European Seafood Exposition Survey Report

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EXECUTIVE SUMMARY

This report details the findings of European Seafood Exposition survey conducted in Brussels in April 2008.

The main purpose of this project was to survey perception that seafood traders / professionals of this industry have about 6 seafood producing countries, including Australia.

We chose to use the 'pick any' method allowing us (in less than 5 minutes per interview) to compare and measure the country's association with relevant attributes.

41 people responded to the survey.

Overall, Australia is perceived closely to New Zealand and is seen as being a 'trustworthy' 'natural' product from 'pristine' waters with 'good food safety' and a 'premium quality'.

On the other hand, Australia suffers from lacking the perceptions to do with good supply, such as 'consistent supply' and 'easy to get'.

Quality is the word that comes first to mind for 29% of the respondents (to the question).

INTRODUCTION

The survey was conducted by representatives of the Australian seafood industry during the 3 days of the European Seafood Exposition in Brussels. In total, 41 people responded to a very short questionnaire aimed to take less than 5 minutes to complete. The questionnaire (Appendix 1) was divided in two parts:

1.   Part one was dedicated to the perception that seafood traders / professionals of this industry have about 6 seafood producing countries.

   a.   After consultation with various Australian seafood industry representative, 6 countries / geographical areas were selected: North America (USA & Canada), New Zealand, India, China, Australia, and Africa.

   b.   Attributes selected to characterize seafood were also chosen after consultation with industry representatives. From an extensive list of attributes, 17 were finally selected: Environmentally Sustainable, Expensive, Good value for money, Natural, Premium quality, Good quality control, Good food safety record, Easy to get, Consistent product supply, Reliable suppliers, Caught / Grown in pristine clean waters, Responsive suppliers, Poor (product) presentation, Distinctive/different species, Variable quality, Trustworthy, Poor packaging.

2.   Part two included general questions related to the business the respondents were in.

   a.   What seafood products are you most interested in?

   b.   When purchasing or dealing in seafood, what three attributes are most important to your company?

   c.   Have you ever traded Australian seafood?

   d.   Have you ever visited Australia?

   e.   Thinking about Australian seafood in general, what comes first to mind?

PERCEPTIONS TRADERS / SEAFOOD PROFESSIONALS HAVE TO 6 DIFFERENT SEAFOOD PRODUCING COUNTRIES

People were introduced to this question as follows:

In the table below, we have a list of seafood producing countries and also a list of typical seafood attributes that you might associate with those countries. Can you place a tick (if any) against any country that you recognize these attributes related to?

First attribute is given as an example

Attributes	North America (USA & Canada)	New-Zealand	India	China	Australia	Africa
Example: Seasonal				✔		✔
Environmentally Sustainable						
Expensive						
….						
Poor packaging						

Rationale of the 'pick any' method

To measure the country's association with relevant attributes, the pick-any approach can be used. In this approach, respondents are asked to indicate, out a set of countries, the one(s) they associate with a particular attribute. The method is very easy and quicker to administrate. This approach has been validated in the quality of information obtained, when compared with other scales (see Driesener and Romaniuk, 2006, Comparing methods of brand image measurement, International Journal of Market Research).

This approach requires two inputs: attributes and the list of competitors (in this case, seafood producing countries, see introduction section). Using the Correspondence Analysis technique, the outcome of the survey is a map (named P:map) where the relationship between different countries and relative attributes are determined. These relationships are displayed graphically in two or more dimensions. This map gives insight into how customers / respondents categorise and group the countries.

The P:map can be read as 2 dimensional maps (i.e. like a map of a country). The following are some guidelines for interpretation:

- The most important interpretation to make from the maps is the relative distance between attributes and between countries, and how close countries are to the attributes.

- Countries that are closer to each other are perceived to be similar.

- The closer that countries or attributes are to the centre, the less differentiated countries are from each other and from the attributes chosen.

