Chilled vs. Frozen Research

Report prepared for Seafish by Brahm Insight, January 2010

supporting the seafood industry for a sustainable, profitable future

Background and objectives

"Gain a thorough understanding of the differences in consumer perceptions and attitudes towards chilled and frozen seafood products"

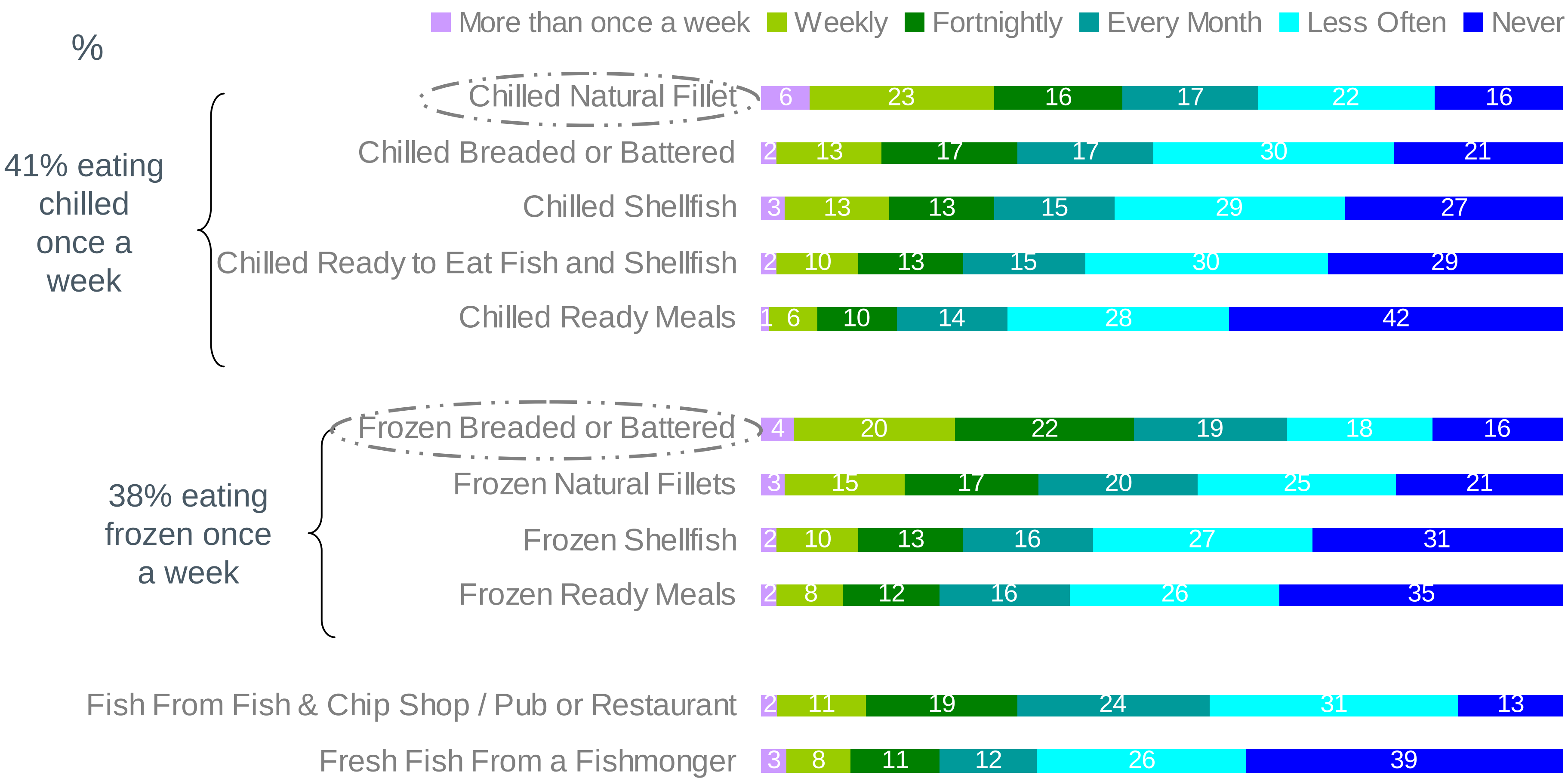
Specifically we needed to identify:

1. Current attitudes and perceptions towards chilled and frozen seafood
2. Current usage of chilled vs. frozen seafood
3. Ascertain any difference in shopping behaviour when purchasing in each category
4. Understand what consumers know about chilled and frozen seafood in general
5. Ascertain current knowledge and understanding of the supply chain

- A combined qualitative and quantitative approach was taken to answer the above objectives in detail and provide clear insight into these categories

Frequency of consumption

Q1 How often do you or your family eat the following types of fish and seafood? *Single code* Base: Total sample n:2030



Consumption of fish reflects the data from the recent Seafish omnimass which shows that on average 1.6 portions of fish are consumed each week.

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Frequency of consumption - demographic differences

Those under 35 consume fish less regularly (correlates with Seafish Omnimass below average weekly consumption)

Most likely to buy chilled fish ready meals

Less confident cooks least likely to buy most products apart from breaded and battered fish

Lower social grades least likely to buy ready to eat or go out to have fish

Those 35+ and ABC1 buy into more natural fish and shellfish both in chilled and frozen, highlighting the confidence in their cooking ability

Also more likely to go to a fishmonger

Those with children more likely to buy into added value products i.e. ready to eat or breaded and battered, but also natural fish and shellfish

FREQUENCY

Younger

Less confident cooks

Lower Social Grade

Older

More Confident Cooks

Higher Social Grade

Regular fish & seafood consumers really enjoy it…but tend to stick to the same dishes

Healthy

Nutritious

Virtuous – no guilt

Quick

Easy

Versatile

"It is just tasty and really good for you – I don't feel bad when I eat it"

"I seem to just do what my mum did – oh that sounds quite sad I am just like my mum!!"

"I really like fish, I would have it every meal if I could!"

Majority have been brought up with fish <u>BUT</u> what they use has rarely changed
Only 2 respondents (one in York, one in Livingston) were more adventurous, both being relatively new into the fish market

Out of all the proteins, fish is seen to be the most ‘scary’

An ‘alien’ fear – unknown and uncertain – afraid of something different

It’s driven by a lack of knowledge

1. **What it looks like**
   - Whole fish is off-putting – head and eyes
   - Shellfish
2. **Bones**
3. **Fishy smell**
   - When purchase and when cook
4. **How to cook**
   - Bake, grill, fry?
   - What do you do with the shell?
5. **Undercook or overcook**
   - Difficult to get right
   - Worries over food poisoning (negative press)

“I have never bought salmon – I just don’t really know what I am supposed to do with it?”

Fish & seafood still seen as pricey…but not so much as previously

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Still expensive in comparison to some other 'everyday' proteins but now has greater VFM connotations

£££ → ££

"I think it has got cheaper hasn't it – well cheaper than it used to be"

- More species available
- Supermarkets delivering more offers – run on traditionally expensive species i.e. salmon and prawns (moved them to become everyday)
- Emergence of more 'premium species' e.g. sea bass, monkfish means salmon, prawns seem cheaper

"I always saw Salmon as an expensive fish, only having it at Christmas but now it is always on offer"

"It is still more expensive than other types of meat but then it is worth paying for"

Some believe all groceries have increased in price, fish included

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Each category fulfils a different occasions

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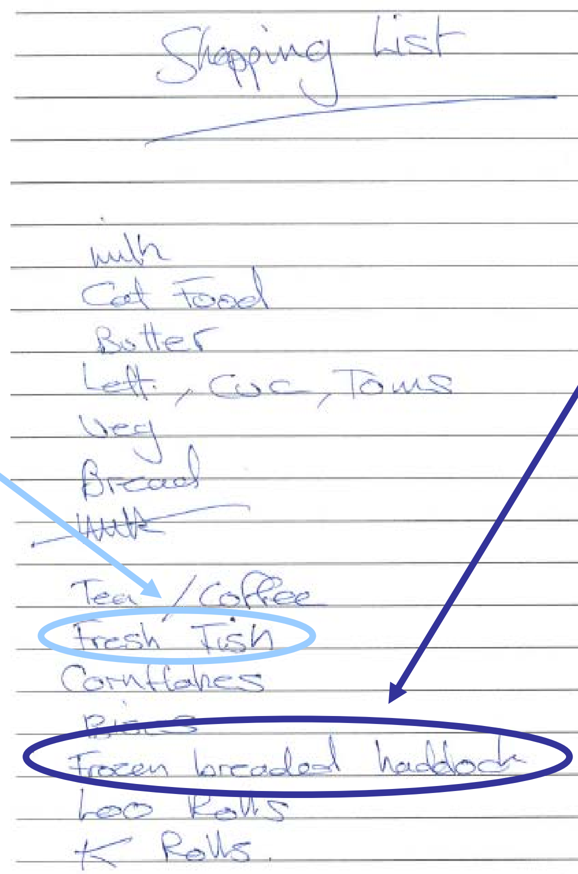

