

SALMON CONSUMERS BY LIFE-STAGES

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SUMMARY

The aim of this report is to provide information about how consumers' age group and whether they are parents of underage children (defined as children 12 years or younger) affect how they consume salmon. Accordingly, respondents were divided into six life stage groups, namely, *OldNoChild* (age 55+ and have no children at home), *MidNoChild* (age between 35-44 and no children at home), *O35Parents* (age 35-54 and have children at home), *U35Parents* (age 18-34 and have children at home), *U25NoChild* (age 18-25 no children), and *O25NoChild* (age 26-34 no children) to investigate any differences. We conduct the analysis by country (US, UK, France and Germany) to highlight any country differences, as well. The main findings are as follows:

1. The proportion of salmon users (as opposed to non-users) differs by country and by life stage groups. The most highly referred reason not to eat salmon is sensory, but higher proportion of younger consumers report environmental or ethical reasons.
2. Quality ratings of salmon (taste, healthiness, convenience and value for money) are similar across life stage groups.
3. Proportions of frequent consumers (those who eat salmon at least once a week) are the highest among young parents with young children and lowest among middle age consumers (35-44) with no small children at home.
4. Types of salmon consumed at home are different among countries and across life stage groups. Certain type of salmon, e.g., sashimi grade, is consumed more among younger consumers, especially young parents with young children.
5. Health perceptions about salmon are somewhat different among life stage groups. Young parents with young children (who seem to eat salmon more frequently) tend to perceive higher risks. There are variations in benefit sides and the patterns are different among countries.

LIFESTAGE GROUPS

We wish to better understand the differences in how people consume (or not consume) salmon, depending on their life stages. To do so, we divide respondents into six life stage groups based on their age and child status (children under 12 at home or not). The categories are: *OldNoChild* (age over 55 and have no young children at home), *MidNoChild* (age between 35-44 and no young children at home), *O35Parents* (age 35-54 and have young children at home), *U35Parents* (age 18-34 and have young children at home), *U25NoChild* (age 18-25 no children), and *O25NoChild* (age 26-34 no children). *OldNoChild* group may include both empty nesters (adults with grown-up children) or those who never had children. Either case, this group consists of relatively older respondents without small children living in the households. *MidNoChild* category is similar but with younger age respondents, and it may also include households with older children (over age 12). *O35Parents* and *U35Parents* are the households with children under age 12, and divided by their age into relatively young (under 35) to old (over 35). Lastly, *O25NoChild* and *U25NoChild* are the individuals without young children at home. We believe that this categorization captures the various life stages that may influence how they perceive salmon as well as their consumption patterns.

Table 1 shows the size of the life stage groups by each country surveyed. The size of each group is similar among countries, although Germany seem to have somewhat larger size of *MidNoChild* and smaller *U35Parents*.

Table 1. Life Stage Groups

	Age	Married	US	UK	FR	GE
<i>OldNoChild</i>	55-75	46%	36%	36%	36%	36%
<i>MidNoChild</i>	35-44	60%	9%	12%	10%	16%
<i>O35Parents</i>	35-54	85%	20%	17%	20%	15%
<i>U35Parents</i>	18-34	75%	16%	14%	13%	8%
<i>U25NoChild</i>	18-25	24%	11%	11%	12%	12%
<i>O25NoChild</i>	26-34	44%	8%	10%	10%	12%
<i>Total</i>			100%	100%	100%	100%

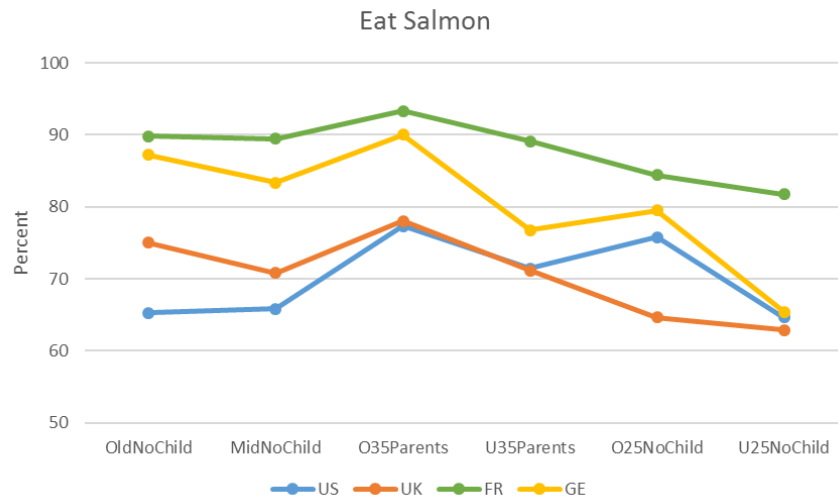
Note: Married people include those who are in civil partnership.