Findings

From the P:map we can see how the different countries are differentiated from one another in relation to various aspects of the seafood from those countries. The key points from this map can be summarised as:

- Australia is perceived closely to New Zealand. That is, respondents see them as being quite similar. Australia (and therefore NZ as well) is seen as being a 'trustworthy' 'natural' product from 'pristine' waters with 'good food safety' and a 'premium quality'.

- Australia is located far from (not associated with) the negative attributes of 'poor presentation', 'poor packaging' and also 'variable quality'.

- Australia suffers from lacking the perceptions to do with good supply, such as 'consistent supply' and 'easy to get'. These perceptions are more strongly associated with China.

- US shares similar high quality perceptions as does Australia, such as 'quality control' and 'premium quality', though at the same time it is much more strongly perceived as being 'expensive'.

- While China is closely associated with good supply, is does however suffer from the perception of having rather 'variable quality'.

- Africa quite clearly suffers from the negative issues of 'poor presentation' and 'poor packaging' of their product, and is located far away from (and therefore without the redeeming qualities of) any of the positive associations of either quality or supply.

- India's is located rather far from any attributes, either positive or negative. This is likely because few people know much about India, as it is emerging as an international supplier.

Figure 1: Perceptual Map

In the total sample, few respondents had had experience in trading Australian seafood (only 10 of the 41 respondents). Therefore, it is unclear through this analysis alone whether the perceptual weaknesses of Australia regarding supply issues are due to experience of poor (relatively) supply, or simply due to not many people having had experience of receiving much supply of Australian seafood in the past. Irrespective, this remains a perceptual hurdle or barrier that must be overcome by Australian seafood sellers on the international market.

However, in order to investigate just the views of these people with no experience of trading Australian seafood, an additional P:map has been created, and is shown in Appendix 2.

Analysis of Deviations

A complementary approach to perceptual mapping is deviation analysis. This is where we use known generalisations about patterns in perceptual data to determine what the expected level of response to perceptual survey questions is. This allows us to then determine if the response levels obtained for each food and attribute are higher, lower, or as expected. This technique was developed at the Ehrenberg-Bass Institute and has been published in the International Journal of Market Research

(Journal of the British Market Research Society). This is a simplified variant of the P:map analysis, which provides a clear list of attributes that can bethought of as being 'strengths' or 'weaknesses'.

It is more limited than the P:map analysis, as it only looks at the country/attribute combinations in isolation rather than as a whole, as do P:maps but its different approach can highlight certain aspects of the relationships more clearly.

Here we will report on the three highest positive and lowest negative deviations that are 10 percentage points or greater in size. It is important to note that these results are relative, in that they show how each of the countries is perceived in comparison to the other countries.

Table 1: Deviation Analysis

Greater than expected responses	Fewer than expected responses
Australia Trustworthy (+ve) Natural (+ve)	**Australia** Poor Packaging (therefore a +ve) Easy to get (–ve) Poor presentation (+ve) Variable Quality (+ve)
USA Good quality control (+ve) Expensive (–ve)	**USA** Poor presentation (+ve) Poor packaging (+ve)
China Variable quality (–ve) Easy to get (+ve) Poor packaging (–ve)	**China** Good quality control (–ve) Premium quality (–ve) Pristine waters (–ve) Trustworthy (–ve)
India Poor packaging (–ve) Variable quality (–ve) Poor presentation (–ve)	**India** Good quality control (–ve)
New Zealand Natural (+ve) Pristine waters (+ve)	**New Zealand** Poor packaging (+ve) Variable quality (+ve) Easy to get (–ve) Poor presentation (+ve)
Africa Poor packaging (–ve) Poor presentation (–ve)	**Africa**

Therefore, for example, it is not that China's seafood is 'easy to get', just that proportionally more customers associated it with this attribute given the popularity of the responses to China and the responses obtained by other countries.

For some attributes, having fewer than expected associations can be a positive (i.e. the attribute 'expensive' or 'poor packaging') and likewise, having more than expected associations can be a negative.

GENERAL QUESTIONS

What seafood products are you most interested in?

Respondents were able to give up to 4 seafood products. Responses are various as described below.