Chilled

- Main and top up shop
- Occasion in mind ~ know going to consume in 1-2 days
- No specific species on list (unless for a recipe)
- Buy what fancy (within their repertoire)
  - What looks nice

Try something new?
- Specific offer
- Recipe requirement

Frozen

- Main shop
- Specific species/product on list
- Stock item ~ not bought with an occasion in mind

Try something new?
- Specific offer
- Recipe requirement
- Innovation in branded products e.g. Birdseye Simply Fish

To expand repertoire purchasing – provide guidance and reassurance
- How to cook – oven, steam etc
- What to put with it – suitable accompaniments
- How it will taste – e.g. strength of flavour, meaty etc

Decision criteria

Chilled = Occasion

Quality
- Freshness
- Visual appearance
- Colour
- Water in pack

Recipe/Availability
- Determines type of species
- Repertoire

Number of mouths to feed
- Size of pieces
- Pack sizes i.e. number of pieces

Price
- Per portion
- Offers

For a special occasion respondents tend to buy from the counter…but only those who feel comfortable in approaching the staff. Intimidation deters some from investigating the counter offering

Frozen = Convenience

Quality
- Brand

Regular purchase
- Offers

Price
- Offers

Number of mouths to feed
- Pack sizes i.e. number of pieces

Less important in both categories
- **Provenance**
- **Sustainability**
- **Catch Method**

Lack of emotional engagement with fish

Provenance/Locally Sourced

- Quality marker e.g. Scottish Salmon
- Price/value overrides – even with Scottish respondents

Sustainability

- Aware what it means i.e. running out
- Some aware of species effected – cod and haddock
- BUT….is not effecting their purchasing behaviour

Catch Method

- Dolphin friendly top of mind – established message
- Line caught – respondents did not know what it meant and have not seen in-store
- Farmed fish – uncertain about what this means but not automatically negative
- Spontaneous comments on throwing dead fish back in to the sea as seen on Trawlermen

Seasonality

- Very few aware of seasonal fishing (2 Scottish respondents aware)
- Those aware did not know what species or what seasons it relates to

Greater Complexity

Fish does not generate any emotional attachment unlike other proteins due to lack of visibility, therefore these issues are perplexing to many consumers

Consumer category perceptions

	Chilled	Frozen
Quality	✓ Fresh ✓ Keeps flavour	✗ Mushy when defrosted ✗ Loses flavour
Price	✗ Expensive (but some perceive to be better VFM through quality expectations)	✓ Frozen USP
Size of portions	✓ Better pieces – plump, good size, ability to choose your own	✗ The ‘end bits’ – thin, inconsistent sizes
Freshness	✓ It’s a given	✗ Complex – *“How can frozen be fresh”*
Pack size	✓ More suited to smaller households ✗ Expensive for larger families	✓ Suited to families ✗ Larger pack sizes not economical for smaller households
Packaging	✓ See pieces ✓ Visual = ascertain quality and VFM	✓ More premium products tempting with on-pack photography ✗ Boxed – can’t see product and could be disappointed ✗ Excess packaging
Quickness	✓ 10 – 15mins maximum	✗ No less than 20 minutes

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Consumer category perceptions

