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# Consumer's Attitude and Perception of Fresh Seafood Products : Cognitive Effects on Behaviour buying (Part 1)

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# PLAN

## **1. Consumer's behaviours**

1.1. Attitudes and habits

2.2. Perceptions and motivations

3.3. Expectations and needs

## **2. Strategic consequences in french food retailing**

# 1. Consumer's behaviours



# Cogépêche Research Project

## Goals :

- Assess consumer's expectations and purchasing habits depending on the way of distribution.
- Propose new trails of valorisation for fresh seafood products.



# Context

- Evolution of the fresh seafood products markets partly due to the globalization of the market.
- Evolution of the consumer's taste and behaviour face to the fresh seafood products
- Evolution of the fresh seafood products perception
- Occurrence of the industrialised fishing production
- Development of the medium and large grocery stores

**Stimuli**

**1**

**Attitudes  
&  
Habits**

**2**

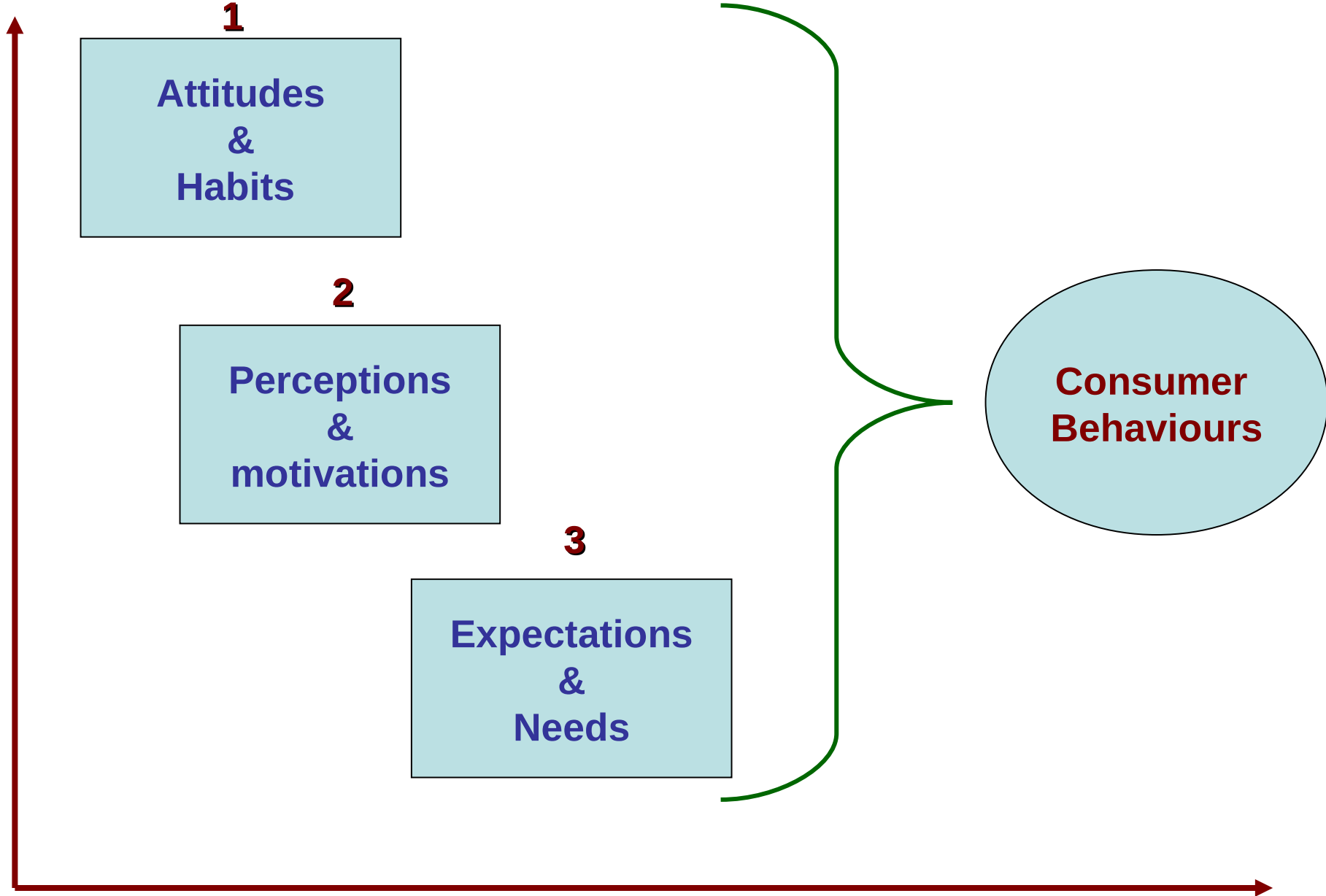
**Perceptions  
&  
motivations**

**3**

**Expectations  
&  
Needs**

**Consumer  
Behaviours**

**Insights**



# Methodology

5 kind of surveys have been set up:

*Methodology regrouping several analyses*

Focus  
group



Trade  
off



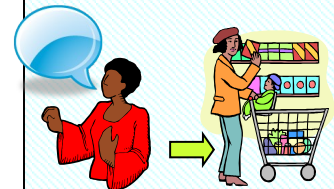
Delphi  
Method



Cognitive  
chains



Cognitive  
dissonance



*Study realized in 2009*

**Consumers expectations analysis**



## Focus group



## Trade off



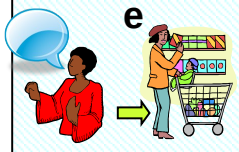
## Delphi Method



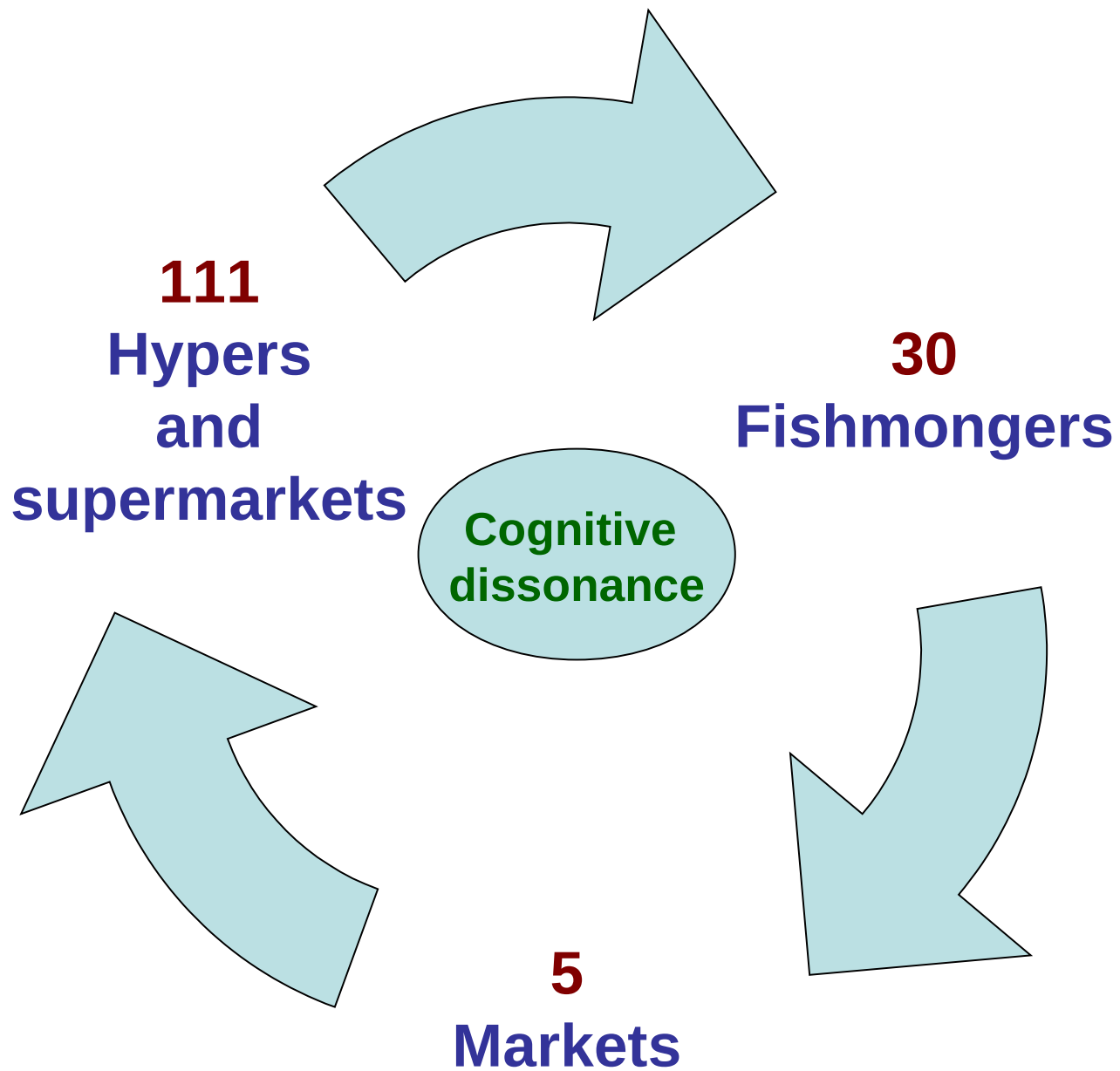
## Cognitive chains



## Cognitive dissonance



- 18 focus group have been realised during the last month with 6 to 10 people each time
- 850 people have been interviewed in order to specify the ideal seafood product for consumers
- 50 interviews to confirm (or to invalidate) expectations, needs and behaviour of seafood products consumers according to professional's viewpoint
- 100 analysis of seafood products characteristics and determination of their importance in the decision of purchasing act
- 150 analysis of consumer's habits, conviction, belief, behaviour about seafood products and the contradiction between them