- **FISH** was one of the 4 seafood products 17 (41% of the sample) people are most interested in. Most of the respondents characterized this fish: fresh (2 respondents), fresh chilled whole (1), chilled (1), fillets (1), cutlet (1), freezer (1), fin (1), roe (1), and different (1).

- **SHRIMP** was one of the 4 seafood products 8 (19.5% of the sample) people are most interested in, including one frozen shrimp.

- **SQUID** was one of the 4 seafood products 7 (17% of the sample) people are most interested in.

- **LOBSTER** was one of the 4 seafood products 6 (14.6% of the sample) people are most interested in, including 1 lobster tail and 1 rock lobster.

- **PRAWNS**, **CRAB**, **TUNA** was one of the 4 seafood products 5 (12.2% of the sample) people are most interested in.

- **COD** and **MACKEREL** was one of the 4 seafood products 4 (9.7% of the sample) people are most interested in.

- **HERRING**, **OCTOPUS**, **SCALLOP** was one of the 4 seafood products 2 (4.8% of the sample) people are most interested in.

- All other species: Barramundi, Sea Bream, Red Snapper, Salmon, Sardine, Anchovy, Clams, Cockles, Shellfish, Sea Cucumber, New-Zealand Mussels, Sole, Hake, Panga (Basa), Lach; were one of the 4 seafood products one single respondent was most interested in.

- 4 people responded the question in a different angle. One said 'everything', one said 'value added', one said 'unique fillet', and one said 'surimi'.

The following table summarises all of these responses.

Table 2: Seafood products you are most interested in

Species	n	% of sample
Fish	17	41
Shrimp	8	20
Squid	7	17
Lobster	6	15
Crab	5	12
Prawns	5	12
Tuna	5	12
Cod	4	10
Mackerel	4	10
Herring	2	5
Octopus	2	5
Scallop	2	5
Other species	1	2
Other responses	1	2
No response	*4*	*10*

When purchasing or dealing in seafood what three product attributes are most important to your company?

Respondents were able to give up to 3 product attributes. All responses given to this question are presented in the table below and then presented by theme.

Table 3: Seafood products you are most interested in

Attribute	# of respondents	% of the sample
Quality	19	46.3
Price	13	31.7
Freshness	5	12.2
Consistency	3	7.3
Supply	3	7.3
Traceability	3	7.3
Cod	3	7.3
Crab	2	4.8
Delivery	2	4.8
Frozen	2	4.8
Money	2	4.8
Relationship	2	4.8
Reliability	2	4.8
Sardine	2	4.8
Sustainability	2	4.8
Time	2	4.8

Shrimp	1	2.4
Squid	1	2.4
Lobster	1	2.4
Fish	1	2.4
Herring	1	2.4
Haddock fillet	1	2.4
Seafood	1	2.4
Shell	1	2.4
Trustworthy	1	2.4
Responsibility	1	2.4
Safety	1	2.4
Germany	1	2.4
New Zealand	1	2.4
Quantity	1	2.4
Catch Tail	1	2.4
Packaging	1	2.4
No response	*6*	*14.6*

- Attributes that can be seen as a characteristic of product:

    o **QUALITY** (19 respondents, including one 'good quality')

    o **PRICE** (13 respondents, including one 'good price')

    o **FRESHNESS** (5 respondents)

    o **CONSISTENCY** (3 respondents)

    o **FROZEN** (2 respondents, including one 'frozen fish')

    o **QUANTITY** (1 respondent)

    o **MONEY** (2 respondents, including one 'good value for money')

- Attributes related to logistic

    o **SUPPLY** (3 respondents)

    o **TIME** (3 respondents, including one 'time delivery')

    o **TRACEABILITY** (3 respondents)

    o **DELIVERY** (2 respondents, including one 'transport')

    o **PACKAGING** (1 respondent)

- Attributes that are related to the 'atmosphere' of the business

    o **RELATIONSHIP** (2 respondents)

    o **TRUSTWORTHY** (1 respondent)

    o **RELIABILITY** (1 respondent)

    o **RESPONSABILITY** (1 respondent)

    o **SUSTAINABILITY** (1 respondent)

