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Getting to Know Southeast Seafood Consumers



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For a copy of this booklet, write UNC Sea Grant, Box 8605,
North Carolina State University, Raleigh, N.C. 27695-8605.

Getting to Know Southeast Seafood Consumers

WRITTEN BY:

David Griffith and Jeffrey Johnson
East Carolina University
Anthropologists

James Murray and Philip Kemp
University of North Carolina Sea Grant College Program
Marine Advisory Service

EDITED BY:

Kathy Hart
University of North Carolina Sea Grant College Program

DESIGNED BY:

Ginny Petty

Consumers are hard to figure.

Corporate America spends millions to learn what will pique the interest and open the pocketbooks of consumers on the car lot, at the mall and in the supermarket.

The seafood industry, too, would like to gain a better understanding of its clientele.

With fish and shellfish sales on the rise, seafood wholesalers, retailers and processors would like to know what influences a consumer's buying choices.

Seafood businesses need to understand how consumers differ from one another in their preferences and needs. It would also be useful to know how consumers learn about new seafood products, how they compare new products to familiar foods and how they decide to make new foods a regular part of their menu.

Practical matters like price, ease of preparation and availability certainly affect food decisions. Yet a person's experiences, lifestyle, phase in life and traditions also influence the foods they purchase and eat.

As fish and shellfish consumption continues to grow and new products are developed and introduced to consumers, seafood businessmen must develop an understanding of the complexity of factors affecting seafood choices.

With these factors in mind, this publication summarizes the results of a study of seafood consumer behavior in the Southeast. It was designed and conducted by anthropologists at East Carolina University and Sea Grant Marine Advisory Service personnel at North Carolina State University. It was funded by the Gulf and South Atlantic Fisheries Development Foundation and the University of North Carolina Sea Grant College Program.

This study combined a variety of research methods—informal and formal interviews, structured marketing research techniques and observation of eating habits. Using these methods, the researchers achieved a comprehensive portrait of seafood consumption in the Gulf and South Atlantic region.

This information should help seafood wholesalers, retailers and processors introduce new products, especially nontraditional fish and shellfish that might diversify the range of marine resources used. And it should encourage, in particular, increased consumer awareness about seafood analog products, such as imitation crab. These products are often made from species of fish and shellfish that now have little or no market value.

Know Your Customer

It helps to understand the social and cultural characteristics, such as region, ethnicity and income, that make consumers different. This knowledge can help seafood businesses tailor their marketing strategies to different consumer segments.

This study helps retailers, wholesalers and processors understand how seafood consumers differ from one another. Often these differences are subtle and may not require radical differences in marketing. In fact, it is surprising how much the similarities outweighed the differences.

Consumers were compared by region to see whether factors such as location (i.e., distance from a coast, urban or rural area) affected seafood consumption. They were grouped according to coastal rural, coastal urban, inland urban or inland rural residence. Consumers in the first three regions consumed about the same amounts of seafood and were in-



fluenced by the same factors when changing their eating habits.

Consumers in inland rural areas, however, were distinct from the other regions. They consumed less seafood, exhibited different cooking and eating habits, and changed their eating behaviors for different reasons.

In particular, inland rural consumers attributed changes in eating habits to adjustments in their family or household, such as marriage or the birth of children. But consumers in the other three regions ascribed their food and menu changes to health reasons or the advice of friends or co-workers.

These findings suggest that seafood businesses may want to modify their existing marketing strategies when selling in inland rural areas. In these areas, stress the place of seafood in family life.

For example, direct marketing toward newlyweds in rural inland areas because they have recently had a change in household. Emphasize the ease of seafood preparation to the new bride who is now cooking for two.

Or tell her seafood does not require a complicated recipe or expensive ingredients that can strain a budget. Seafood can be deliciously prepared with everyday ingredients and simple recipes. Also, stress preserving costs rather than per-pound prices. It will de-emphasize the perceived high cost of seafood.

In the other three regions, promote seafood as a health food or a food for festivities with friends. Advertise the versatility of seafood on the grill since it is often associated with gatherings. Suggest simple recipes that are not too spicy. Too many spices can overpower the natural flavor of seafood. Be careful not to use recipes that contain excessive amounts of fats or oils that would negate the healthy attributes of seafood.

In comparisons of consumers by race, white and minority consumers differed in their cooking styles and the types of seafood products they selected. Whites, for example, are less likely than minorities to fry foods. Even so, all races are eating less fried food. Instead, food is either broiled, which has grown in popularity particularly among minorities, or barbecued, which is popular among whites and minorities.

When selecting seafood, minorities are more likely to eat fresh fish fillets, shellfish and imitation seafood products than whites. But whites were more likely than nonwhites to eat frozen processed fish products. Rates of consumption for canned fish products and frozen fish fillets

were similar for both groups.

