SEAFOOD STUDY 2016 INSIGHTS AND OUTLOOK : **THE FRENCH & SEAFOOD**

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CONTENT

SOURCES:

Seafood Study France

Survey France 2016

Carried out by TNS on behalf of the Norwegian Seafood Council between 29th of March and 4th of April

Sample size: N = 2001

Seafood Consumer Insight

Survey tracker, yearly from 2012- 2016

Carried out by TNS on behalf of the Norwegian Seafood Council between 15th of February and 30th of February every year

Sample size 2012: N = 1000

Sample size 2013: N = 1001

Sample size 2014: N = 1023

Sample size 2015: N = 1012

Sample size 2016: N = 1012

Europanel/ NSC

Sample size: 12 000 households

INTRODUCTION

SEAFOOD FROM NORWAY
by Maria Grimstad de Perlinghi
Country Director France

Norway, with its cold, clear waters and immense stretches of untouched coastline, provides ideal conditions for fish and seafood. Along the Norwegian coast we can find more than 200 species of fish and shellfish. Every day, 37 million meals with seafood from the Norwegian waters are enjoyed by consumers around the globe.

Norway exports a rich variety of species to almost 150 different countries, and is the second largest exporter of fish and seafood in the world. It goes without saying that we have a firm grasp of export statistics, and that understanding the markets is essential to us.

At the Norwegian Seafood Council, we are also convinced that learning as much as possible about fish consumers in our different markets and sharing this knowledge with our partners is one of our main tasks.

France is an important partner for Norway as it represents the largest consumer market both for Norwegian seafood in general *and* for Norwegian salmon. In 2015 Norway's direct seafood export to France reached 650 million euros.

The range of fish and seafood available in France today is better and more diverse than ever before. France is also in many other respects considered as a very well developed seafood market. However, fish consumption has declined slightly these last years, and consumers are on average far from the consumption the health authorities would like them to have to promote a balanced diet and good health.

In order to achieve an upward trend for seafood in France, there is a need for more knowledge about fish consumption and fish consumers' attitudes and needs. Who eats fish frequently, and who does not? What types of fish are especially popular, and how do people eat them? How is the sushi segment evolving and is it still a trend? How do consumers make their choices when it comes to seafood? And last but not least, where are the opportunities? These and many other questions will be at the heart of this study.

For example, did you know that 41,8 million French consumers eat less seafood than what is recommended by the health authorities? Or that 59% of French only know how to cook between one to three different seafood dishes? Another interesting fact we will explore is that 22% of consumers have sushi at least once a month, and that newly recruited sushi consumers now come from all socio demographic categories. Could it be that sushi is about to become mainstream? And when it comes to how consumers evaluate quality in seafood - one of the most important drivers for seafood consumption - which criteria do French consumers rely on?

Fish is healthy and it can taste wonderful. As a country where seafood and fishing is part of both our ancient and modern culture and history, it is our responsibility to preserve these precious resources so that future generations can continue to enjoy tasty, healthy and sustainable seafood. Ensuring that more healthy food from the sea is served at the dinner table in France is thus the shared responsibility of everyone in the fish trade. This study aims to make a small contribution to that effort by providing more information about French fish consumers and their habits, attitudes and opinions.

Best regards,

Maria Grimstad de Perlinghi

Maria Grimstad de Perlinghi

Country Director France
Norwegian Seafood Council

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SEAFOOD CONSUMPTION

1.1. CONSUMER HABITS

LET'S START WITH THE BASICS:

What are the habits of French consumers in terms of seafood, and where might we see opportunities?

Figure 1: Food and Agriculture Organisation of the United Nations (FAO), 2016.

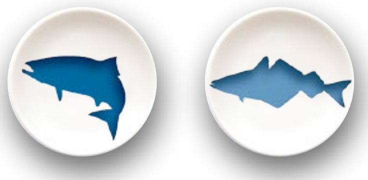
The annual seafood consumption per capita in France is 34 kilos in wet weight. This is stagnating and even declining slightly these last years.

*** FACT: 97% of French consumers eat seafood**

Figure 2: TNS Gallup/NSC, 2016 Q: Regardless of whether it is for breakfast, lunch or dinner, at home or out (All meals): How often do you eat fish/seafood?

However, 97% of French consumers do eat seafood, even though as much as 34% eat seafood at a low frequency; 2-3 times a month or less.

2 PORTIONS PER WEEK



Even though we know that health is very important to French consumers when it comes to their food, this does not seem to be a strong enough driver for them to sustain a seafood consumption that would bring them all the health benefits seafood can offer. As a matter of fact, both French and international health authorities state that we should eat 2 portions of seafood per week to get all the health benefits from seafood. If we look at the full picture when it comes to consumption frequency in France, we observe that only 37% of consumers

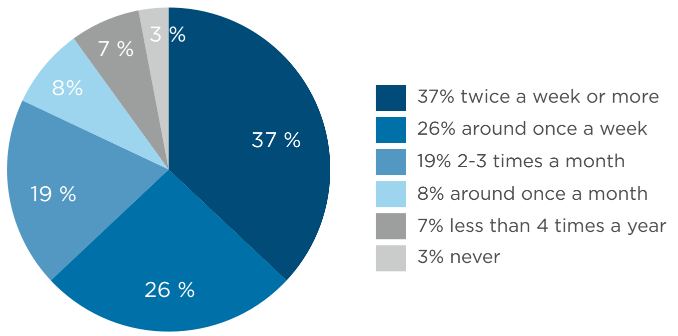


Figure 3: TNS Gallup/NSC, 2016 Q: Regardless of whether it is for breakfast, lunch or dinner, at home or out (All meals): How often do you eat fish/seafood?

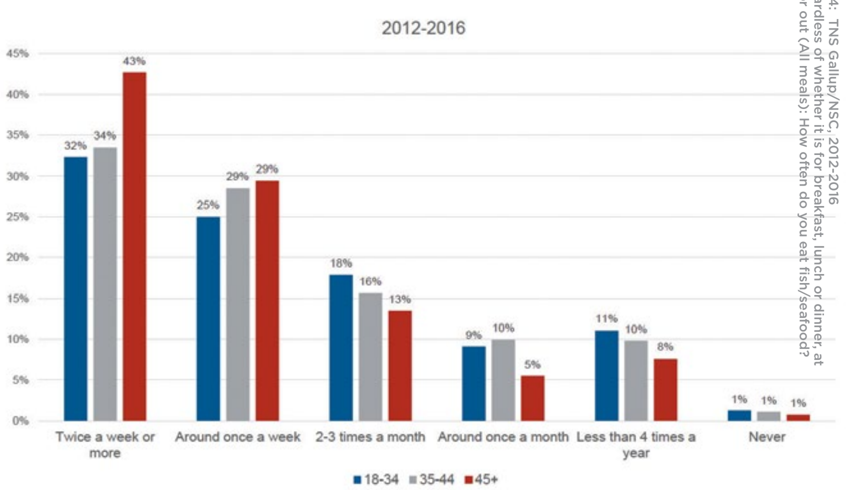


Figure 4: TNS Gallup/NSC, 2012-2016 Q: Regardless of whether it is for breakfast, lunch or dinner, at home or out (All meals): How often do you eat fish/seafood?

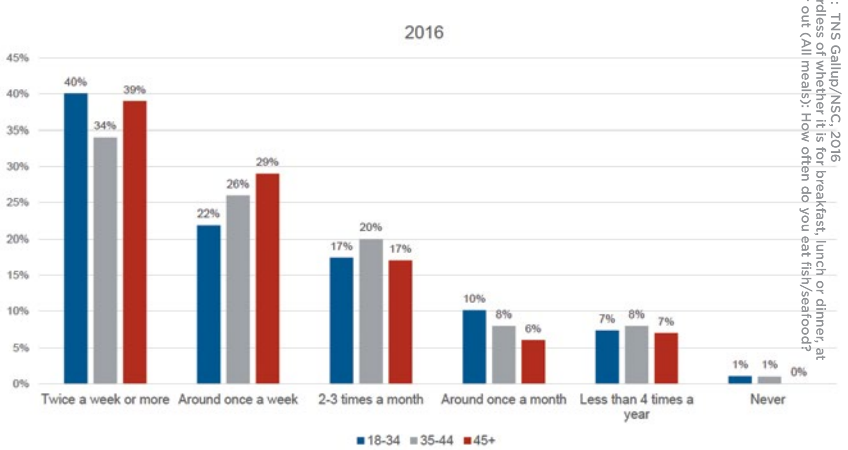


Figure 5: TNS Gallup/NSC, 2016 Q: Regardless of whether it is for breakfast, lunch or dinner, at home or out (All meals): How often do you eat fish/seafood?

actually sustain the recommended seafood intake, with a weekly consumption of two meals or more. 26% eat only once a week, and 34% even more rarely than that. 3% never eat seafood.

OLDER CONSUMERS EAT MORE OFTEN!

To begin with, it is interesting to have a look at the profile of consumers who eat seafood the most frequently. Who are they? In most markets, we would expect the older age groups to be the most frequent consumers of seafood.

This is because they generally have lesser budgetary restraints, better cooking skills, more time for cooking and care more about a healthy diet. The aggregated numbers from the five last years in France show exactly this trend: the older you are, the more seafood you eat. Among those over 45 years, 43% have the recommended seafood intake of two portions a week, whereas only 32% of those between 18 and 34 eat seafood at this rate.

YOUNGER CONSUMERS ARE EATING MORE SEAFOOD!

However, if we look at 2016 alone, we observe that younger consumers are just as strongly represented among high frequent seafood consumers as the 45+ group. 9% more consumers between 18 and 34 eat seafood twice a week or more in 2016 compared to 2015. Why is that? Are young consumers becoming more interested in their health, or is the seafood consumption being helped by the sushi trend? Or is it because they like it more, and it's more available than before? We will come back to this later in the study.

*** FACT: 41,8 million eat seafood less than twice a week**

Still, the truth is that as much as 63% of French consumers, or 41,6 million people DON'T eat the recommended amount of seafood. It is probably utopian to try and convince all French consumers to up their consumption to two meals a week, especially when we think of those who have very low consumption frequency, and maybe don't even like fish.

• What if we gave ourselves a more realistic growth perspective for the French market?

• What if we tried to influence consumers who are most easily won over to an increased seafood consumption?

• What if we could inspire those who eat seafood once a week to eat seafood twice?

• What if we consider the fact that 26%, or 17,1 million consumers in France, eat seafood once a week? Given that they actually eat seafood at a quite high frequency, it should be reasonable to deduce that they DO like fish, they DO know how to prepare it and recognize the health benefits from seafood consumption.

France is often considered as a well developed market when it comes to seafood, there is no doubt that the potential is still strong. Even though the seafood consumption has been stagnating, and there has been quite some «bad buzz» around fish and seafood in France the latest years, seafood is undoubtedly the protein source that French could eat more of, both from a health, environment and taste perspective.

Also, when comparing France to some of its European neighbours,

4 OUT OF 10 FRENCH EAT SEAFOOD TWICE A WEEK OR MORE

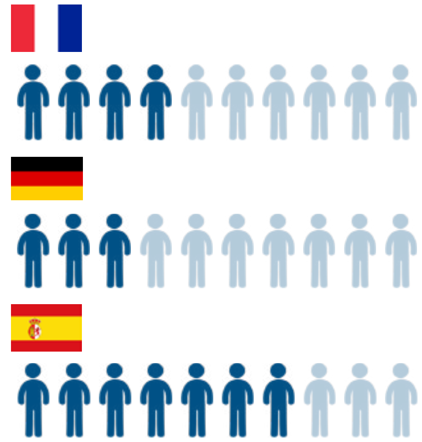


Figure 6: TNS Gallup/NSC, 2016 Q: Regardless of whether it is for breakfast, lunch or dinner, at home or out (All meals): How often do you eat fish/seafood?

French consumers only have an average seafood consumption. While almost four out of ten consumers (37%) in France eat seafood twice a week or more, only three out of ten Germans (30%) have the same consumption frequency, whereas seven out of ten (72%) Spaniards eat seafood at this rate.

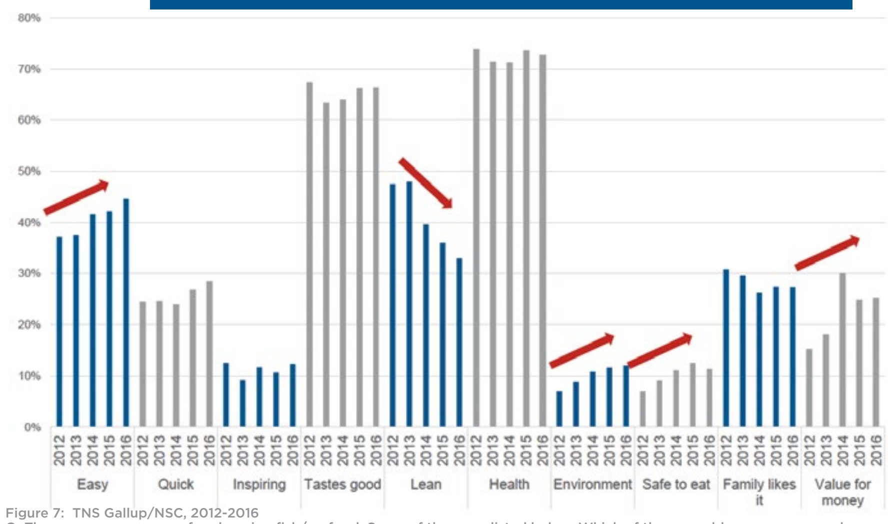


Figure 7: TNS Gallup/NSC, 2012-2016 Q: There are many reasons for choosing fish/seafood. Some of them are listed below. Which of these would you say are good reasons for choosing fish/seafood for yourself? Choose up to 5.

French consumers give many good reasons to eat seafood. Taste is the second most important reason for eating seafood, only beaten by health. As we can see in the chart, over 40% of consumers think that seafood is easy to prepare. The fact that seafood is easy to prepare is also a growing «good reason to choose seafood», together with environmental and safety aspects of seafood. When we look at this picture, it could give us a few ideas in order to search for solutions to inspire consumers to eat more fish.

TRUE POTENTIAL AMONG THOSE WHO EAT ONCE A WEEK

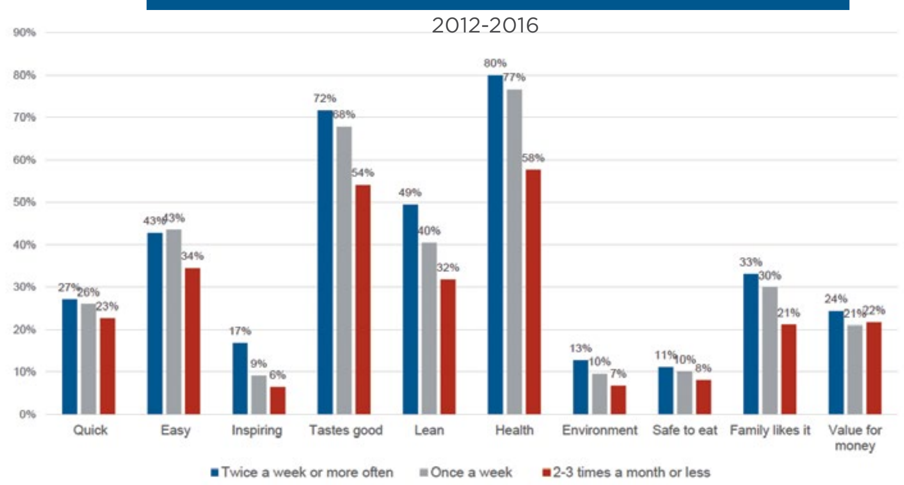
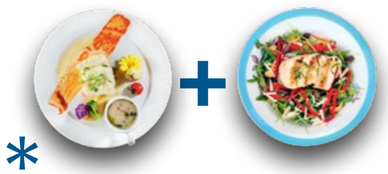


Figure 8: TNS Gallup/NSC, 2012-2016
Q: There are many reasons for choosing fish/seafood. Some of them are listed below. Which of these would you say are good reasons for choosing fish/seafood for yourself? Choose up to 5.

For instance, If we look at the aggregated numbers between 2012 and 2016, we clearly see that those who eat the most seafood also give the most good reasons to eat seafood. However, it is interesting to observe that those who eat only once a week have almost as many strong reasons for eating seafood as those who eat twice a week! They do think that seafood tastes very good, that it is good for their health, and that it is easy to prepare. This means that the motivating elements are almost as many for these consumers as for those who have the recommended seafood intake.



POTENTIAL: 18% GROWTH

So, let's go back to the hypothesis that we could increase the French seafood market. If we could inspire those who eat seafood once a week to up their consumption to two portions a week, we could gain a market of approximately 400 000 tons of seafood, or a 18% increase in market size!

WHY DON'T THEY EAT MORE?

So why don't they eat more? We will try to give you some possible answers through the different chapters in this study. In our last chapter, we will also look very concretely at the opportunities and make recommendations for growth.

1.2. CONSUMER PREFERENCES

First, let's take a few steps back and have a look at what consumers like when it comes to different proteins, and more specifically when it comes to seafood.

HOW DO FRENCH CONSUMERS RATE DIFFERENT PROTEINS?

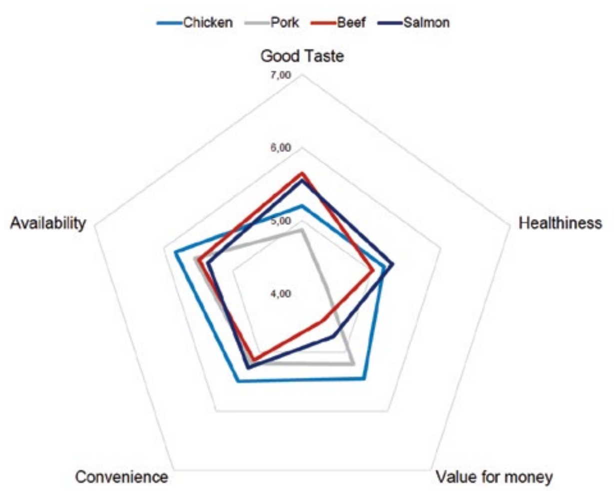


Figure 9: TNS Gallup/NSC, 2016
Q: How would you rate each of the following meat category in terms of five criteria: "good taste", "healthiness", "value for money", "convenience" and "availability" in a scale of 1 (extremely poor) to 7 (superior)?

When we ask consumers to rate different types of protein in terms of taste, healthiness, value for money, convenience and availability, chicken is the uncontested champion on three of these factors. It is perceived as the protein which has the best availability and which offers the best convenience and value for money. Salmon and beef, on the other hand, are rated as the proteins with the best taste. All over, salmon is also doing better than beef, firstly because it is considered as being the healthiest protein, and secondly because it offers better value for money than beef. Finally, pork is the least valued protein among consumers; it does not outperform the other proteins on any of the criteria.

FOOD: WHAT IS IMPORTANT FOR CONSUMERS?

Figure 10: TNS Gallup/NSC, 2016
Q: it is important for me that thefood I eat (on a typical day)...

In this study, we have tried to map out what French consumers consider as important when choosing their everyday food. We have gathered different factors into what we call «food motives».

As we can see from this overview, the majority of French consumers state that sensorial qualities are very important for their food choices, meaning that they value taste, texture, smell and appearance. Almost just as many think that health is important, meaning that they particularly consider nutritional content and health benefits from their food.

This is quite interesting because this gives us a perspective on what is important for different segments and in different situations. Therefore, the food motives will appear a few times throughout the study as a way to learn more about French seafood consumers.

WHAT IS IMPORTANT FOR CONSUMERS?

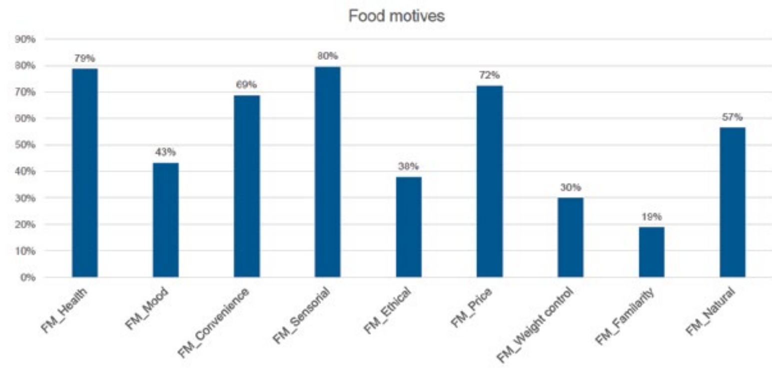


Figure 11: TNS Gallup/NSC, 2016
Q: it is important for me that the food I eat (on a typical day)..

FOOD MOTIVES:

SENSORIAL: taste, texture, smell, appearance
HEALTH: vitamins/minerals, healthy, nutritious, protein, good for skin/hair/nails, rich in fiber
PRICE: reasonably priced, cheap, value for money
CONVENIENCE: easy/quick to prepare, readily available, available close to home/work
NATURAL: no additives, natural ingredients, no artificial ingredients
ETHICAL: from a country I accept, identifiable country or origin, environmental friendly
MOOD: stress handling, cope with life, relaxing, invigorating, stimulating, makes me happy
WEIGHT CONTROL: low in calories, helps control weight, low fat
FAMILIARITY: similar to the food I usually eat, food I know, food I ate when I was young

DIFFERENT SEAFOOD CONSUMPTION, DIFFERENT FOOD MOTIVES

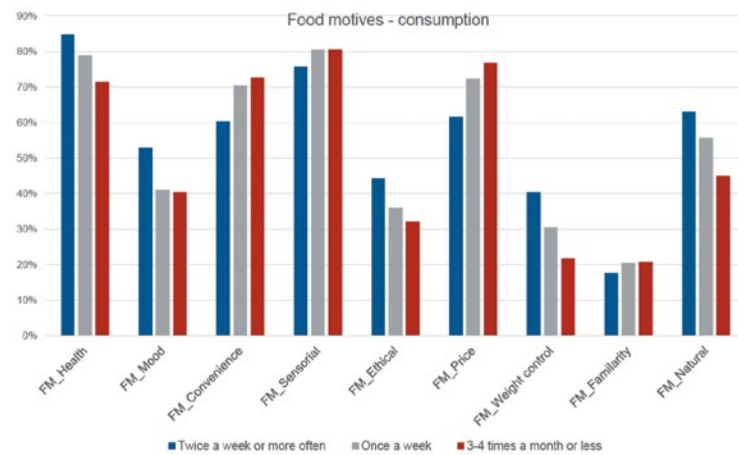


Figure 12: TNS Gallup/NSC, 2016
Q: it is important for me that the food I eat (on a typical day)/Regardless of whether it is for breakfast, lunch or dinner at home or out, how often do you eat fish/seafood?

When we look at seafood consumption frequency and food motives, we also notice that there are some factors that are considerably more important for consumers who eat seafood often than for those who eat less. For instance, health aspects, naturalness, mood/how the food makes them feel, ethics and weight control are significantly more important for consumers who eat seafood twice a week than for others. On the other hand, price aspects and convenience are much less important for high-frequency consumers, whereas low-frequency consumers value those aspects much more.

CONSUMPTION OF DIFFERENT PROTEINS

We have also had a look at the consumption frequency of different proteins. Compared to other main sources of protein, seafood is the one that is the least frequently consumed as a main meal, except for lamb. For instance, 62% of French consumers eat poultry once a week or more as a main meal, 57% eat pork and 56% eat beef at this frequency. In comparison, only 50% eat seafood once a week or more as a main meal. What is interesting, is that health authorities all over the world recommend to eat at least 2 seafood meals a week, whereas there are generally no specific recommendations for the other proteins; the problem is rather that we eat too much of them.

WHO IS EATING WHAT?

Now, let's look at some of the specificities among the consumers of different proteins. Those who eat chicken most frequently (more than once a week) are women and families with children. For beef and pork, the picture is more dominated by men, but families with children remain strongly represented among high-frequency consumers.

PREFERRED SPECIES

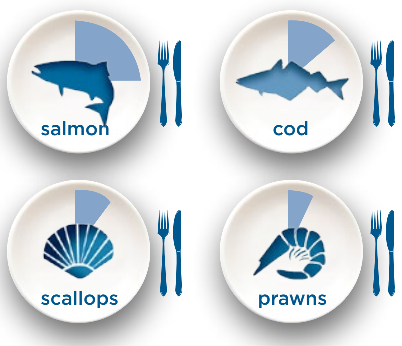


Figure 13: TNS Gallup/NSC, 2016
Q: What type of fish/seafood do you normally prefer for your weekday/weekend/restaurant dinner?