- o **SAFETY** (1 respondent)
- Attributes that refer to a specific seafood product
  - o **COD** (3 respondents)
  - o **CRAB** (2 respondents)
  - o **SARDINE** (2 respondents)
  - o **SHRIMP, SQUID, FISH, HADDOCK FILLET, SEAFOOD, SHELL, HERRING, LOBSTER, CATCH TAIL** (1 respondent)
- Attributes that refer to a country
  - o **GERMANY** (1 respondent)
  - o **NEW ZEALAND** (1 respondent)

Have you ever traded Australian Seafood? Have you ever visited Australia?

Most of the respondents (70%) never traded Australian seafood, and 56% never visited Australia.
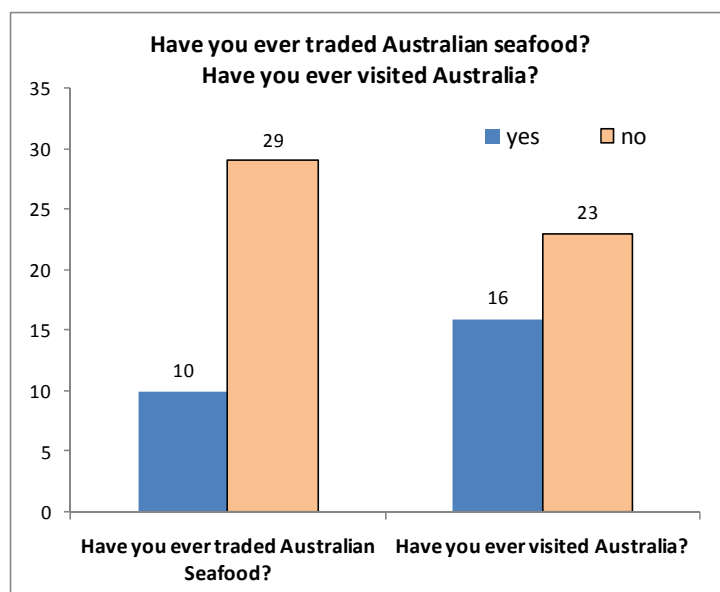

Figure 2: Respondents' background regarding Australia

Thinking about Australian seafood in general, what comes first to your mind?

10 people did not respond to the question.

Quality is the word that comes to mind for 9 respondents (29% of the respondents to the question). It includes the following response: quality, quality control, very good quality (not easy to bring to Europe), excellent quality (shark). Kangaroo came to mind to two respondents, as well as Barramundi, Lobster, Tuna, and sustainable.

All other responses have been given by one respondent: Abalone, Prawns, a lot of different thing, environmental products, excellent, exotic, good, health, natural, freshness, nice restaurants, pure, and unique species.

It should be mentioned that respondents may have been influenced by the first part of the questionnaire.

APPENDIX 1: QUESTIONNAIRE

My name is _____. We are looking at how traders perceive different seafood producing countries. Could you complete this short questionnaire? It will take less than 5 minutes to complete.

(If no, thank you for your time) *(*If yes) Thank you for your valuable participation.

In the table below, we have a list of seafood producing countries and also a list of typical seafood attributes that you might associate with those countries. Can you place a tick (if any) against any country that you recognize these attributes related to?

First attribute is given as an example

Attributes	North America (USA & Canada)	New-Zealand	India	China	Australia	Africa
Example: Seasonal				✔		✔
Environmentally Sustainable						
Expensive						
Good value for money						
Natural						
Premium quality						
Good quality control						

Good food safety record					
Easy to get					
Consistent product supply					
Reliable suppliers					
Caught / Grown in pristine clean waters					
Responsive suppliers					
Poor (product) presentation					
Distinctive/different species					
Variable quality					
Trustworthy					
Poor packaging					