	Chilled	Frozen
Convenient	✓ Quick and easy to use × Have to do more preparation	✓ Driver to use – straight in oven × Have to take time to defrost natural fish
Brand	✓ Trust in supermarket own label in chilled × No specific 'branded' products	✓ Important – drives quality perceptions ✓ Traditional household names × Less trust in supermarket own label – expect lesser quality
Nutrition	✓ Because it is fresh! It retains all goodness	× Loses nutritional values in freezing process
Natural	✓ Expect greater variety ✓ Natural = fresh	✓ Some aware of frozen Seabass in Tesco × Limited awareness of full range – don't expect it to be available
Added Value	✓ Fishcakes & seafood sticks × Other products (i.e. battered) not expected	✓ Expectations of frozen in general ✓ Category was established on these products
Ready Meals	✓ 'Better' ready meals i.e. Cod Mornay	✓ Traditional, easy recipes i.e. fish pie × More processed
Sustainable / Local	➢ No difference	

Category performance

Q2 For each of the following values, please state whether you think chilled or frozen fish and seafood performs better, or they are both the same? *Single code* Base: Total sample n:2030

Category Winner

- Frozen
- Chilled
- Chilled
- Frozen
- Chilled
- Frozen
- Chilled
- Chilled
- Frozen
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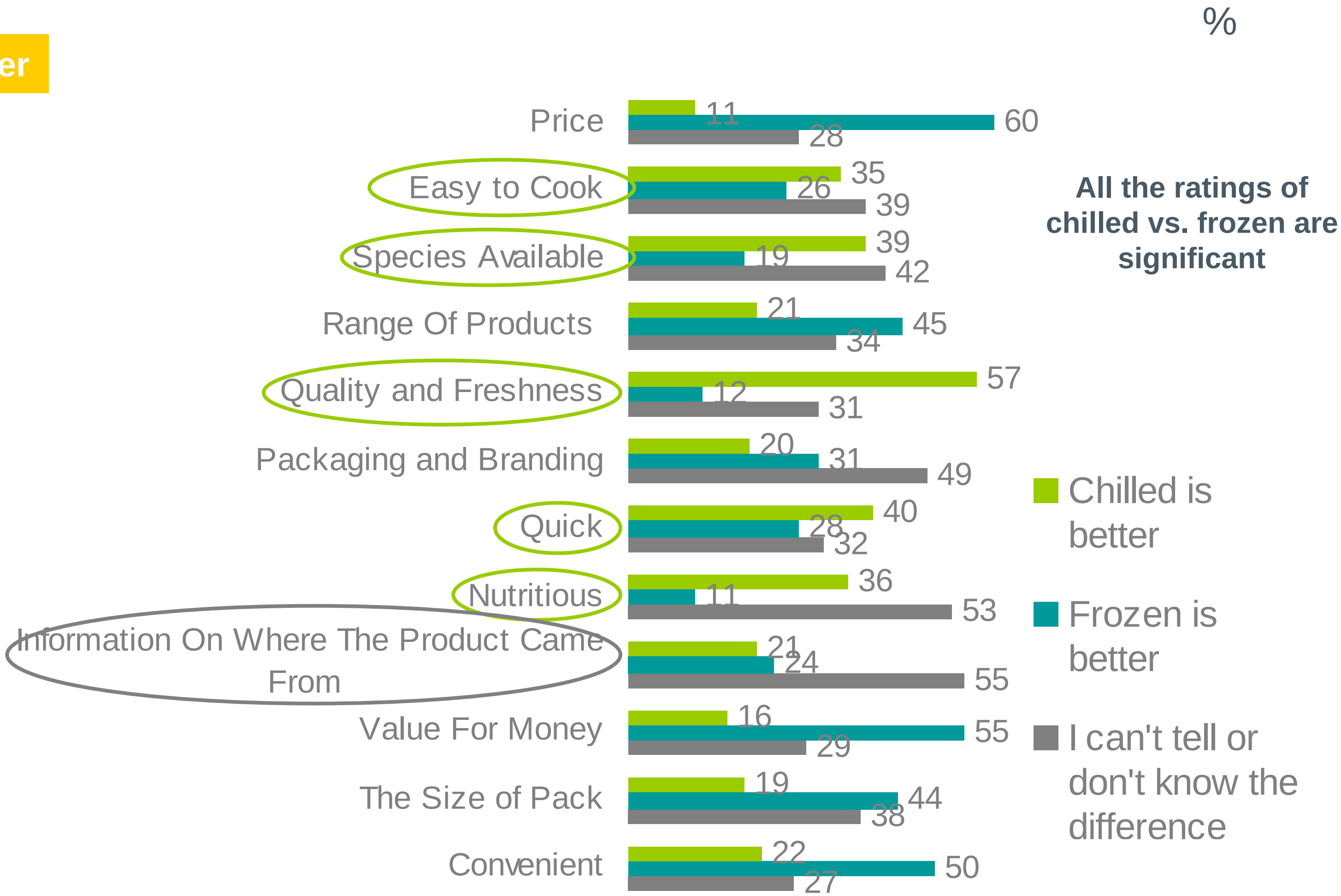
- Frozen
- Frozen



