

# SEAFISH

How to get younger UK consumers hooked on seafood

2018 Norwegian-UK Seafood Summit, 24 January 2018

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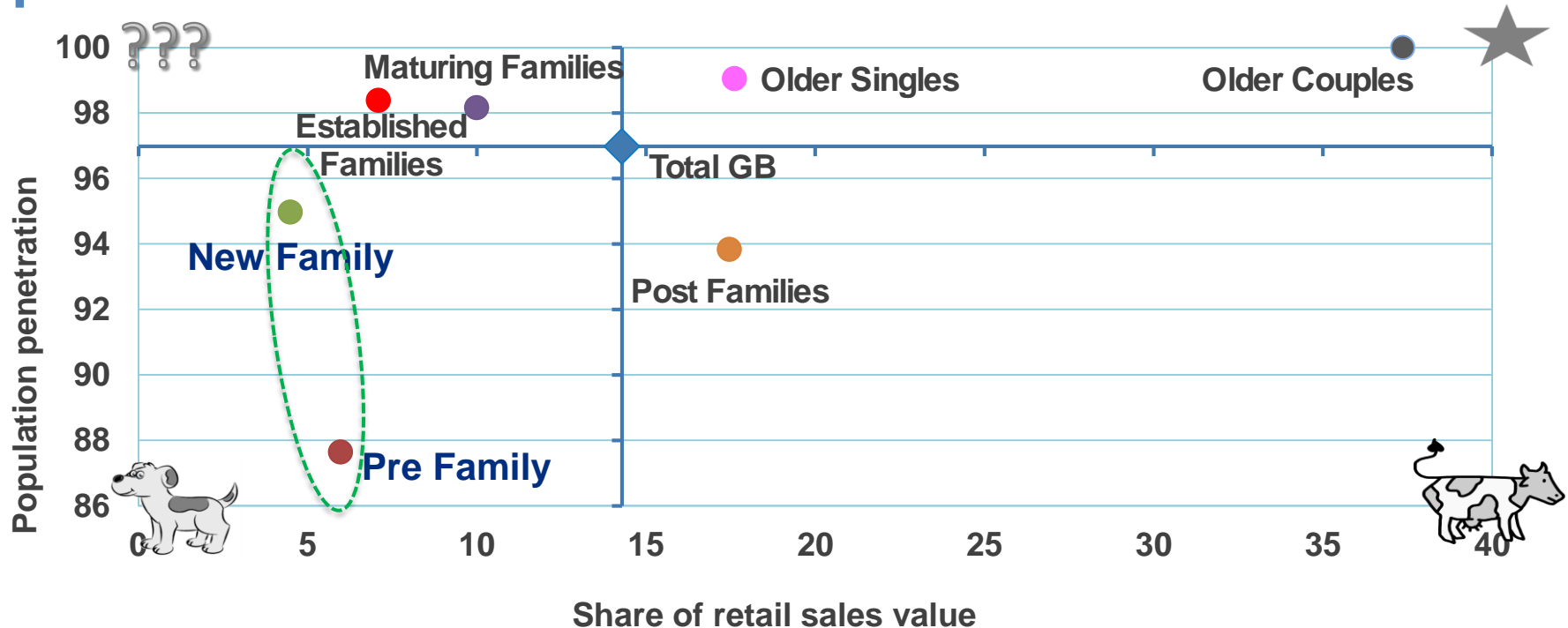
## How to get younger UK consumers hooked on seafood

