AQUA2006
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SEAFOODplus Session Thursday 11 May

Consumer behaviour and preferences for aquaculture products

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Project 2.1 CONSUMERSURVEY

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What does aquaculture mean to the European Consumer?

- Even though aquaculture has grown heavily in importance, little is known about consumer perceptions of wild versus farmed fish
- What does aquaculture actually mean to consumers
- SEAFOODplus project CONSUMER-SURVEY investigates this issue

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De 'facto on World Fish production: source and use (Million tons)

	1990	1994	1996	1998	2000	2002
Inland capture	6.6	6.7	7.4	8.1	8.7	8.7
Marine capture	79.3	84.7	86.1	79.6	86.5	84.5
Aquaculture	13.1	20.8	26.7	30.6	35.5	39.8
Total	99.0	112.3	120.2	118.2	131.0	133.0
Fish as Food	70.3	79.8	88.0	93.6	96.8	100.7
Population	-	5.6	5.7	5.9	6.1	6.2
Kg/caput	-	14.3	15.3	15.8	15.9	16.2

(Source: FAO Fishery Policy and Planning Division)

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Focus group discussions

With light and heavy users in Belgium and Spain:

- ***Consumers are not really aware of farmed versus wild fish***
- ***Attitudes are formulated only when probed for; not spontaneously***

- Wild fish: freedom, happiness, but also better texture
- Farmed fish: artificial, pollutants added, but also cheaper / affordable
- Animal welfare and sustainability issues not spontaneously mentioned
- Credence : *"We do know enough about fish origin, but it may be better so."*

"Even if we are informed, can this information be trusted?"

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European Consumer Survey

- Survey in 5 European countries: Spain, Belgium, Netherlands, Poland and Denmark
- Representative samples covering between 809 and 1110 consumers – in total 4786
- Responsible person in the household for shopping and cooking
- Questionnaire measuring a large number of different aspects related to consumer attitudes and perception of seafood including quality perception (**general**, **farmed**, **wild**)

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Consumption of fish… average times per week

Consumed at home versus out

	Belgium	Denmark	Netherlands	Poland	Spain
Home	0.88	1.12	0.69	1.05	2.12
Out	0.22	0.31	0.26	0.15	0.49
Sum	1.10	1.43	0.95	1.20	2.61

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Consumption of fish average times per week

Consumption of wild versus farmed fish

	Belgium	Denmark	Netherlands	Poland	Spain
Wild fish	0.14	0.18	0.15	0.29	1,04
Farmed fish	0.22	0.12	0.19	0.26	0.62
Sum	0.36	0.30	0.34	0.55	1.66

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Widespread confusion

- Within the entire sample (n = 4,786):
  - **2.5% claim (almost) never to eat fish**
  - But : when asked specifically about farmed and wild fish consumption …
  - **34.4% claim never to eat wild fish**
  - **33.6% claim never to eat farmed fish**
  - **24.8% claim neither to eat wild fish nor farmed fish ....**

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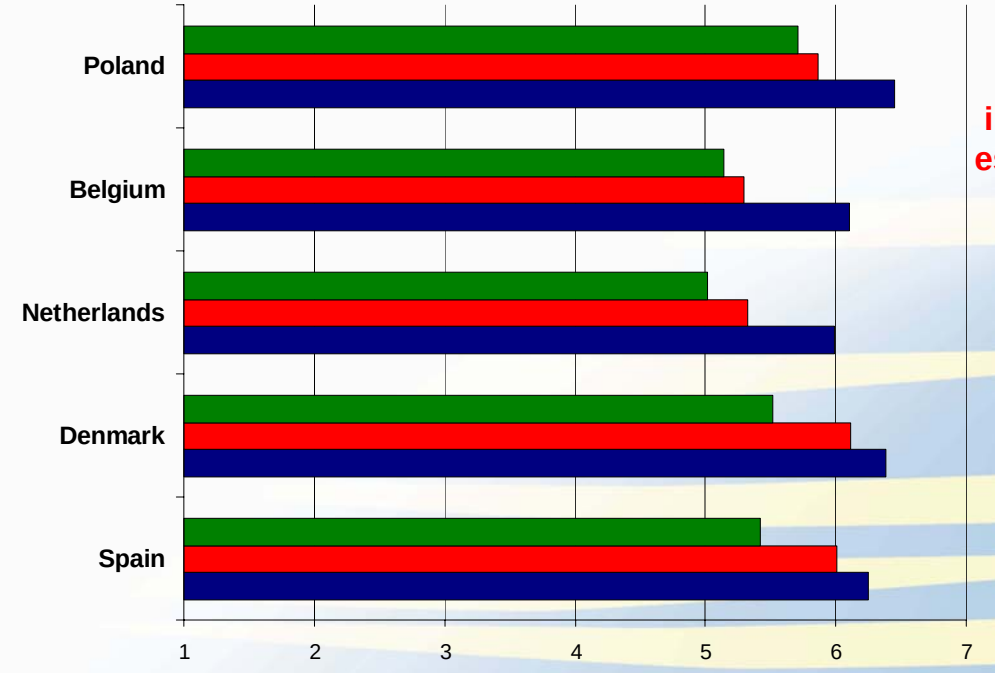
Perception of wild and farmed fish: HEALTH