## *1.1. Attitudes and habits*



# Habits and behaviours : Marketing *Channel*



## Hyper and super markets

- Market prices
- Easy to access
- Great choice
- Stalls attractives

**But**

- Lack of professionalism



## Markets

- Good report  
Quality/price
- Freshness
  - Choice
- Professionalism

**But**

- Price sometime high

## Fishmongers

- Stalls attractives
- Freshness guaranteed
- Convivial ambiance
  - Confidence

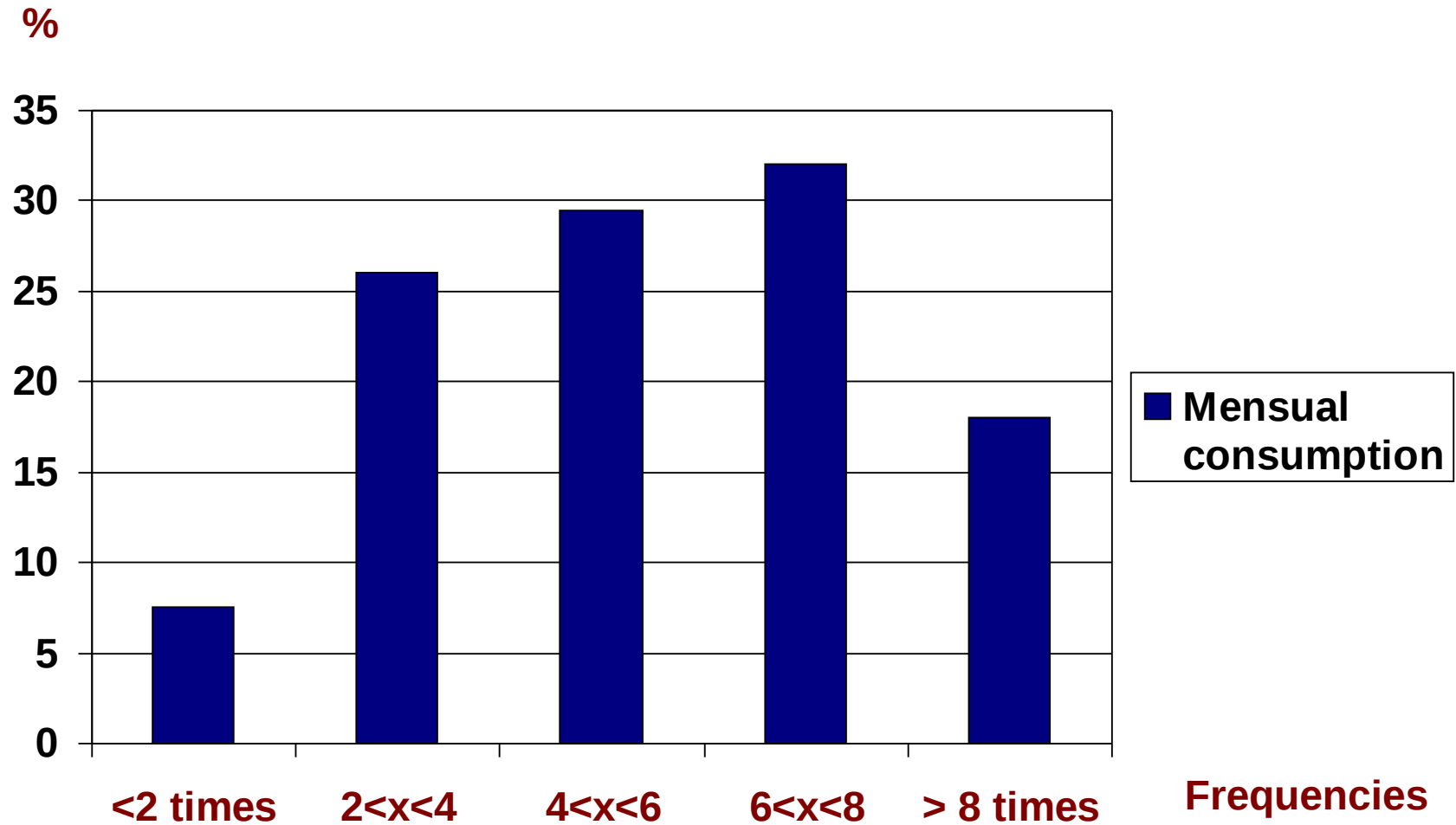
**But**

- Price sometime high
  - Basic frame

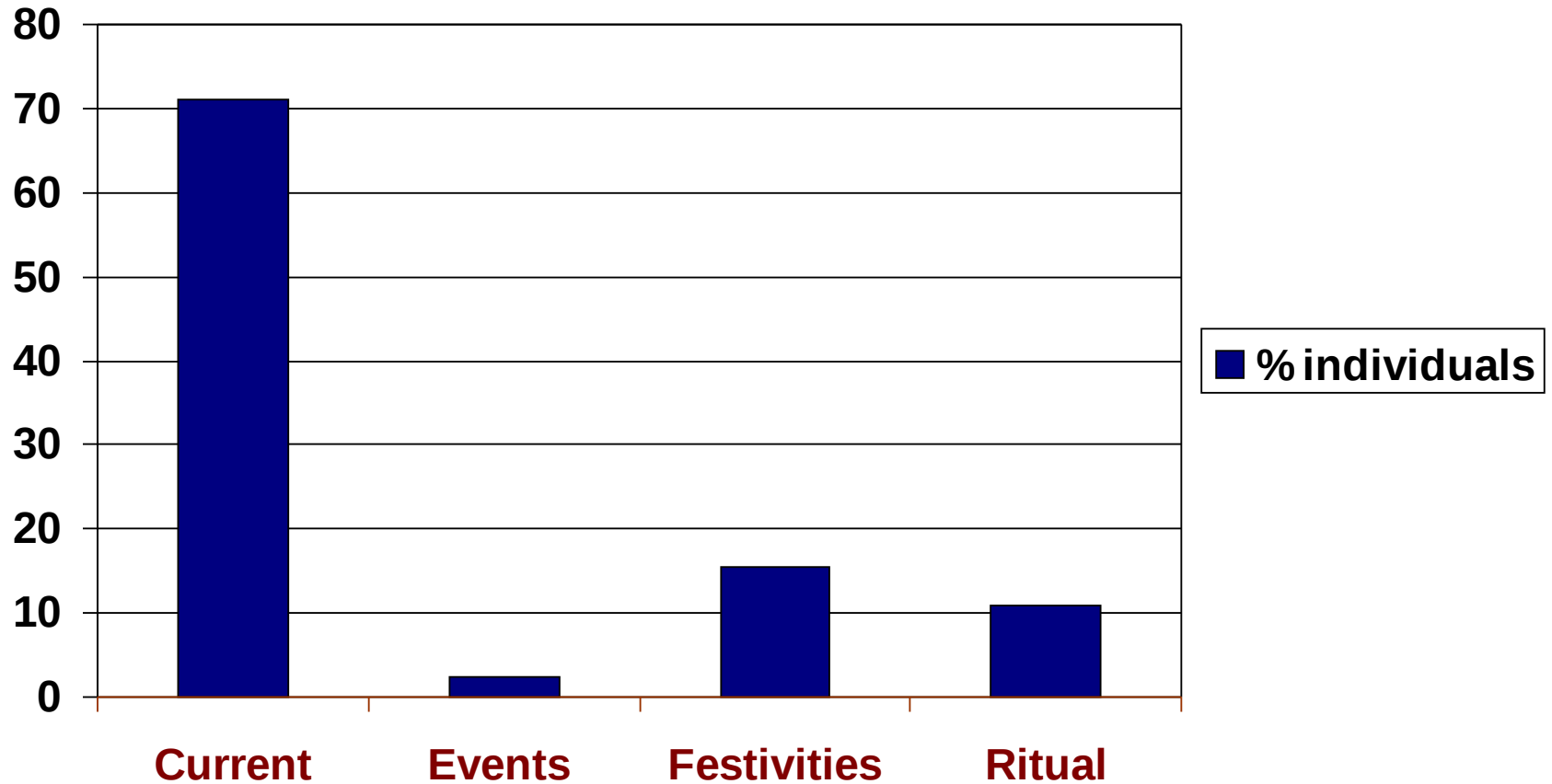
Noble species

Basic species

# Buying frequency



# Context involving buying act :



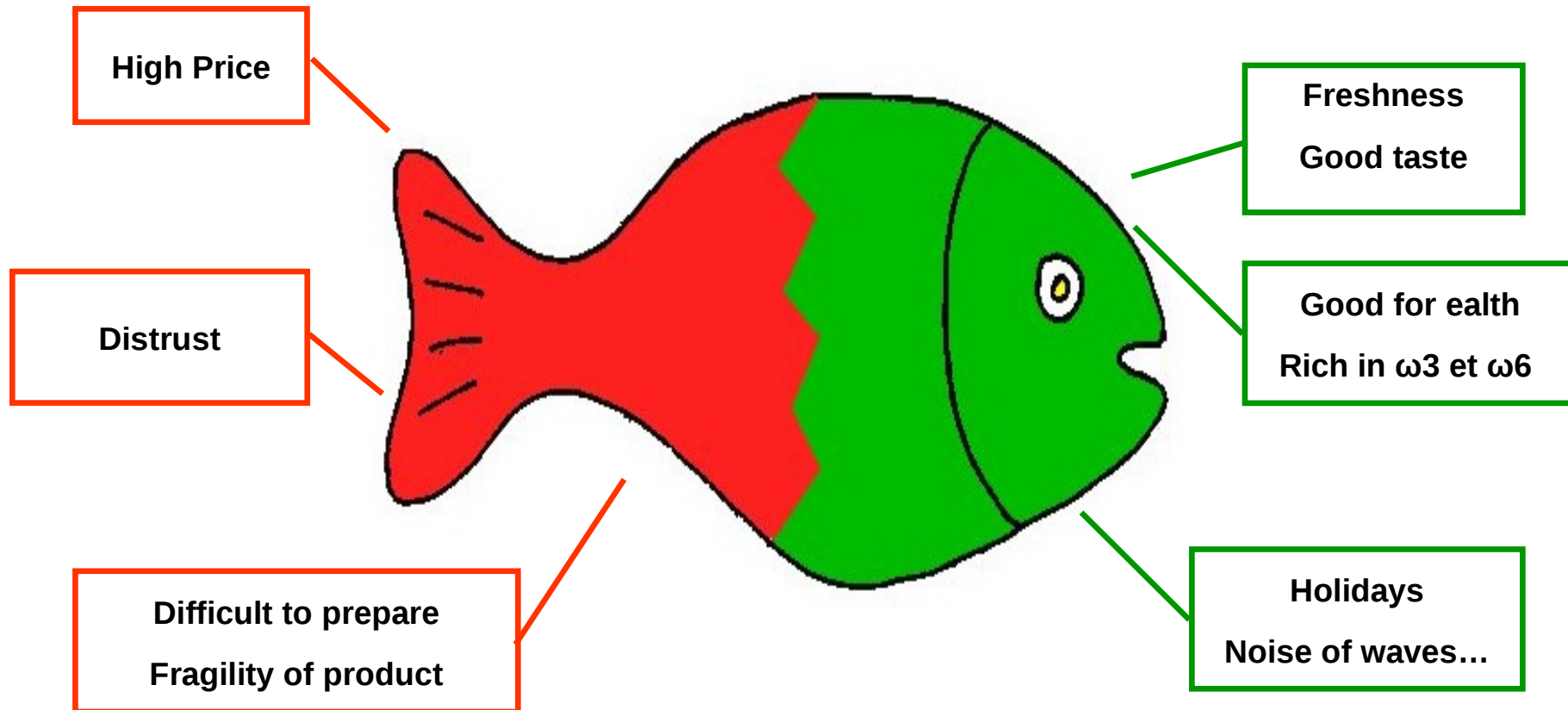
Events : diner, birthday, wedding

Festivities : Christmas, Easter, New year ...

