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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**

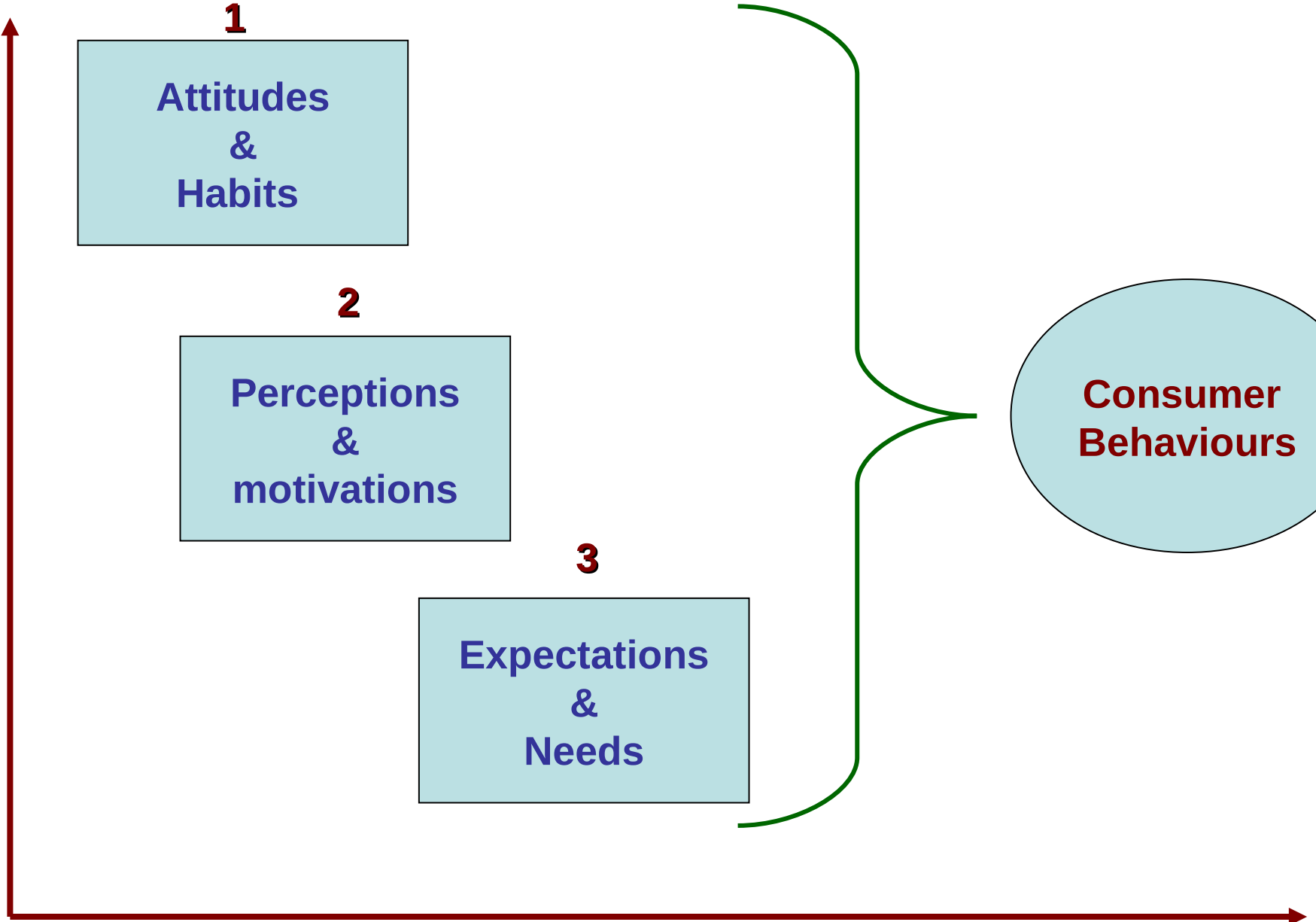
**Perceptions  
&  
motivations**

**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