Strong belief, in favour of wild, esp. in DK and SP

- Farmed fish healthy
- Wild fish healthy
- Eating fish is healthy

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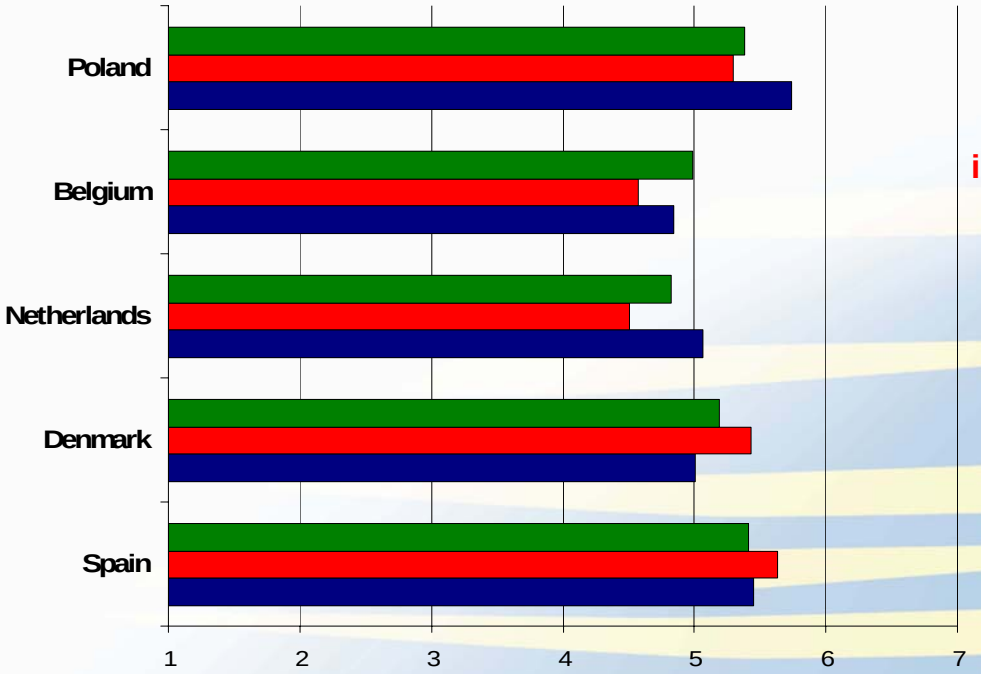
Perception of wild and farmed fish: SAFETY