## *2.2. Perceptions and motivations*



**Perception of seafood products** → The picture of seafood product is globally positive but a distrust and confusions exist.





# Consumer's perception of fresh seafood



- Taste
- Pleasure
- Conviviality
- Tradition
- Health

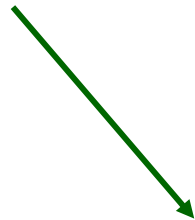


- Suspicion
- Expensive
- Hard preparation

# Main criteria of fresh seafoods

## FOCUS GROUP

1. Freshness
2. Specie
3. Price



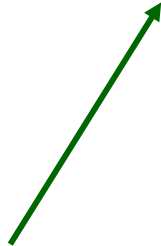
## COGNITIVE CHAIN

1. Freshness
2. Specie
3. Price



## COGNITIVE DISSONANCE

1. Aspect/Freshness
2. Price
3. Label/brand



## Main Criteria

Quality/  
Freshness/  
price

## DELPHI

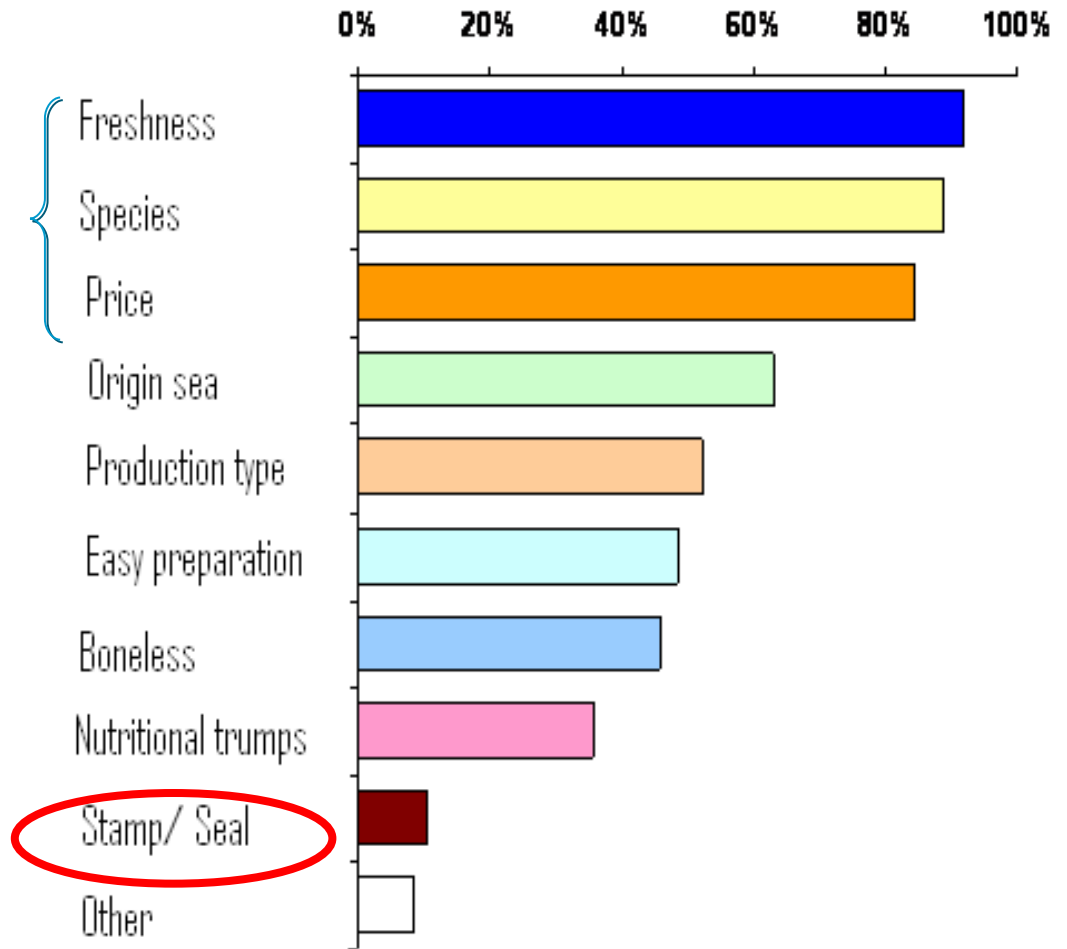
1. Price
2. Quality/Freshness



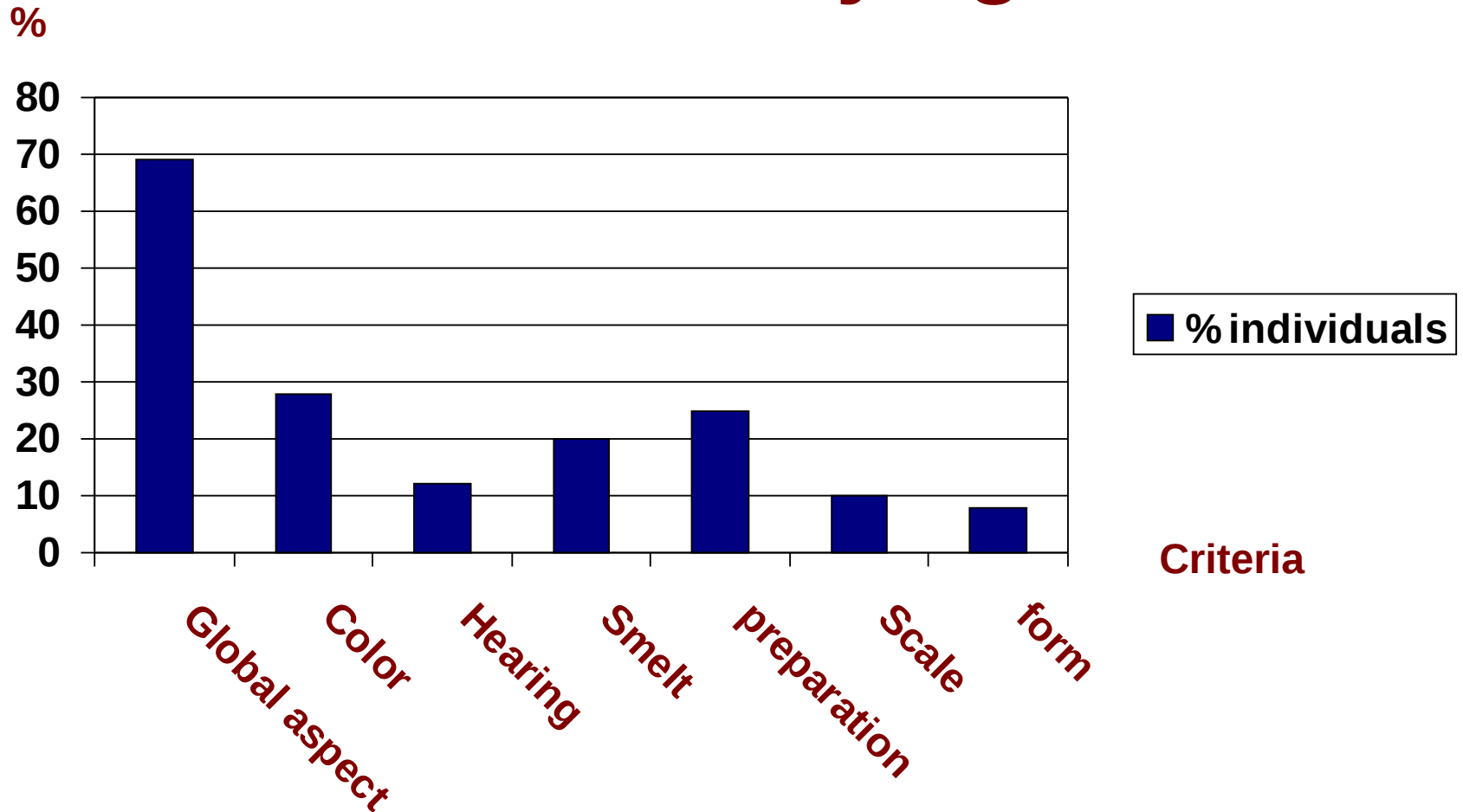
# Selection Criteria for fresh seafood

**Most important criteria to buy fresh seafood**

Stamp, seal and other signs of quality has effect only in 11% of consumers



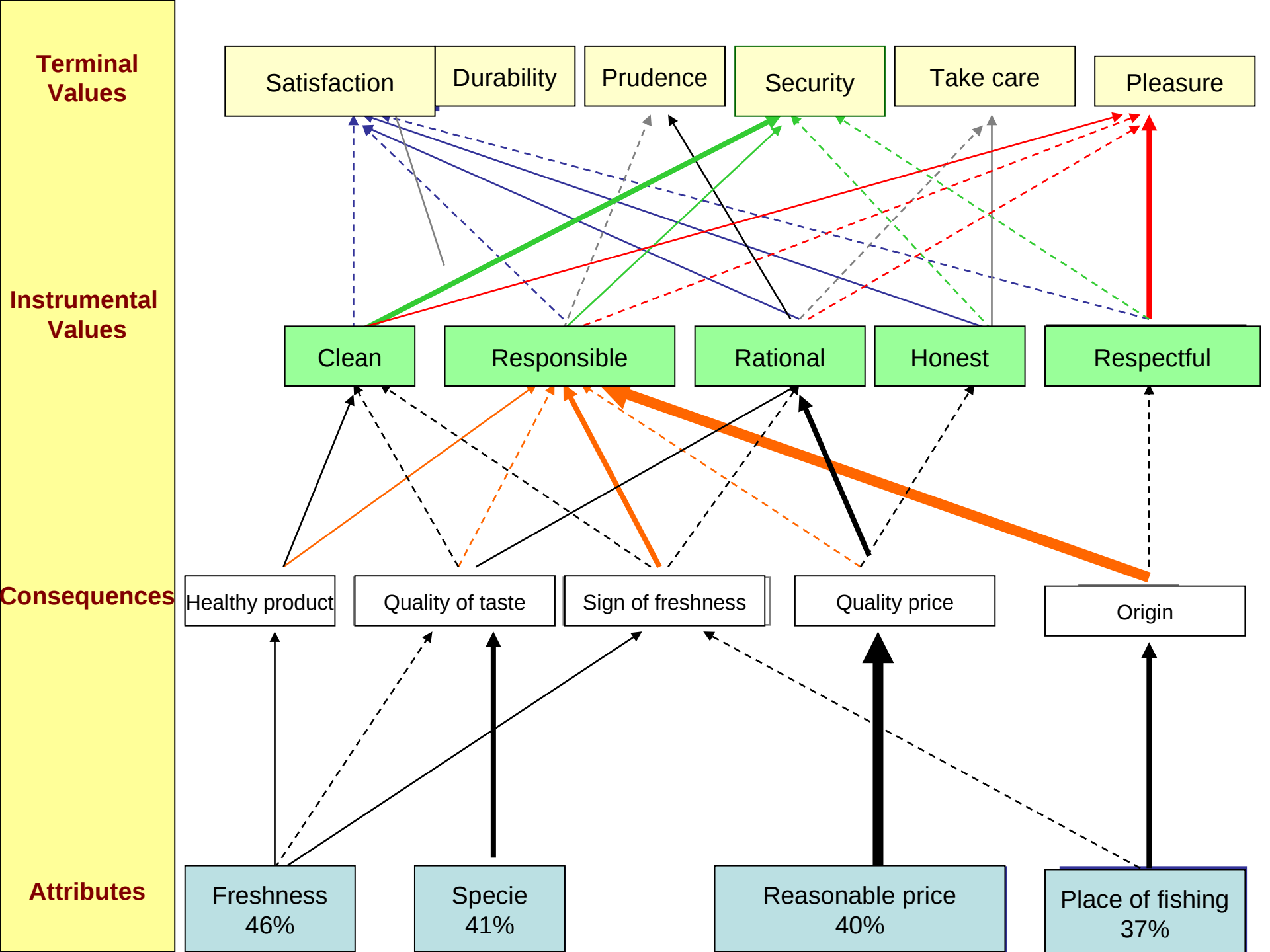
# Intrinsic criteria for fresh seafood buying