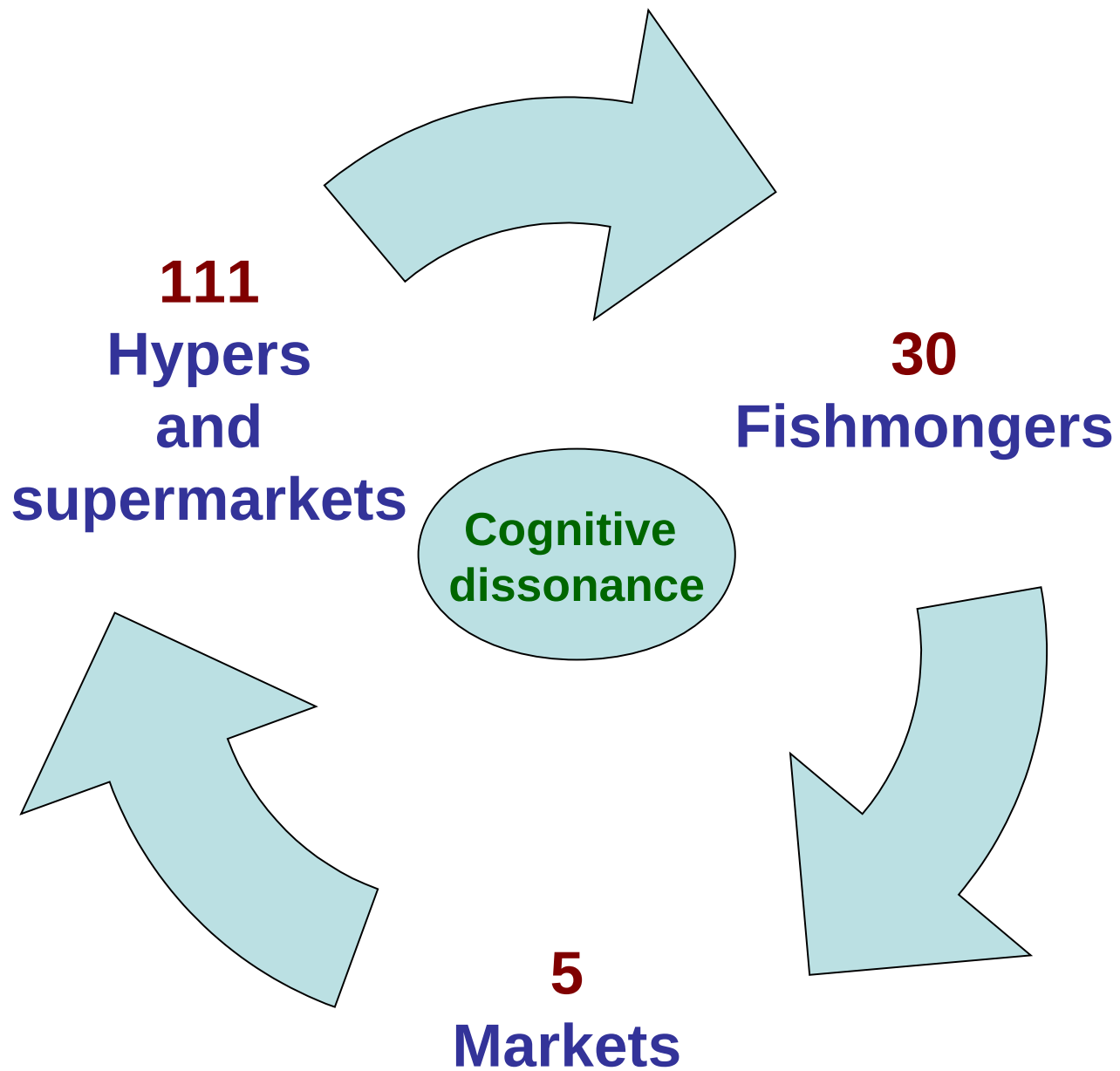
Cognitiv  
brains



Cognitive  
dissonanc  
e



- 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

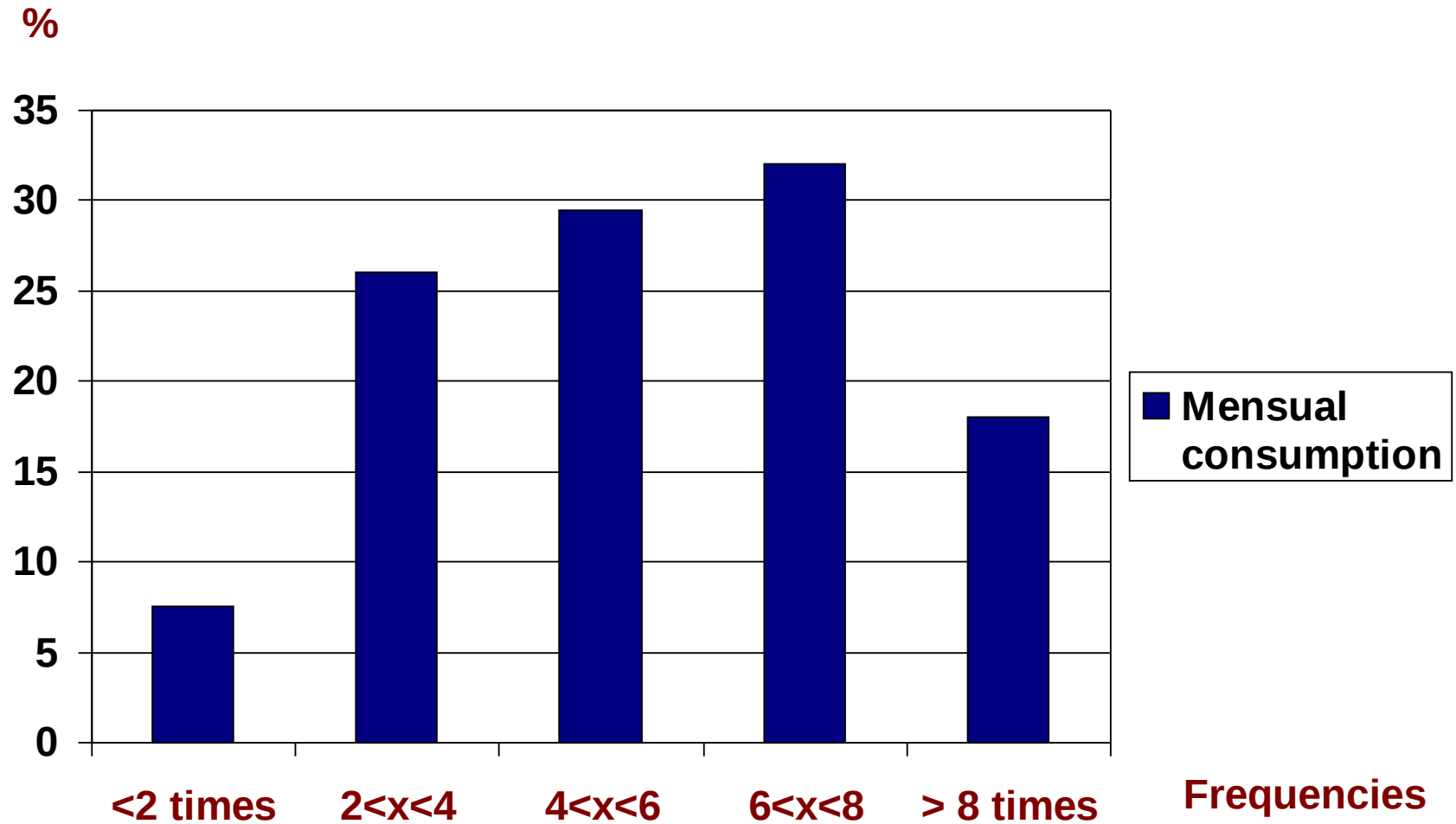
• But

- Price sometime high
  - Basic frame