No problem, in favour of wild in DK and SP, in favour of farmed in BE and NL

- Farmed fish safety
- Wild fish safety
- Eating fish is safe

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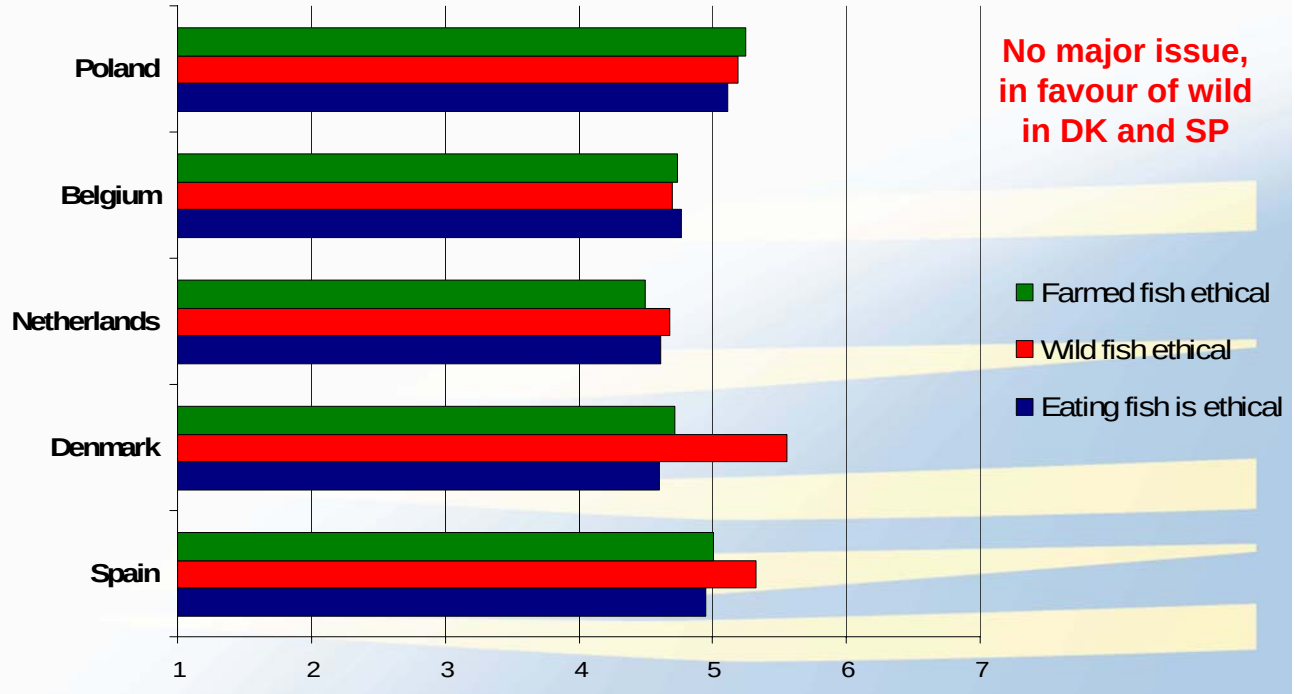
Perception of wild and farmed fish: ETHICS



No major issue, in favour of wild in DK and SP

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General and specific beliefs

- **When general beliefs about fish are compared with specific beliefs in relation to wild and farmed fish**
  - Mostly **small differences** occur
  - **Perception of wild fish** is a bit closer to general beliefs
  - Especially Spain and Denmark (higher levels of consumption) are **more positive** towards wild fish

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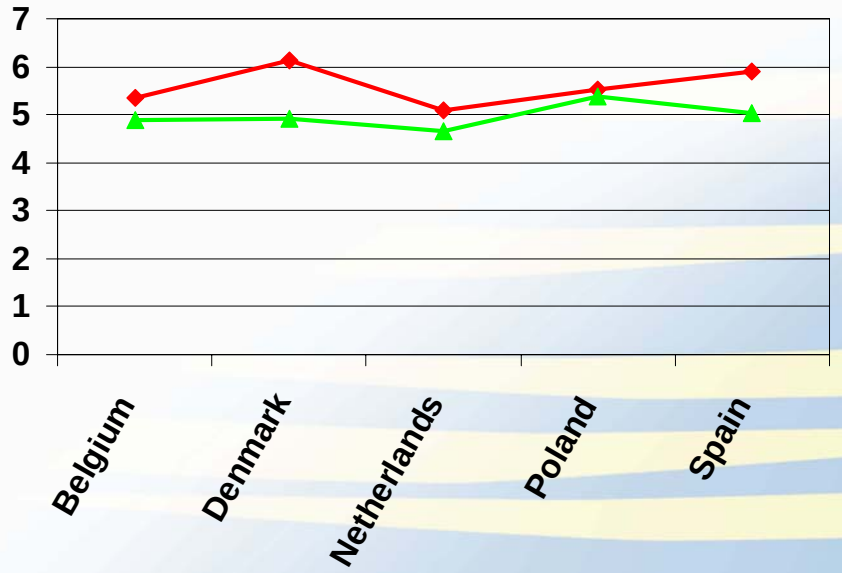
Perception of QUALITY