CONSUMPTION OF DIFFERENT PROTEINS

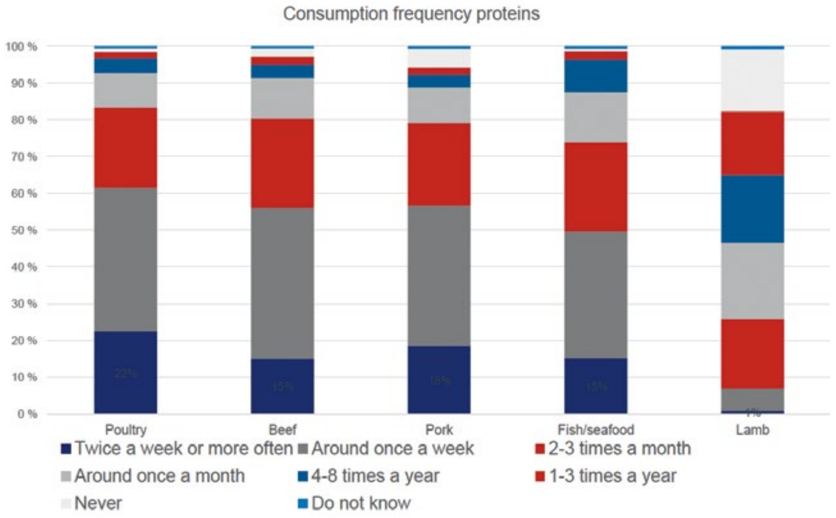


Figure 14: TNS Gallup/NSC, 2016
Q: How often do you eat the following types of proteins?

WHO IS EATING WHAT?

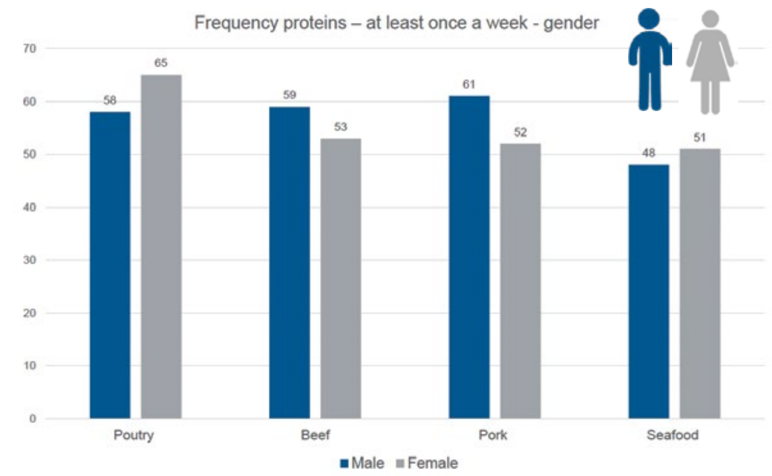


Figure 15: TNS Gallup/NSC, 2016
Q: How often do you eat the following types of proteins?

FAMILIES WITH CHILDREN EAT PROTEINS MORE FREQUENTLY

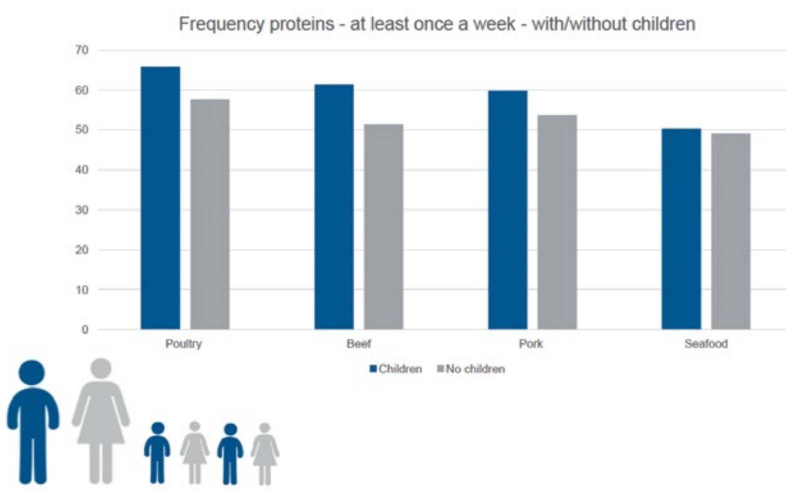


Figure 16: TNS Gallup/NSC, 2016
Q: How often do you eat the following types of proteins?

When it comes to seafood more specifically, what are the preferences of French consumers? This overview shows which species they prefer, whether it's for lunch or dinner, weekdays or weekends. Salmon and cod are the very clear favorites, followed by scallops and prawns.

WHAT DO THEY REALLY EAT?

1. TUNA
2. SALMON
3. COD
4. MUSSELS

Figure 17: Europanel, 2016

If we look at the actual consumption, the preference is somewhat different from what people really eat. If we look at what people buy for consumption at home, tuna is the most sold specie, followed by salmon, cod and mussels.

TOP SPECIES AT HOME

However, the chart on the right gives us a better picture. Indeed, tuna is the most bought specie in volume. However, 97% of the volume sold is prepared or canned tuna, and not fresh fish. Salmon, the second most sold specie, shows the specificity of being bought in many different ways; in terms of volume, fresh and smoked are the most popular, but salmon is also bought frozen and prepared. For cod, mussels and prawns we see quite some variation in the way the products are bought. Whereas also cod is bought mainly as fresh or frozen, 90% of mussels are sold fresh, and 81% of prawns are sold prepared; probably peeled and «ready-to-eat».

TOP SPECIES AT HOME

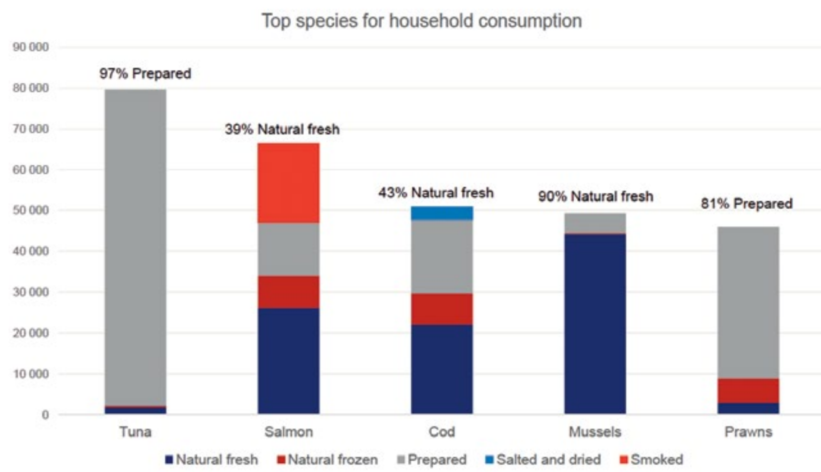
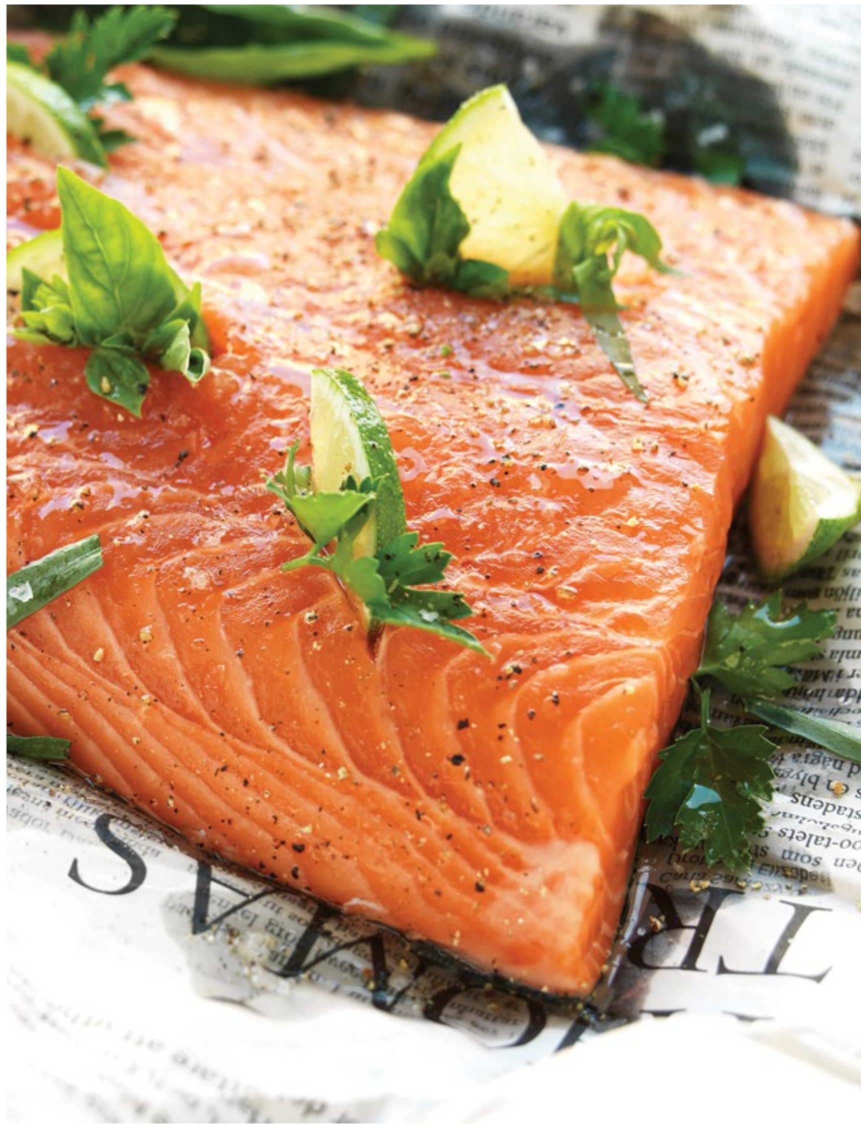


Figure 18: Europanel, 2016



1.3. CHILDREN

WHY?

1. Too expensive
2. Do not like the taste
3. Afraid of bones
4. It's not appetizing
5. Do not like the smell

ONLY 32% OF FRENCH CHILDREN EAT THE RECOMMENDED AMOUNT OF FISH EVERY WEEK.

But why don't children eat more seafood? It is quite surprising to observe that the single most important reason that children don't eat more fish is that the parents think it's too expensive. All the following reasons are linked to the senses; parents think that the children don't like the taste, that they are afraid of bones, that it's not appetizing and that they don't like the smell. The fact the children eat little fish seems to have little correlation with the parents' perceived ability to cook child friendly recipes (only 5% say that recipes are a problem). However, it is quite probable that the parents project their own reticence towards fish on their children. It is a commonplace misconception that children don't like fish. However, we know that fish is more popular among families with children than with other households.

CONSUMPTION FREQUENCY FOR CHILDREN

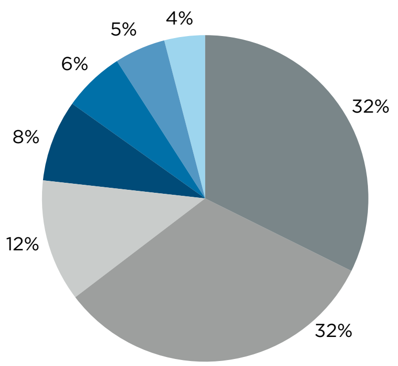


Figure 19: TNS Gallup/NSC, 2016
Q: Regardless of whether it is for breafast, lunch or dinner, at home or out (All meals): How often do your children (living at home) eat fish/seafood?

* INSIGHT:

Only 32% of French children eat the recommended amount of fish every week

35%
of French children eat fish less than once a week

As of today, we have limited knowledge about children and seafood. Through this study, we have tried to have a specific look at the attitudes towards seafood among the future generations of consumers.

* FACT:

CHILDREN LOVE SALMON!

NO SURPRISE:

FISH FINGERS ARE CHILDREN'S FAVORITE

Figure 20: TNS Gallup/NSC, 2016
Q: What is your childrens favorite fish dish?

Children eat fish mainly at home. Even though legislation imposes a certain frequency of fish in French school canteens, parents still state that most of their children's fish meals are eaten at home (62%). 14% of parents seem to trust that the children get their main nutritional needs in seafood through the meals served at school or in kindergarten. 20% seem to think that the childrens' fish meals are equally consumed at home and at school/kindergarten.

CHILDREN LOVE SALMON

We already know that salmon is the preferred specie among French consumers. Is the situation the same for children? In fact, the preferred species among children are the same as among adults; salmon is the uncontested favorite of the children's plates, followed by cod, prawns and tuna.

FISH FINGERS ARE CHILDRENS'S FAVORITE DISH!

Salmon may very well be the favorite specie among children, but it does not have to mean that their favorite dish is with salmon. In fact, when asked about their children's favorite fish dishes, fish fingers are clearly the most popular dish. As one of the consumers replied to the open question: **«Fish fingers... Sorry!».**

CHILDREN LIKE FISH!

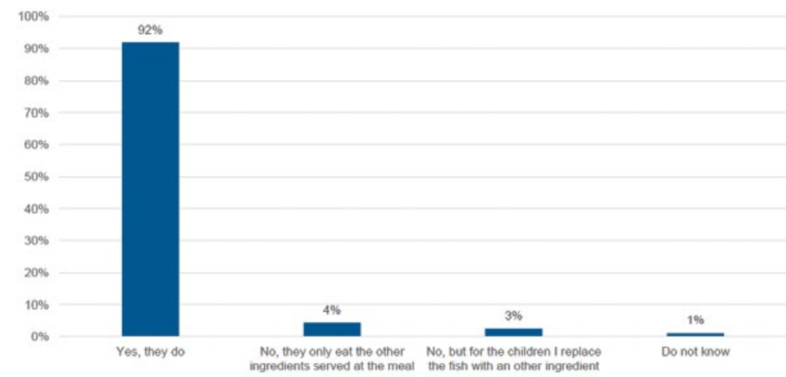


Figure 21: TNS Gallup/NSC, 2016
Q: When serving fish as a meal at home, do the children also eat fish?

W HY DON'T THEY EAT MORE FISH?

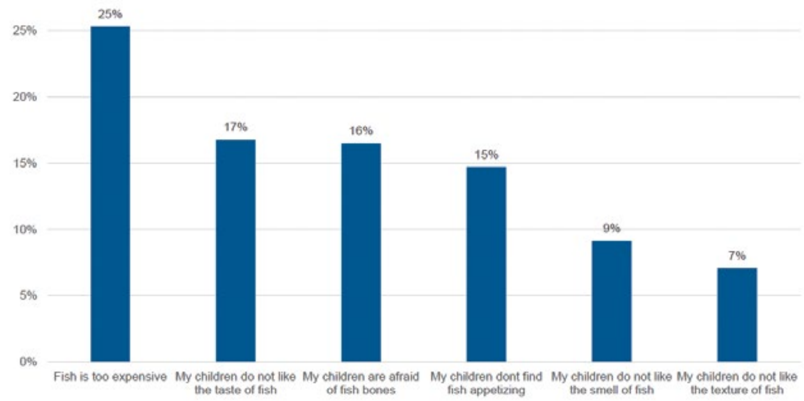


Figure 22: TNS Gallup/NSC, 2016
Q: Why do your children not eat fish more often?

WHERE DO CHILDREN EAT FISH?

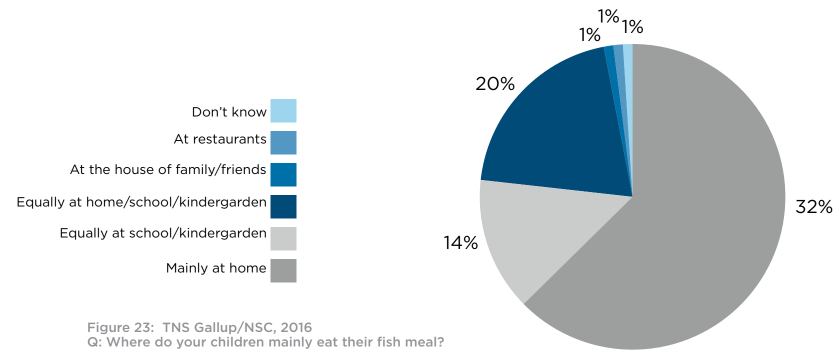


Figure 23: TNS Gallup/NSC, 2016
Q: Where do your children mainly eat their fish meal?

PREFERRED SPECIES AMONG CHILDREN

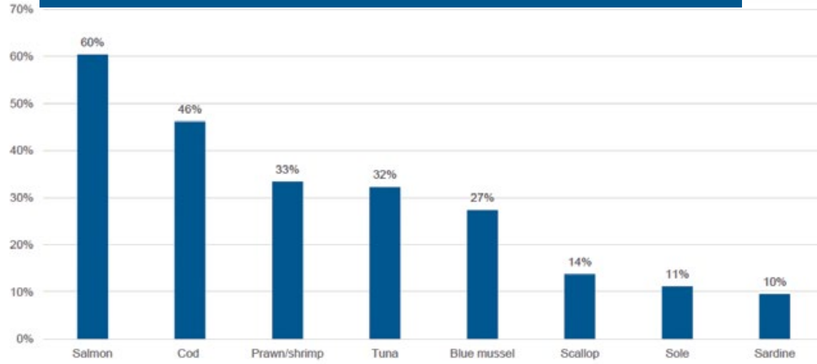


Figure 24: TNS Gallup/NSC, 2012-2016
Q: Which specie do your children prefer?

FRENCH CHILDREN'S FAVORITE FISH DISHES

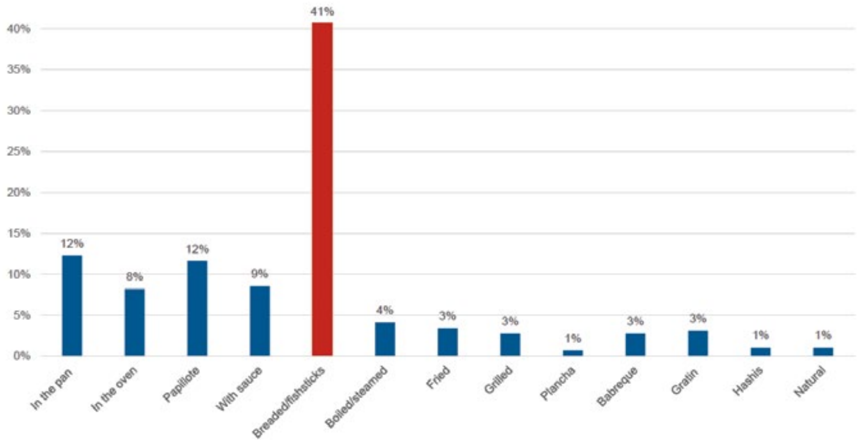


Figure 25: TNS Gallup/NSC, 2016,
Q: What is your childrens favorite fish dish?

1.4.
OUT OF HOME

Now, let's take a closer look at what is happening with the consumption of seafood out of home.

CONSUMPTION FREQUENCY OUT OF HOME

When we observe the development over the five last years, it seems like young French consumers eat outside at an increasing rate. This is particularly visible among those under 35, where 44% eat out more than once a month, but also among those between 35 and 44. Those over 45 are eating out at a stable rate.

DECLINE IN HOME CONSUMPTION

When we observe the seafood consumption among households in France, the tendency is towards a slight decline. This is probably quite strongly linked to the price increase in seafood these last years. But it is also possible that this decline has something to do with the fact that people are eating outside at an increasing rate.

*

FACT:

49% of French consumers eat out at least once a month

only 1/3 have seafood

Figure 26: TNS Gallup/NSC, 2016
Q: How often do you eat dinner at a restaurant, café or similar place outside your home in total and how often do you eat fish/seafood?

Still, the fact is that even though about half of French consumers eat out at least once a month, only one third actually have seafood.

However, high-frequency seafood consumers eat more often at restaurants.

CONSUMPTION FREQUENCY OUT OF HOME

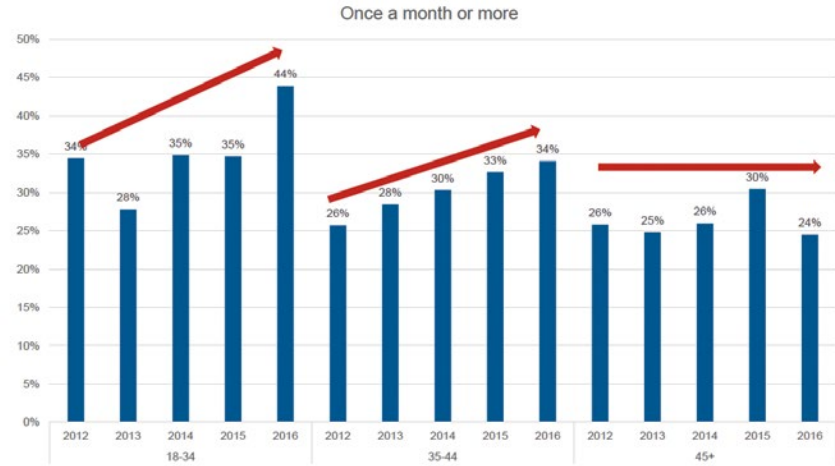


Figure 27: TNS Gallup/NSC, 2012-2016
Q: How often do you eat fish/seafood for dinner at a restaurant, café or similar place outside your home?

DECLINE IN HOME CONSUMPTION

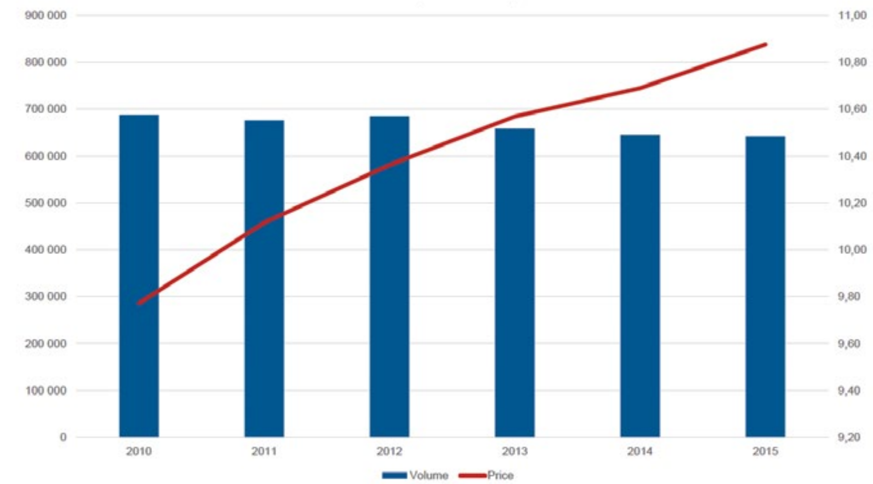


Figure 28: Europanel, 2012-2016

EAT AT A RESTAURANT ONCE A MONTH OR MORE OFTEN

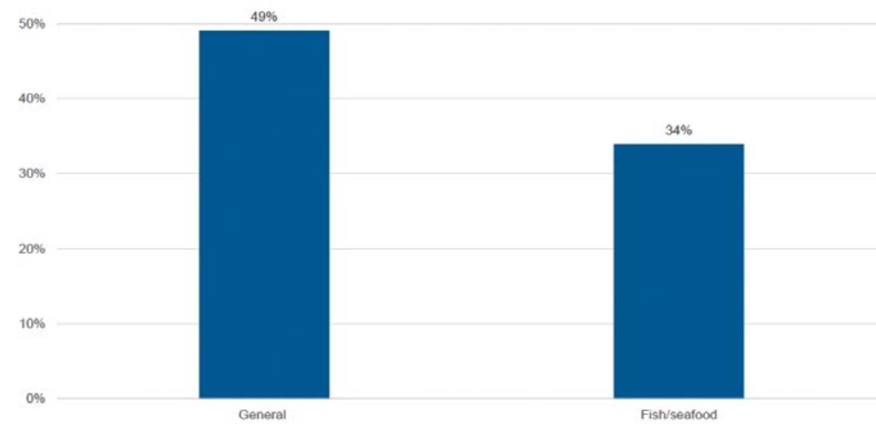


Figure 29: TNS Gallup/NSC, 2016
Q: How often do you eat dinner at a restaurant, café or a similar place outside your home in total and how often do you eat fish/seafood?

allowing them to eat outside more frequently than other consumers.

Meanwhile, high-frequency seafood consumers eat more often at restaurants. They eat outside at least 2-3 times a month. This is very coherent with the overall profile of high-frequency seafood consumers; they have rather higher education and higher income, probably allowing them to eat outside more frequently than other consumers.

PEOPLE EAT MORE OUT IN PARIS

We also observe an over-representation of people eating at restaurants – both in general and seafood - in the Paris region. This is a tendency one would expect, given that there is a greater concentration of both higher seafood consumption and higher incomes in this region. The fact that people live in smaller houses and apartments than elsewhere in France is probably also influencing people to eat more outside than inviting people to their homes.

PREFERRED SPECIES AT RESTAURANTS
1. SALMON
2. SCALLOP
3. SOLE
4. COD

Figure 30: TNS Gallup/NSC, 2016
Q: Regardless of season, what type of fish/seafood do you usually prefer when having fish/seafood at a restaurant, café or similar?

When eating at a restaurant, the number one favorite among French consumers is still salmon. Cod, the other favorite for consumption at home, is also popular at restaurants, but is here beaten by both scallops and sole, which are probably perceived as more exclusive species that people know less about preparing at home, and therefore like to have at restaurants.

HIGH-FREQUENCY SEAFOOD CONSUMERS EAT MORE AT RESTAURANTS

Figure 31: TNS Gallup/NSC, 2016
Q: How often do you eat dinner at a restaurant, café or a similar place outside your home in total and how often do you eat fish/seafood? / Regardless of whether it is for breakfast, lunch or dinner, at home or out (All meals): How often do you eat fish/seafood?