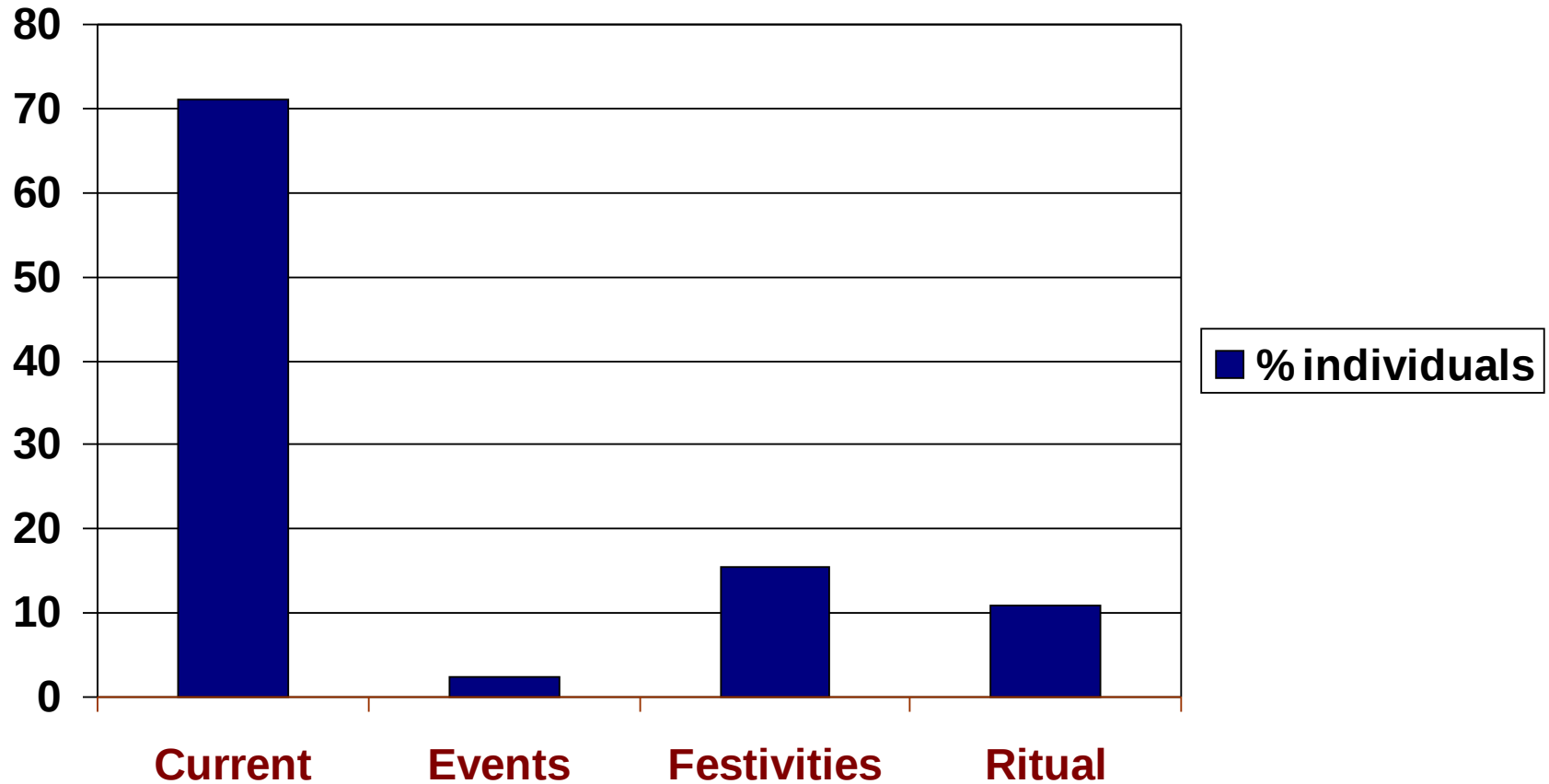
Noble species

Basic species

# Buying frequency



# Context involving buying act :



Events : diner, birthday, wedding

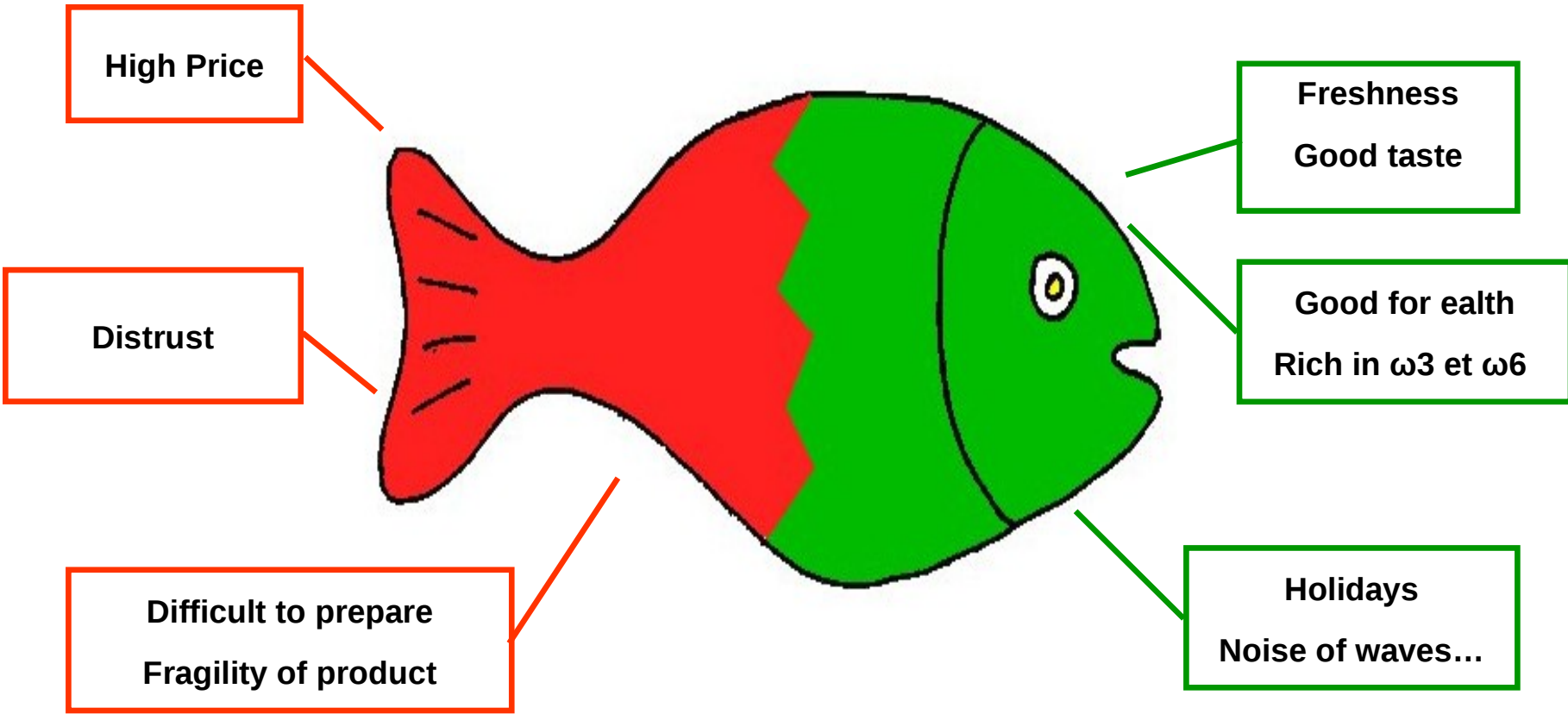
Festivities : Christmas, Easter, New year ...

