How to get younger UK consumers hooked on seafood

2018 Norwegian-UK Seafood Summit, 24 January 2018
How to get younger UK consumers hooked on seafood

Presentation Overview

• Scene setting - overview of young consumers by value and penetration
• Seafish consumer segment summary with insight into the profile of the ‘young’ Forgotten Fish group
• A quick dive into seafood consumption with quantitative and qualitative findings with clear ideas to hook consumers into eating more seafood
• Summing Up
Seafood consumers Boston matrix: population penetration and share of sales value

Source: Nielsen HomeScan 4 Nov 2017
Seafood consumers Boston matrix: population penetration and purchase frequency

Source: Nielsen HomeScan 4 Nov 2017
Seafood consumers Boston matrix: population penetration and sales value change v last year

Source: Nielsen HomeScan 4 Nov 2017
Consumer segmentation

Charles and Isabelle
- Fabulous Fish
Wealthy families who can afford to spend on fish

Roger and Gillian
- Fresh fish families
Older families who enjoy eating a wide variety of fish

Dan and Hannah
- Forgotten Fish
Students/young professionals who rarely eat fish

Russell, Deborah, Jack & Chloe
- Fish finger families
Busy, young families who opt more for frozen fish for ease

Beryl and Arthur
- Fish on a Friday
Aging elders who eat fish out of a longstanding habit

Gary and Lynn
- Frugal frozen
People who opt more for frozen fish due to a limited budget
Dan and Hannah - Forgotten Fish

- 10.35% of Households and 9.82% of the population
- They are ‘pre-family’ and ‘new family’ Neilson HomeScan profiles
- Low level fish eaters
- Generation rent - 3 times likely to be home sharing (26%) and renting (58%)
- Money tighter – only 22% saying they are ‘comfortable’ on their income (UK average 27%)
- Living in urban areas near workplaces
Characteristics

- Working full-time
- Busy, active, social people
- Often exercising after work
- On a budget, maximising their money
- Limited cooking skills and preparation time during the week
- Often shopping every day/couple of days for immediate consumption
- Shopping on way home from work or the gym = common
- Spontaneous “What do I fancy tonight?” shopping rather planned meals
- If married/co-habiting more of a routine to food shopping and meal preparation from people who are singles
Consumer research into behaviours on seafood consumption
42% 18-24 year olds
32% 25-34 year olds
who eat one or less portions of fish a week claim that it is the cost of fish that prevents them from eating more fish.
(32% UK average)

Hook younger consumers with good value options
34% 18-24 year olds
32% 25-34 year olds
eat at least one portion of fish a week because of the
‘general health benefits of eating fish’
(35% UK average)

Hook younger consumers with good health messaging/info
73% 18-24 year olds do not know that it is recommended that they eat two portions of fish a week, one of which should be oily. (72% UK average)

72% 18-24 year olds agree that they feel encouraged to specifically eat two portions of fish a week (78% UK average)

Hook younger consumers with good health and 2aweeek messaging
• Methodology – programme of focus groups by consumer segments
• Groups recruited by professional members of the Market Research Society
• Participants undertake activities in advance:
  - keeping a food diary
  - purchasing something new
  - participants collect/share copies of seafood marketing they have seen
Younger 25-35 pre-children

what are they eating?

• A LOT of chicken!!! And a LOT of pasta
• Pizza
• Ready meals
• Takeaways = regular event = convenient
• Occasional Fish & Chips
• Eating out, capitalising on meal deals
• Also, buying reduced price food at the end of the day = value

“ Mostly it’s chicken, there’s loads of it around and it’s very easy to cook”
Where does fish figure?

• ‘I eat fish to change it up because it’s a bit healthier, cod usually’
• Fish = a minority meal protein
• Not as top of their mind as we would like it to be
• Young consumers strive for:
  Meals that are quick to prepare
  Meals that are easy to prepare
  Meals that are good value for money
  **AND** fish often thought as difficult to meet these requirements

Hook younger consumers with quick, easy and good value products and recipes
Why do they NOT eat more fish?

• ‘I so often want to cook it and I go to the fish aisle and it just ends up confusing me because I don’t know what to do or what to buy’

• ‘I look at the fish and there’s too much going on. Too many different varieties I can go with. Even the pre-packed’

So, bewilderment and confusion:

• ‘I’m frightened to go to the counter because I have a bit of a problem with heads on fish anyway. I look at it and I don’t know what I’m asking for’

Hook younger consumers by improving their confidence with fish
Why do they NOT eat more fish?

- ‘It’s not drummed into us enough how to do fish quickly’
- ‘I don’t want to make poison myself – how do I know when it’s cooked?’
- Fish = caught up in perceptions of being complicated, messy, smelly
  ‘I don’t want it in my fridge, stinking my fridge out’
- ‘I don’t know how all the different fish taste. Swordfish vs. seabass vs. pollock. I wouldn’t have a clue and sometimes they smoke them and sometimes they don’t’
If you were the seafood marketing board ... What would you do to encourage people to eat more fish?
Suggestions for eating more seafood

• Remind them that **fish and chips counts** to eating their two portions of fish a week – different portion sizes needed for options/times of day
• Remind them that **sandwiches/salads all counts** towards eating two a week
• **Fish Meal Deals** – fish meal centre and veg/salad that goes with it
  Many do not know what to SERVE with fish, meal deal = a solution
• **Remember lunchtime** – younger consumer all taking food to work or buying lunch
Suggestions for eating more seafood

• Harness influencers on digital channels – quick and easy fish recipes to make after work
• Selling seafood with imagery that is interesting, colourful, modern, simple, looks easy to prepare
• Videos/content all being consumed and being targeted at young, busy professionals. These are go-to places for young consumers finding information on nutritious, easy, delicious fish dishes
• Inspiring young consumers - serving up ideas for dishes/menu options on latest and emerging trends

<table>
<thead>
<tr>
<th>Consumer preferences</th>
<th>UK Average %</th>
<th>Younger consumer (Forgotten Fish) %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Like different cultures and ideas</td>
<td>39</td>
<td>54</td>
</tr>
<tr>
<td>Like to pursue a life of challenge/novelty/change</td>
<td>31</td>
<td>45</td>
</tr>
<tr>
<td>Often do things at spur of the moment</td>
<td>39</td>
<td>42</td>
</tr>
</tbody>
</table>
Suggestions for eating more seafood - sampling

• We gave each respondent a budget to buy some fish they hadn’t tried recently and cook it and report back on how they got on
• Some very positive feedback in terms of encouraging trial and potential to expand repertoire
• Majority pleased and proud of their results and happy to buy and serve again
In summary

• Key growth opportunity in young consumers highlighted by the Boston illustrations
• Barriers of price, confidence, smell and cooking level continues to be an issue
  BUT this consumer group will active seek information/content and are looking for new ideas
• We need to make fish feel easy, quick and convenient and place in the minds of consumers when they are thinking about purchase
• Health is key for seafood and when consumers know about the benefits they say it will encourage them to consume more
• Meal deals, sampling and inspiration is key
Our 24/7 shop window
Hub of information and conversations on recipes, tips, species info and health benefits.

Seafood Week
5 – 12 Oct 2018
2017 - £142.6m Sales
2016 - £132.7m Sales
2015 - £125.6m Sales

Evolving health campaign championing eating two portions of fish a week

Fish and Chips plus other trade activities key part of our work

www.fishisthedish.co.uk  www.seafoodweek.co.uk  www.2aweek.co.uk
www.fishandchipawards.com  www.enjoyfishandchips.co.uk
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