PEOPOLE EAT MORE OUT IN PARIS

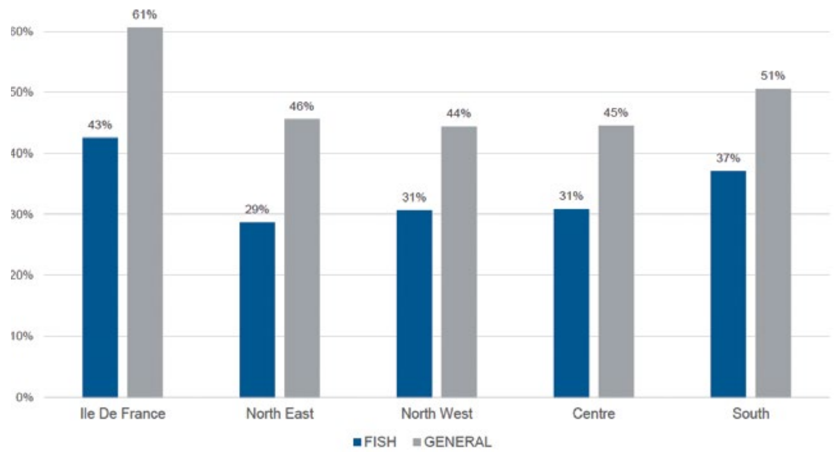


Figure 32: TNS Gallup/NSC, 2016
Q: How often do you eat fish/seafood for dinner at a restaurant, café or similar place outside your home and how often do you eat fish/seafood?

/02.

SHOPPING

After looking at the French seafood consumption, we have been able to establish how much seafood the French eat, at which frequency and learn more about their preferences among different proteins, but also among seafood. Let's now take a dive into how French consumers really behave when it comes to seafood shopping. In this chapter, we will learn more about their buying habits, what they buy, when they buy, where they buy, and last but not least; why? In the second part of this chapter about shopping, we will also examine consumers' attitudes towards the online trend for grocery shopping, and especially attitudes towards buying seafood through this channel.

2.1. BUYING HABITS

WHERE THE FRENCH BUY SEAFOOD

In this chart, we have an overview of where respondents buy some of the most common species. Clearly, seafood in France is generally bought at super- and hypermarkets, independently of species. However, some species are more often bought at certain point of sales.

Smoked salmon is overwhelmingly often bought at super- and hyper-markets. There is a very rich and differentiated offer of smoked salmon in supermarkets, and this product presentation is much less available at other points of sales than fresh fish and seafood.

Tuna is also much more frequently bought in super- and hypermarkets; this is probably linked to the fact that tuna is mostly sold canned, not fresh. Also, we observe that the more common the specie, the more it is bought in self-service, and the less common the specie, the more it is bought at the hyper- or supermarket fishmonger, or at the traditional fishmonger.

HIGH-FREQUENCY CONSUMERS BUY MORE AT SPECIALIST STORES

When we look at consumption frequency of seafood among the respondents, we can see that this has an influence on where they choose to buy. In this chart, where consumers have been divided into high-, medium- and low-frequency seafood consumers, we see that the more seafood you eat, the more you buy at the fishmonger, whether it is the fishmonger in a super- or hypermarket, or the traditional, independent fishmonger (39% for high-frequency consumers vs. only 29% among low-frequency consumers). Inversely, consumers who eat seafood rarely, buy much more at self service shelves in super- and hypermarkets (55% vs. 40% for the high-frequency consumers).

WHERE THE FRENCH BUY SEAFOOD

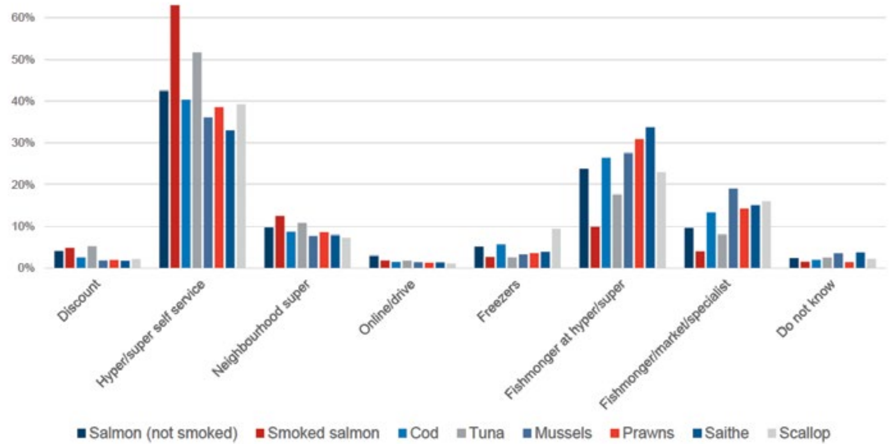


Figure 33: TNS Gallup/NSC, 2016
Q: Where do you normally buy the different species?

HIGH-FREQUENCY CONSUMER BUY MORE AT SPECIALIST STORES

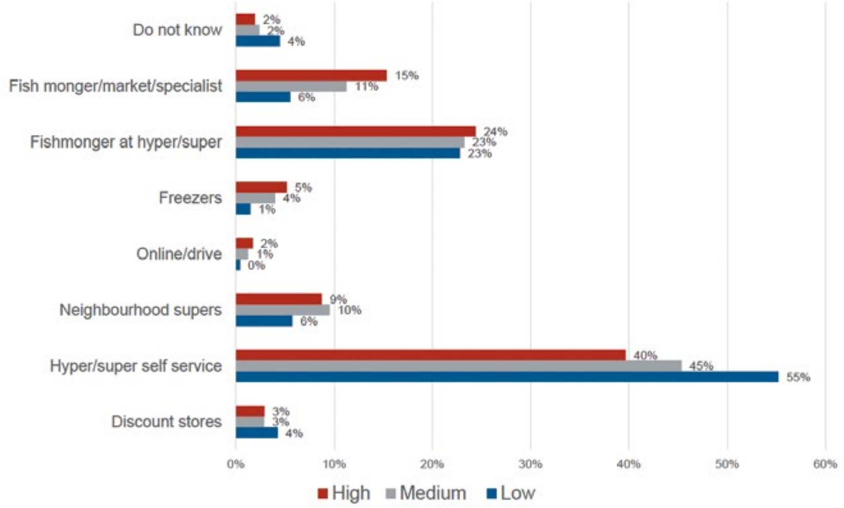


Figure 34: TNS Gallup/NSC, 2016
Q: Where do you normally buy the different species? / How often do you eat seafood?

CONSUMERS WITH BETTER COOKING SKILLS BUY MORE AT SPECIALIZED STORES

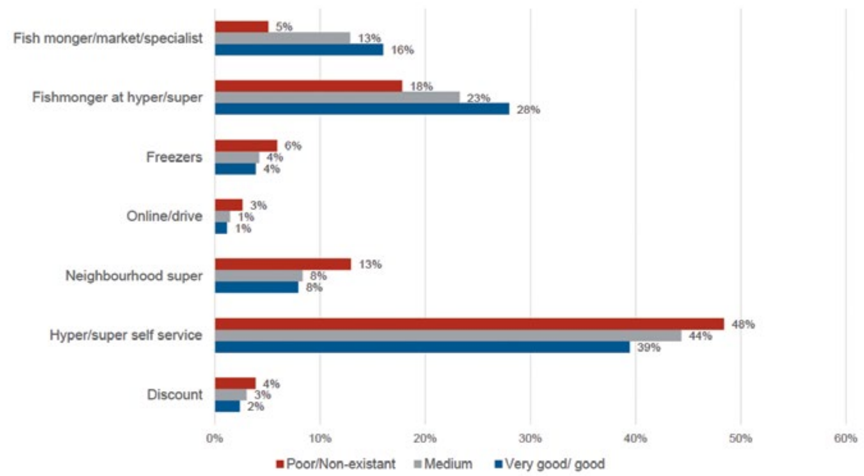


Figure 35: TNS Gallup/NSC, 2016
Q: Where do you normally buy the different species? / How do you rate your cooking skills?

CONSUMERS WITH BETTER COOKING SKILLS BUY MORE AT SPECIALIZED STORES

There is also a second factor that quite strongly influences where consumers buy seafood, namely their cooking skills. In this overview, we find that respondents with very poor cooking skills more frequently buy at the self-service counter in super- and hypermarkets; 39% for those with poor cooking skills vs. 48% for those with good/very good cooking skills. On the opposite, respondents with good/very good cooking skills buy much more often at the fishmonger, both the traditional and at the super- and hypermarket. From these findings, we can probably deduce that the consumers who eat seafood the most often and have the best cooking skills probably feel more competent to make their own choice at the fish counter, and wish to buy from a qualified seafood professional who can respond to their questions, give them tips and prepare the fish the way they want.

FOOD MOTIVES INFLUENCE WHERE YOU BUY

Let's look at how the food motives influence the place of purchase of seafood. Clearly, consumers who buy seafood at discount stores and self service in supermarkets are much more concerned by price aspects of their food than consumers who buy elsewhere. On the other hand, consumers who are the most concerned about the naturalness of their food tend to buy seafood much more at the fishmonger, food market or specialist store. This could allow us to conclude that we generally find much more demanding and competent consumers at the traditional fresh fish counter, and that these consumers have quite other needs than those who buy primarily at the self service.

FOOD MOTIVES INFLUENCE WHERE YOU BUY

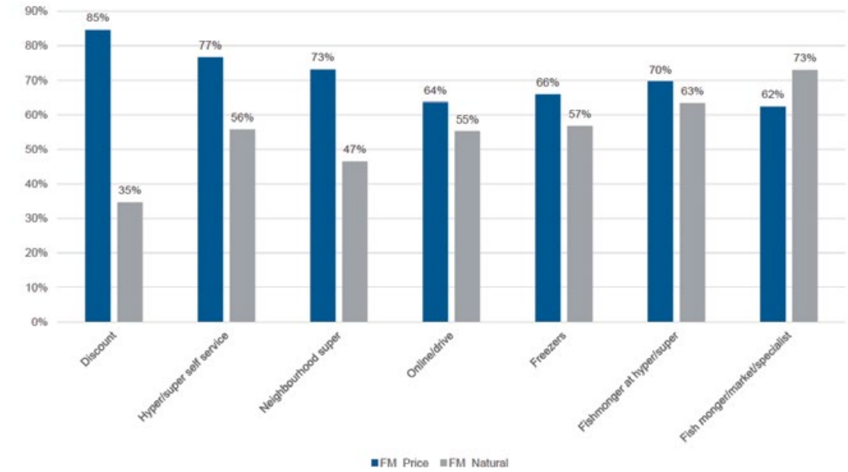


Figure 36: TNS Gallup/NSC, 2016
Q: Where do you normally buy the different species?/ It is important for me that the food I eat (on a typical day)..

HOW DO CONSUMERS BUY THEIR FISH?

Now, we will look into how consumers buy their fish. Do they buy it fresh or frozen? Are they buying prepacked? Why would they, or rather, why would they not?

> *
> NO SURPRISE:
> French consumers buy fresh salmon and cod in fillets

France is undoubtedly a market for fresh seafood. Also, as we have observed earlier, salmon and cod are the uncontested champions of French consumers' plates. It is therefore not surprising these widely available species are those the respondents buy most. Also, we observe that they are mostly bought in some form of fillet, loin or portion. The common denominator for these are that they are readily available and need little preparation, this is completely coherent with the reasons the French state for buying seafood in general; the reasons that are trending are convenience, quick and easy!*

*ref. chart: *many good reasons*, ch.1 p.11-NSC2016©

REASONS FOR BUYING FILLETS/LOINS OF COD/SALMON

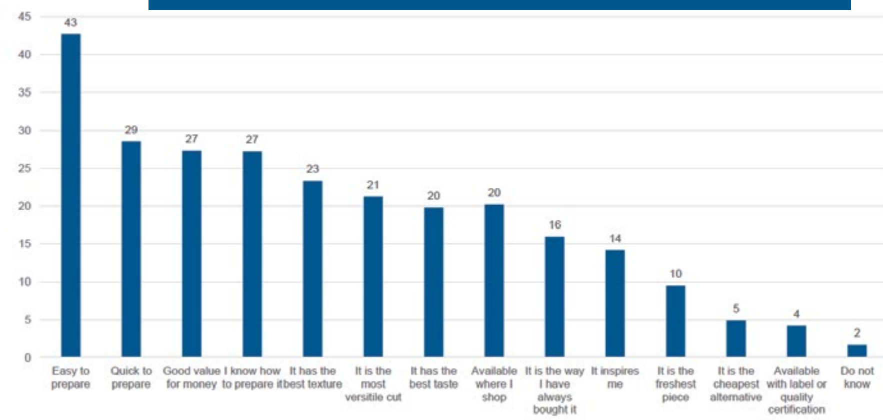


Figure 37: TNS Gallup/NSC, 2016
Q: You have indicated that you usually buy fresh salmon/cod as fillet/loins. What are your most important resons for buing this cut?

DIFFERENT SPECIES ARE BOUGHT IN DIFFERENT CUTS

In this chart, we also see that there are some disparities in how consumers buy cod and salmon. This is linked to how they are presented in the main sales channels; whereas salmon is mostly available as fillets, cutlets and pre-packed, cod is more often presented as fillet or loins.

Regarding the different cuts, the 45+ group buys more cutlets than the oth-er age groups. This is probably linked to the fact that cutlets were among the first cuts available for fresh salmon and cod, and this age group has taken on the habit to buy it this way. When we ask them why they buy it, they also state that it is because it's the way they know how to prepare it. When it comes to cod, the 45+ group buys loins more often than younger age groups. This is also the case for two-people households without children.

WHOLE FISH IS NOT FOR THE FRENCH. OR...?

Only 5% buy whole cod, and 9% buy whole salmon. This does not at all seam to be influenced by socio-demographic factors, even though one might expect that the 45+ group would be more heavily represented here. However, an interesting finding is that cooking skills seem to have a strong impact on the kind of fish cut you buy. Those who buy whole fish rate themselves as much more competent in the kitchen than other consumers. They probably know how to handle the whole fish and make use of different parts of the fish. Therefore, it is also logical that they have a perception of whole fish as being better value for money.

We will come back to the impact of cooking skills on the seafood consumption in our next chapter. To sum up, the main reason for buying fillets, whether it is for salmon or cod, is that it is so easy and quick to prepare. However, whichever cut consumers chose, they always choose it because they think this cut is the easiest to prepare. The only exception for this is whole fish, which consumers buy because they feel it gives the best value for money.

DIFFERENT SPECIES ARE BOUGHT IN DIFFERENT CUTS

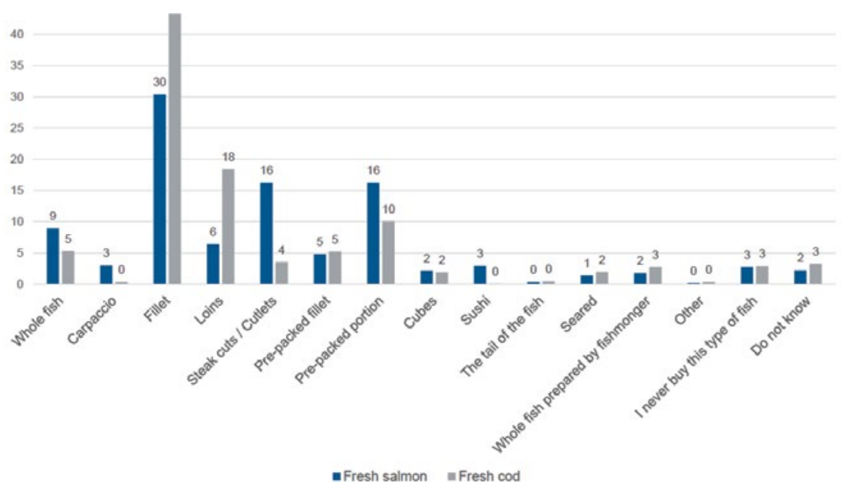


Figure 38: TNS Gallup/NSC, 2016
Q: How do you usually buy the different species listed below (for home consumption)?

WHOLE FISH IS NOT FOR THE FRENCH. OR...?

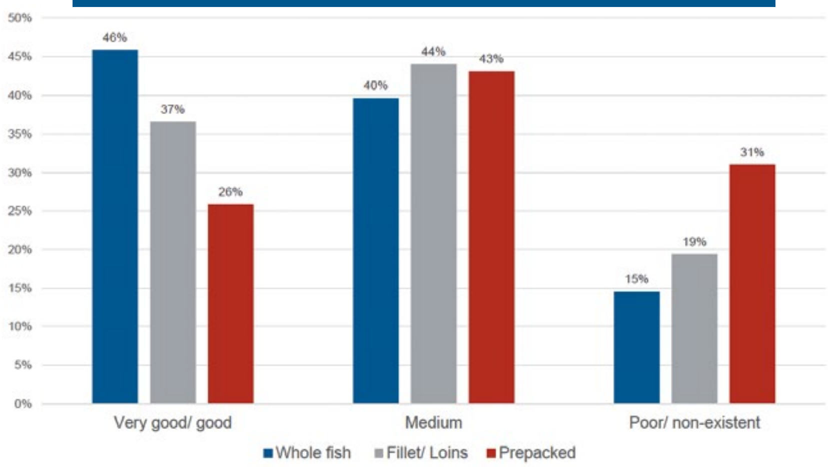


Figure 39: TNS Gallup/NSC, 2016
Q: Where do you normally buy the different species?/How do you rate your cooking skills? / How do you usually buy the different species listed below (for home consumption)?

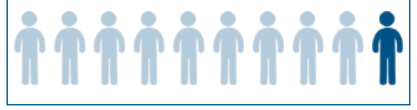
Figure 40: TNS Gallup/NSC, 2016
Q: How do you usually buy the different sspecies listed below (for home consumtion)? / You have indicated that you usually buy fresh salmon as fillet/loins. What are your most important reasons for buing this cut?

FRESH AND FROZEN FISH

Although France is a market which is dominated by fresh seafood, and especially fillet cuts, many consumers also choose frozen seafood. However, reasons for buying frozen seafood are quite different from the reasons for buying fresh seafood. While concerns about price, ease of preparation and availability are very important reasons for buying frozen, consumers emphasize quality, taste, healthiness and appearance when buying fresh seafood.

*
FACT:

9 out of 10 don't buy prepacked



Considering our findings about where and how consumers buy seafood, it is also useful to look at how they perceive prepacked seafood from the self service counters. One fact to start with: nine out of ten French consumers don't buy prepacked seafood.

However, prepacked seafood is often considered as the key to growing the seafood market. If we look at the most common species, salmon and cod, 79 % of salmon consumers never buy prepacked salmon, whereas 85 % of cod consumers never buy prepacked cod. The reasons why consumers don't buy the fish prepacked, whether it's salmon or cod, are very similar.

PREPACKED; WHY ARE CONSUMERS SO RELUCTANT?

Why are consumers so reluctant to prepacked seafood? The main reasons why people don't buy prepacked cod and salmon are exactly the same. The number one reason is that it's not the way consumers are used to buying fish – and maybe it is simply a too new concept for them to have taken on the habit of buying it? Secondly, consumers don't seem to find it inspiring, and thirdly, there is an important lack of trust when it comes to freshness and quality of the prepacked fish.

FRESH AND FROZEN FISH

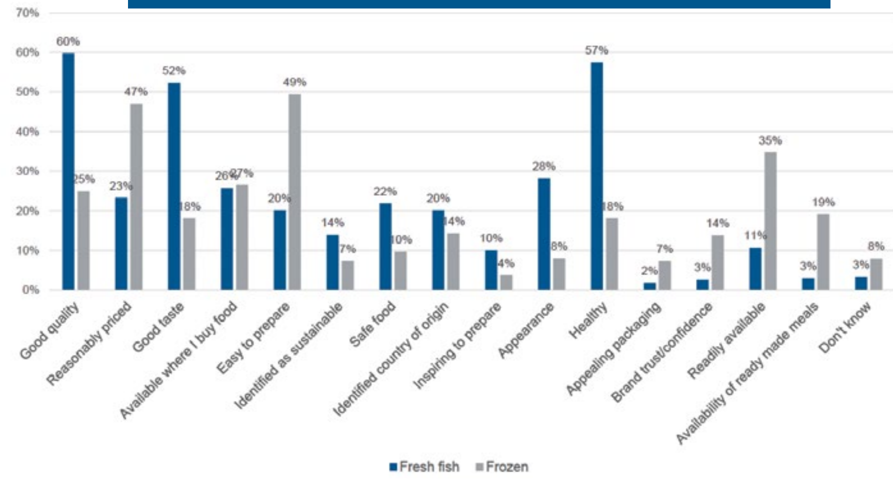


Figure 41: TNS Gallup/NSC, 2016
Q: There are many reasons for buying frozen/fresh fish. In your opinion, which of the statments listed below are good reasons for doing this?

RESASONS FOR NOT BUYING PREPACKED

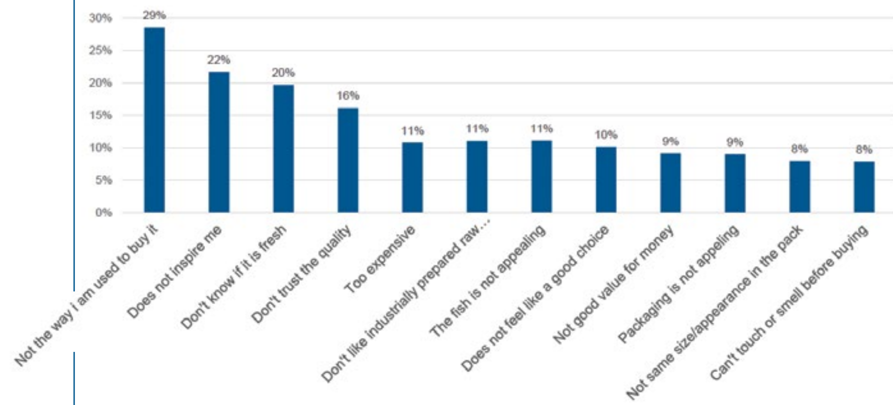


Figure 42: TNS Gallup/NSC, 2016
Q: You have indicated that you do not usually buy prepacked fillet or prepacked steaks. Why do you not buy fresh prepacked cod/salmon?

1. Not the way I'm used to buy it
2. Does not inspire me
3. Don't know if it's fresh
4. Don't trust the quality
5. Does not look appealing

Figure 43: TNS Gallup/NSC, 2016
Q: You have indicated that you do not usually buy prepacked fillet or prepacked steaks. Why do you not buy fresh prepacked cod/salmon?

WHY SOME CONSUMERS CHOOSE PREPACKED

On the positive side, we observe that 21% of salmon consumers buy prepacked salmon, and 15% of cod consumers buy prepacked cod. These consumers have understood that the prepacked fish is very easy and quick to prepare, and hence offer the same advantages as other fresh fillet cuts. However, they differ from other consumers, because they make this choice specifically because these product presentations are available where they shop. One could therefore conclude that convenience is even more important among consumer groups who choose prepacked seafood than among others.

*** INSIGHT:**

prepacked is
a limited success

Meanwhile, this gives us some food for thought. Right now, it seems like prepacked is a limited success. If we look at the sales to French house-holds, we also observe that there is hardly any development in the sales of prepacked seafood. In the last chapter of this study, we will try to have a closer look at what could be done to remove some of the barriers that make consumers reluctant to prepacked seafood.

FRENCH CONSUMERS' IDEAL SEAFOOD IS...

A little bit for fun, we thought we should ask French consumers what their ideal seafood would be. We asked a hypothetical question that removed all barriers linked to availability, price, and type of cut in order to see which specie consumers would prefer most: «*Imagine that all kinds of fish and seafood were available at your preferred shop, at a reasonable price, and in the cuts/pieces you like. If you could choose freely, which fish or seafood specie would you buy?*»

One could expect French consumers to choose very exclusive and/or expensive species when asked this question. They could have benefited from the occasion to wish for scallops, lobster, sole or other species that they like a lot, but more rarely eat. However, it seems like French consumers are very happy with what they actually buy and eat in their everyday life, because salmon still comes out as the specie most of the respondents choose (25 %). Of course, this also has to do with the fact that salmon is among the most widespread and known species in France, but it is still interesting to observe that it has such a strong preference even when barriers for competing species have been removed. Thisresult is however coherent with what we know consumers think about salmon. When we ask them about their reasons to buy salmon, they clearly state that salmon tastes good, in front of the health benefits it offers. Next, the fact that salmon is easy and quick to prepare seems to count a lot for consumers, together with the perception of salmon as the ideal fish for the family.