## *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

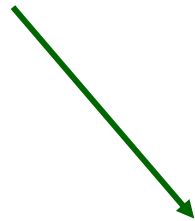


- Suspicion
- Expensive
- Hard preparation

# Main criteria of fresh seafoods

## FOCUS GROUP

1. Freshness
2. Specie
3. Price



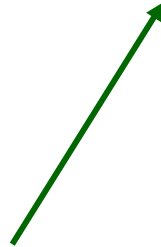
## COGNITIVE CHAIN

1. Freshness
2. Specie
3. Price



## COGNITIVE DISSONANCE

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



## Main Criteria

Quality/  
Freshness/  
price



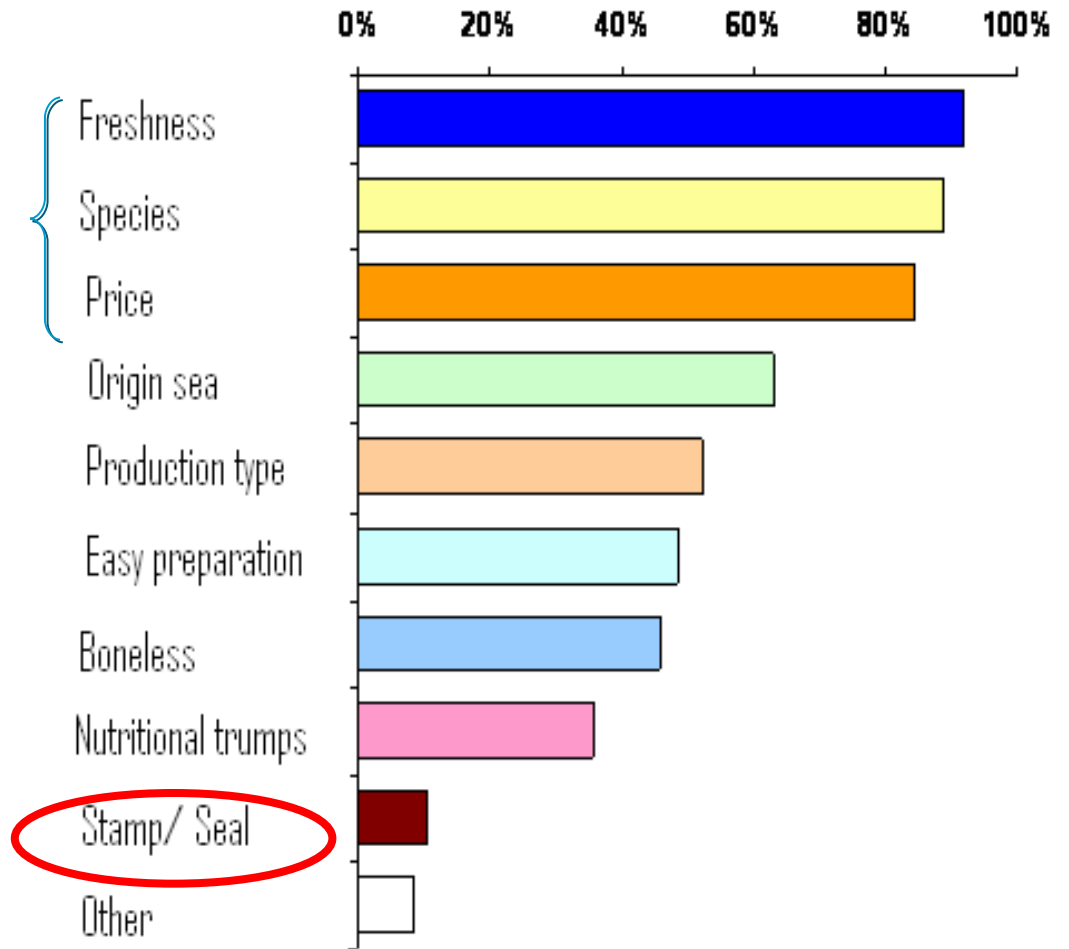
## DELPHI

1. Price
2. Quality/Freshness

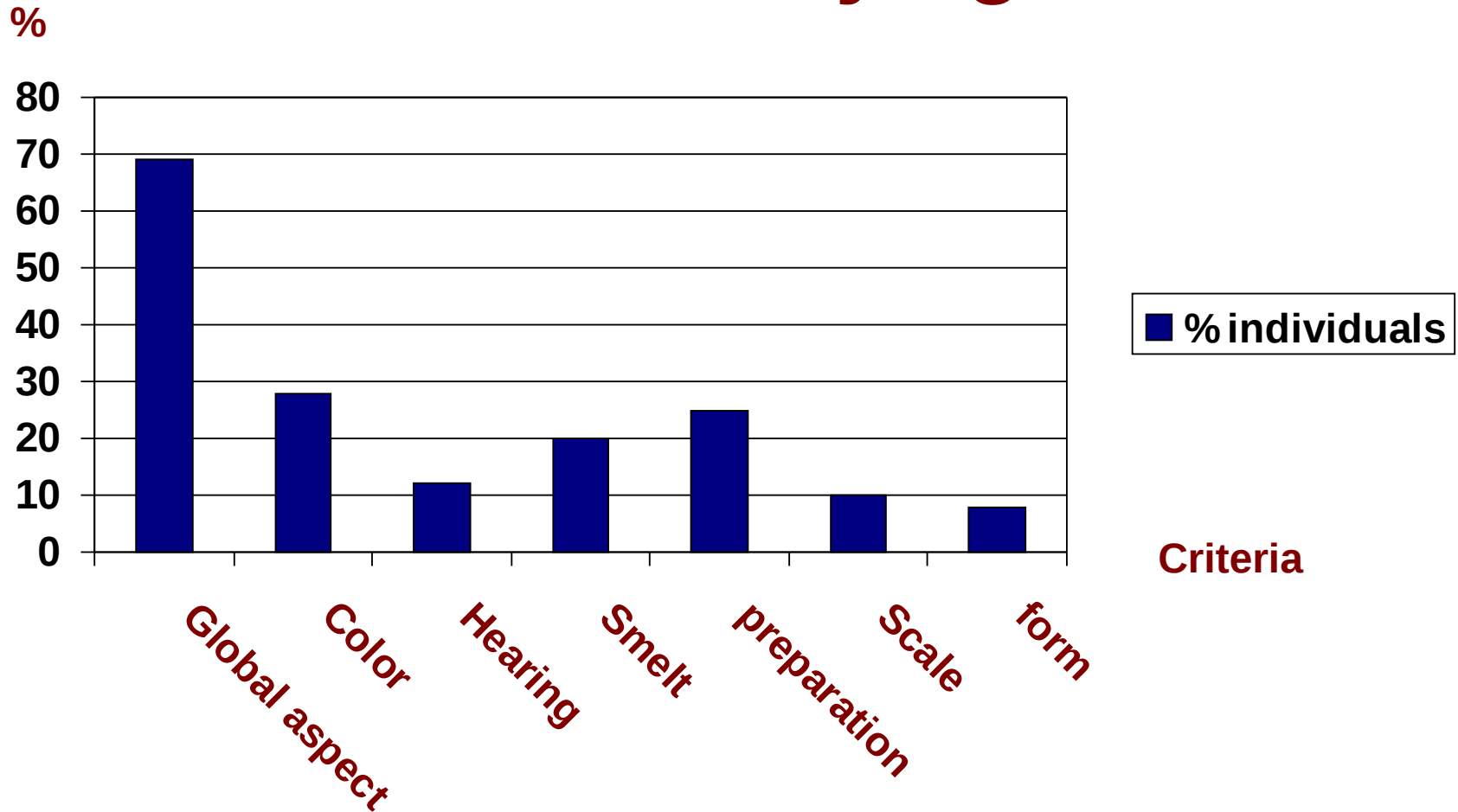
# Selection Criteria for fresh seafood

Most important criteria to buy fresh seafood

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