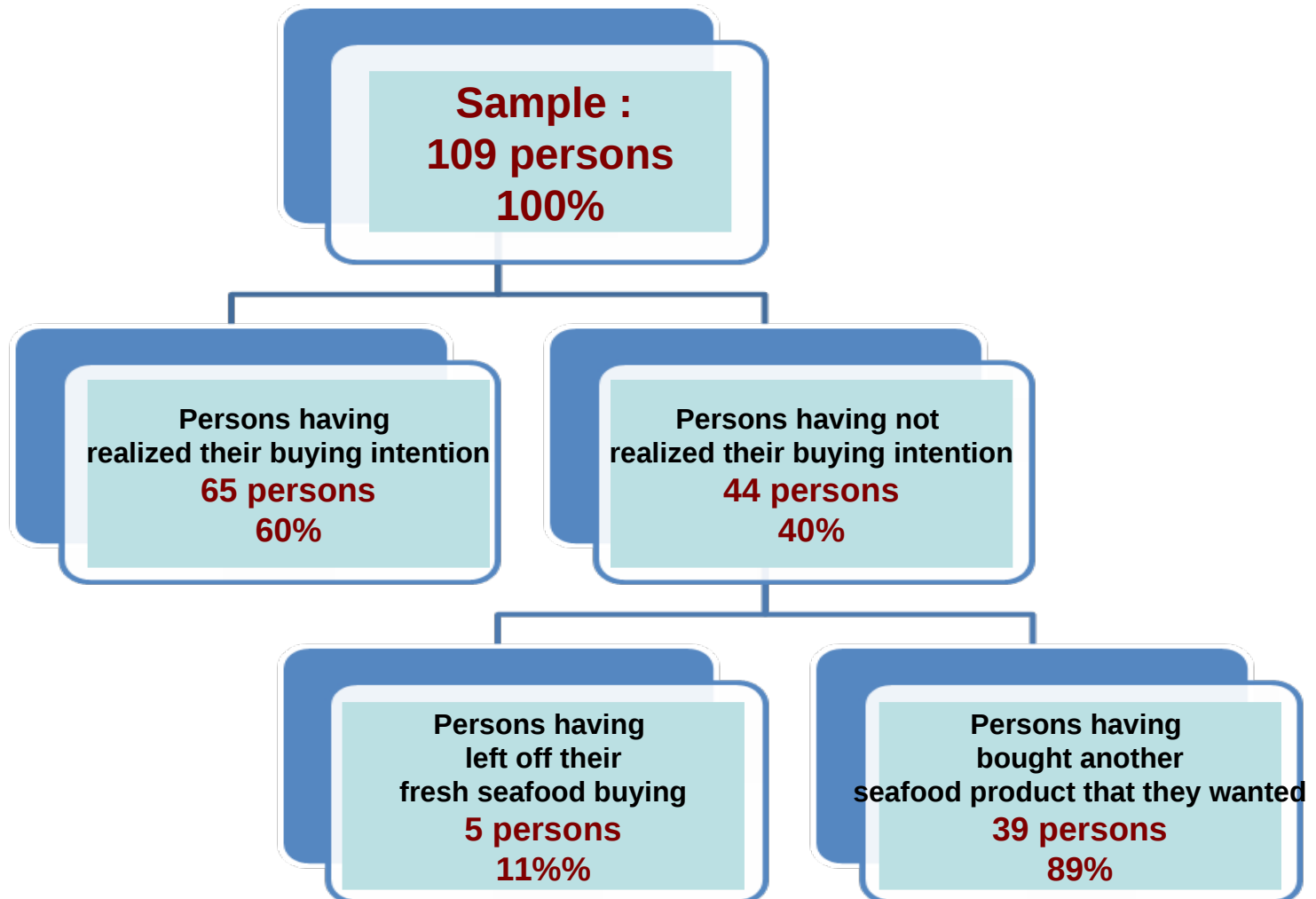
# Attributes-Consequences-Values

## (Cognitive chain)

Attributes	Consequences	Instrumental values	Terminal values
1. Freshness	1. Quality of taste	1. Rational	1. Security
2. Name of Fish	2. Sign of freshness	2. Responsible	2. Pleasure
3. Sensible price	3. Healthy product	3. Honest	3. Satisfaction
4. Place of fishing	4. Report quality/price	4. Clean	4. Liberty
5. Taste	5. Easy to prepare	5. Independent	5. Prudence
6. Date of capture	6. Gain of time	6. Respectful	6. Take care to the others
7. Aspect	7. Origin of product	7. Helpful	7. Durable contribution
8. Fillet			
9. Without bones			
10. Origin			



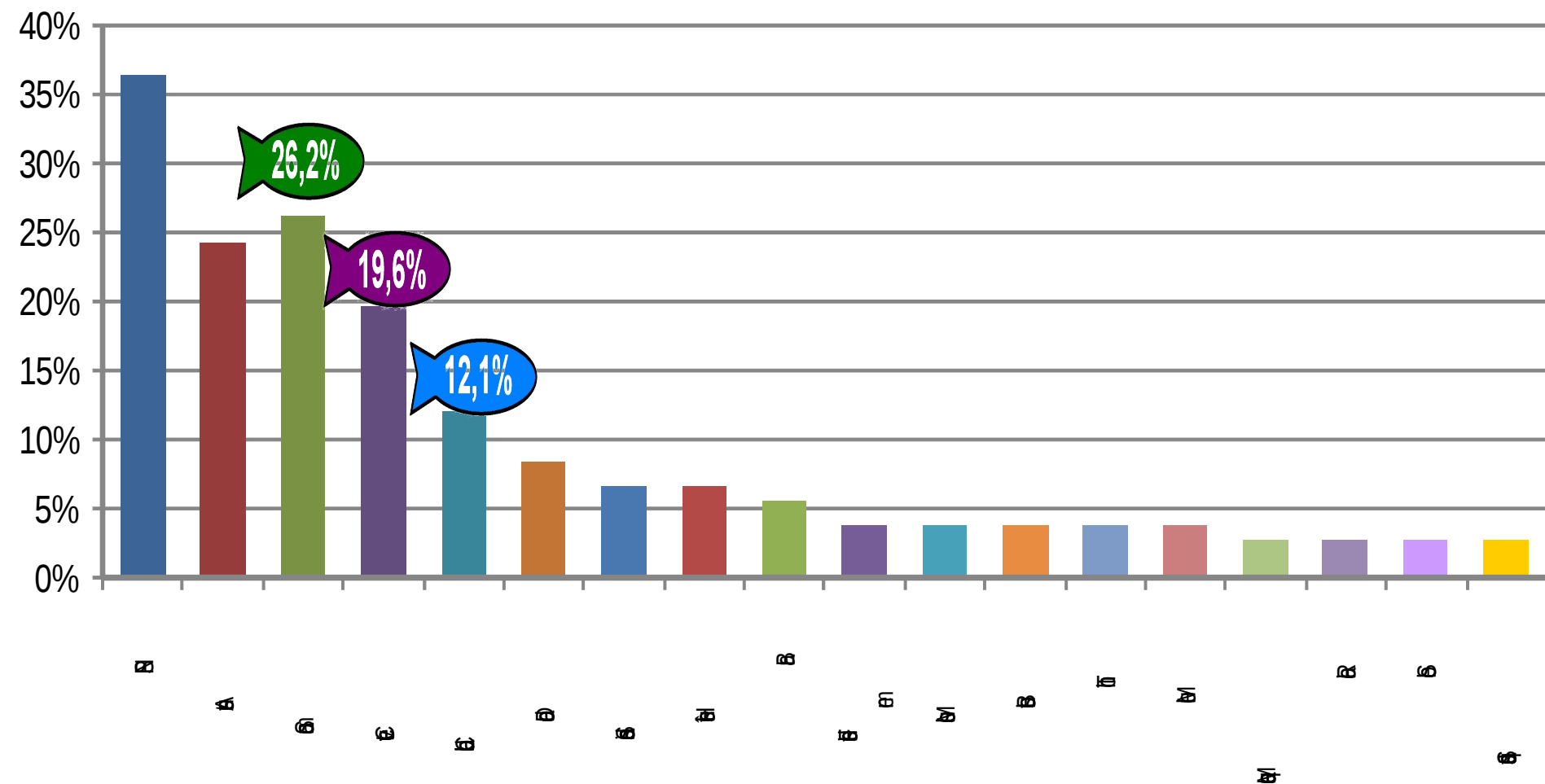
# Customer behaviour concerning fresh seafood buying