To capitalize on these differences, carry a different mix of products in areas where large concentrations of minorities shop. Also, stock recipes featuring cooking styles that minorities prefer.

And these findings have implications for processors, too. They might vary the cuts and value-added steps according to the demographics of the areas where they are marketing.

From these examples, seafood retailers can see that being sensitive to regional, ethnic and other differences between consumers can aid in attempts to increase sales or introduce new products to consumers.

Although a more detailed examination of Southeastern consumers is available (see final page), Tables 1 and 2 present the entire sample's preferences for seafood products and the ways they changed consumption of these over the past five years.

Canned tuna remains the leader. But fresh fish fillets and shrimp are close to overtaking tuna's top position. This seems likely as we look at the trends over the past five years (Table 2). More consumers reported eating more shrimp and fresh fish fillets than reported eating more tuna. Nearly as many reported eating more shellfish.

Table 1 Consumption of Selected Seafood Products:
percent who reported consuming the product at least once per week

SEAFOOD PRODUCT	PERCENT
Canned tuna	46.1
Fresh fish fillets	43.8
Shrimp	33.0
Other shellfish	17.6
Frozen fish fillets	13.4
Frozen processed fish products (e.g. fish sticks)	6.0
Imitation seafood products (e.g. "Sealegs")	.9

Table 2 Changes in seafood products consumed in the past five years

SEAFOOD PRODUCT	PERCENT
FRESH FISH FILLETS	
more	47.7
less	15.9
the same	36.3
SHRIMP	
more	46.2
less	10.8
the same	42.9
CANNED TUNA	
more	30.7
less	20.2
the same	49.1
OTHER SHELLFISH	
more	29.4
less	10.2
the same	60.4
FROZEN FISH FILLETS	
more	16.5
less	17.7
the same	65.8
IMITATION SEAFOOD PRODUCTS (e.g. "Sealegs")	
more	8.8
less	2.4
the same	88.8
FROZEN PROCESSED FISH PRODUCTS (e.g. fish sticks)	
more	7.5
less	15.0
the same	77.5

Although imitation products still lag far behind the others, as people increasingly eat shrimp and shellfish, they also eat more imitation seafood products. Hence, the general increase in shellfish consumption may boost the market for seafood analogs, too.

Displaying these items side-by-side (without cross-contamination) may enhance this trend. Make sure that your sales personnel are knowledgeable about the composition and nutrition of seafood analog products. Tell consumers that the analog is not *artificial* but rather *imitation*. If they understand it contains real fish products, they will be more receptive to trying it.

Changing Food Consumption Habits: An Exception or A Rule?

For nearly 90 percent of Southeastern consumers, the foods they eat and the ways they eat them tend to change over time. But apparently the change is not constant throughout consumers' lives. Instead, consumers go through periods of experimentation and change followed by periods of relative stability.

Realizing when and under what conditions consumers begin to experiment with new foods and change their eating habits can help seafood businessmen introduce new seafood products to consumers. During these periods, consumers try new foods and, more importantly, adopt them as regular parts of their diets.

Four general factors usher in experimentation and change in the foods people eat and the ways they eat them. These are:

1. a change in an individual's living arrangement,
2. a move from one region of the country to another,
3. a change in the size and composition of a household that is associated with growing older, and
4. a change in an individual's health or awareness about health.

Of course, these can occur simultaneously and sometimes reinforce one another. For example, a person moving from one region of the country to another may also be moving from the parental home to establish his or her own abode. Or an older person may become more aware of