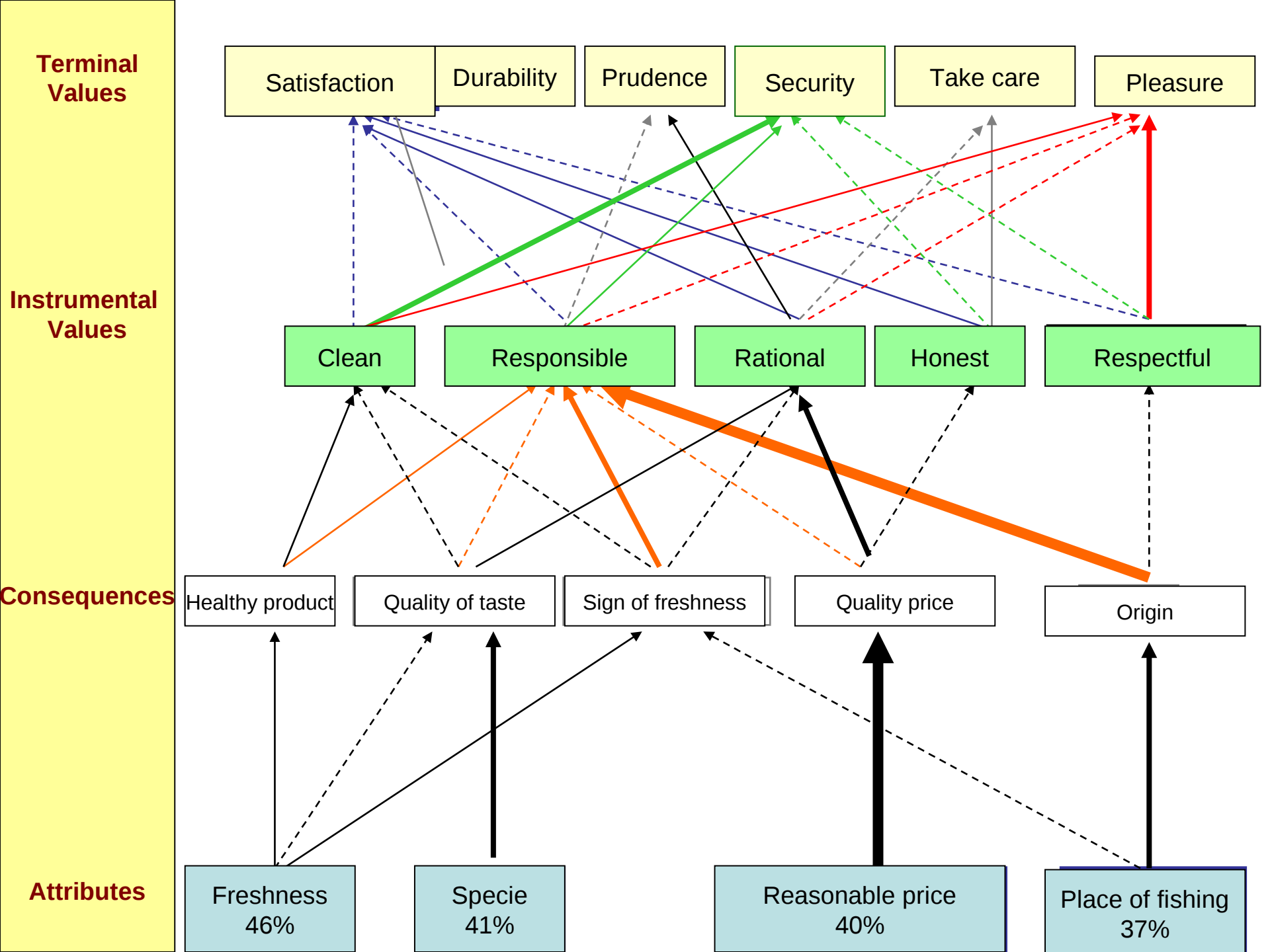


# Intrinsic criteria for fresh seafood buying

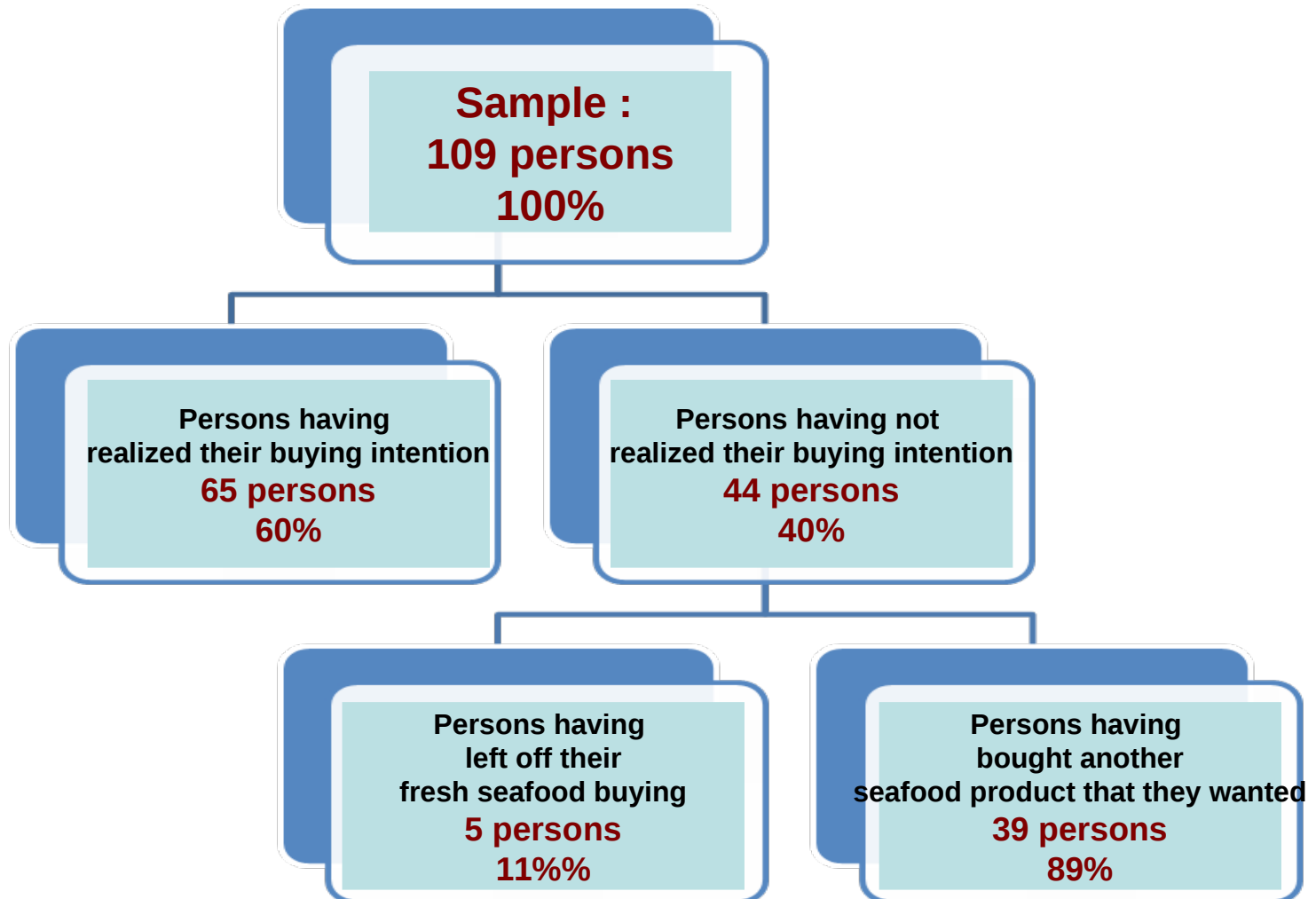


# Attributes-Consequences-Values (Cognitive chain)

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			



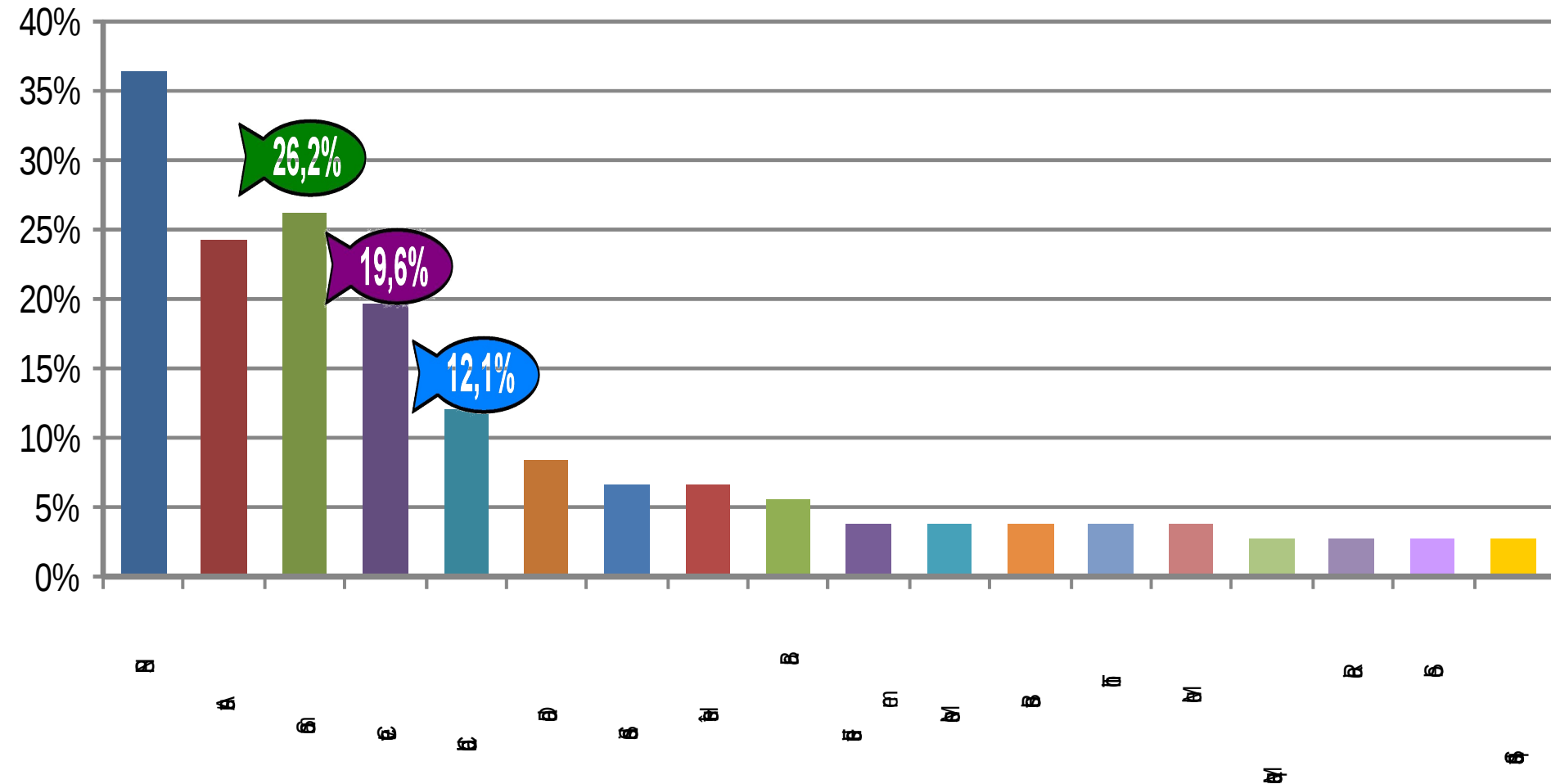
# Customer behaviour concerning fresh seafood buying