### 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

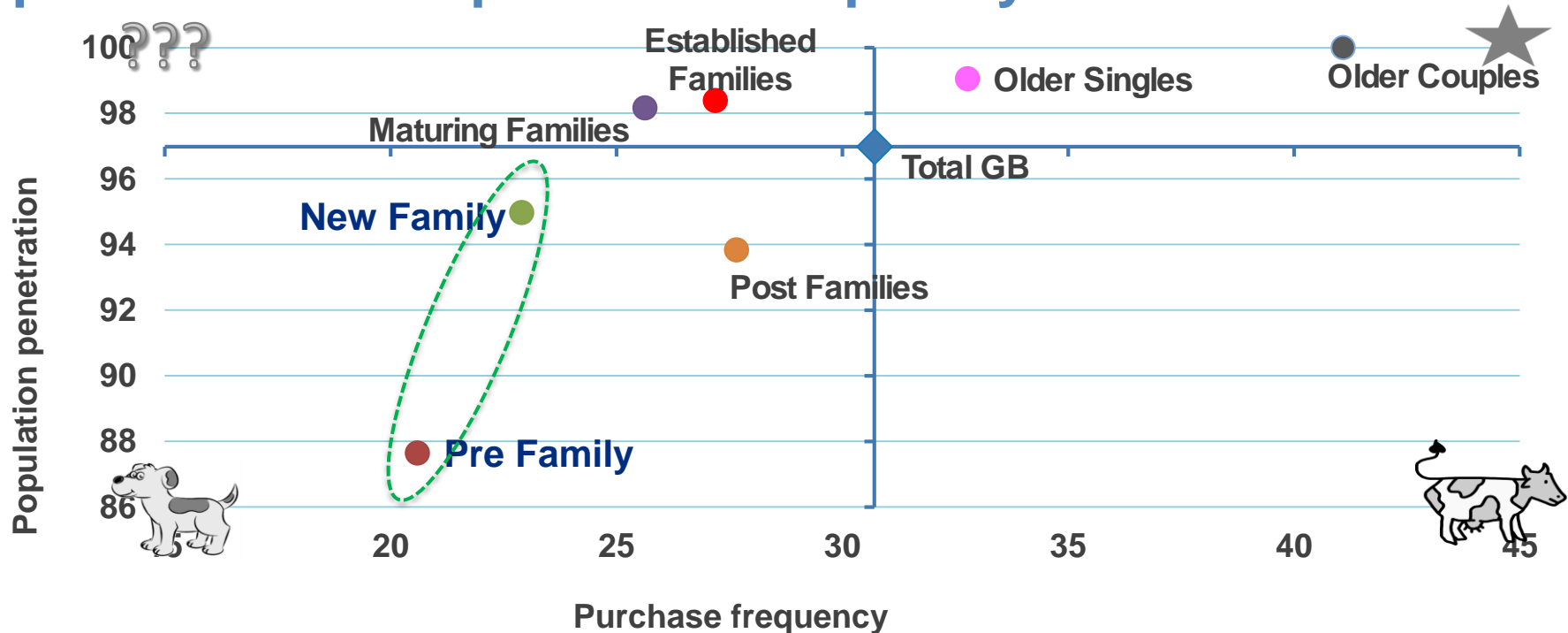
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## Seafood consumers Boston matrix: population penetration and share of sales value



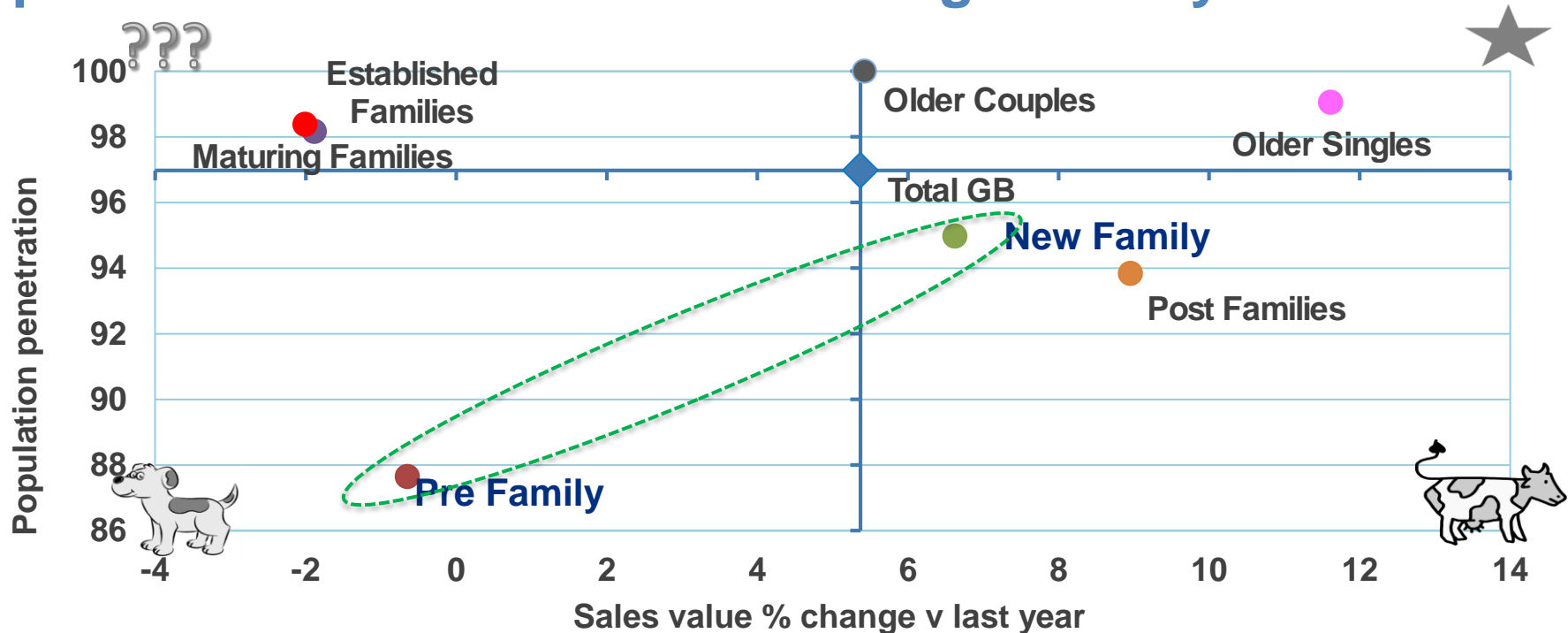
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## Seafood consumers Boston matrix: population penetration and purchase frequency



