Burgers, Asian noodles, Sandwiches
- **With different meat options:**
 - Chicken, Pork, Beef, Tuna and Vegetarian
- **Each consumer had to choose between 5 options 12 times in a varied experimental design**
- **Data collected**
 - UK N = 557
 - Germany N = 639

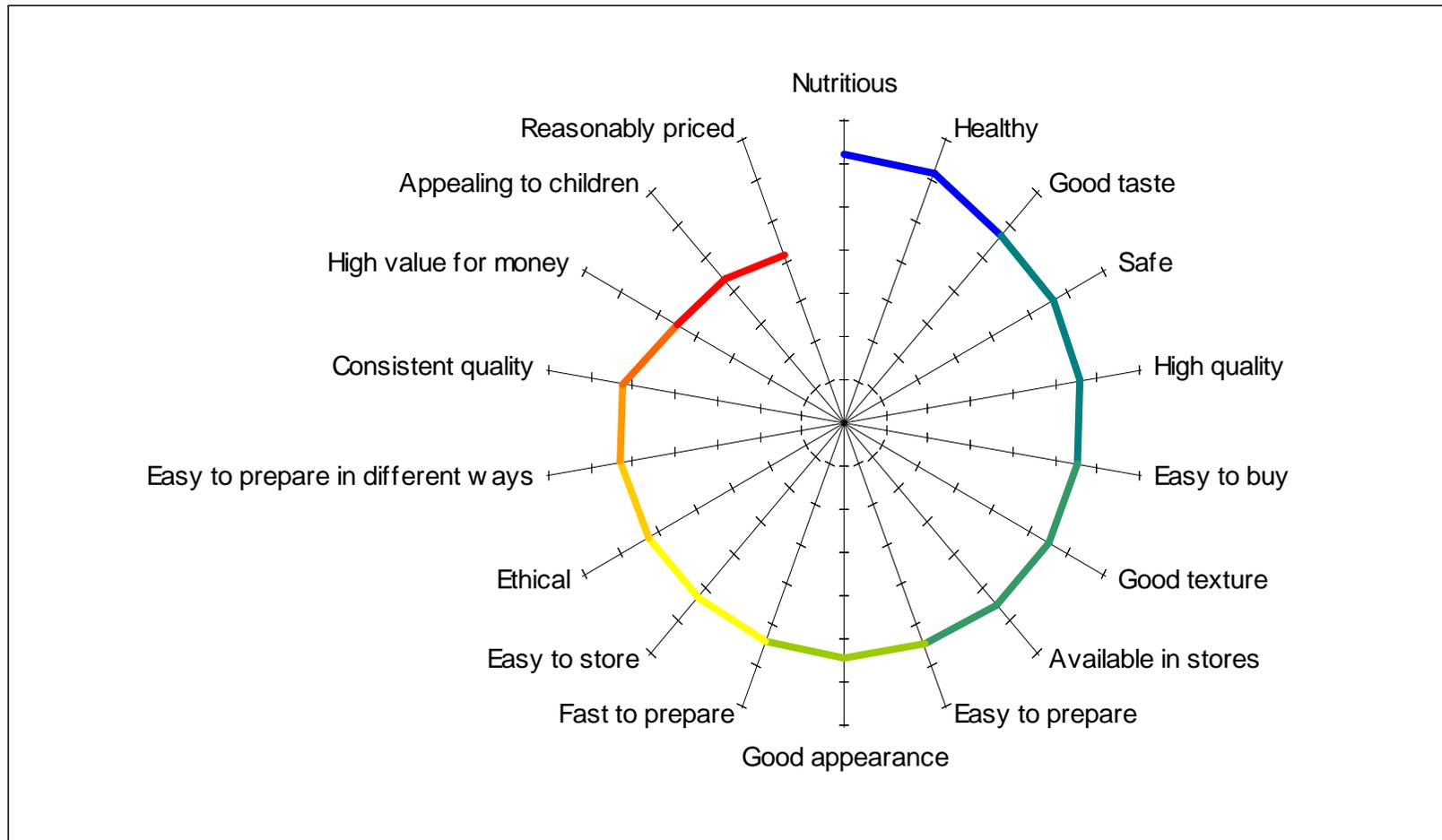
Consumption levels in choice experiment