# Fresh Seafoods wished before buying

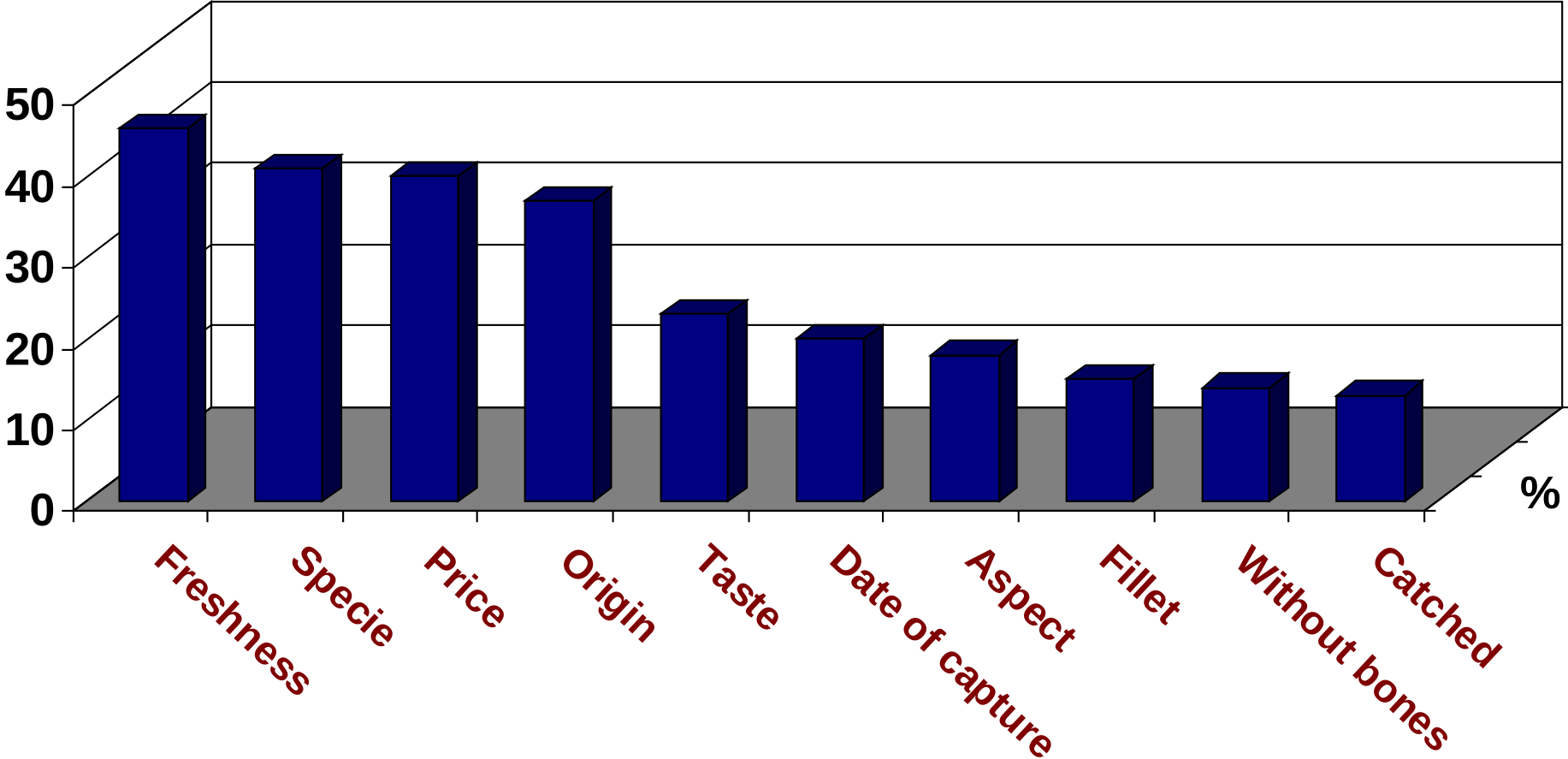
Kind of product customers wish to buy

%

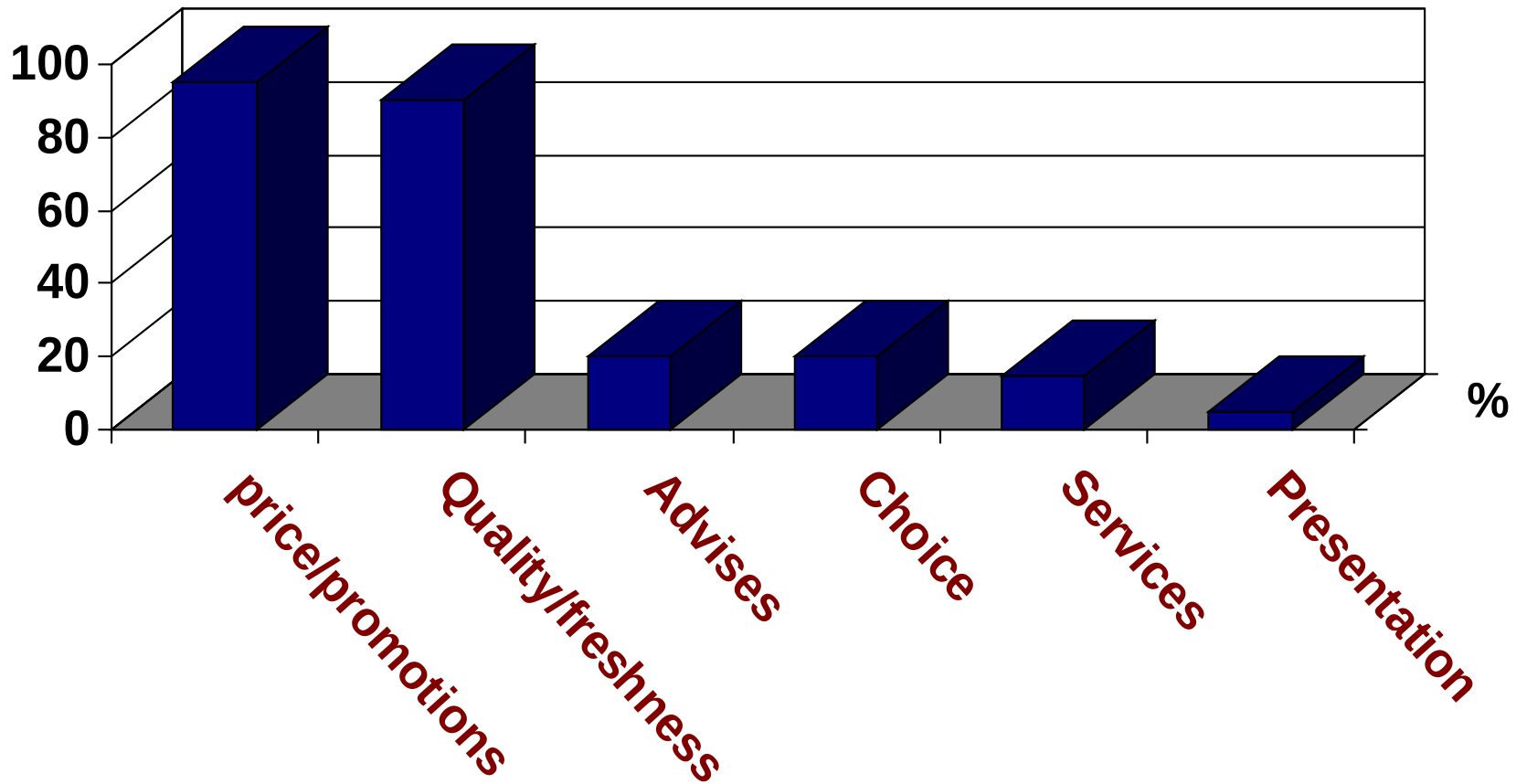




# Attributes influencing consumers' buying act



# 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





- Unawareness of fresh seafood products: main obstacle to the consumption of fresh seafood products.

• Gap between expectations, needs and purchasing habits... Which consent to pay?



• Seal of approval, eco-label, signs of quality... Is there a real interest for consumers?