# SEAFISH

## Seafood consumers Boston matrix: population penetration and sales value change v last year



# SEAFISH

## Consumer segmentation

# SEAFISH

## 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

# **SEAFISH**

**Consumer research into behaviours on seafood consumption**



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YouGov

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

# SEAFISH

YouGov

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

# SEAFISH

YouGov



When told of  
the multitude  
of health  
benefits of  
fish...

**73% 18-24 year olds**  
**72% 25-34 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**  
**76% 25-34 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 2aweek messaging

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- 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**:

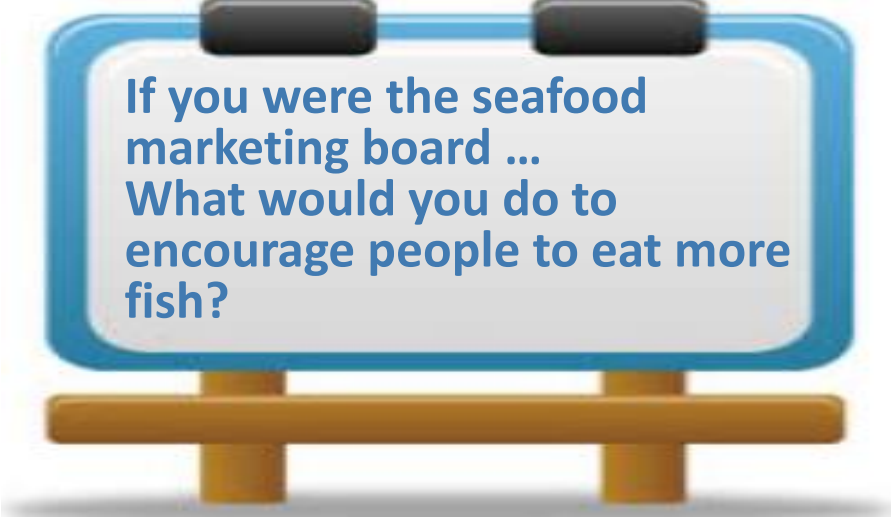
- 'I'm frightened to go to the counter because I have a bit of a problem with heads on fish anyway. I look at it and I don't know what I'm asking for'

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'

Hook younger consumers with messaging to overcome barriers



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

Consumer preferences	UK Average %	Younger consumer (Forgotten Fish) %
Like different cultures and ideas	39	54
Like to pursue a life of challenge/novelty/change	31	45
Often do things at spur of the moment	39	42

## 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



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[www.fishthedish.co.uk](http://www.fishthedish.co.uk)



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

[www.seafoodweek.co.uk](http://www.seafoodweek.co.uk)



Evolving health campaign  
championing  
eating two portions  
of fish  
a week

[www.2aweek.co.uk](http://www.2aweek.co.uk)

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## Questions

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