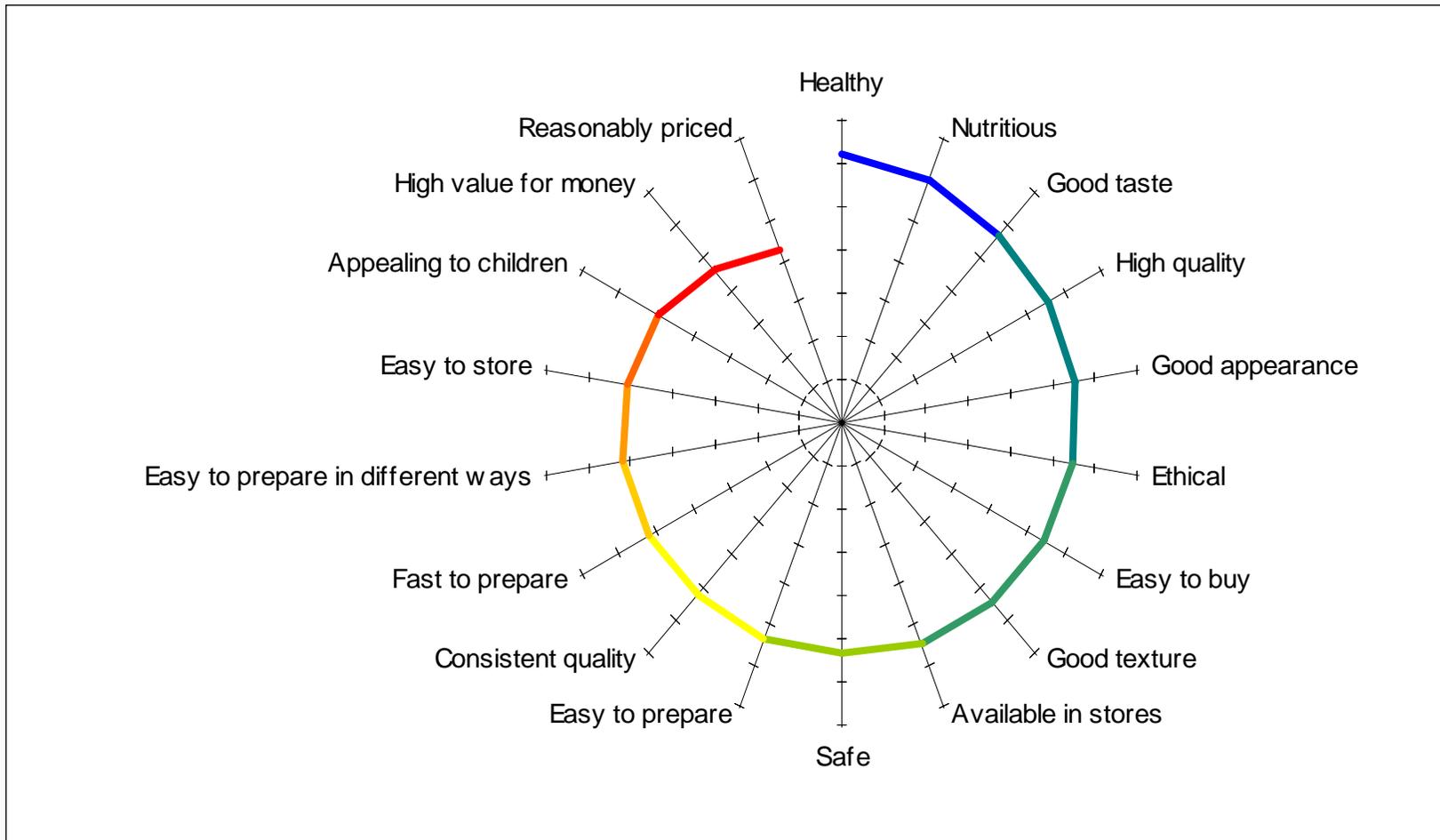
MAPP

Arhus School of Business
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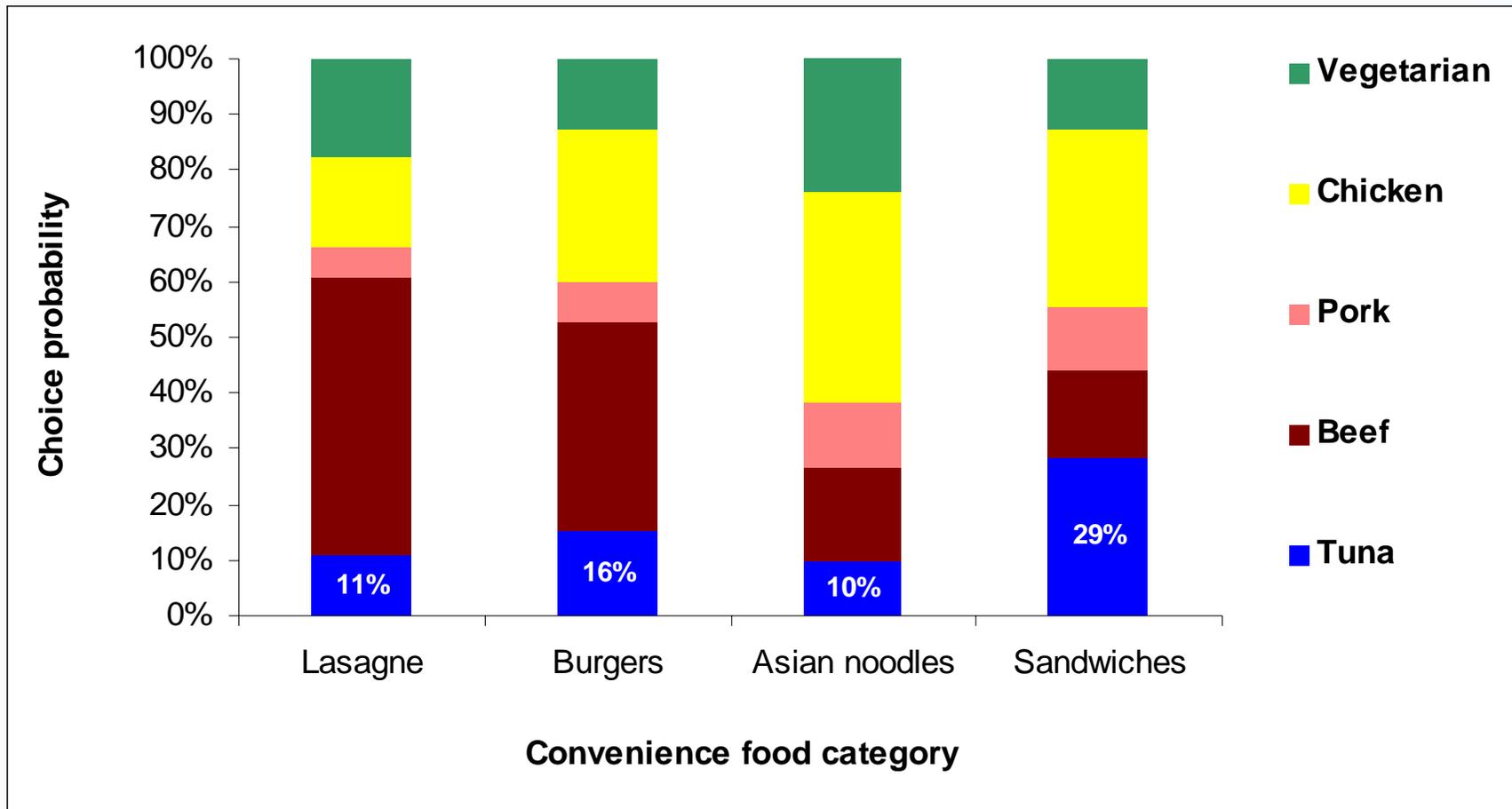
Quality perception - UK