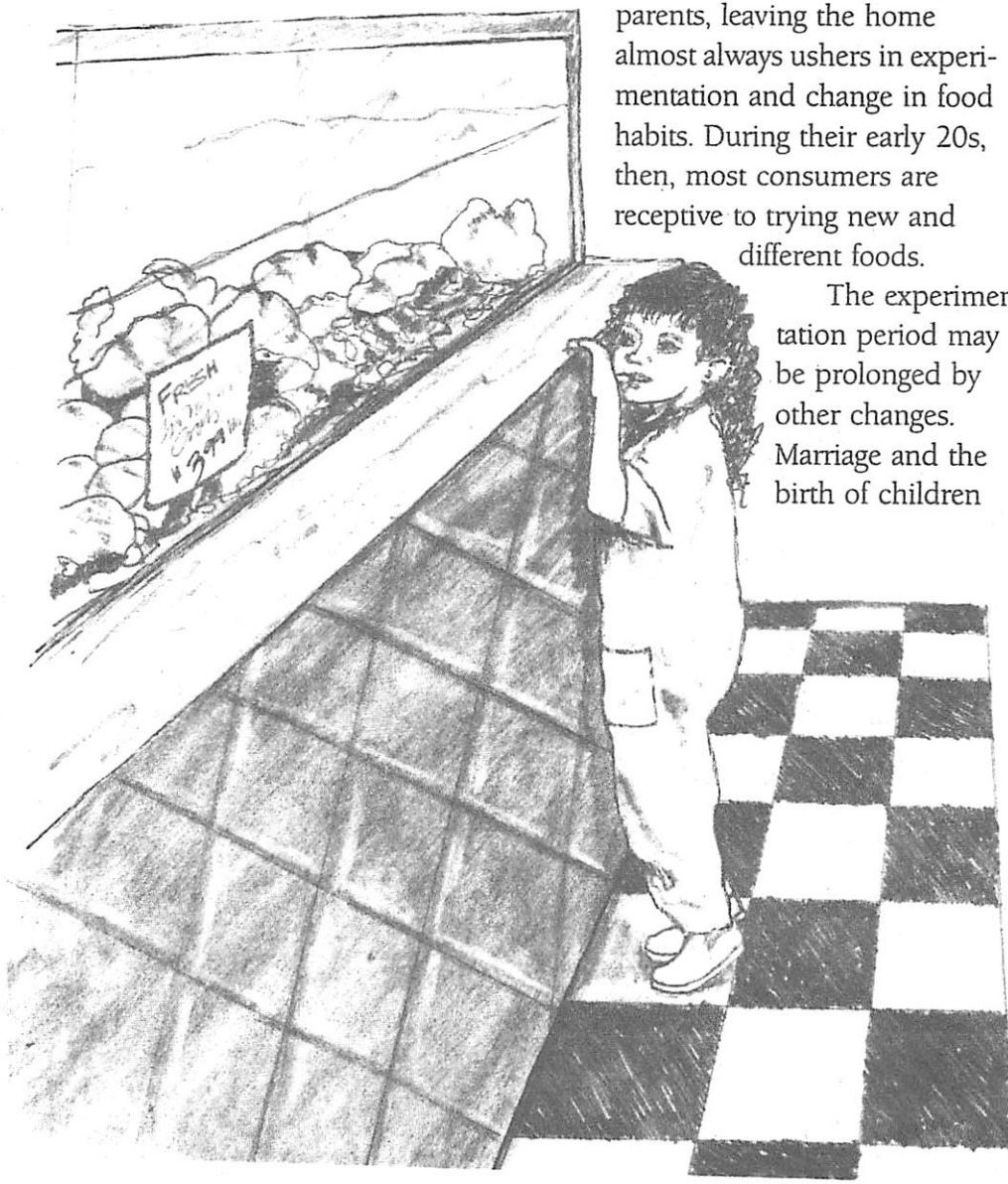
health and nutrition issues due to his or her own health. In any case, each factor spurs experimentation and change in a person's eating habits.

First, a change in living arrangement causes changes in food consumption, especially among consumers leaving their parental homes to establish households of their own. Most consumers who are responsible for cooking and buying foods usually learn to cook at home from their mothers and during their teens.

Although early cooking styles and dishes may be influenced by

parents, leaving the home almost always ushers in experimentation and change in food habits. During their early 20s, then, most consumers are receptive to trying new and different foods.

The experimentation period may be prolonged by other changes. Marriage and the birth of children



can prolong experimentation for consumers into their 30s.

These are, in addition, years fertile with new acquaintances and friendships. The study also revealed that most consumers receive information about food from friends first, relatives second, and less often, co-workers.

To benefit from consumers' willingness to change, gear promotions to activities that are associated with gatherings of friends. Consider promotions that feature outdoor grilling and picnics with friends. Promote species that are good on the grill or which make good sandwich spreads, cold seafood pasta salads and/or whole shellfish for roasting on a fire.

After their 20s and early 30s, consumers tend to become more stable in their food habits and less likely to change until later in life. However, experimentation and change may emerge within a household that has recently moved from one region of the country to another.

Regionality tends to influence consumers during periods of experimentation and change. Stressing regional themes, such as oyster roasts or shrimp boils, may enhance the appeal of foods to consumers who are looking for something new.

Also, food conveys important symbolic messages. It makes strong or subtle statements about regional or ethnic identities. Thus, food may be one way a family adapts to its new surroundings.

To appeal to newcomers, advertise provincial seafood choices or create packaging materials or logos to promote the regionality of a seafood species.

Although consumers stabilize their food habits after their 20s and 30s, they again begin to experiment with menus as the family grows older and children begin leaving home.

But this time of experimentation differs from the earlier period. It does not represent as large a proportion of consumers as the earlier phase and the degree to which eating habits change may not be as great as earlier. Also, not surprisingly, this time is often associated with increased awareness about health and nutrition issues. Overwhelmingly, people perceive seafood to be a healthy food.