# Fresh Seafoods wished before buying

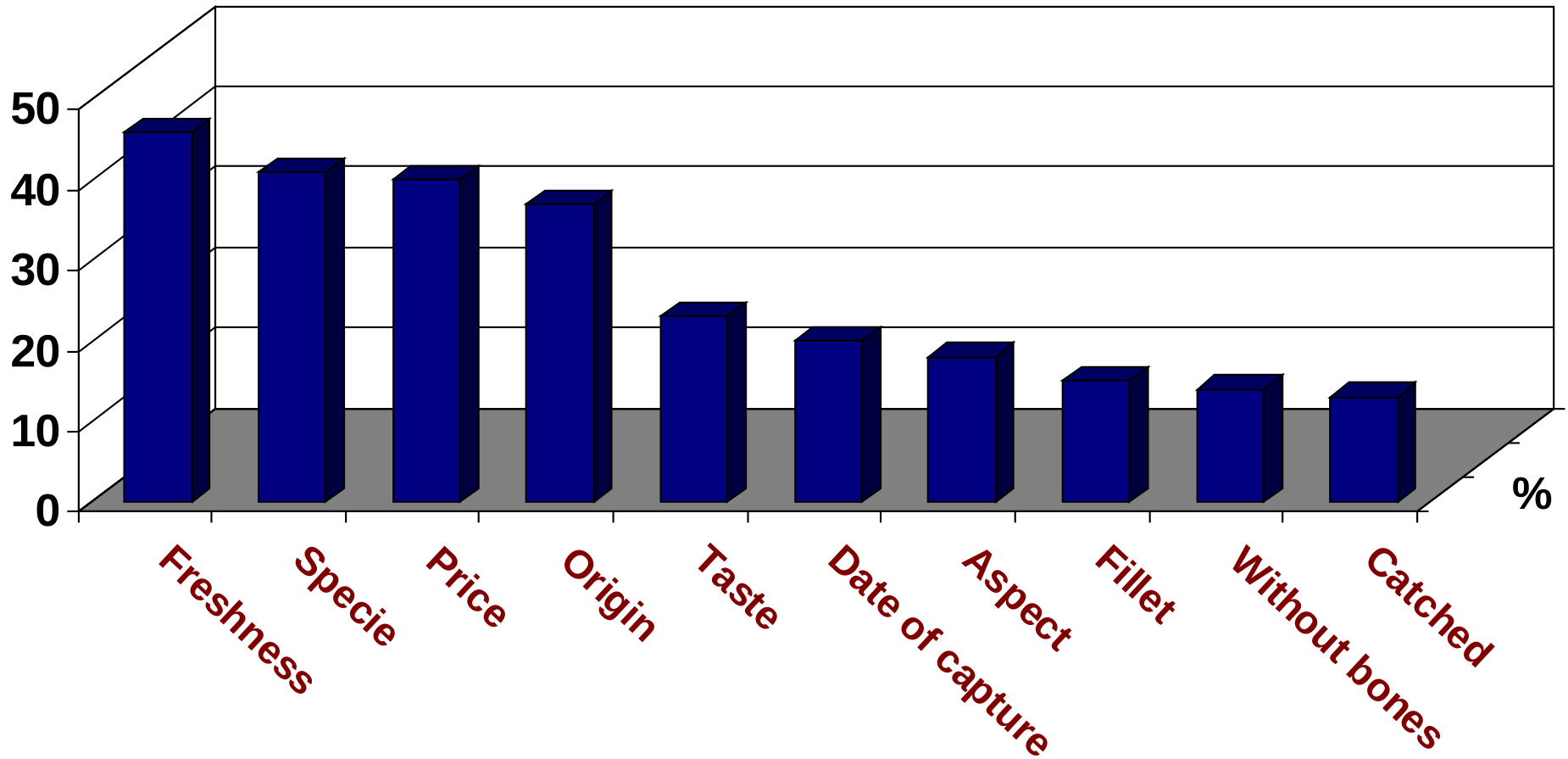
%

Kind of product customers wish to buy

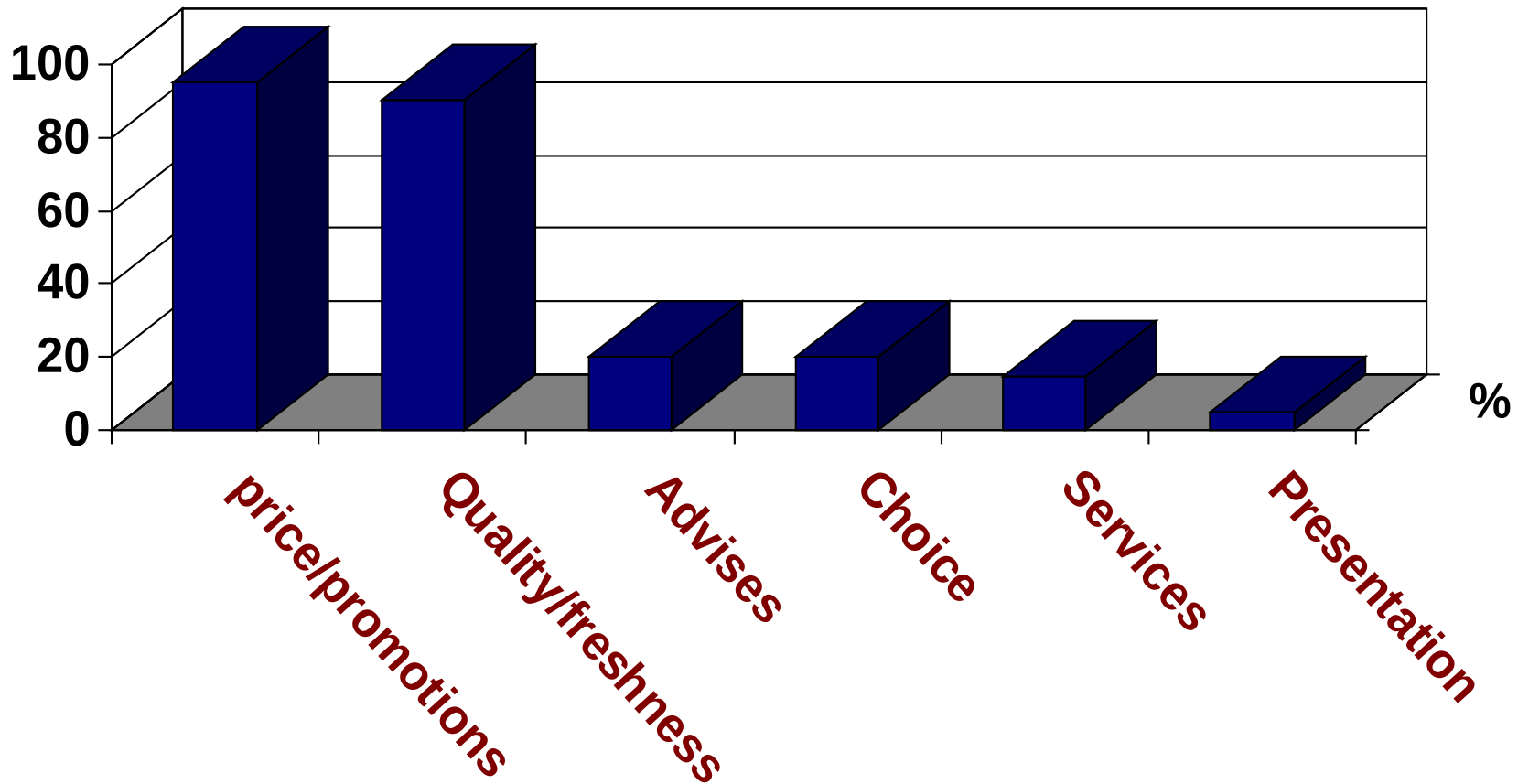




# Attributes influencing consumers' buying act



# Buying attributes of consumers for seafood professionals



# **Ideal product of fresh seafood:**

- 1. Wild fish**
- 2. Low level of lipid**
- 3. Jagged**
- 4. Boneless**
- 5. Fresh**



# Dissonance

## Ideal seafood product

- 1° Wild fish
- 2° Low level of lipid
- 3° Jagged
- 4° Boneless
- 5° Fresh

## Exemple of real purchase

1<sup>st</sup> species consume  
in France:

**Salmon**



Farmed fish  
Oily fish  
(high in omégas 3)

Source: Ofimer, 2007

### 3.3. *Expectations and needs*



# Ideal Tag for fresh seafood (*sociodemographic segmentation*)

## Total

1. **Wild origin**
2. Thin fish
3. Cutted
4. Without bone
5. freshness

## Females

1. Wild origin
2. **Freshness**
3. Thin fish
4. Cutted
5. Without bone

## Males

1. Wild origin
2. **Thin fish**
3. Cutted
4. Without bone

## 18-25 years

1. **Cutted**
2. Wild origin
3. Thin fish
4. Without bone