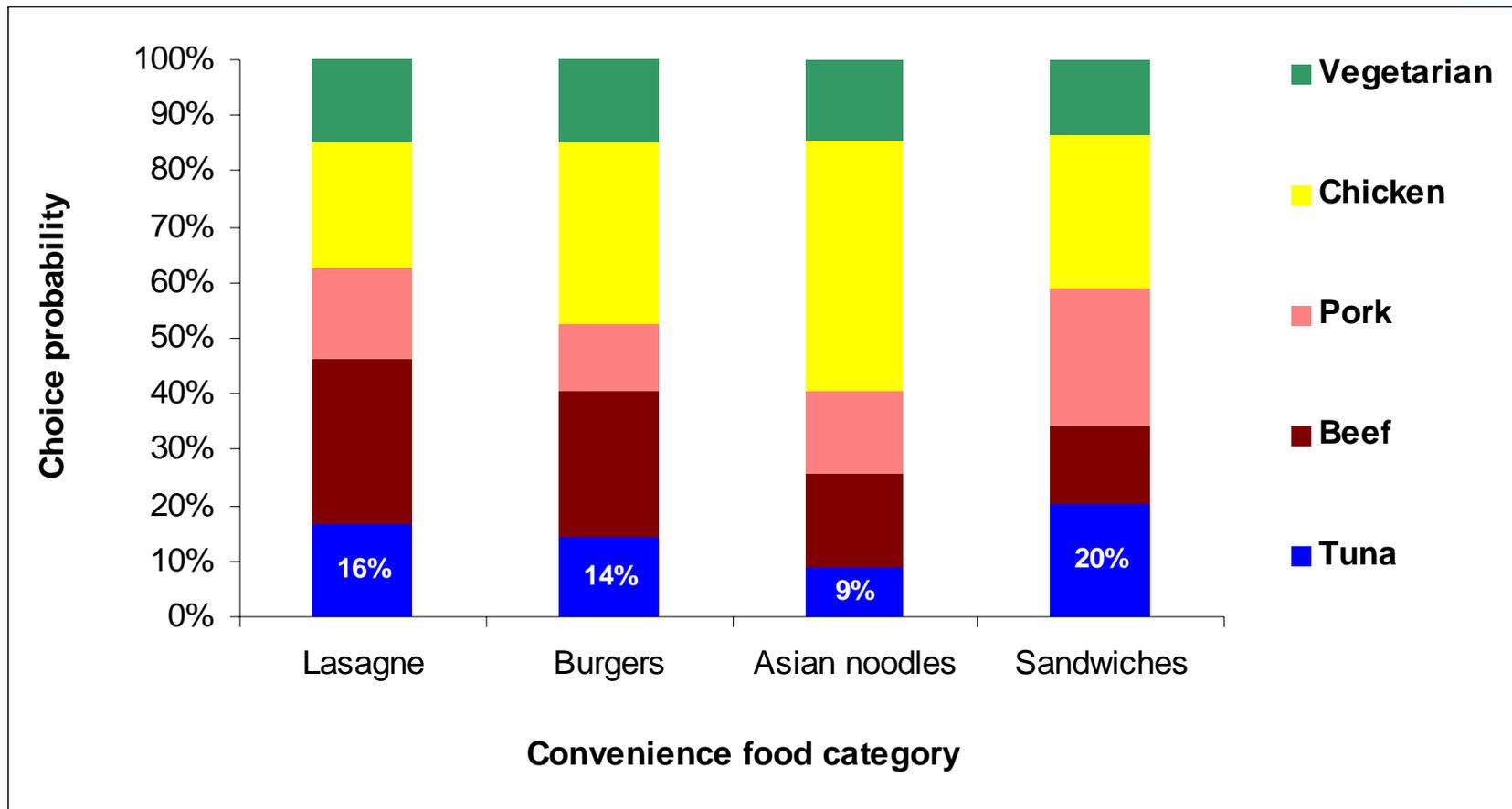
Quality perception - Germany



UK choice results



German choice results



Convenient seafood

- **SEAFOOD is IN the choice set!**
- **SEAFOOD has a good image!**
- **But preparation is a barrier to many consumers**
- **Need for fast, easy and "good" seafood products**
- **Also - semi-ready-made: A helping hand, but with some home-made elements will have broad appeal**
- **Help to make fish meals an obvious choice – easy access, recipes and instructions about preparation**

What's the trend?

- **In general consumers want seafood products that are tasty, healthy, convenient and that are 'produced' in a desirable or acceptable way**
- **Consumers do not know much about aquaculture**
- **But consumers want to predict quality**
- **So they use cues and information sources they believe in**
- **And consumers need easy recipes, instructions about preparation and convenience seafood to help making seafood meals a success**

A better life with seafood...

A large version of the SEAFOOD plus logo, with "SEAFOOD" in blue and "plus" in yellow, set against a blue background with yellow wavy lines.

www.seafoodplus.org