WHY SOME CONSUMERS CHOOSE PREPACKED

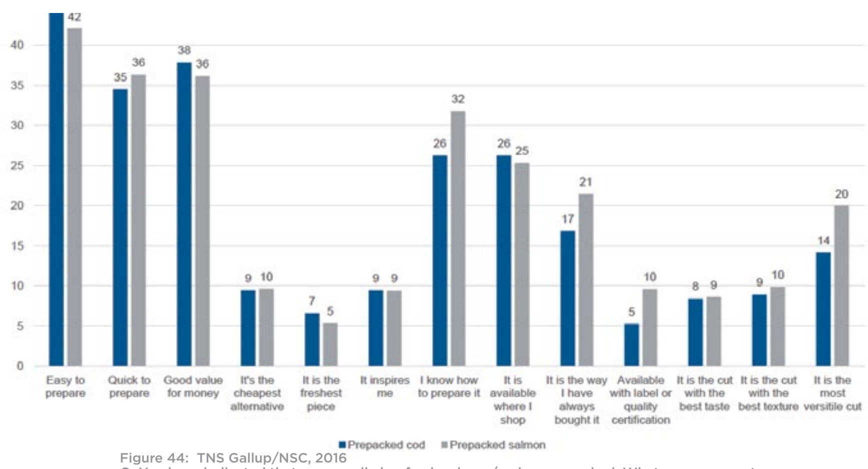


Figure 44: TNS Gallup/NSC, 2016
Q: You have indicated that you usually buyfresh salmon/cod as prepacked. What are your most important reasons for buying this cut?

TOP 5
REASONS TO BUY SALMON

1. Tastes good
2. Health benefits
3. Easy to prepare
4. Quick to prepare
5. The family likes it

Figure 45: TNS Gallup/NSC, 2016
Q: There are many good reasons for choosing salmon. Some of them listed below. Which of these would you say are good reasons for choosing salmon for yourself?

2.2. ONLINE SHOPPING

LIKELIHOOD OF BUYING GROCERIES ONLINE

Online and drive grocery shopping is trending in France. But what are really consumers attitudes towards this new way of shopping food? Why do they shop online, and more importantly, why not? And if they use online shopping services; what will they buy? Does the online and drive trend affect the seafood market?

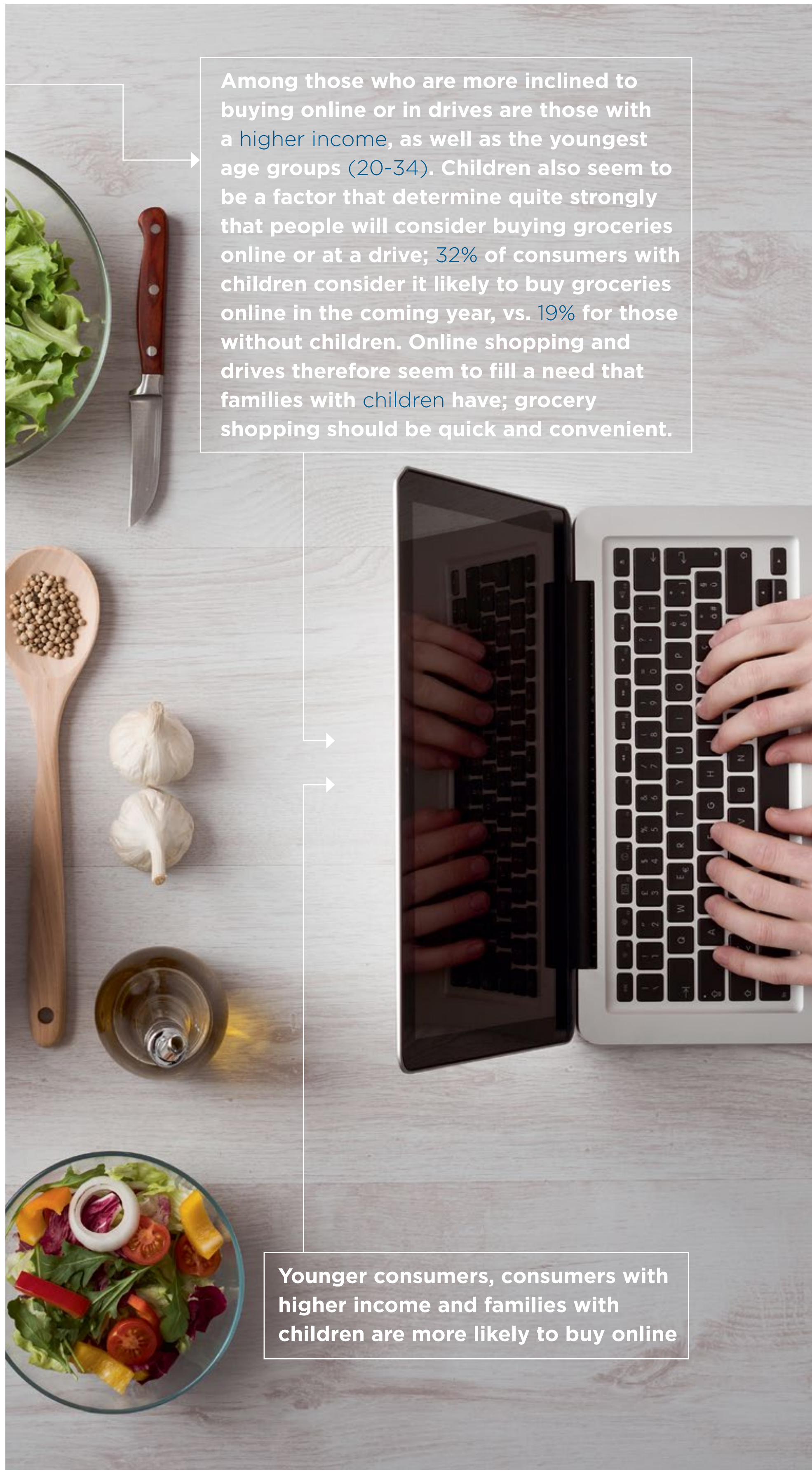
Are the French embracing grocery shopping in online stores and drives?

*** FACT:**

62% are reluctant to buying groceries online

Figure 46: TNS Gallup/NSC, 2016
Q: How likely are you to buy groceries online or in a drive in the next 12 months?

To start with, we asked respondents to rate the likelihood of buying groceries online the next twelve months. The result shows that 62% of French consumers rate it as unlikely that they will buy online. On the other hand, 10% state that they are already buying groceries online, and 25% say that it is likely that they will buy online during the next twelve months.



*

FACT:

only 8% of French consumers will buy seafood online or in a drive

When it comes to groceries in general, it seems like the online option is about to make a real place for itself among French consumers. However, when it comes to seafood, the reality is quite different: Only 8% of French consumers would consider buying fish/seafood online or in drives the coming year. The youngest age group (20-34) is more likely to buy seafood online than other age groups. This may result from two factors:

• Firstly, the fact that they are born in the internet age and may not present as strong barriers towards buying online as older consumers.

• Secondly, many of these consumers are probably in an early stage of establishing a family as well as a stable working career, and try to optimize how they spend their time.

Online grocery shopping seems to be one of the solutions they look towards to unite an active work life and family. Their seafood consumption or will they start buying seafood through other channels, such as traditional fishmongers?

*

INSIGHT:

the barrier for buying online is much stronger for **SEAFOOD** than for groceries in general

YOUNGER CONSUMERS ARE MORE LIKELY TO BUY GROCERIES ONLINE

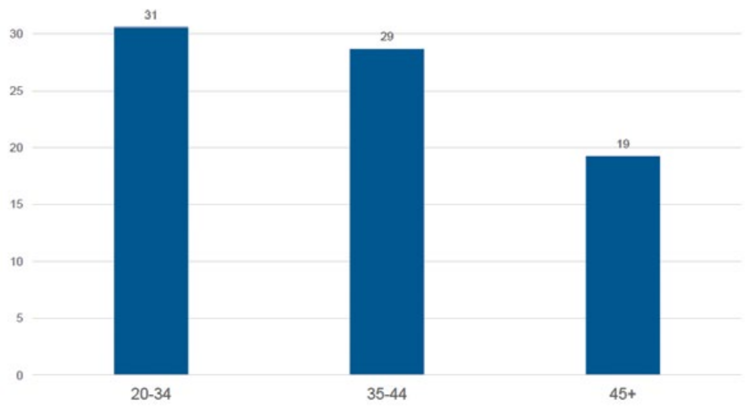


Figure 47: TNS Gallup/NSC, 2016
Q: How likely are you to buy groceries online or in a drive in the next 12 months?

LIKELIHOOD OF BUYING GROCERIES ONLINE

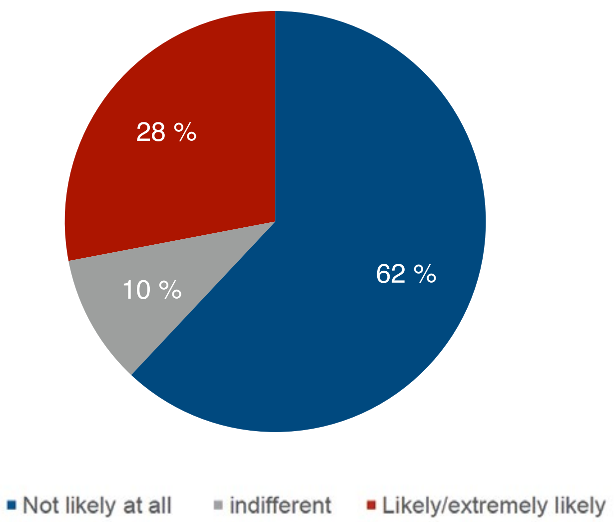


Figure 48: TNS Gallup/NSC, 2016
Q: How likely are you to buy groceries online or in a drive in the next 12 months?

HOUSEHOLDS WITH CHILDREN ARE MORE LIKELY TO BUY GROCERIES ONLINE

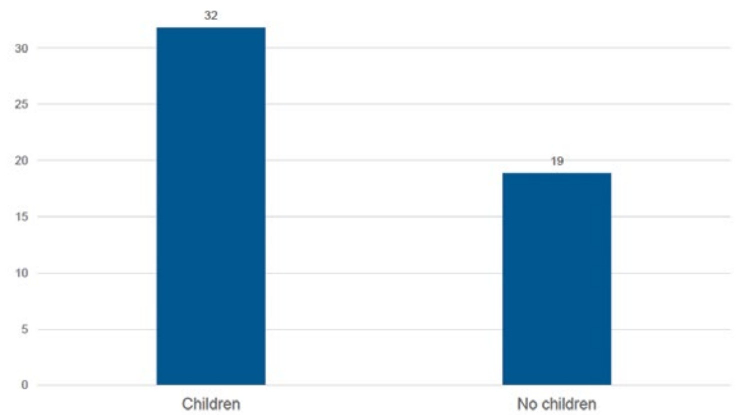


Figure 49: TNS Gallup/NSC, 2016
Q: How likely are you to buy groceries online or in a drive in the next 12 months?

WHY WON'T CONSUMERS BUY SEAFOOD ONLINE?

When we ask consumers specifically why they won't buy seafood online, the answer is not surprising: The inability to see the product for themselves is stated as the single most important reason for not buying seafood online. Consumers clearly wish to see the product for themselves and make their own choice. This all over result could be summed up as a general lack of trust when it comes to online grocery shopping.

When given an open question regarding why they will not buy seafood online, consumers have shared their concerns.

„I'm afraid it won't be fresh and that the cold chain might be broken. Also, the choice is made by the merchant and not by myself."

* Respondent quote

LIKELIHOOD OF BUYING ONLINE INCREASES WITH INCOME

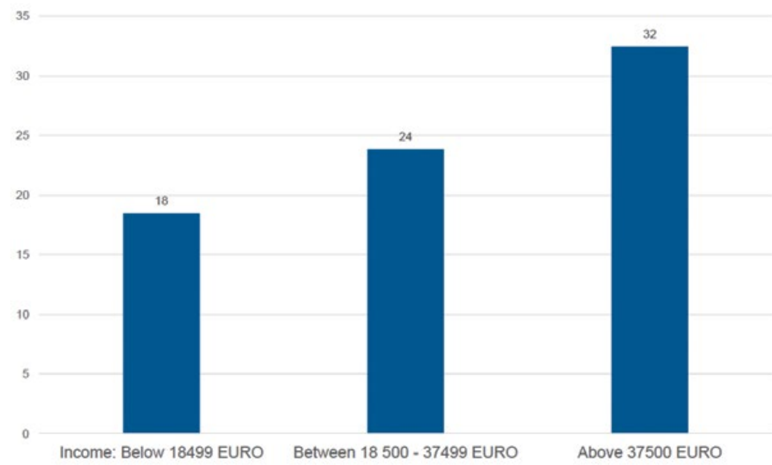


Figure 50: TNS Gallup/NSC, 2016
Q: How likely are you to buy groceries online or in a drive in the next 12 months?

ONLY 8% WILL BUY SEAFOOD ONLINE

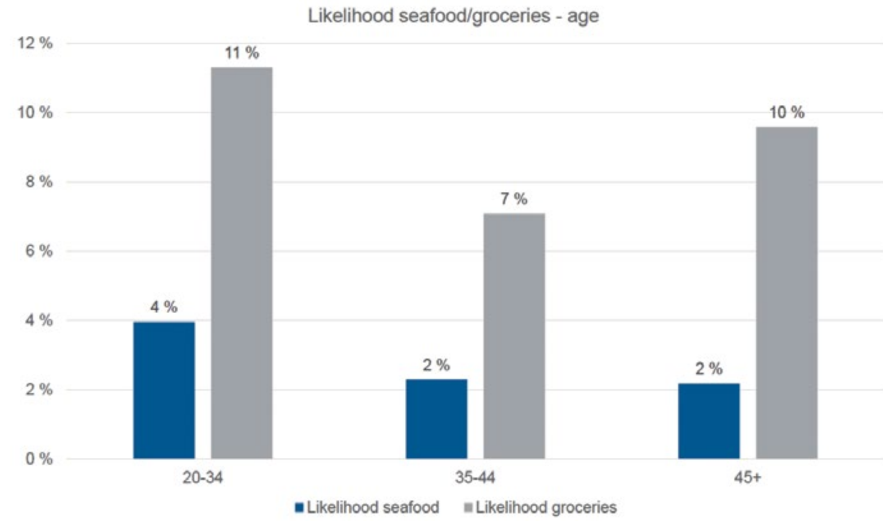


Figure 51: TNS Gallup/NSC, 2016
Q: How likely are you to buy groceries online or in a drive in the next 12 months?

„I appreciate the contact with my fishmonger, I like to see the product for myself and choose the piece I like.“

* Respondent quote

These quotes seem to emphasize quite well the barriers for seafood in the online channel. It seems like the emergence of this buying channel might turn out as a true menace to the seafood consumption. Since we know that the ability to see the product and choose the piece they want are important factors for French seafood consumers, it is not surprising that they are holding back on the seafood buying online.

What we still don't know is what they do if they don't buy seafood online. Will they simply cut back on their seafood consumption or will they start buying seafood through other channels, such as traditional fishmongers?

However, there are probably a few initiatives that could be taken with seafood in the online segment in order to increase trust and give seafood a chance to grow through these channels.

We will come back to this in the last chapter of the study.

ONLY 8% WILL BUY SEAFOOD ONLINE

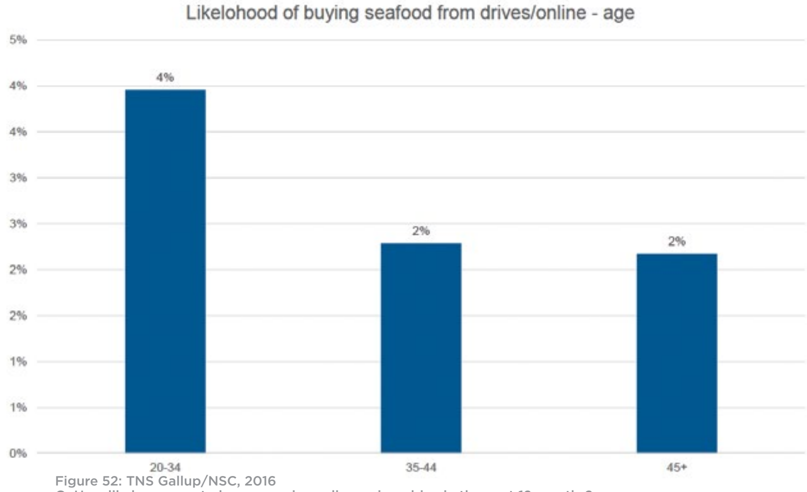


Figure 52: TNS Gallup/NSC, 2016
Q: How likely are you to buy groceries online or in a drive in the next 12 months?

WHY WON'T CONSUMERS BUY SEAFOOD ONLINE?

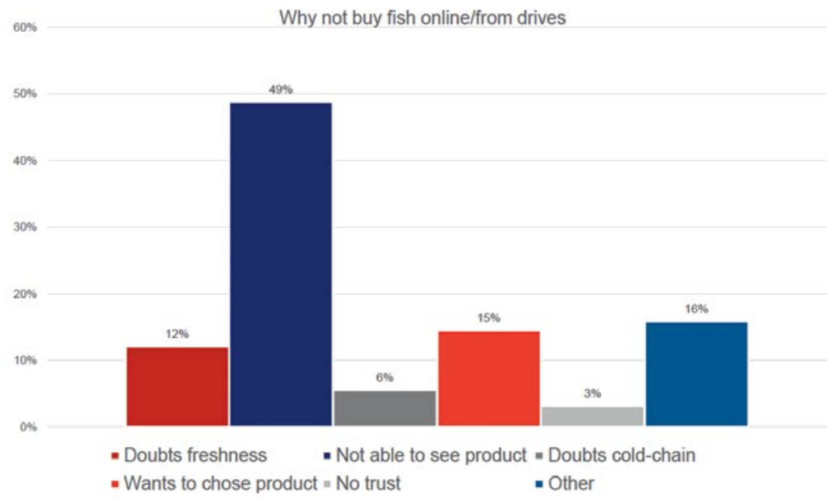
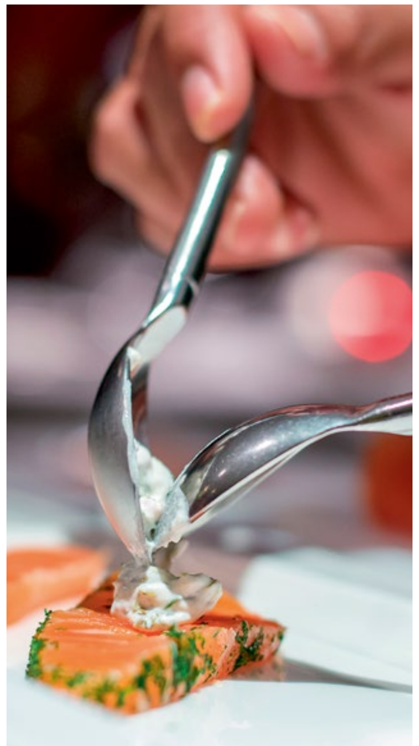


Figure 53: TNS Gallup/NSC, 2016
Q: You have indicated that you are not likely to buy fish/seafood online or drive in the next 12 months.
Why won't you?

/03.

COOKING & EATING

When launching this study, we were quite curious to know more about how the French cook and eat their seafood. In this chapter, we will first have a look at the cooking competences of French consumers, and how they influence their seafood consumption. Secondly, we will learn some more about the recipes they use and prefer, and, at last, we will explore how the sushi trend is evolving in France. Who are the sushi consumers, how often and where do they eat sushi?



3.1. COOKING SKILLS

From before, we had a reasonably good idea about both consumption, preference and buying habits. But what about the cooking skills among French consumers? We would expect a quite high level of competence in the cradle of gastronomy. But how are the French really managing in the kitchen? And what is their repertoire when it comes to seafood?

COOKING SKILLS IN GENERAL - AND FOR FISH & SEAFOOD

In this part of the study, we asked respondents to assess their cooking skills for food in general and for seafood in particular. As we can see in the chart at the right, more consumers think they have good to very good cooking skills when it comes to food in general (40%) than for seafood (33%). Naturally, this means that more consumers qualify their cooking skills as «poor» or «non-existent» when it comes to seafood (23%), compared to food in general (15%). Seafood hence stands out like a cooking category of its own where it is not enough to have basic cooking skills, but where you need specific competences in order to succeed.

COOKING SKILLS IN GENERAL - AND FOR FISH & SEAFOOD

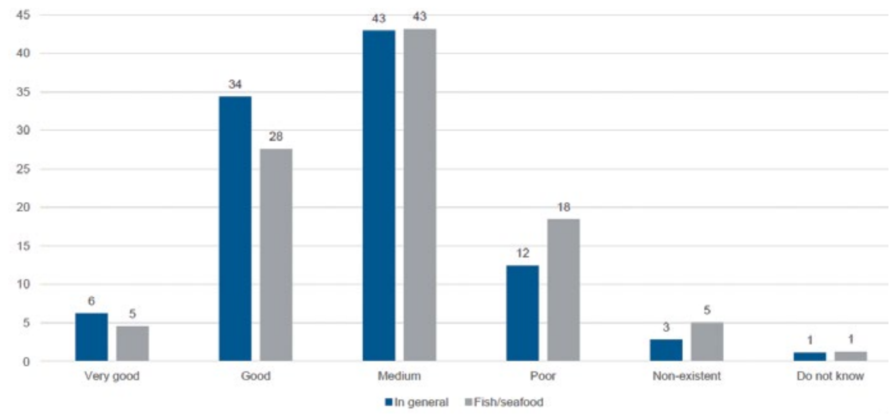


Figure 54: TNS Gallup/NSC, 2016
Q: How do you assess your cooking skills in general and for fish/seafood?

COOKING SKILLS INCREASE WITH SEAFOOD CONSUMPTION

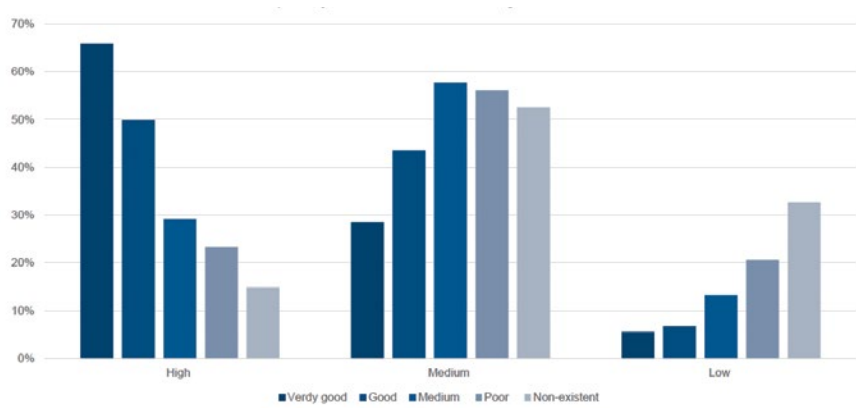


Figure 55: TNS Gallup/NSC, 2016
Q: How do you assess your cooking skills in general and for fish/seafood?/ How often do you eat fish/ seafood?

COOKING SKILLS INCREASE WITH SEAFOOD CONSUMPTION

When we cross information about cooking skills and seafood consumption among the respondents, we observe that consumers with high frequency in their seafood consumption also more frequently evaluate their cooking skills to be good or very good. As we can see in this chart, this relationship is strong; as we would expect, better cooking skills go with high seafood consumption, and inversely, poor cooking skills go together with low seafood consumption.

COOKING SKILLS INFLUENCE HOW CONSUMERS BUY FISH

Cooking skills also influence how consumers buy seafood. Consumers with strong cooking skills buy whole fish much more frequently than others, whereas those with poor cooking skills buy prepacked rather than other cuts. Those with average cooking skills seem to buy a little bit of everything; whole fish, fillets and prepacked.

DIFFERENCES BETWEEN MEN AND WOMEN

Gender also has impact on how consumers assess their cooking skills. 87% of French women asses their cooking skills as medium to very good, whereas men seem to think they are a little bit less competent in the kitchen (80% rate themselves as medium to very good). We see the same tendency with fish, where 78% of women feel medium to very good in cooking fish, versus only 72% for men. Even though these differences are significant, they may not be as big as one would expect. It seems like French men have taken a liking to cooking, and maybe they cook as much as women now?

COOKING SKILLS IN FAMILIES WITH/WITHOUT CHILDREN

When it comes to cooking skills in general, there is no difference between households with and without children, whereas for fish, households with children rate themselves as having better cooking skills (35% think they are good to very good) than households without children (29%). One probable explanation is that people care more about their diet once they have children, and hence start to acquire cooking skills for seafood.

COOKING SKILLS INFLUENCE HOW CONSUMERS BUY FISH

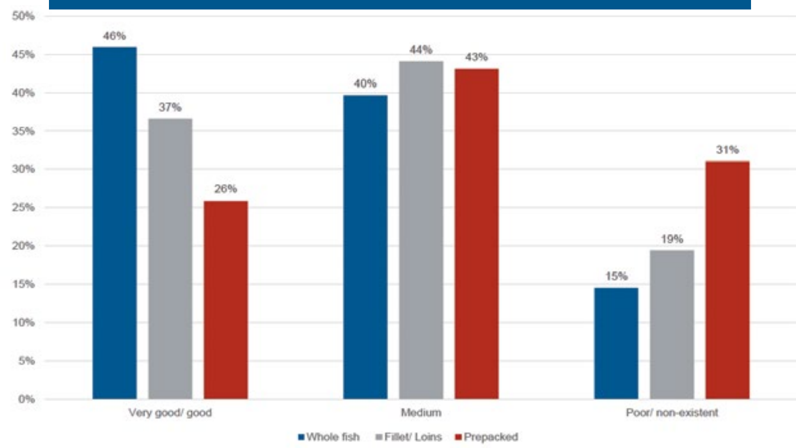


Figure 56: TNS Gallup/NSC, 2016
Q: How do you assess your cooking skills in general and for fish/seafood? / How do you usually buy the different species?