Lack of awareness of the supply chain

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IT JUST ISN'T ON THEIR RADAR

"I have never really thought about it"

"I don't like thinking about any of that for any of my food"

"Frozen fish – I wouldn't have a clue where that came from"

"I think if I thought about it I wouldn't eat fish again"

"The only thing I know is that fishermen don't get it on a Monday do they?"

- **It isn't easy to understand…..when made to think about it respondents saw it as very complex**
- **BUT….it isn't important to them and they are not actively seeking out this information**
- **Even those with strong family heritage with fishing in Scotland are unaware of the specifics of the supply chain**

What does the frozen supply chain look like for consumers?

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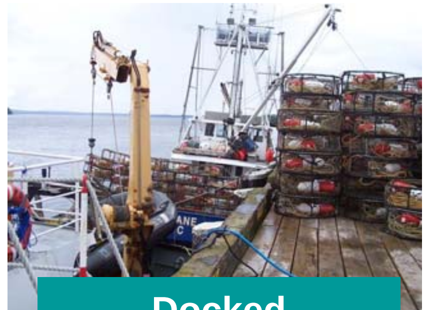
Caught at sea



Docked

Processed in a factory

Frozen

Delivered to store

"What they actually fillet it on the boat? That seems strange"

"That does make a difference to me. I would never have thought they could do that. That makes it fresher than fresh?!"

Frozen At Sea
Frozen is Fresh!

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- **Changes opinions – but hard to comprehend – *"How do they freeze it – its just ice isn't it"***
- **But….they like the idea that freezing is immediate – seals the freshness in**

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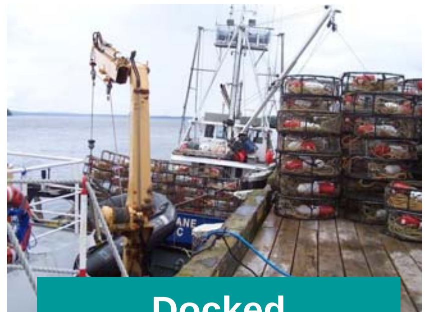
What does the chilled supply chain look like for consumers?

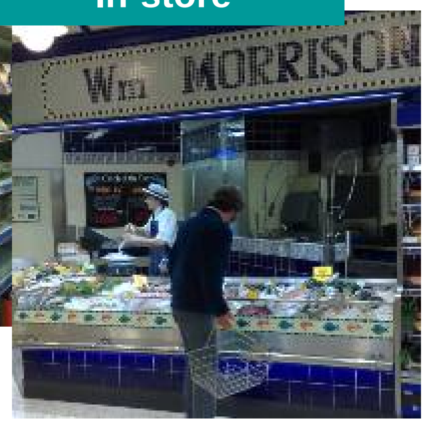
Caught at sea



Docked

Sent to store & filleted

In-store



"I think it just comes off the boat and goes straight to the store in refrigerated lorries "

"When you think about it, how does the overseas fish get here fresh?"

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- **When prompted to think about the 'fresh' supply chain, respondents got very confused and concerned**

Summary

- Regular seafood consumers enjoy it but tend to stick to what they know
- Seafood consumption is hampered by consumers' lack of knowledge - it's a 'scary' protein
- Seafood is still seen as expensive, but consumers acknowledge it as a value for money protein
- Chilled and Frozen formats are chosen depending on occasion
  - Chilled purchases depend on the occasion
  - Frozen is bought for convenience

Summary

- Consumers don't have any emotional engagement with fish which makes it difficult for them to understand complex fisheries issues like
  - Provenance
  - Sustainability
  - Catch method
  - Seasonality
- Very little thought is given to the supply chain and consumers aren't really interested
- When asked to think in more detail about the supply chain consumers get very confused and concerned