High quality, Dk and Sp favour of wild

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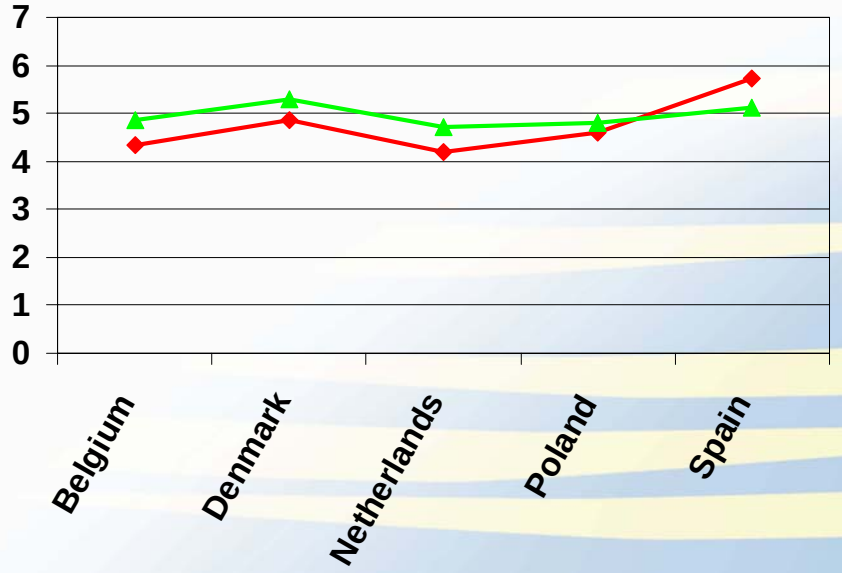
Perception of CONSISTENT quality



High perceived consistency, in favour of farmed

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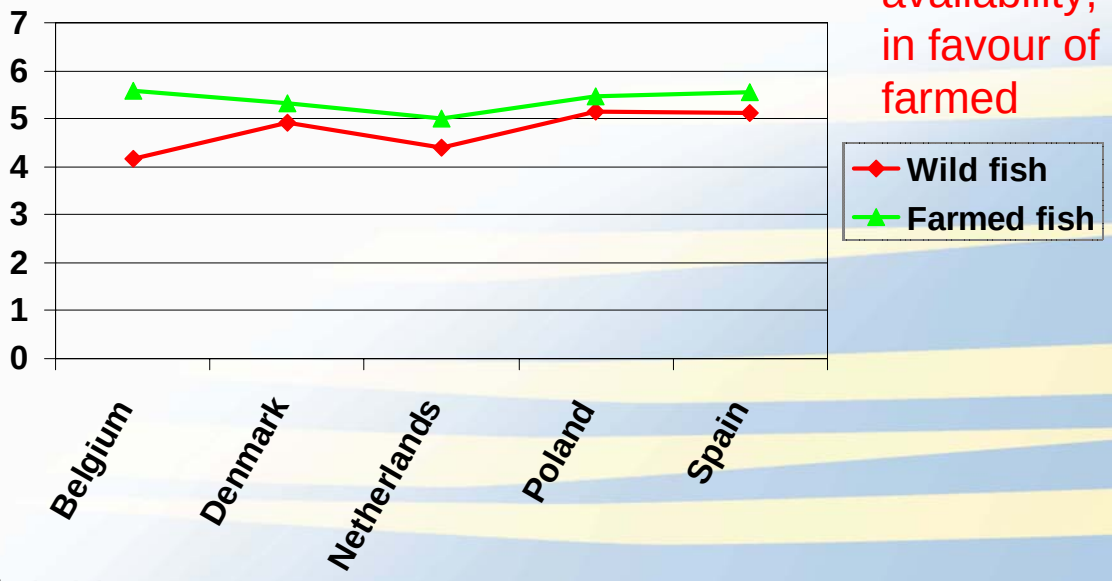
Perception of AVAILABILITY

Perceived availability, in favour of farmed



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Conclusions

- Perception of fish quality is high – slightly higher for wild fish
- Perception of **consistent** quality is higher for farmed fish
- Farmed fish are perceived to be **more available, easier to purchase**
- But consumers are **confused** – do not know what is what
- **More information is needed** – especially if specific benefits should be communicated – a big challenge for the industry

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A better life with seafood…

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