DIFFERENCES BETWEEN MEN AND WOMEN

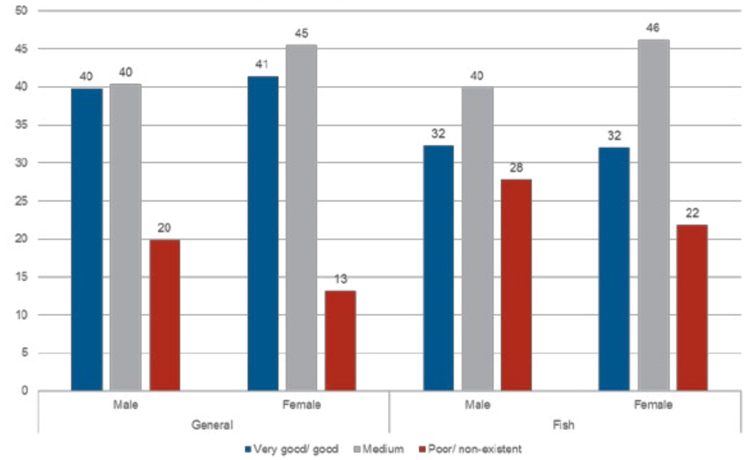


Figure 57: TNS Gallup/NSC, 2016
Q: How do you assess your cooking skills in general and for fish/seafood?

COOKING SKILLS IN FAMILIES WITH/WITHOUT CHILDREN

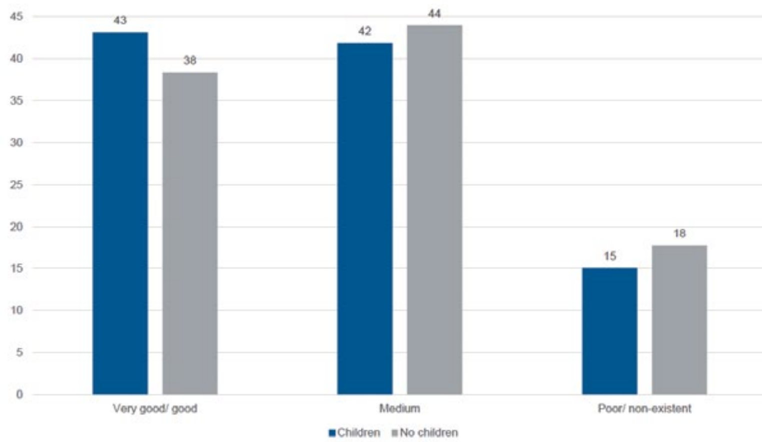


Figure 58: TNS Gallup/NSC, 2016
Q: How do you assess your cooking skills in general and for fish/seafood?

COOKING SKILLS AND AGE

It is no surprise that cooking skills increase with age; if we compare those who are between 35 and 44 with those over 45, the latter group is 6% more confident in the kitchen in general, and 10% more confident when it comes to seafood.

HOW CONFIDENT ARE THE FRENCH ABOUT THEIR COOKING COMPARED TO THEIR EUROPEAN NEIGHBOURS?

When comparing a few big countries in Europe, there are three main findings;

• First, Germans are in fact those who evaluate their general cooking skills the highest. 61% of Germans think they are good to very good in the kitchen, compared to only 40% in France.

• Secondly, we observe that it is a general tendency in Europe that people assess their cooking skills to be less good when it comes to seafood than to food in general.

• Thirdly, even though disparities within cooking skills seem to be quite important between these three European countries, cooking skills for fish are surprisingly similar.

Even though France has almost three times the seafood consumption of Germany, they don't know more about cooking it.

3.2. RECIPES

Next, we will go one step further with consumers' cooking skills, and look at their repertoire when it comes to seafood dishes, how much time they spend cooking, and where they get their inspiration. When asked how many dishes they know how to cook with seafood, 59% of consumers state that they know only between one and three different recipes.

As expected, we see that the number of seafood dishes they know is increasing with income and education. We already know that those with higher income and education eat more fish. But do they eat more fish because they know how to cook it or do they learn how to cook fish because they like fish?

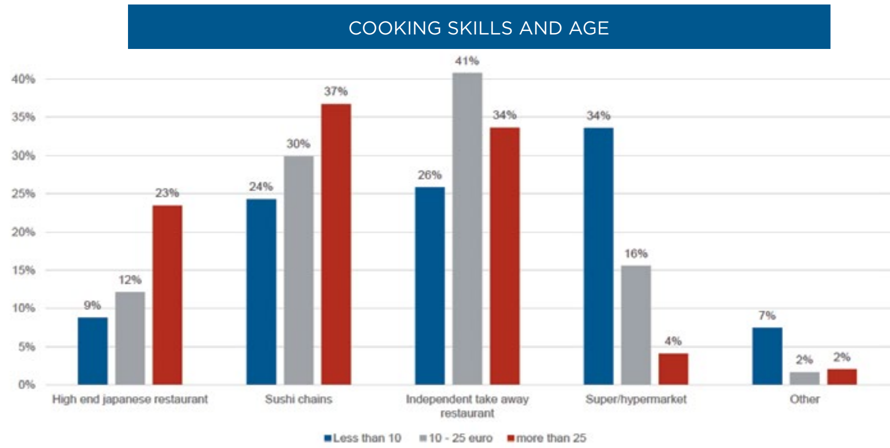


Figure 59: TNS Gallup/NSC, 2016
Q: How do you assess your cooking skills in general and for fish/seafood?

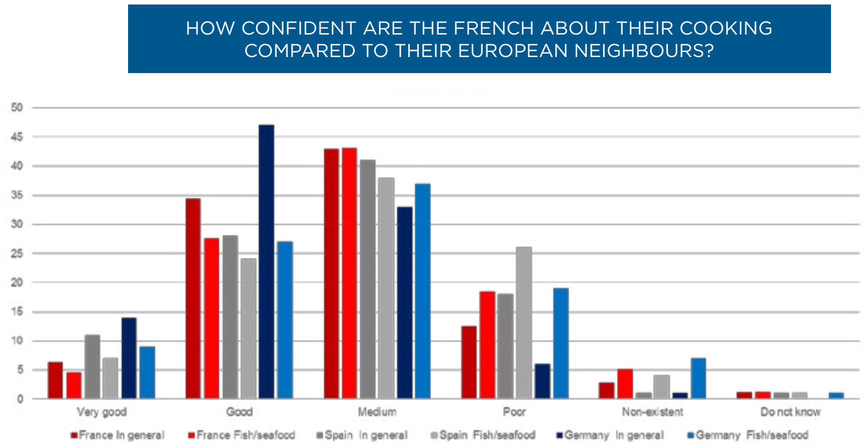


Figure 60: TNS Gallup/NSC, 2016 France. TNS Gallup/NSC, 2015 Spain, TNS Gallup/NSC, 2014 Germany
Q: How do you assess your cooking skills in general and for fish/seafood?

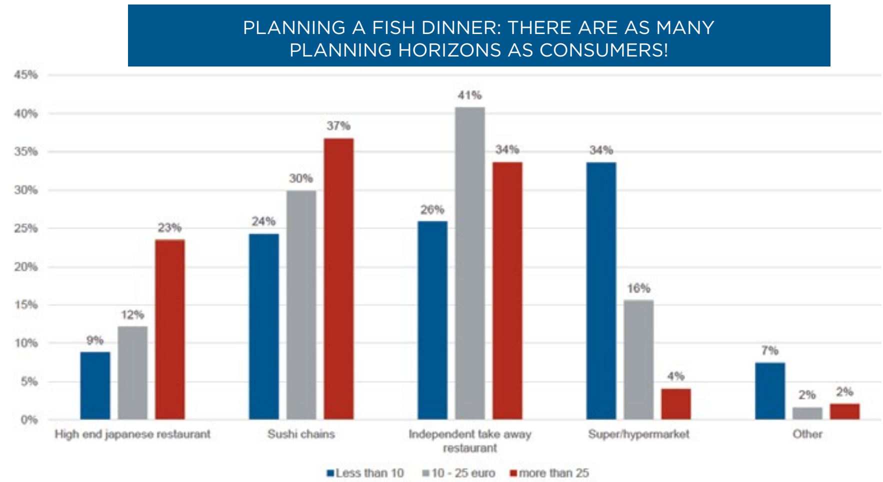


Figure 61: TNS Gallup/NSC, 2016
Q: When do you normally decide to prepare a fish meal?

PLANNING HORIZON INCREASES WITH INCOME

It is a common conception that if you have budgetary restraints, you should try to plan your grocery shopping a little bit ahead. Meanwhile, the findings for France actually show that respondents with the highest income are those who plan their fish dinners most ahead, whereas consumers with income below average strongly tend to decide on their shopping while in the store. For instance, in terms of marketing and promotions, this is interesting because they indicate that high income segments should be easier to influence at any time, while low income segments are more easily influenced to buy a seafood product at the point of sale.

HOW MUCH TIME DO THE FRENCH SPEND ON COOKING?

But how much time do consumers really spend preparing their fish dishes? 56% spend 30 minutes cooking a main meal with fish. This is less time than they would spend cooking any other type of main meal, and might indicate that the French have embraced the simplicity of cooking with seafood; they know it does not have to take too much time to prepare a seafood dinner. As one would expect, the French easily accept spending more time cooking seafood dishes during the weekend. This is also linked to the fact that consumers consider a much wider range of seafood during the weekend than for everyday. Knowing that they don't master so many different seafood dishes (only 11% know how to cook more than 7 different dishes with seafood – in comparison, 31% know how to cook more than 7 dishes with meat, and 38% when it comes to vegetables) - one would expect that they spend more time on both shopping and preparing seafood during the weekend.

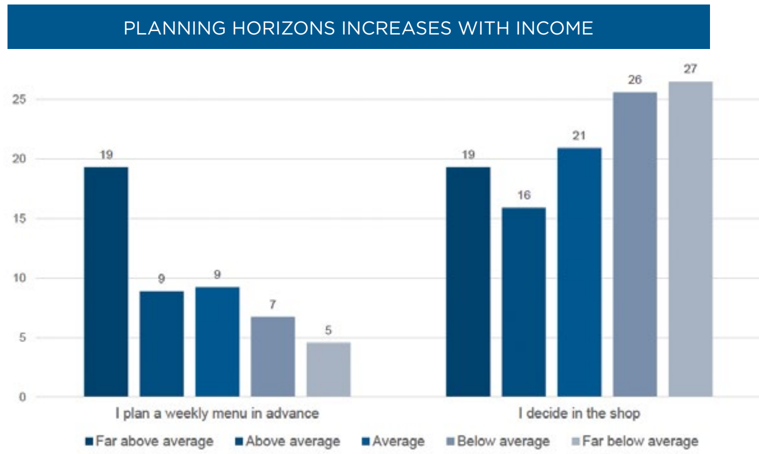


Figure 62: TNS Gallup/NSC, 2016
Q: When do you normally decide to prepare a fish meal?

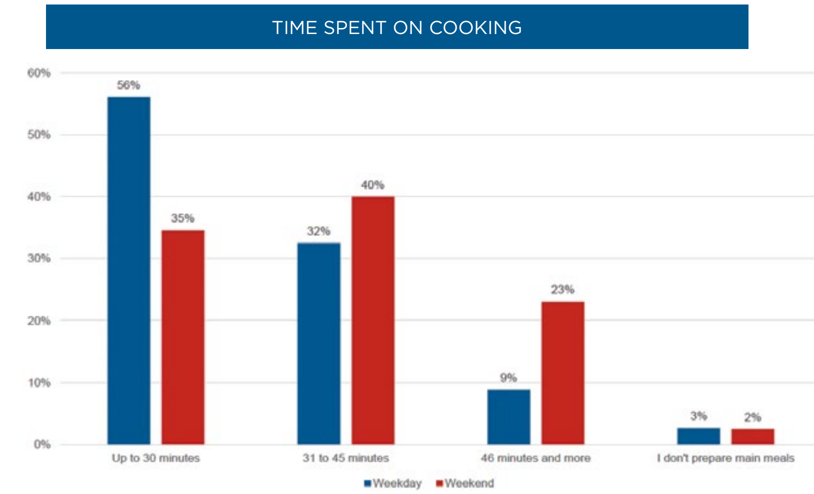


Figure 63: TNS Gallup/NSC, 2016
Q: How much time (on average) do you use to prepare a main meal, lunch or dinner?

Figure 64: TNS Gallup/NSC, 2016
Q: How much time (on average) do you use to prepare a main meal, lunch or dinner?

WHEN FRENCH PEOPLE COOK FISH, THEY PAN FRY IT!

Independently of the cut they prepare, French consumers prefer to pan fry their fish. If they don't pan fry it, their second choice is to cook it in the oven or steam it. The only exception is for whole fish, which is almost always prepared in the oven.

However, the cooking methods for salmon seem to confirm that women think more about a more dietary way of cooking fish; they clearly prefer to steam or oven cook their portions/ fillets, whereas men clearly prefer pan frying them.

> *
> FACT:
> 49% of consumers find their recipes online

WHERE DO CONSUMERS FIND RECIPES?

Internet is by far the main source for new recipe ideas. Surprisingly, the second source of inspiration is recipes they learnt from someone in their family! Opposite to what we may have expected, recipe ideas form stores, from the fishmonger etc. are a much less significant source.

Among the eldest consumers, family recipes seem to weigh even more than for the average consumer, while recipes from the internet are less important to the age group over 45 years old.

WOMEN ARE MORE ACTIVE THAN MEN ON THE INTERNET

Women also use the internet significantly more for recipes than men, along with magazines and newspapers.

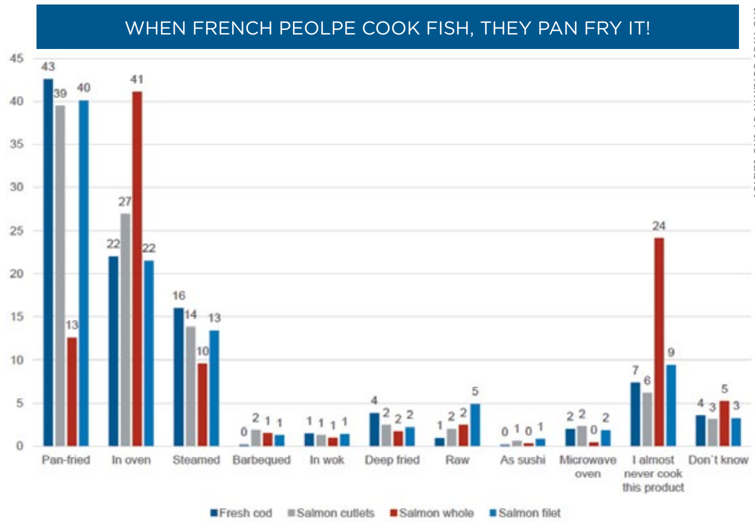


Figure 65: TNS Gallup/NSC, 2016
Q: Indicate how you most often prepare each of the products listed in the first column of the table?

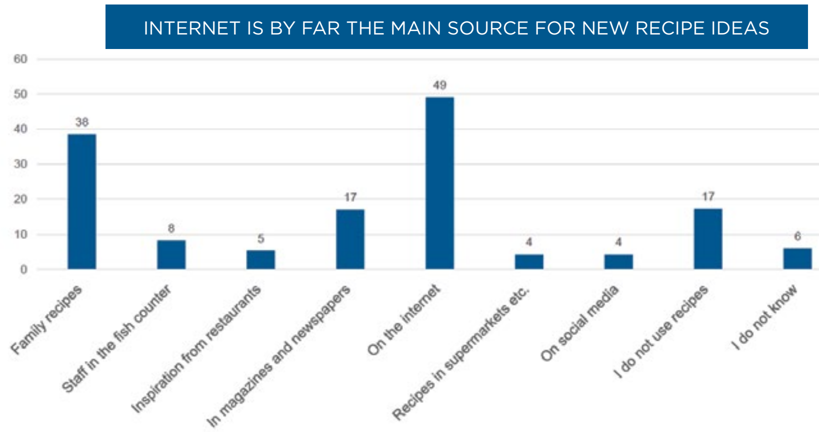


Figure 66: TNS Gallup/NSC, 2016
Q: Where do you find your fish recipes?

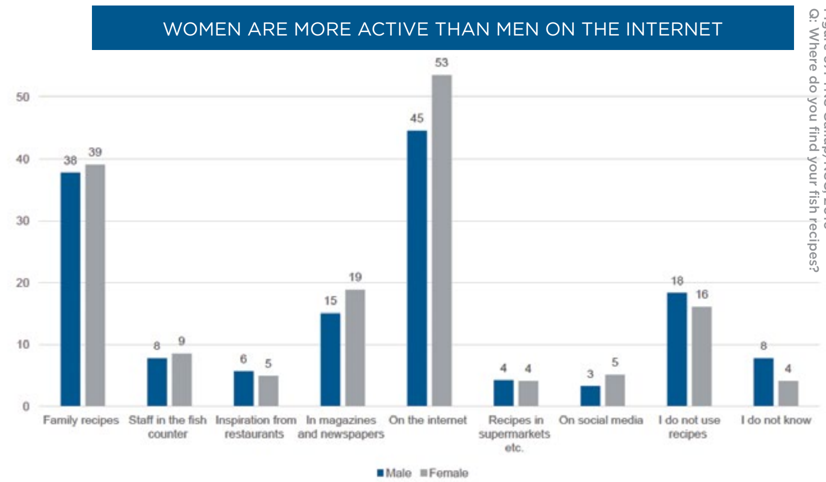


Figure 67: TNS Gallup/NSC, 2016
Q: Where do you find your fish recipes?

Figure 68: TNS Gallup/NSC, 2016
Q: Where do you find your fish recipes?

> *
> SURPRISE
> There is no difference between men and women when it comes to seafood dishes.

> Whereas women feel considerably more competent than men in the kitchen in general, there is no difference between the number of dishes men and women know how to make with seafood.

WHAT ARE FRENCH CONSUMERS' FAVOURITE FISH DISHES?

We also asked the respondents in this study open questions about their favorite dishes. When asked about their favorite fish dish, independently of the specie, as many as 39% state that it is «brandade». What is maybe more surprising, is that sushi comes as number two with 17%, followed by paëlla (14%), pasta (9%) and bouillabaisse (8%).

FRENCH CONSUMERS' FAVORITE SALMON DISH IS...

Salmon is French consumers' favorite fish. What would be their favorite salmon dish? The results for this question are more evenly distributed, perhaps a sign that the respondents truly appreciate the versatility of salmon, and know that it can be used for a lot of different dishes. However, papillote is the winner with 15%, followed by «with pasta» (11%), pan fried (7%), «with rice» (6%) and oven baked (6%).

FRENCH CONSUMERS' FAVORITE SMOKED SALMON DISH IS...

For a long time, smoked salmon with pasta has come across as a hit among consumers, for instance on

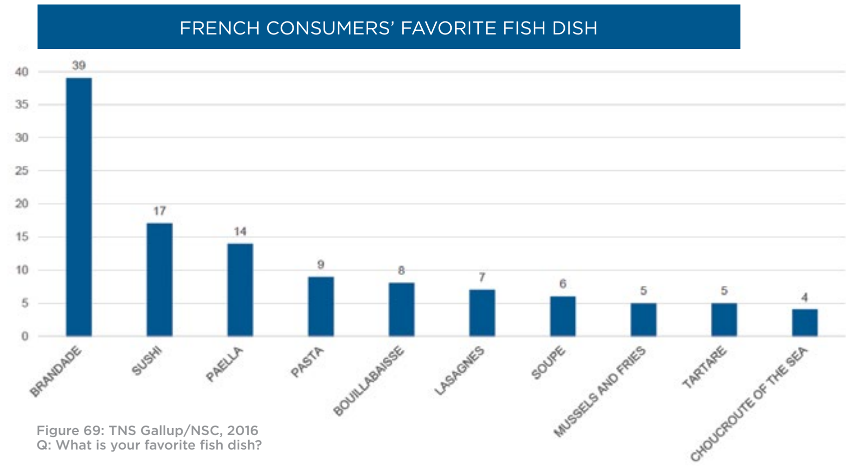


Figure 69: TNS Gallup/NSC, 2016
Q: What is your favorite fish dish?

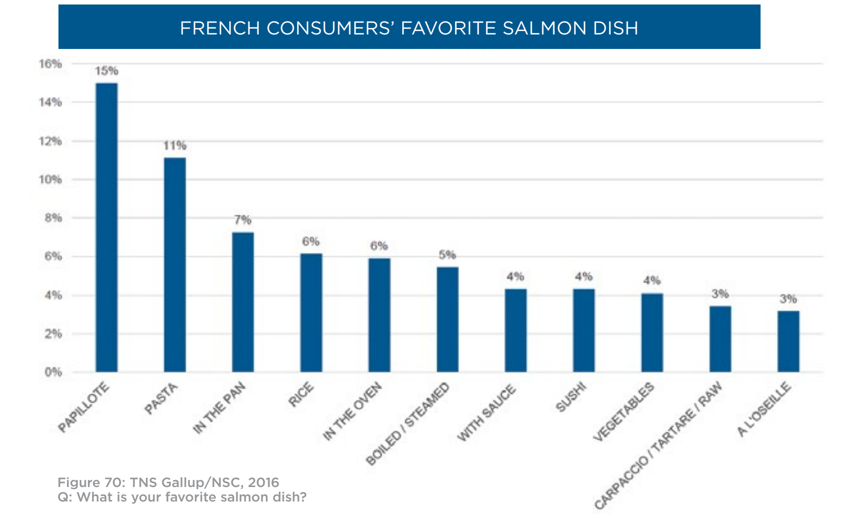


Figure 70: TNS Gallup/NSC, 2016
Q: What is your favorite salmon dish?

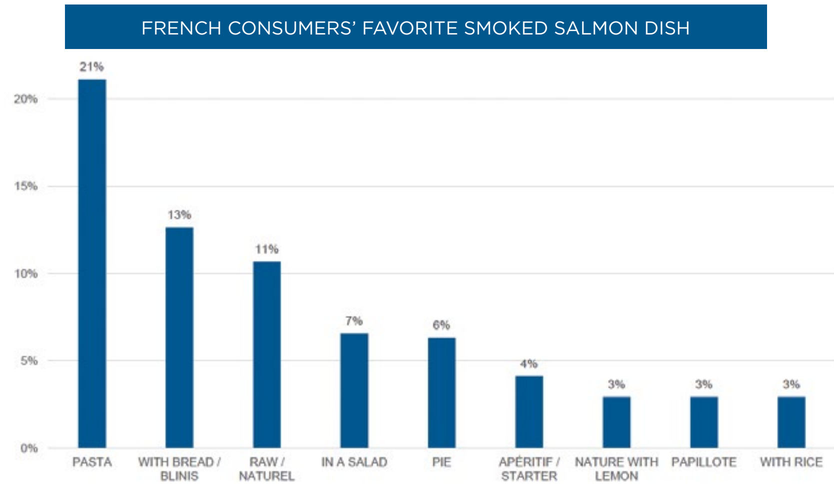


Figure 71: TNS Gallup/NSC, 2016
Q: What is your favorite smoked salmon dish?

social media. This dish seems to be a moment of indulgence and pleasure in the everyday stress that very many consumers appreciate. And, when the respondents in this study were asked about their favorite smoked salmon dish, pasta is the clear winner, with 21%. The following dishes, «with bread» (13%) and «natural» (11%) show that French consumers also really appreciate smoked salmon as it is, without artefacts. Many also like to use smoked salmon in salads (7%) and pies (6%).

FRENCH CONSUMERS' FAVORITE COD DISH IS...

Lastly, we asked about the favorite cod dish. The result is not very different from salmon, with papillote as the winner with 15%, followed by «with sauce» (12%), pan fried (11%), «with rice» (9%) and in the oven (7%).

FRENCH CONSUMERS' FAVORITE COD DISH

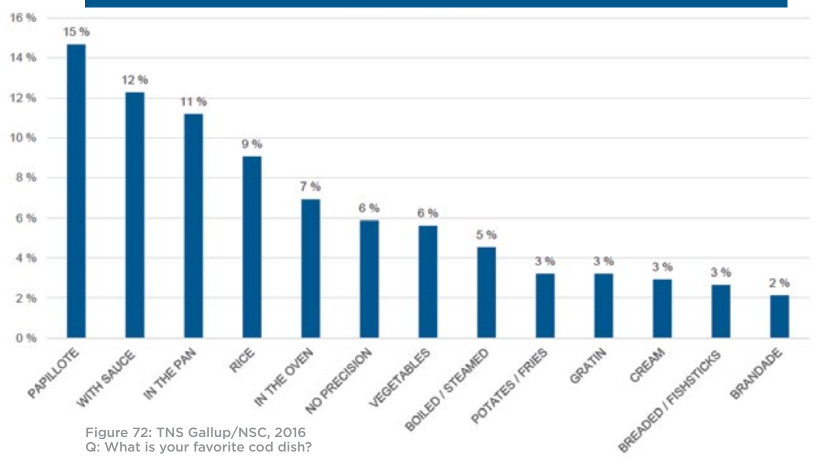


Figure 72: TNS Gallup/NSC, 2016
Q: What is your favorite cod dish?