# Consumer's needs

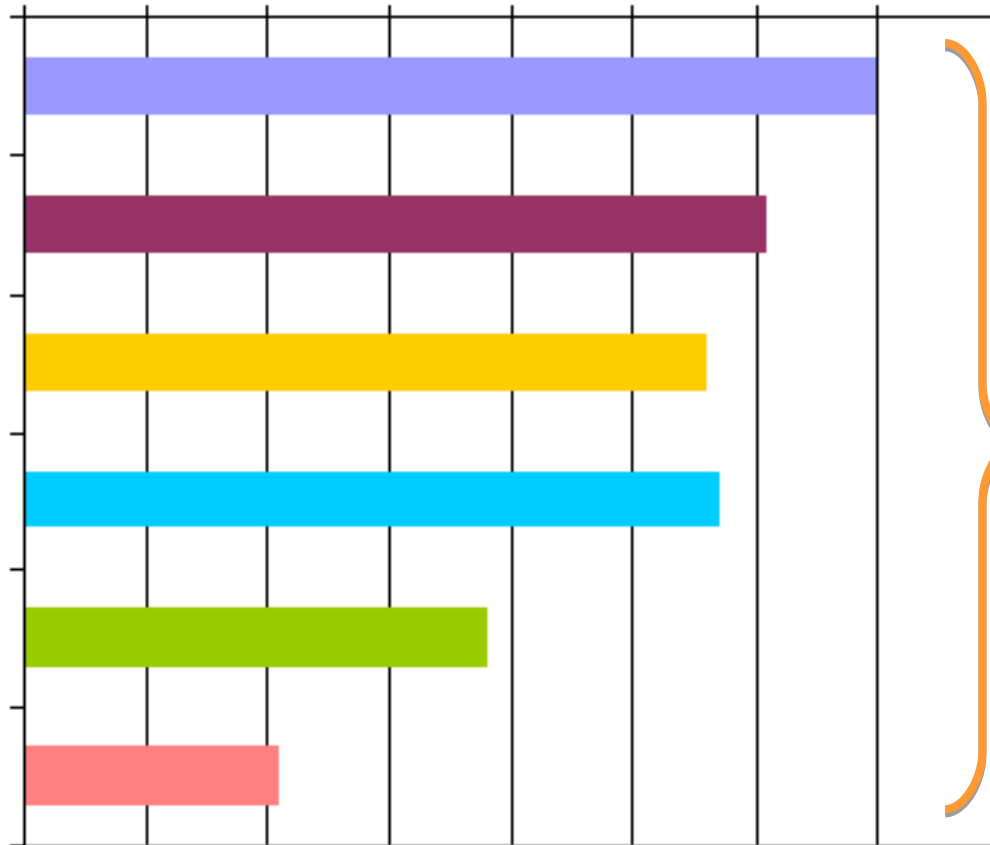
- ✓ More information about origin, place of fishing,
- ✓ More transparency
- ✓ Proposition from salesmen to discover fresh seafood : recipes and advices about preparation, accompanying vegetables...
- ✓ Fresh seafood ready to cook, boneless
- ✓ Stall more exotic and original
- ✓ Cheaper



# What consumer needs?

%d'individus  
0% 10% 20% 30% 40% 50% 60% 70% 80%

- Cutted product
- Origins' informations
- Advices from seller
- Advise for preparation
- Receipes
- Nutritional informations



**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)