5. Freshness

## 26-35 years

1. **Cutted**
2. Wild origin
3. Thin fish
4. Without bone
5. freshness

## 36-55 years

1. **Wild origin**
2. Thin fish
3. Without bone
4. Cutted
5. Freshness
6. **Omega 3**

## >56 years

1. **Wild origin**
2. Thin fish
3. Cutted
4. **Omega 3**
5. Without bone
6. freshness



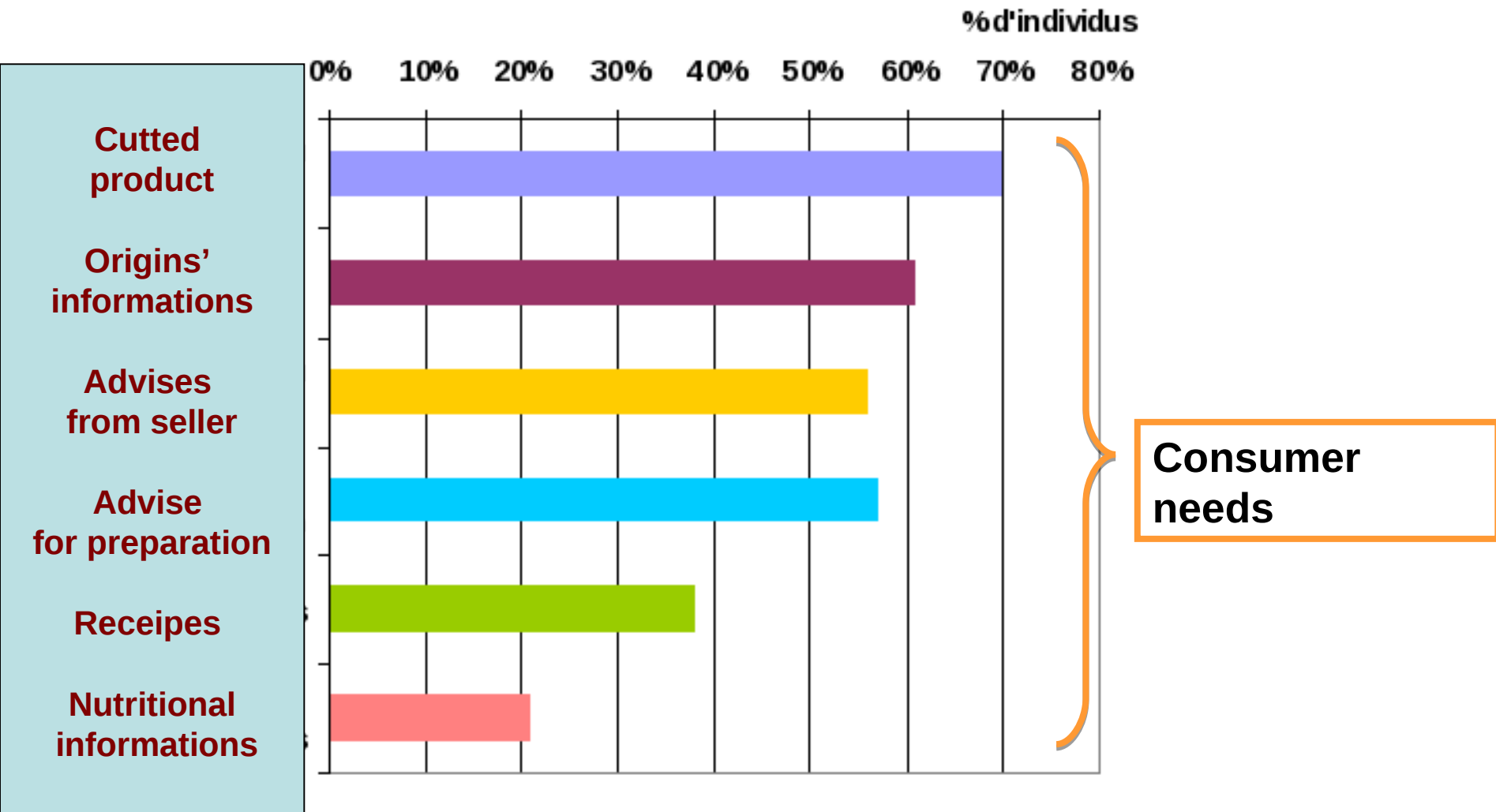


# Consumer's needs

- ✓ More information about origin, place of fishing,
- ✓ More transparency
- ✓ Proposition from salesmen to discover fresh seafood : recipes and advices about preparation, accompanying vegetables...
- ✓ Fresh seafood ready to cook, boneless
- ✓ Stall more exotic and original
- ✓ Cheaper



# What consumer needs?



# The consumer of tomorrow....

**.... wants to consume ethical products**

**.... wants clear information**

(needs facts to support his emotional choices)

**.... wants to improve the quality of life**

(demand for natural and original products)

**.... wants to experience different cultures**

(demand for ethnic products)

**.... wants convenience**

(offered in the way he wants it)