3.3. SUSHI

Earlier, we concluded that sushi is among the favorite salmon dishes of French consumers. The sushi trend has been blooming in France over the last years, and has lately started to spread even into French hypermarkets. What is the status when it comes to sushi?

22% EAT SUSHI AT LEAST ONCE A MONTH

As much as 22% of the respondents eat sushi at least once a month or more, which comes across as a very frequently for such a specific type of seafood meal. Unsurprisingly, these respondents are mainly high-frequency seafood consumers, and this actually means that sushi could account for about 12% of their total seafood consumption or more. There are three other things that are interesting to note about these respondents. First, 30% of those between 20-34 years of age consume sushi once a month or more, whereas only 15% of the population aged over 45 eat sushi this often. Secondly, education level seems to be the second most important factor for sushi consumption: the share of consumers eating sushi at least once a month is increasing with the level of education. Lastly, where the respondents live also influences their sushi consumption. This is probably strongly linked to the disparities in the sushi offer on the French territory. The Paris region naturally has the highest proportion of high-frequency sushi consumers: 40% of those living in the Paris region eat sushi once a month or more.

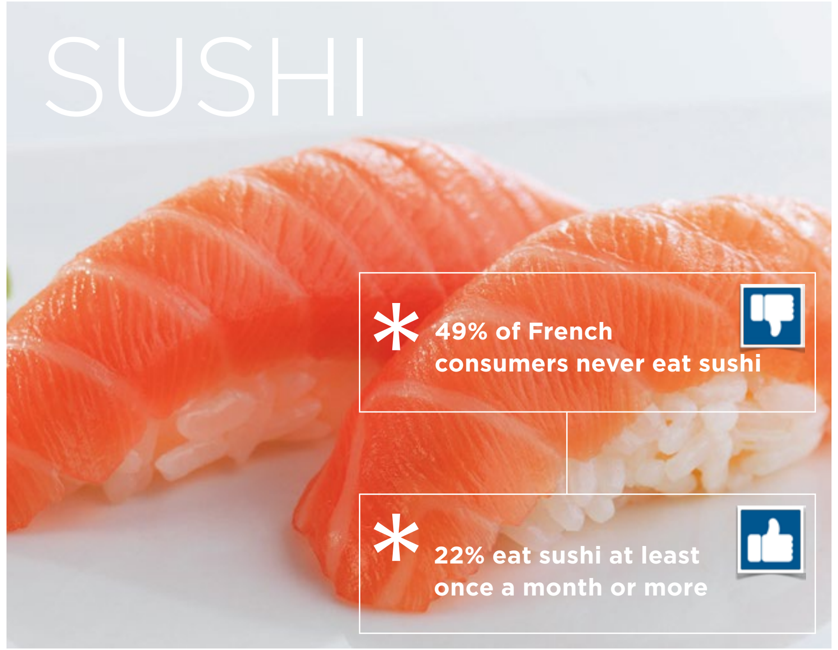


Figure 73: TNS Gallup/NSC, 2016
Q: How often do you eat sushi??

Figure 74: TNS Gallup/NSC, 2016
Q: How often do you eat sushi?

YOUNG CONSUMERS HAVE SUSHI MOST FREQUENTLY

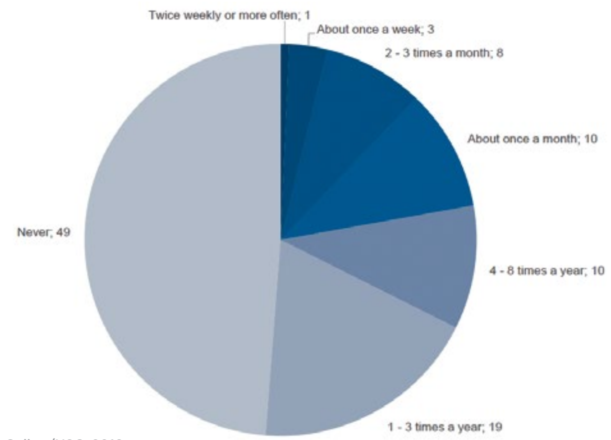


Figure 75: TNS Gallup/NSC, 2016
Q: How often do you eat sushi?

YOUNG CONSUMERS HAVE SUSHI MOST FREQUENTLY

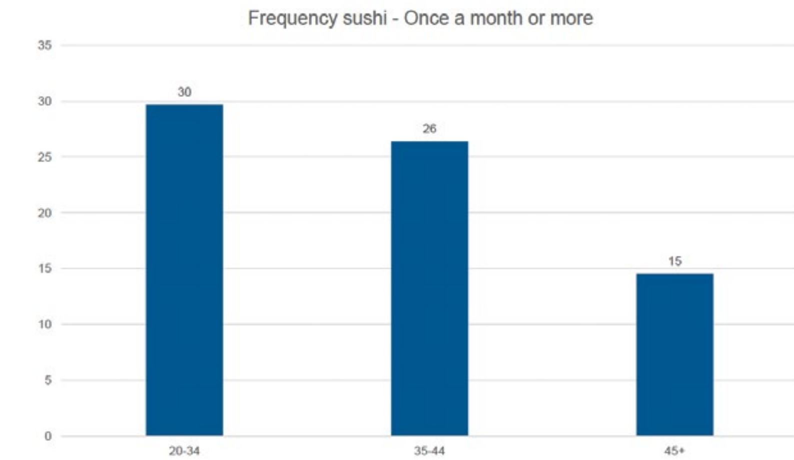


Figure 76: TNS Gallup/NSC, 2016
Q: How often do you eat sushi?

WHEN DID THE FRENCH START EATING SUSHI?

We also asked the respondents when they started eating sushi, and the results show a good spread between newly recruited and well established sushi consumers.

In these data, we clearly see the footprint of the development of the sushi trend in France: It started as an exclusive trend among those with highest education and highest income; these consumers now declare that they started eating sushi more than ten years ago. Whereas sushi is not in general considered to contribute to social status, this is more frequently emphasized by these avant-garde consumers of sushi – even today.

*
SUSHI IS BECOMING MAINSTREAM

Among those who have been recently recruited to sushi (less than three years ago), we see a wide socio-demographic spread, showing that sushi has become something that anyone is likely to eat. Based on these data, we think it is fair to conclude that sushi is becoming increasingly mainstream in France.

*
FACT:

45% of those who don't eat sushi seem to be sceptical towards raw fish

Figure 77: TNS Gallup/NSC, 2016
Q: Think about your friends and family that don't eat sushi. What is the reason why this might be?

WHEN DID THE FRENCH START EATING SUSHI?

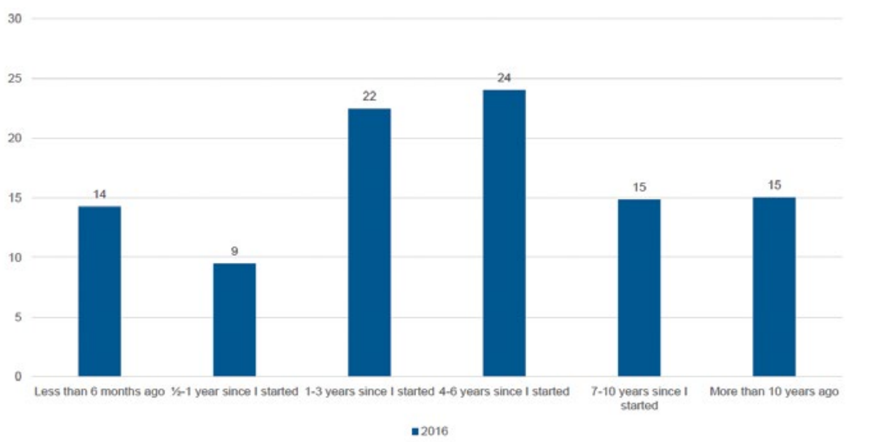


Figure 78: TNS Gallup/NSC, 2016
Q: When did you start to eat sushi?

SUSHI CONSUMPTION INCREASES WITH EDUCATION

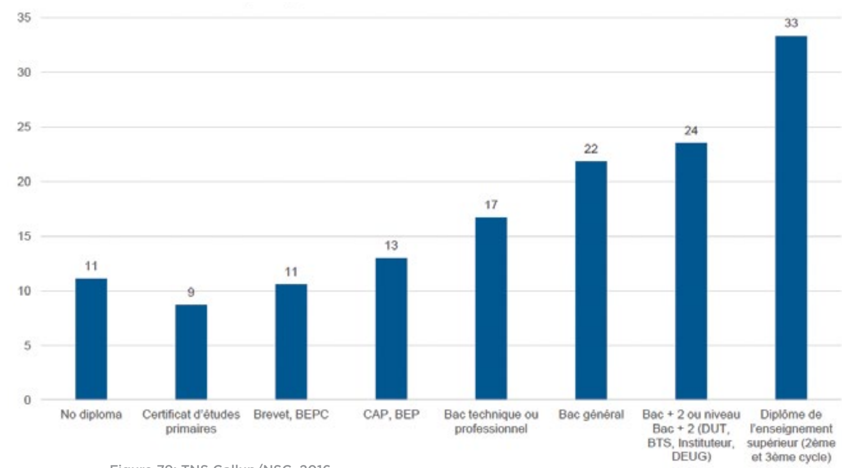


Figure 79: TNS Gallup/NSC, 2016
Q: How often do you eat sushi?

SUSHI CONSUMPTION IS STILL STRONGEST IN PARIS

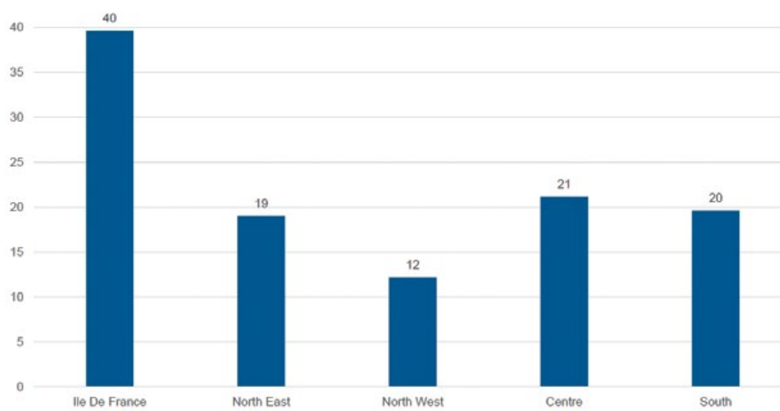


Figure 80: TNS Gallup/NSC, 2016
Q: How often do you eat sushi?

STRONG SKEPTICISM TOWARDS RAW FISH

45% of those who don't eat sushi seem to be skeptical towards raw fish. Now, what about those who don't eat sushi? Why are they not tempted by this trend? The fact is that 45% of those who don't eat sushi seem to be skeptical towards raw fish. This means that it is not the sushi itself that does not tempt them, but that fish in its raw state is a consumption barrier for these consumers.

Among other reasons for not eating sushi, price seems to be an issue for many respondents; 32% state that they perceive sushi as being too expensive. Also, 24% refrain from eating sushi because their family and friends don't like it. Last but not least, 19% of consumers who don't eat sushi also consider that there might be reason to doubt the hygiene conditions in the sushi restaurants.

FRENCH PERCEIVE SUSHI AS...

But above all, sushi seems to be perceived as food that allows us to get to know a new food culture. This is maybe not so surprising, given that it is probably the biggest food culture export since pizza from Italy and hamburgers from the US. Unsurprisingly, people also perceive it as expensive, but on the positive side, sushi is seen as convenient and healthy food one should share with others.

FOOTPRINT OF THE DEVELOPING SUSHI TREND

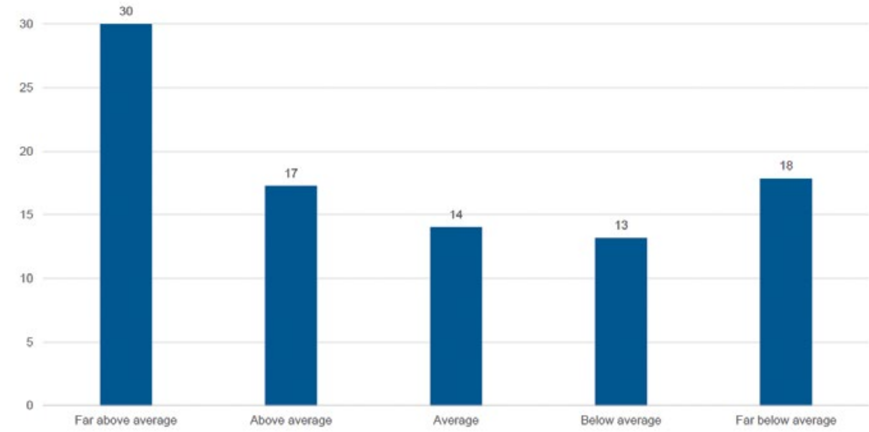


Figure 81: TNS Gallup/NSC, 2016
Q: When did you start to eat sushi?

STRONG SKEPTICISM TOWARDS RAW FISH

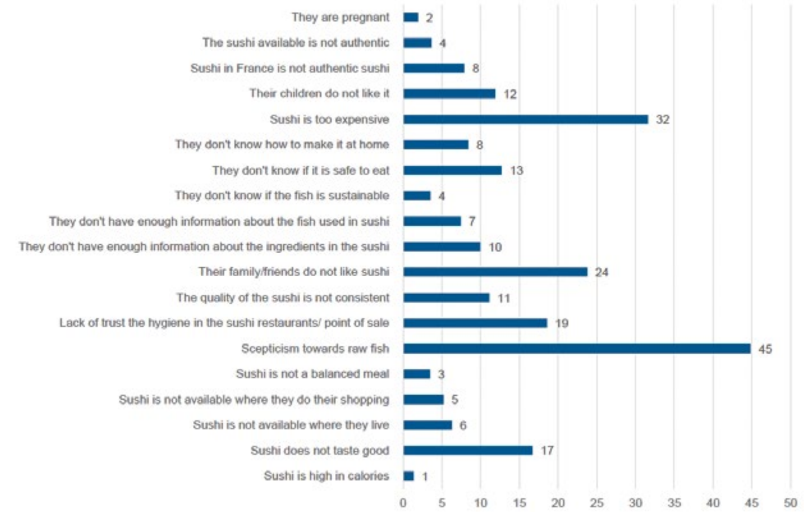


Figure 82: TNS Gallup/NSC, 2016
Q: Think about your friends and family that don't eat sushi. What is the reason why this might be?

THE FRENCH PERCEIVE SUSHI AS...

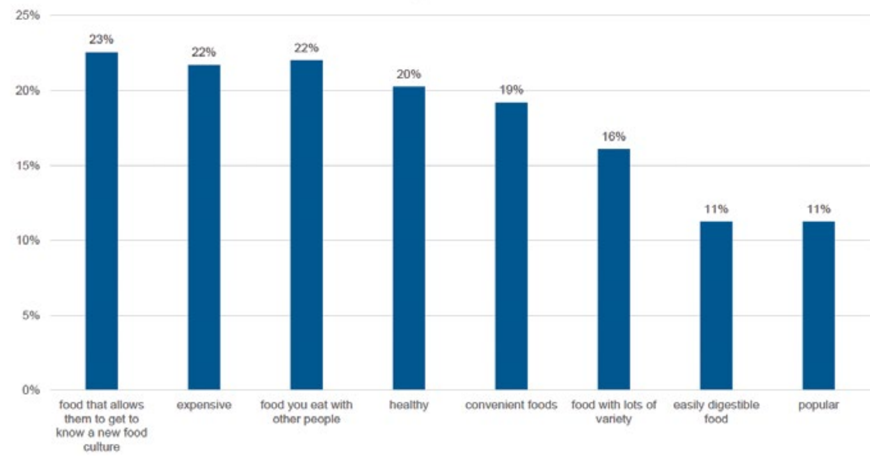


Figure 83: TNS Gallup/NSC, 2016
Q: Among your friends and family who eat sushi, what best reflects their perceptions of sushi? For them sushi is...

CONSUMERS CHOOSE SUSHI FOR THE TASTE

When asked about good reasons for choosing sushi, good taste is stated as the single most important reason. Lagging far behind, we find health and dietary aspects. When comparing to the most important reasons to eat seafood, we observe that seafood in general is perceived as much quicker and easier to prepare than sushi. It is clear that the «DIY» («do it yourself») on sushi has not yet reached France, but might be an interesting concept to introduce, because people think sushi is really expensive, and showing how you could easily make it at home may appeal to sushi lovers who would like to eat it more frequently.

NO DIFFERENCE IN FREQUENCY BETWEEN MEN & WOMEN

A few years ago, sushi surfed on the wave of healthy eating, and it was often said that women were big consumers of sushi because of the healthy and lean image. Today, however, we may conclude that sushi is just as popular among men and women, and that they express the same reasons for eating sushi; taste is king!

CONSUMERS CHOOSE SUSHI FOR THE TASTE

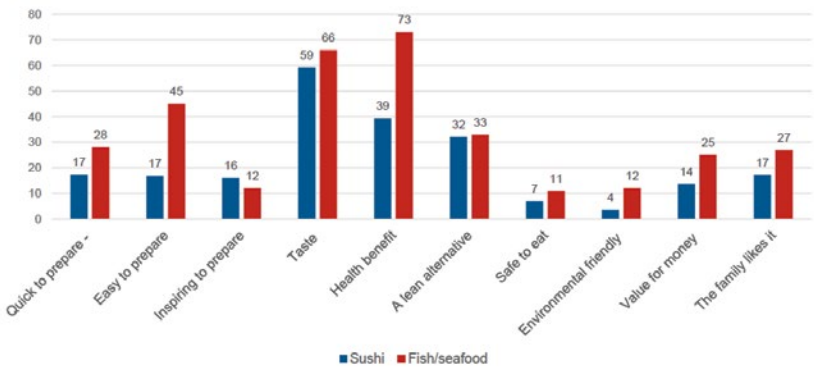


Figure 84: TNS Gallup/NSC, 2016
Q: There are many good reasons for choosing sushi. Some of them are listed below. Which of these would you say are good reasons for choosing sushi for yourself?

NO DIFFERENCE IN FREQUENCY BETWEEN MEN & WOMEN

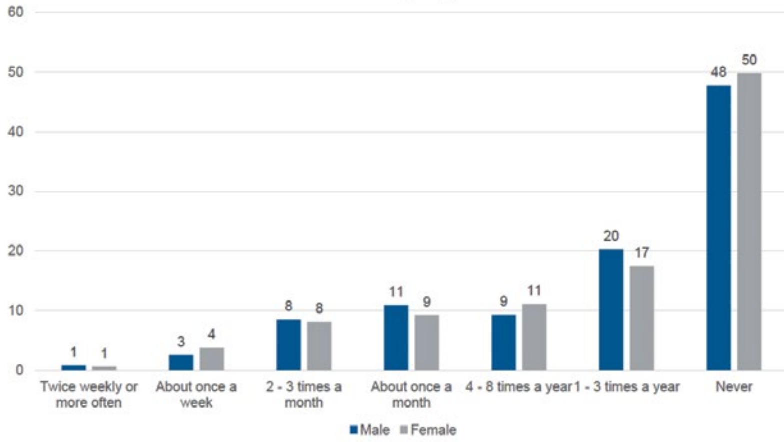


Figure 85: TNS Gallup/NSC, 2016
Q: How often do you eat sushi?

REASONS FOR CHOOSING SUSHI AMONG MEN & WOMEN

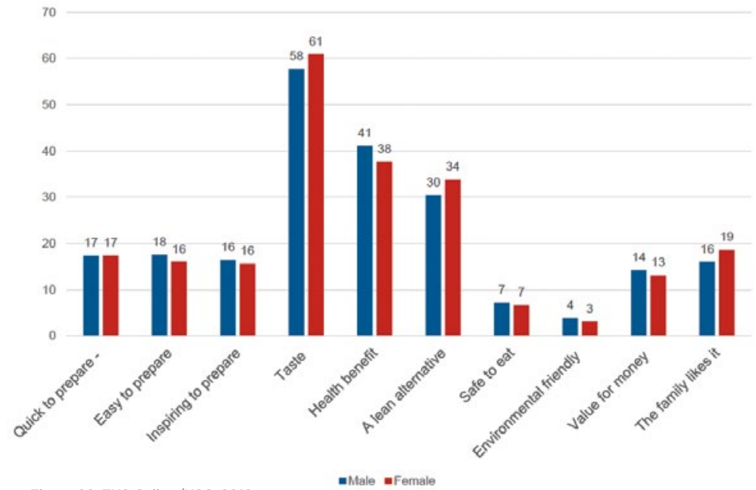


Figure 86: TNS Gallup/NSC, 2016
Q: There are many good reasons for choosing sushi. Some of them are listed below. Which of these would you say are good reasons for choosing sushi for yourself?

WHEN DO FRENCH CONSUMERS EAT SUSHI?

What do we know about when and where consumers have sushi? From this study, we learn that sushi is mainly eaten for dinner, whether at home or at a restaurant. The second most important occasion for sushi consumption is lunch, but then especially for those with high income and higher education living in Paris.

When consumers choose sushi for a dinner at home, this mainly happens on weekends. However, if they eat sushi outside, it is most likely to be at an informal restaurant.

WHERE DO FRENCH CONSUMERS BUY SUSHI?

Sushi is mainly bought at independent sushi restaurants (35%), followed by sushi chains (28%) and hyper- and supermarkets (21%). As one would expect, very few (12%) buy their sushi at high-end sushi restaurant. Within this, there are some interesting findings: for instance, children are heavily overrepresented in high-end restaurants. This is probably closely linked to the fact that their parents are high-frequency sushi consumers - more «expert» consumers – and have income far above average.

WHEN DO FRENCH CONSUMERS EAT SUSHI

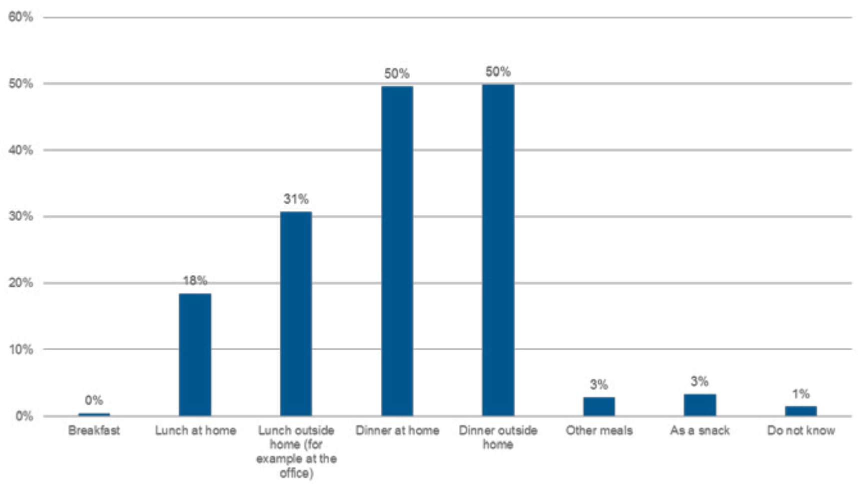


Figure 87: TNS Gallup/NSC, 2016
Q: For which of the following situations do you eat sushi?

WHERE DO FRENCH CONSUMERS EAT SUSHI?

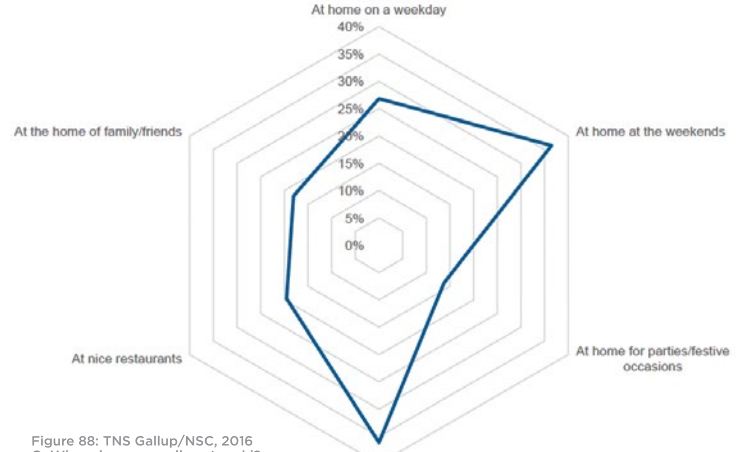


Figure 88: TNS Gallup/NSC, 2016
Q: When do you usually eat sushi?

WHERE DO FRENCH CONSUMERS BUY SUSHI?