To target these consumers, market gourmet product lines or "extra care in handling" promotions. These consumers perceive sanitation in processing and handling as an important health-related aspect of foods.

Fish as Health Food: From Current Benefits to Future Costs

Seafood does seem to be the ideal health food. It is light, low in fat and calories, and usually low in cholesterol. And seafood's "natural, pure" qualities are further enhanced with symbolic meaning in Western culture.

First, from commonplace myths about the power of oysters to promote virility, we often associate fish with sexuality. Hence, seafood is thought of as a romantic meal, more so than other foods.

Second, from its importance in the Bible, we often give fish a sacred quality, thus endowing it with purity and goodness.

With both objective and subjective reasons to promote seafood as the new health food, it is no wonder that the seafood industry has fully—in many ways too fully—exploited the image of fish as a health food.

Although the low fat, light image of fish is usually accurate, too much emphasis on seafood as a health food might pose problems for the future. Now, seafood businesses are tempted to promote seafood solely on its "healthy" attributes and to construct a marketing campaign on this image.

But this strategy could backfire if a seafood-related illness were to occur and receive national attention. Or the strategy could crumble under negative publicity, such as has been seen recently in *Newsweek*, *The New York Times* and ABC's *20/20*.

You should stay informed about the potential for negative publicity regarding the types of products that you carry. Make a plan for taking corrective action. Consider either recalling products or publicizing the positive aspects of the issue in a responsible manner that can maintain your credibility.

Seafood marketers should be careful in building a marketing campaign on a foundation that is not solidly backed by research findings.

Teaching Consumers About Seafood: Filling in the Blanks

The problems associated with promoting seafood as a health food do not mean, of course, that seafood wholesalers, retailers and processors should ignore the health attributes of seafood.

In fact, there are sound reasons to emphasize seafood's healthy aspects. But educate consumers about its other positive characteristics, too. Stress seafood's value *per portion* or its versatility.

Emphasizing other positive characteristics, such as the variety of flavors, may be important in promoting species of fish and shellfish that do not conform to consumers' expectations about how health foods taste. Similar to many health foods, particularly those low in sodium, consumers perceive fish to be "good" only if it is bland or tasteless.

Retailers and wholesalers should educate consumers about the different flavors of seafood. Unfortunately, many people don't want fish to taste like fish. Fish that is distinctly flavored is often viewed as "rotten" by unknowledgeable consumers.

The mild, bland tastes that consumers seek in a health food may not characterize species such as bonito, mullet, bluefish or other underutilized species. These species, however, could be promoted as excellent fish for smoking or barbecuing since the study also revealed increases in the popularity of these two cooking techniques.

The possibilities for introducing consumers to new attributes about seafood are enormous. Consumers don't know much about seafood. When asked to group meat and seafood products, consumers lumped all seafood products together. But they saw distinctions among beef, pork and poultry products.

In other words, they could distinguish between a whole chicken and chicken nuggets. But they are less likely to differentiate between fresh flounder and fish sticks.

This reflects consumer knowledge about and experience with sausages and prepared versions of chicken, pork and beef. But it also points to a lack of knowledge about various forms of seafood. Consumers did, however, differentiate between canned seafood and other seafood products.

Hundreds of different species of fish and shellfish are available. Each

has its own unique taste, texture and color. In your marketing program, address seafood's versatility but be careful not to confuse consumers further. Consider grouping species by the color of their flesh or their oil content. Then provide recipes that could be used for the entire group. This could help eliminate consumer hesitancy about buying a new product, especially if they are familiar with other species in the same group.

Watch your packaging. Consumer perception and classification of seafood are closely related to packaging. They reflect two concerns: the degree to which a food is processed (usually seen as a negative quality) and the ease of preparation (usually seen as a positive quality).

These two attributes, in some contexts, contradict one another. Most of the respondents expressed positive reactions toward prepared, single-meal entrees, but they viewed what they perceived to be highly processed foods (including fish) in a more negative light. Yet, food processing is geared toward making food easier to prepare.

How do marketers manage this contradiction? Consider how consumers classified two imitation crab products.

One, a boxed product, was seen to be similar to fish products (fish sticks, breaded fillets) considered highly processed. The imitation crab product in the store package was seen more positively. Consumers grouped it with desired seafood products such as the store-packaged flounder and shrimp. Imitation crab packaged this way falls between the "natural," unprocessed seafood products and the easy, oven-ready entrees.

Further Information

In this publication, we have only begun to present the findings of our study. For those interested in learning more about consumers in the Southeast, a comprehensive report of all the study's findings can be obtained from:

David Griffith
Institute for Coastal and Marine Resources
East Carolina University
Greenville, North Carolina 27834

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