A. What seafood products are you most interested in?

1……………………………

2……………………………

3……………………………

4……………………………

B. When purchasing or dealing in seafood what three product attributes are most important to your company?

1……………………………

2……………………………

3……………………………

C. Have you ever traded Australian seafood?　　☐ Yes　☐ No

D. Have you ever visited Australia?　　　　　　☐ Yes　☐ No

E. Thinking about Australian seafood in general, what comes first to your mind?
_____

F. Do you have business card to give us? *If **not**, ask for:*
- *the company s/he work with: _____*
- *the business the company is in: _____*
- *what s/he does in this company: _____*
- *how big the company is: large, medium or small*

Interviewer:	Questionnaire #:	Date:

APPENDIX 2: P:MAP FOR PEOPLE WITH NO EXPERIENCE TRADING IN AUSTRALIAN SEAFOOD

An additional P:map was created for only those people who had no experience in trading Australian seafood (n=29), in order to compare these people's perceptions (of Australian seafood) with the total sample of respondents. There is very little difference between the P:map above and that in the total sample, shown above. Primarily this is due to the majority of the sample being comprised of people with no experience in trading Australian seafood. This figure is shown below:
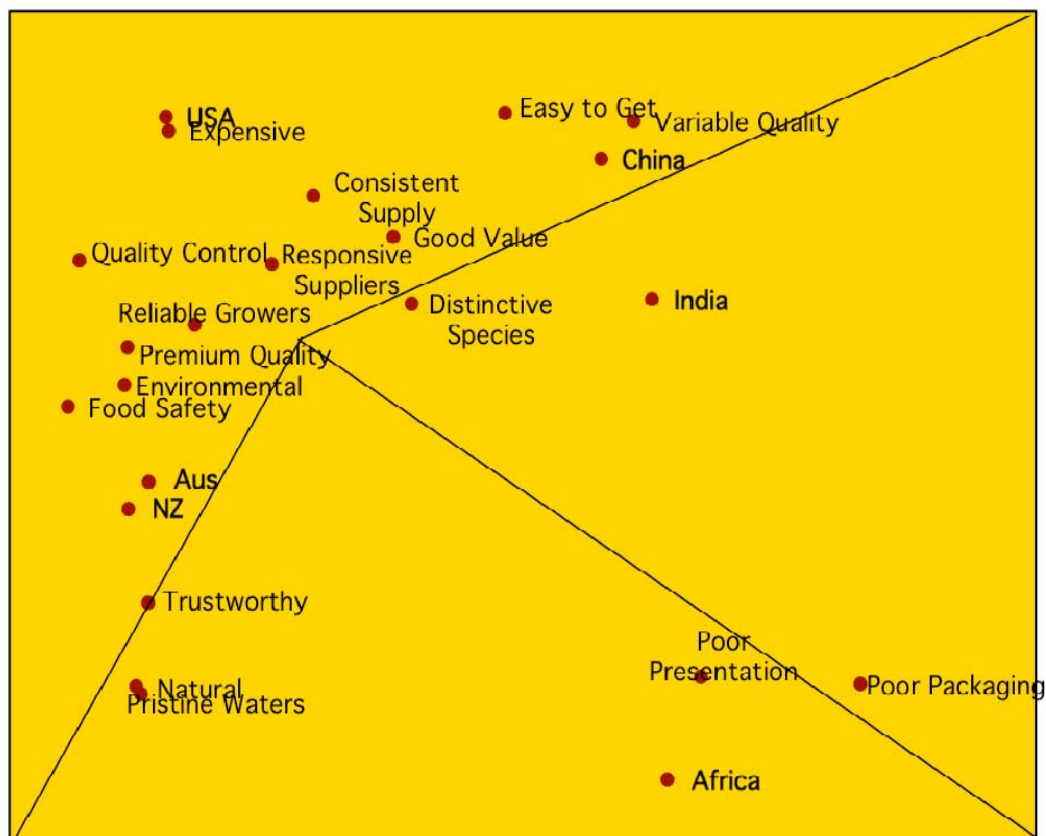

Figure 2: Perceptual Map of non-Australian traders