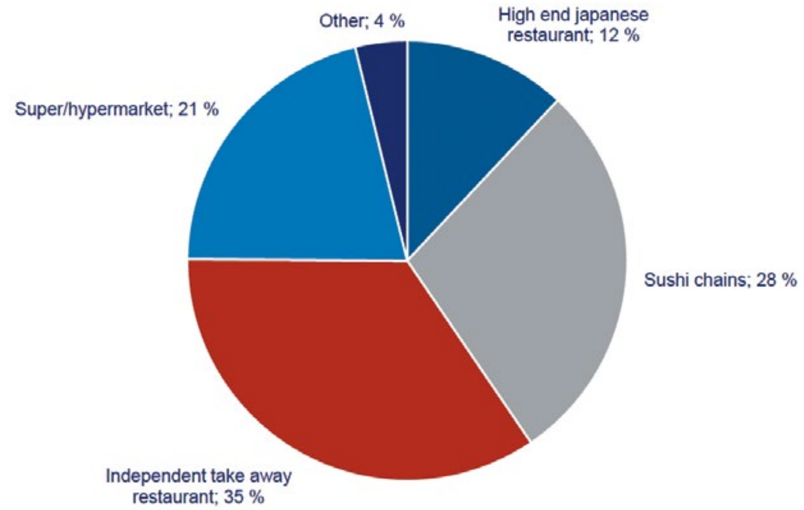


Figure 89: TNS Gallup/NSC, 2016
Q: When you buy sushi, where do you most often buy it?

WHERE SEGMENTS BUY SUSHI

To a certain extent, consumption frequency also influences where consumers buy their sushi; buying rate at sushi restaurants is increasing with frequency. We also find that consumers with low sushi consumption frequency (1-3 times a year) are more likely to buy at a supermarket than those who eat more, but this does not exclude that they sometimes choose to eat at a restaurant. The distribution in point of sales among all sushi consumers might indicate that they consider sushi for many different occasions, and select the point of sale that seems appropriate for the consumption moment they are in. We may also mention that those with the lowest consumption frequency are just as likely to go to a high-end restaurant as those who eat sushi very often (more than once a month). Also, we remember from earlier that one of the main barriers to eating sushi is the price, and there is a clear correlation between income and consumption frequency.

WHAT WILL CONSUMERS PAY FOR SUSHI?

42% of sushi consumers are willing to pay up to 10 euros for take-out or delivery of sushi. At an informal restaurant, however 66 % of consumers are willing to pay between 10 and 25 euros. A mere 20% are willing to pay more than 25 euros for a sushi meal at a restaurant. It is interesting to note that no consumer in our respondent base of 2000 consumers are willing to pay more than 55 euros for a sushi meal. Conclusion: sushi is probably still seen as quite fast and easy food, and is not aligned with high class French gastronomy. This of course leaves a limited perspective for high-end sushi restaurants, whereas one would think that there is still room for developing low-cost sushi concepts. As mentioned above, this could even be «DIY» concepts if the barriers for preparation are broken down efficiently.

WHERE SEGMENTS BUY SUSHI

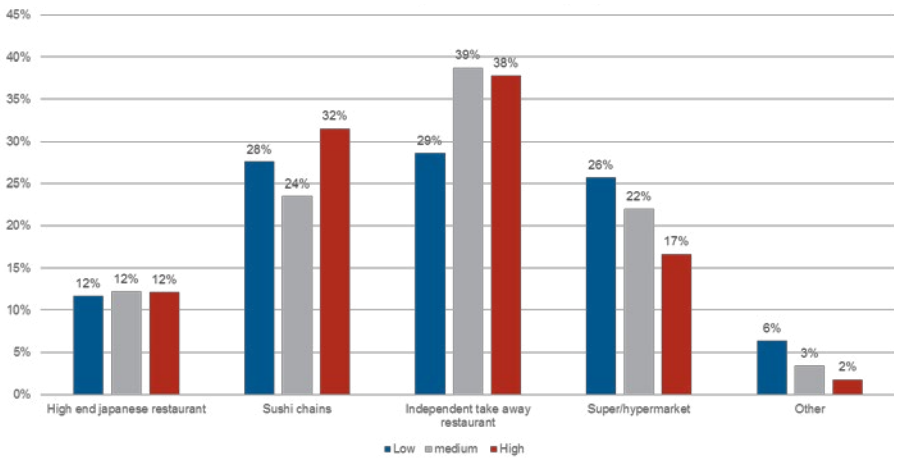


Figure 90: TNS Gallup/NSC, 2016
Q: When you buy sushi, where do you most often buy it?/ How often do you eat sushi?

WHAT WILL CONSUMERS PAY FOR SUSHI?

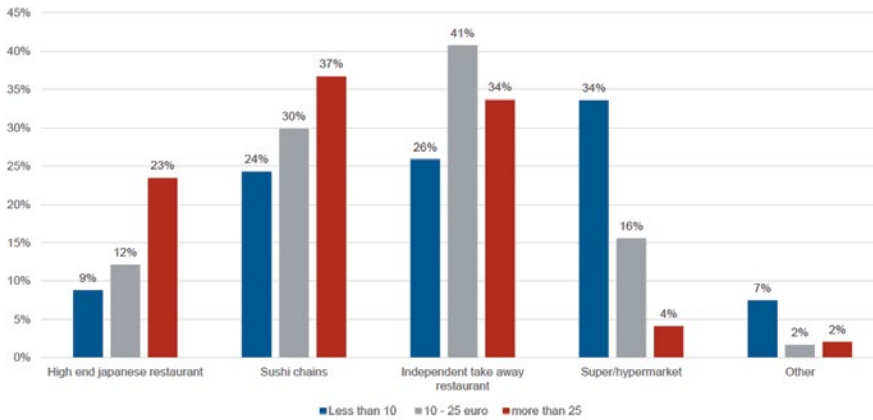


Figure 91: TNS Gallup/NSC, 2016
Q: How much on average would you be willing to pay for a sushi meal per person?

WILLINGNESS TO PAY FOR SUSHI

It is interesting to note that there is relatively little difference in the willingness to pay based on consumption frequency. However, it is very clear that low-frequency sushi consumers (1-3 times a year) have a lower price limit than more frequent consumers; 53% are willing to pay no more than 10 euros, whereas 15% of the most frequent seafood consumers are willing to pay more than 25 euros for a sushi meal.

WHAT ARE FRENCH CONSUMERS' FAVORITE TOPPINGS?

We have also looked at what consumers like about sushi. What are their favorite toppings? No surprise, salmon is the definite favorite topping for sushi (69% of mentions), followed by tuna (45%), prawns (40%) and vegetables (24%). The preference seems to largely reflect the actual offer in the sushi market, but also French consumers' general preference in seafood. One would hence expect that for further development of the sushi category, one could largely rely on the species that French consumers already like and are used to eating.

MOST POPULAR SUSHI PIECES

When it comes to choice of different sushi, most respondents like a lot of different pieces. The most preferred sushi piece is maki, followed by sashimi, california rolls and spring rolls. This is not surprising when we see that these pieces are also those that French sushi consumers know the best.

SALMON IS THE SUSHI FAVORITE

Decidedly, salmon is the most preferred and available topping for sushi. We looked at sushi consumers' relationship with salmon, and it is very clear that the great majority (93%) was used to eating salmon before they started eating sushi.

WHAT ARE FRENCH SUSHI CONSUMERS' FAVORITE TOPPINGS?

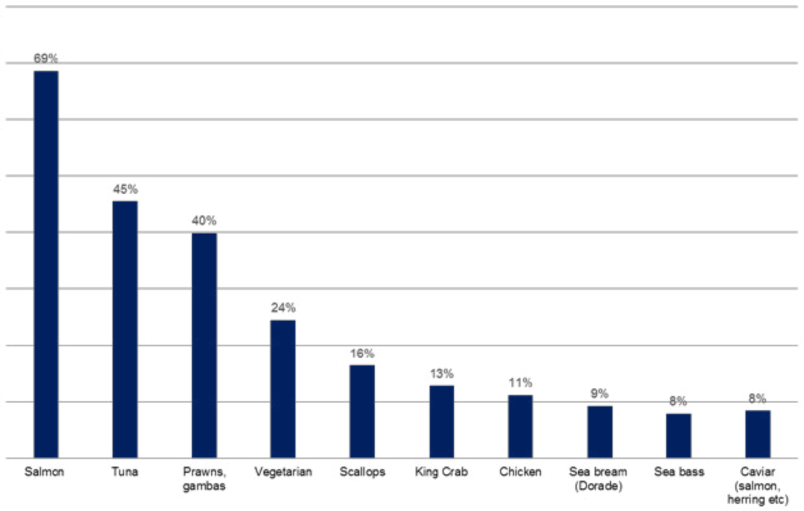


Figure 92: TNS Gallup/NSC, 2016
Q: Which of the following ingredients do you prefer in sushi?

MOST POPULAR SUSHI PIECES

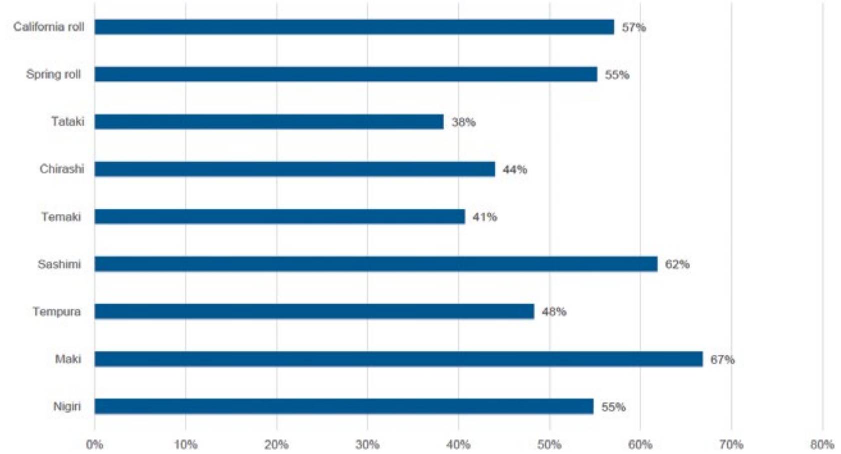


Figure 93: TNS Gallup/NSC, 2016
Q: Which of the following ingredients do you prefer in sushi?

SALMON IS THE SUSHI FAVORITE

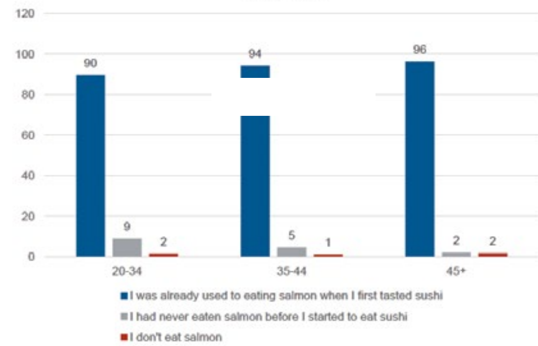


Figure 94: TNS Gallup/NSC, 2016
Q: Which of the following ingredients do you prefer in sushi? / Which of these statements are most correct for you?

This means that salmon probably recruits consumers to sushi. Meanwhile, there are important disparities between the youngest and eldest age groups; where the 45+ group overwhelmingly ate salmon before sushi, there is – despite the high penetration of salmon in the French market - a significant percentage (9%) of young consumers (20-34) who tasted salmon for the first time through sushi. Therefore, sushi could also be considered as one of the important recruiters to the salmon category.

DO CHILDREN EAT SUSHI?

Finally, there is one important question remaining about sushi: do children eat it? Yes, to a certain extent, they do; 35% of French sushi consumers state that their children also eat sushi. These are however strongly represented among those with high revenue, which is a finding that is coherent with the fact that most consumers perceive sushi to be expensive.

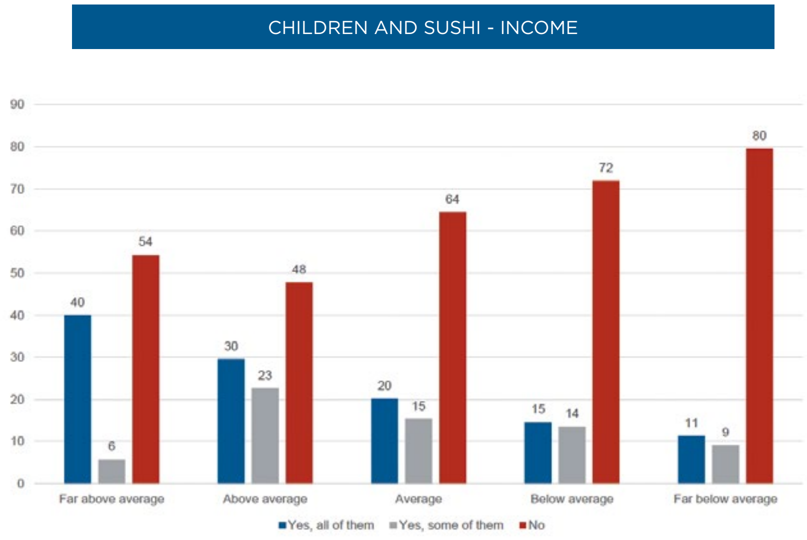


Figure 95: TNS Gallup/NSC, 2016
Q: Do your children eat sushi?

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CONSUMER OPINIONS

In this section, we will explore consumer opinions on quality, and especially how they assess the quality of seafood. We will also take a closer look at French consumers' knowledge of labels, and how they impact their buying.

4.1. QUALITY

WHAT IS QUALITY IN SEAFOOD?

Figure 96: TNS Gallup/NSC, 2016
Q: How important are the terms below for the quality of fish as a product?

Quality is a concept that is on everyone's lips when speaking about food. With regards to seafood, we know that perceived quality is among the top drivers for preference. But what is quality for consumers? We will try to give some answers to this question on the following pages.

When we ask consumers to rate the importance of different factors that may influence the quality of their seafood, it is not surprising that the French are very demanding. Basically, they think that all the aspects of the production impact the quality, However, the most important quality indicator for the respondents is the fact that the fish evolves in clean waters. One should also take note of the fact that when it comes to farmed fish, the feed is rated as extremely important for the quality. However, the criteria «wild-caught» is still very high on the ranking, and the only fact that the fish is wild seems to inspire consumers to think it is good quality. As the fourth and fifth quality criteria, the respondents also mention fish welfare and capture method.

EXPECTATIONS TO QUALITY INCREASE WITH AGE

It is also clear that consumers become more demanding with age. In this chart, we can see that the hierarchy of the criteria remain the same, but that the different criteria increase in importance with the age of the consumers. Simply put, those over 45 expect much more from the quality of the fish than younger consumers.

OPINION ON WILD, FARMED & ORGANIC FISH

In this study, we asked consumers to give their opinion on farmed, wild and organic fish in order to better assess their opinion on the different types of fish.

Organic fish is seen as more environmental friendly, healthier, more animal friendly and safer to eat than both wild and farmed fish. When it comes to wild fish, it is seen as being more natural, having better quality and being more tasty and nutritious than both farmed and organic fish.

No surprise: farmed fish outweigh wild and organic fish only on points that are less important for quality among consumers. Farmed fish is seen as better value for money and more risky than wild and organic fish.

What is interesting with these impressions is that apparently consumers are confused about organic and farmed fish. Do they know that organic fish is farmed? Not sure.

WHAT IS IMPORTANT FOR THE QUALITY OF THE FISH

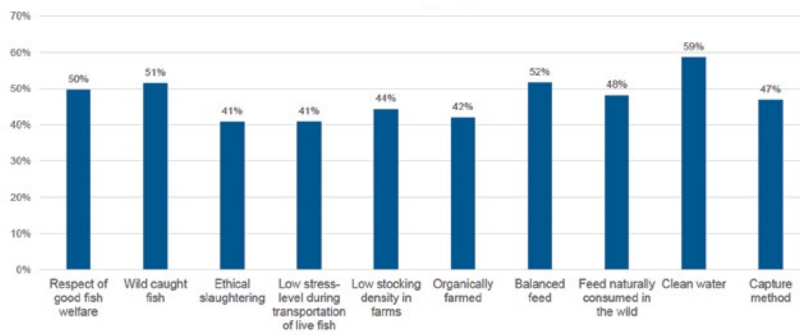

Figure 97: TNS Gallup/NSC, 2016
Q: How important are the terms below for the quality of fish as a product?

EXPECTATIONS TO QUALITY INCREASE WITH AGE

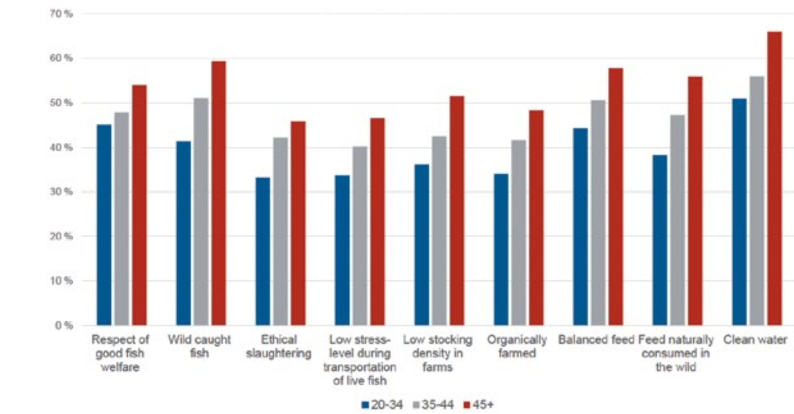

Figure 98: TNS Gallup/NSC, 2016
Q: How important are the terms below for the quality of fish as a product?

OPINION ON WILD, FARMED & ORGANIC FISH

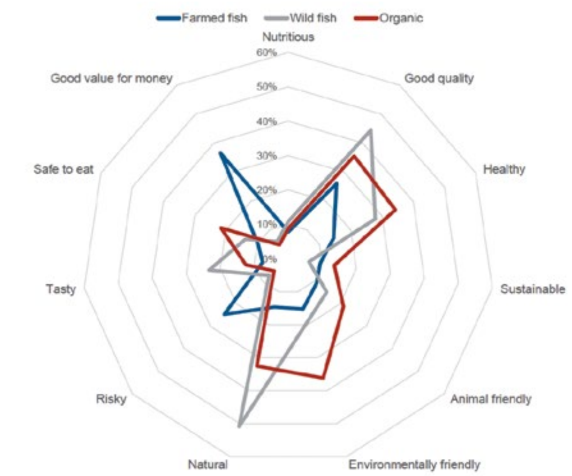

Figure 99: TNS Gallup/NSC, 2016
Q: Which features do you think are the most relevant in characterizing farmed, wild and organic fish?

WILD is...

1. **Natural**
2. **Good quality**
3. **Tasty**

FARMED is...

1. **Value for money**
2. **Good quality**
3. **Risky**

ORGANIC is...

1. **Good quality**
2. **Environmental friendly**
3. **Healthy**

To sum up, it is interesting to look at the three strongest criteria that define the different types of seafood according to consumers. As we can see from the overview, **wild** seafood is characterized as natural, as having good quality, and as being tasty. **Organic** is perceived as good quality, environmental friendly and healthy. And last but not least, **farmed** is considered as good value for money and as having good quality, but also as being risky.

Consumers are clearly a bit confused about the different kinds of fish that exist on the market. Even though France is one of the biggest consumers of farmed seafood in Europe, there seems to be very many old myths about farmed fish especially that lead consumers to doubt that farmed fish is a good alternative to wild fish.

OPINION ON WILD, FARMED & ORGANIC FISH

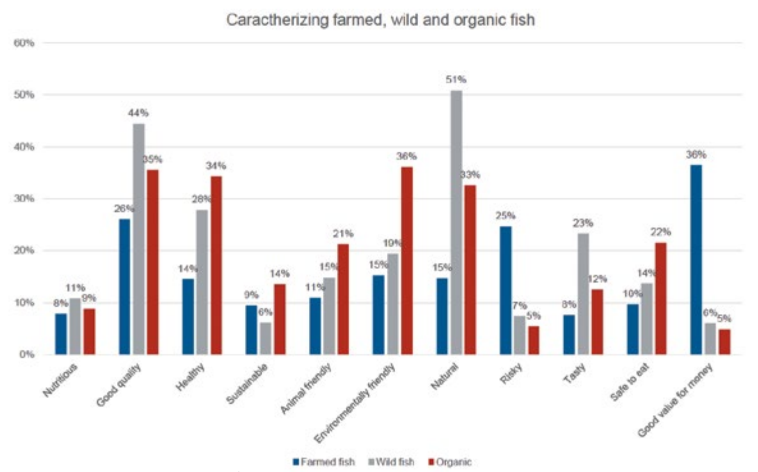

Figure 100: TNS Gallup/NSC, 2016
Q: Which features do you think are the most relevant in characterizing farmed, wild and organic fish?

1. USE OF HORMONS
2. USE OF ANTIBIOTICS
3. CAN BE ORGANIC
4. GOOD VALUE FOR MONEY
5. GOOD TASTE

Figure 101: TNS Gallup/NSC, 2016
Q: Generally, what are your impressions of farmed fish?

In order to learn more about this, we also asked consumers about their general impressions of farmed fish. Not surprisingly, the results show that there still is a great job left to be done when it comes to combating myths about farmed fish.

The strongest affirmations when it comes to farmed fish is that there is extensive use of antibiotics and hormones in the production of the fish. More positive perceptions, such as good quality and taste, lag far behind in the ranking of the impressions. However, quite a few consumers have understood that farmed fish can be organic, and that it presents good value for money. There is clearly an opportunity to improve the image of farmed fish through myth busting and by putting forward all the positive aspects of fish farming that consumers have still not discovered.

4.2. QUALITY LABELS

QUALITY LABELS

In France there is a multitude of labels destined to give consumers information and reassurance regarding the quality of the food they buy. In this study we have asked respondents to react to 10 different labels currently used in the French market.

The all over result is that consumers to a very little extent know about these labels; 9 out of 12 labels come across as «very little known» to consumers. The only labels that French consumers clearly recognize are Label Rouge, Bio and Saveur de l'année. The multitude of different labels created to inform about sustainability seem to fall through completely with most consumers.

Only 3 labels are truly known to consumers.

DO CONSUMERS KNOW WHAT LABELS MEAN?

Many of the labels on the French market might enjoy a certain awareness among consumers. But do they know what the labels mean? Or do they just make assumptions as to what the labels mean? In this chart, we can see that consumers link Label Rouge and Saveur de l'année quite strongly to the notion of quality. Agriculture Biologique is on the other hand seen as being «organic» , probably very much helped by the fact that this term is included in the label's name. Most of the remaining labels have much lower awareness, but it seems like they are quite efficient in conveying the meaning of the labels through their designs, since consumers mostly manage to give a quitecorrect opinion on what the label means.

FACT: ONLY 3 LABELS ARE TRULY KNOWN TO CONSUMERS

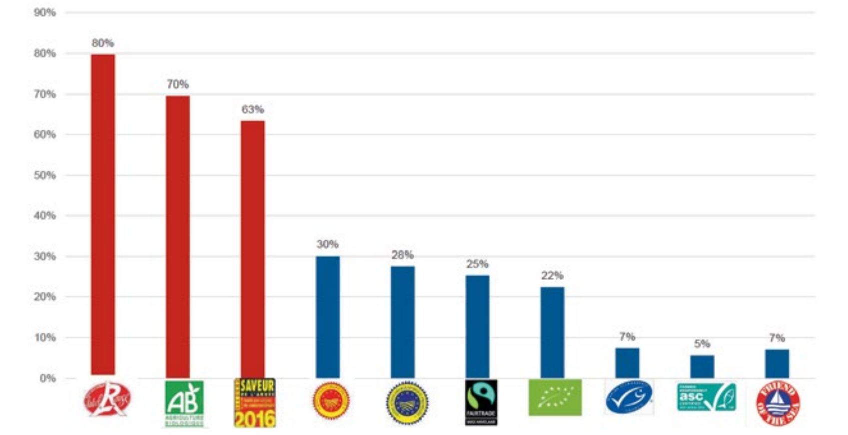

Figure 102: TNS Gallup/NSC, 2016
Q: How important is this label when you buy a fish product?

DO CONSUMERS KNOW WHAT THEY MEAN?

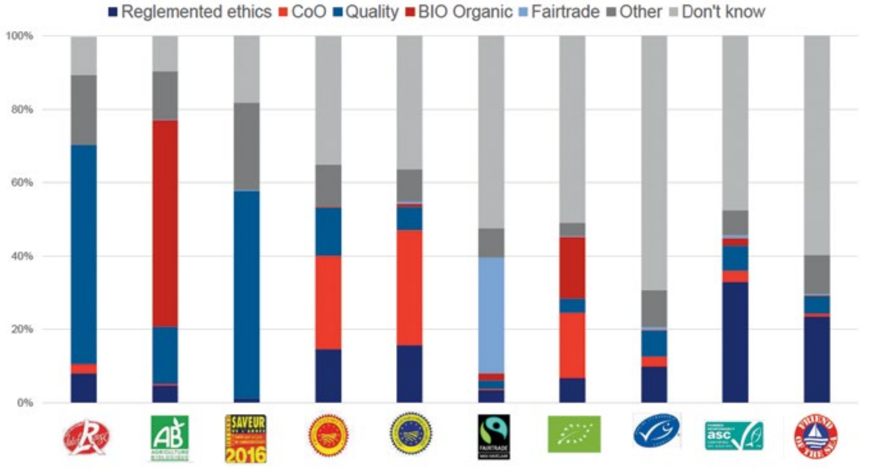

Figure 103: TNS Gallup/NSC, 2016
Q: What do you think this label means?

LABEL ROUGE = QUALITY

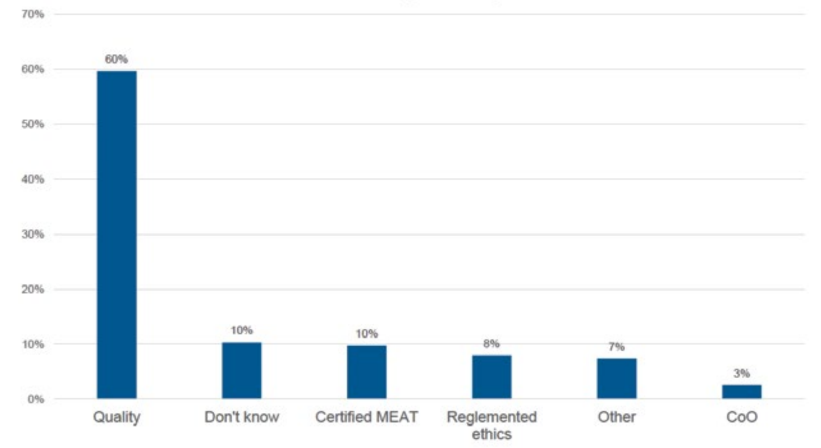

Figure 104: TNS Gallup/NSC, 2016
Q: What do you think this label means?

LABEL ROUGE

In the data on Label Rouge, the most known label in France, there are a few interesting findings. First, this label is clearly linked to quality among consumers. But this label also has a specificity: although the rate is not very strong (10%), this label seems to be linked to meat in the consumers' minds. This is something that has not appeared on any of the other labels presented in the study.

ARE LABELS IMPORTANT FOR THE CHOICE?

One thing is to observe whether the labels are known and understood by consumers, another thing is to determine whether they are actually impacting the consumers' choices. In this chart, we can clearly see that most of the labels, when known to the consumers, are to some extent important for the choices they make in the store. The only two exceptions are Saveur de l'année and Fairtrade, which are more easily ignored by consumers than the others.

Based on these findings, we can reasonably conclude that labels have a certain importance for French consumers. Some of them are quite commonly known, quite well understood by consumers, and have an impact on their buying decision. Labels may therefore be one of the solutions to reassuring consumers about quality, also when it comes to seafood.

4.3. ORIGIN

ORIGIN

There is an increasing demand from consumers when it comes to knowing where the food comes from. This is true also when it comes to seafood. It is clear that the country of origin gives consumers an indicator that helps them assess whether it's the right product for them.

LABEL ROUGE = QUALITY

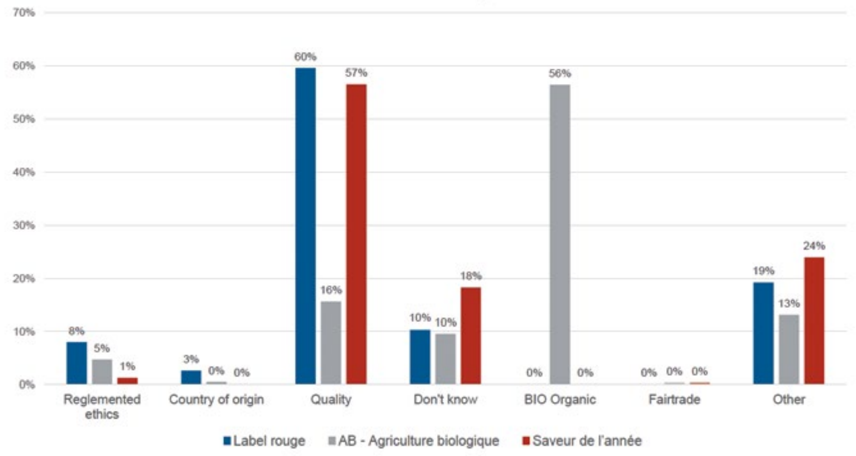

Figure 105: TNS Gallup/NSC, 2016
Q: What do you think this label means?

ARE LABELS IMPORTANT FOR CHOICE?

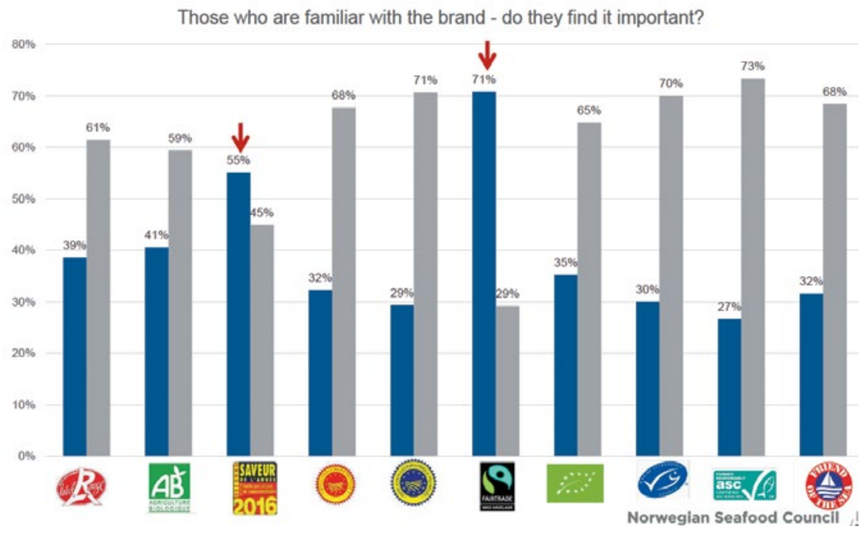

Figure 106: TNS Gallup/NSC, 2016
Q: How important is this label when you buy a fish product?

* QUALITY LABELS ARE IMPACTING FRENCH CONSUMERS

ORIGIN MATTERS!

Clearly, in France, origin matters. From this chart, we can see that nine out of ten consumers state that country of origin is important when buying fish/seafood. This number is increasing steadily, and has gone up by 4% only the last year.

IMPORTANCE OF ORIGIN INCREASES WITH CONSUMPTION FREQUENCY

The importance of knowing the origin also increases with the consumption frequency for seafood among the respondents; the more seafood you eat, the stronger the need to know the origin of the seafood.

PREFERRED COUNTRY OF ORIGIN

Because consumers care a lot about knowing the country of origin when buying seafood, it is also interesting to look at which countries consumers prefer when it comes to some of the most known species. In this chart, we can see the preferences in terms of country for salmon, cod, prawns and trout. For salmon, the preference clearly goes to Norway, well in front of Scotland. This is quite particular, because for all the other species, we observe not only that France is the preferred country of origin, but also that the rate of people who don't know is very high.

This is something we can observe in most markets; when there is little focus on the origin of the product, consumers tend to automatically prefer their home country, which is the «default choice». Salmon, on the contrary, is a specie that enjoys a high awareness, and consumers know which countries the product may come from. Hence, they are also in a position to prefer one country over another.

ORIGIN MATTERS!

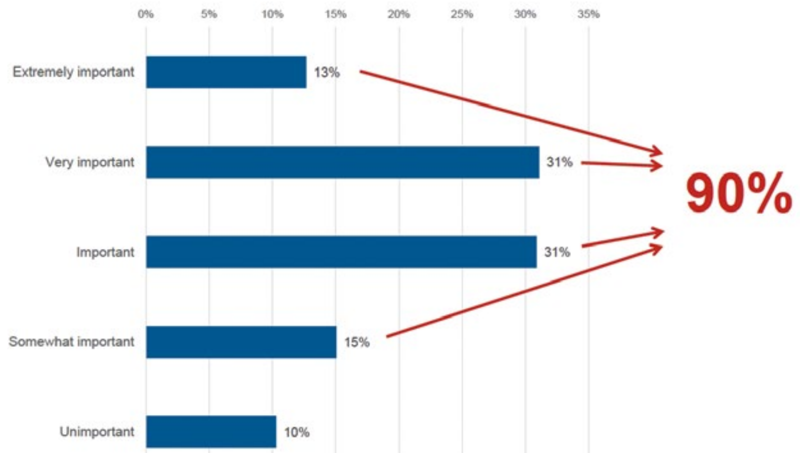

Figure 107: TNS Gallup/NSC, 2016
Q: How important is the country of origin to you, when buying fish/seafood?

IMPORTANCE OF ORIGIN INCREASES WITH CONSUMPTION FREQUENCY

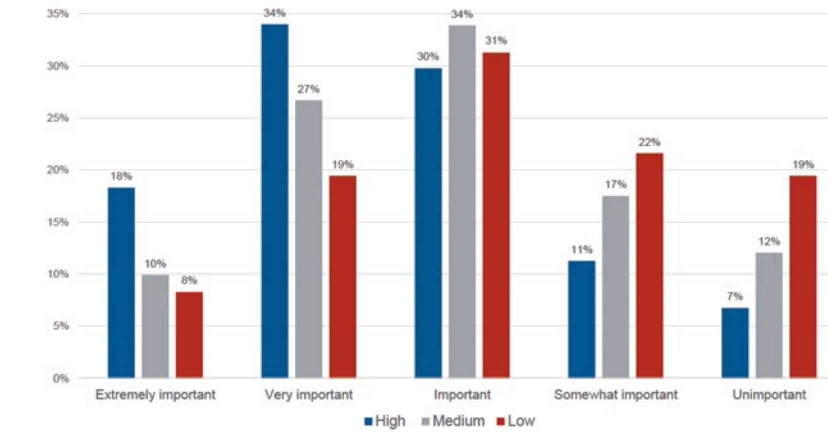

Figure 108: TNS Gallup/NSC, 2016
Q: How important is the country of origin to you, when buying fish/seafood?

PREFERRED COUNTRY OF ORIGIN

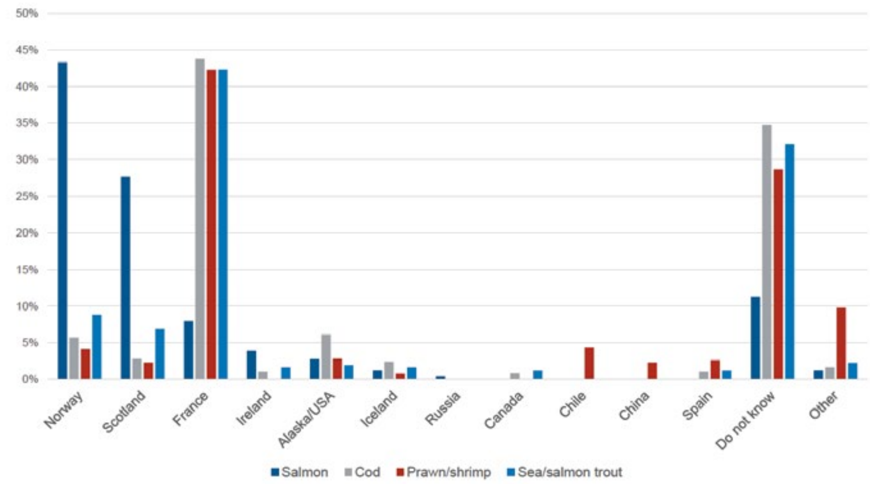

Figure 109: TNS Gallup/NSC, 2016
Q: Which is your preferred country of origin when you buy these species?

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THE FUTURE OF SEAFOOD

We are coming towards the end of this study, and we can clearly conclude that there is still much work to be done in order to build the French seafood market. Although most French consumers eat seafood, the barriers are still many, and often rely on trust issues. French consumers are maybe more demanding and ask more questions about the food they eat than their European neighbours, and it seems clear that it is necessary to increase the level of information available to the consumers. In the following section we will look at some of the opportunities we might cease in order to win over more consumers to seafood.

*

HOW CAN WE INSPIRE

consumers to eat more seafood?

1. Better value for money
2. Without bones
3. Quality labels
4. Indication of sustainability
5. Country of origin

Figure 110: TNS Gallup/NSC, 2016
Q:What could encourage you to eat more fish/seafood than you do today?

HOW CAN WE INSPIRE CONSUMERS TO EAT MORE FISH?

If we look at the top five factors that would inspire consumers to eat more fish, we clearly see that value for money is an issue for many respondents. This does not necessarily mean that the seafood has to be cheaper – and there is of course very little we can do about the price of seafood – but it means that the perceived value of the seafood is not good enough compared to the price consumers are asked to pay. But if we look to the factors mentioned in the chart on the right, we see that there are quite a few things the seafood sector and distribution could work on in order to inspire French people to eat more seafood. The findings give us ample reason to believe that the perceived value for money can be increased through a stronger satisfaction rate when it comes to product information and presentation. In this chart, consumer needs regarding origin and sustainability appear among the top factors that might increase their seafood consumption. Why not start by making those elements more visible on all types of fish?

5.1. OPPORTUNITIES

OPPORTUNITY 1
DIFFERENCIATE FRESH SEAFOOD TO SATISFY DIFFERENT CONSUMER NEEDS

TOP 5 FACTORS THAT WOULD INSPIRE CONSUMERS TO EAT MORE FISH

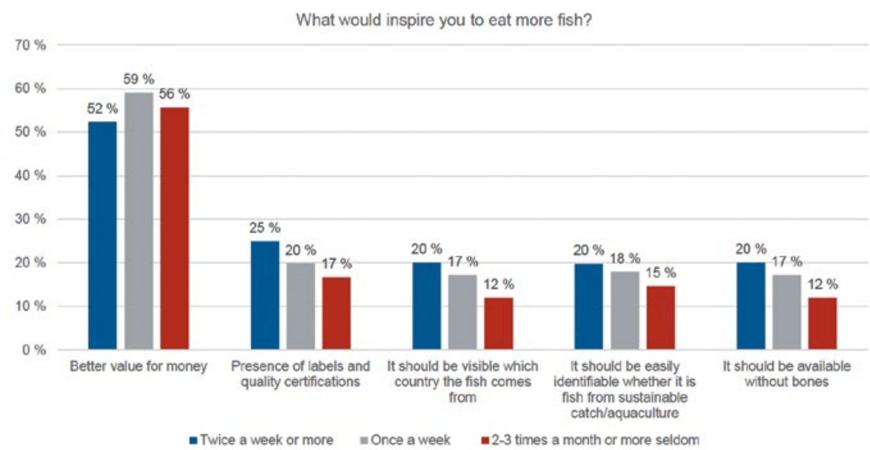

Figure 111: TNS Gallup/NSC, 2016
Q: What would encourage you to eat more fish/seafood than you do today?

Through this study, we have learned that there is a significant difference among consumers based on their consumption frequency, but also on age and income. Different consumers have different needs. However, natural seafood in France today – with some very few exceptions - is very generic. It is probable that this is the reason why many high-frequency consumers choose to buy seafood at a specialist, because they then get the feeling that the professional they are dealing with has made a selection to fit with their needs. But fish and seafood in general would probably come much closer to what the consumers expect if even fresh seafood, whichever the presentation, gave information about fishing or farming conditions, origin etc.

There is also a true opportunity to design different product profiles for the expectations of different kinds of consumers – ranging for those who seek a cheap and convenient product to the most demanding consumers who want premium quality and stronger presence of information to justify and/or reassure about the quality.

OPPORTUNITY 2
CONSUMERS NEED QUALITY REASSURANCE ON FARMED FISH

Even though France is one of the biggest consumers of farmed fish in Europe, this study has revealed that there are a lot of myths and negative opinions on aquaculture. However, fish farming is cited among the future solutions to feed the people on our planet, and is definitely here to stay. But to reconcile consumers with fish farming, there is a great need for pedagogy to allow them to understand that farming in water is just as normal as farming on land, and might just as well offer the quality guarantees they are seeking.

There is clearly an opportunity to improve the image of farmed fish through myth-busting and by putting forward all the positive aspects of fish farming that consumers have still not discovered.

OPPORTUNITY 3
PROMOTE ORIGIN OF SEAFOOD

Origin is an increasingly important criteria for consumers when they buy seafood. While 90% think origin has a certain importance for their seafood, as many as 44% state that it is «very» or «extremely» important. Whether the origin is put forward as a tiny village, a region or even a country, it seems like this reassures the consumers, who then feel that they have more elements at hand to make a qualified choice. Especially when we consider that importance of origin increases with the seafood consumption, it comes across as an evidence to promote the origin of seafood in order to satisfy the consumers who actually make out the volumes in the French seafood market. In an open question about how Norway as a country is perceived, very many respondents said something about seafood and the nature. One consumer stated:

„Norway is a cold country with superior quality of water and with a wide range of fish to offer“*

OPPORTUNITY 4
COMBAT PARENTS' IDEAS THAT CHILDREN DON'T LIKE FISH!

We know that families with children eat more fish than households without children. Maybe this is because parents are trying to offer their children a diet that is as balanced as possible, regardless of what they would really prefer to eat. However, they are not eating as much fish as they should, even though we know that children eat fish when it is served to them. Could it be that they like fish more than the parents think?

When we look at reasons why children don't eat more fish, the price comes up as the first obstacle, followed by sensorial issues such as taste, bones, smell… In order for families with children to up their seafood consumption, producers and distribution would probably have to work on both issues. A possible solution could be to propose a range of seafood products that offers good quality at a reasonable price, which would be the case for instance of several whitefish species. Secondly, one would have to push species that are known for their mild taste and which offer the possibility to remove bones and cut portions into child-friendly serving sizes.

In addition, it would probably make a difference if parents were inspired on how to introduce fish to children. For instance, it is a known trick to serve fish with something else children love, such as pasta. Also, parents should be incited to never stop trying. It is known that children have to taste things several times before they acquire a liking for it. And finally, why don't give parents tips about fish recipes they could prepare together with the children? Children are always more inspired to taste something they contributed to making. Teaching children to eat and like fish is a true challenge for the future;

besides the fact that they are tomorrow's consumers, seafood consumption is crucial both to public health and part of the solution for a more sustainable protein consumption on our planet.

*Figure 112: TNS Gallup/NSC, 2016
Q: Think about the country Norway. What are the words that describe your impressions and feelings when you think about Norway?

OPPORTUNITY 5
DESEASONALIZE SALMON

Even though salmon is French consumers' favorite fish, the consumption throughout the year is not even. If we consider the whole salmon category, including smoked salmon, there is of course an upswing for Easter, and especially for Christmas. However, there is a time of year when salmon consumption always experiences a drop: that is, during the summer months.

CONSUMERS THINK SALMON IS NOT FOR SUMMER*

When we ask consumers about why they eat less salmon during the summer months, a great majority of answers are concentrated around the fact that they think that salmon is simply not for summer! However, they also seem to link this to the fact that they have few recipes and ideas for how to cook salmon during the summer months – for instance on the barbecue. Also, they put forward the competition from meat in this season; meat in general is so well established in the summer and/or barbecue habits of French consumers, and during the summer, price promotions on meat are flourishing.

*Figure 113: TNS Gallup/NSC, 2016
Q: The salmon consumption in France is lower in the summer than the rest of the year. What do you think is the reason for this? And what could increase the salmon consumtion during summer?

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1. IT'S SEASONAL
2. NEED RECIPES & IDEAS
3. PRICE PROMOTIONS

THE SEASONS OF SALMON CONSUMPTION

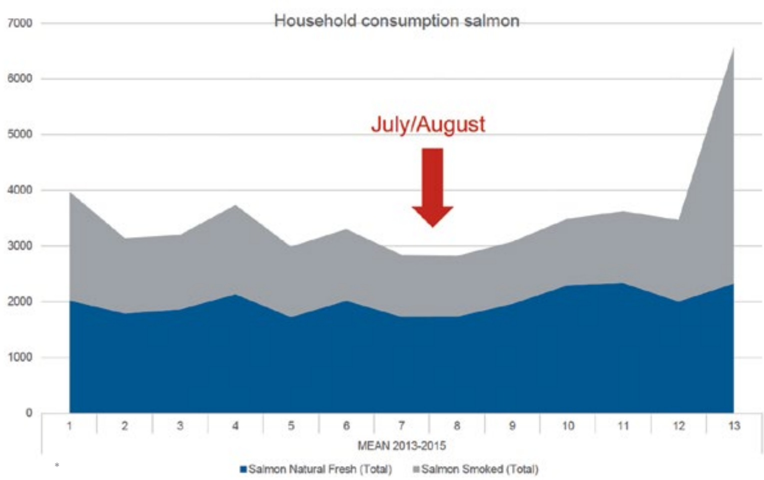

Figure 114: Europanel 2013-2015 - Salmon consumption

CONSUMERS NEED RECIPES AND INSPIRATION

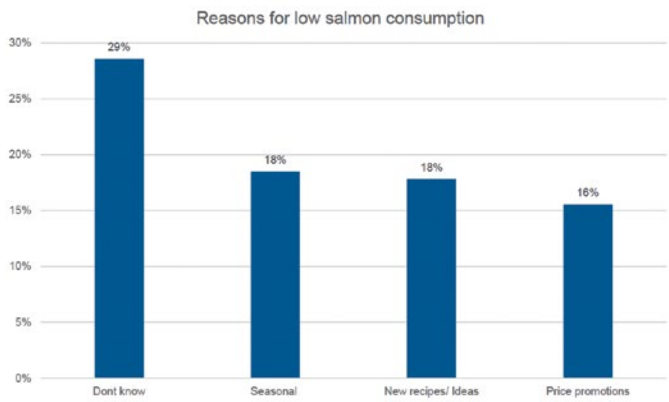

Figure 115: TNS Gallup/NSC, 2016
Q: The salmon consumption in France is lower in the summer than the rest of the year. What do you think is the reason for this? And what could increase the salmon consumption during summer?

So even though salmon is the favorite fish, and consumers seem to think that it is a very versatile and easy option for cooking around the year, they have some troubles adapting this specie to their summer habits. This probably means that there is a job to be done in order to remove seasonal barriers for salmon to a greater extent, and give consumers inspiration and advice on how to integrate salmon perfectly with their consumption needs during the summer.

„(SALMON) IS A RICH DISH, ASSOCIATED WITH CHRISTMAS, THE COLD AND BIG OCCASIONS... ALL THE CONTRARY OF A BARBECUE AMONG FRIENDS. MAYBE THIS WOULD CHANGE WITH ADVERTISEMENT ALL YEAR ROUND, LESS FOCUSED ON CHRISTMAS?"

Figure 116: Quote from consumer regarding salmon consumption in the summer TNS Gallup/NSC, 2016
Q: The salmon consumption in France is lower in the summer than the rest of the year. What do you think is the reason for this? And what could increase the salmon consumtion during summer?

OPPORTUNITY 6
BUILD TRUST TOWARDS QUALITY AND FRESHNESS IN ONLINE CHANNELS

From our section about online shopping, we remember that there is a general lack of trust among consumers – for groceries in general, but particularly for seafood.
The number one concern was that people can not see and choose the products for themselves; that the merchant might not be picky enough on behalf of the consumers.
However, today, it is possible to conceive a product range that would reassure consumers about buying seafood online. What if seafood producers could propose standardized products for this segment, meaning that the consumer would have a fish fillet that would always look the same and have the same portion size?
On the merchant's side, what about considering a system that allows showing of a full range of information about the product, including fishing or farming conditions, as well as the real date of expiration of the product? These measures, among others, could help remove some of the barriers consumers have towards buying seafood online; they would probably be more likely to buy if they knew for instance that they would always receive a salmon back loin with the same shape and size, if they could have more information about the origin of the product, and if they knew exactly for how long they could keep it.

OPPORTUNITY 7
RELAUNCH PREPACKED SEAFOOD

With nine out of ten seafood consumers who don't buy prepacked, this is a true barrier for growing the market. Prepacked offers some real advantages; it is packed in a protected atmosphere and can therefore sit a few days in the fridge before consumers eat it, allowing them to plan their seafood

meals more independently of their shopping frequency. Also, prepacked can be sold almost anywhere, even in the smallest neighbourhood store or online, since it only requires adequate cooling, and no water or ice. It is also very easy to transport and store for consumers, since the packaging is dry and clean.

From the finding of this study, it seems like most consumers don't buy prepacked simply because they haven't taken on the habit. Also, we observe that prepacked is bought more frequently by those who eat seafood the least, and who care mostly about the price aspect when they choose seafood. However, prepacked does not seem to satisfy the needs of the more «expert» high-frequency seafood consumers. And we should not forget: this is where the volumes in the seafood market are! However, for these «expert» consumers to consider buying prepacked fish, we would need to present it in a way that makes it appealing to them: they would like to feel inspired by it, and be sure of the quality and freshness. Today, most prepacked fish is very anonymous, and don't offer much relevant information that the consumers are seeking. It might seem like the design of the packaging, more vigilance with regards to how the fish pieces in prepacked are presented, as well as more ample information about the fishing/farming, conservation and preparation would be welcome among consumers. Why could prepacked seafood not be perceived as just as premium as for instance some references of smoked salmon or caviar?

CLOSING REMARKS

The aim of this study was to generate greater knowledge about fish consumption and consumer behavior in France. Through this study, it has become clear that even though France is an important seafood market, and with a seafood consumption within the average in Europe, there is still a long way to go in order to develop the market. French consumers are demanding consumers, and don't seem very satisfied with the existing seafood offer. They are always aiming for good quality, adequate product information – and this at a price they find acceptable. At the same time, this study has given some ideas as to which paths to choose in order to incite French consumers to up their seafood consumption. However, this will not happen without producers, distribution and all those working with seafood joining forces to propose the options consumers are asking for. We hope that this study has brought the readers a wider knowledge about the French seafood market, and that it has given food (or fish) for thought.

Paris, May 2016

THANK YOU

LIST OF ILLUSTRATIONS

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