SALMON USERS VS. NON-SALMON USERS

First, we look at whether they eat salmon at all. Respondents identified themselves as either they eat salmon or never eat salmon. The percentage who responded as “eat salmon” are plotted by the life stage groups by country in Figure 1.

The overall levels of “eat salmon” is quite different among countries. In France, the percentage who identify themselves as salmon users is the highest in all life stage groups, whereas the percentage is lower in the U.S. and the U.K. Germany is situated in-between.

Figure 1. Percentage of Salmon Users



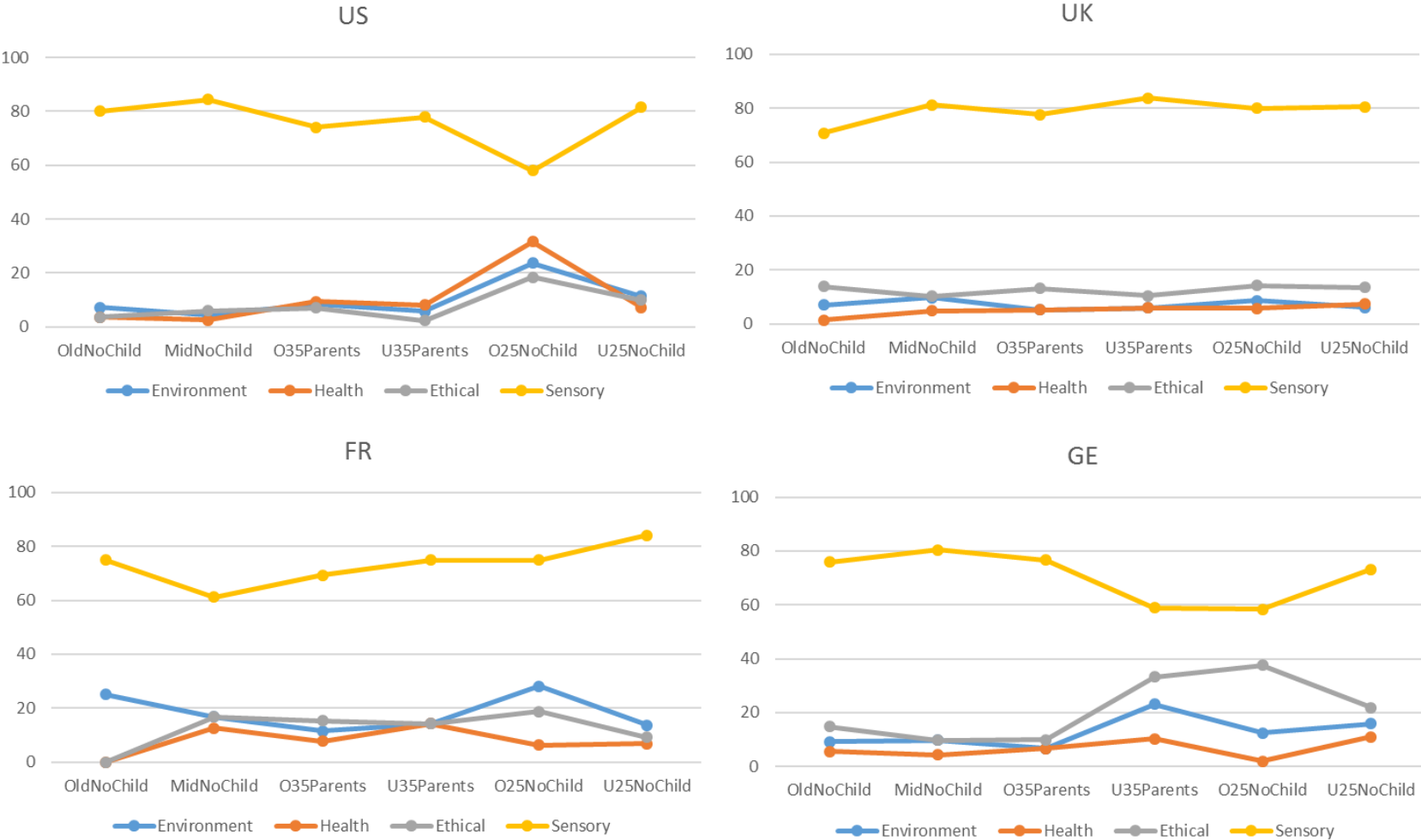
Percentage of respondents in each country and life stage group who identified themselves as salmon users as opposed to non-users.

There are some general trends one can see from the figure. Older groups seem to state that they eat salmon compared to younger groups, and parents over 35 have the highest percentage of identifying themselves as salmon users among all countries. Younger respondents without young children are the group with the lowest percentage.

REASON NOT TO EAT SALMON

If a respondent stated that they never eat salmon, they were further asked the reasons for not eating salmon, and these responses are summarized in Figure 2. In general, the largest proportion of non-salmon users choose “sensory” reason in all countries. Other criteria are chosen to varying degrees in each country. A significant proportion of the *O25NoChild* group choose “health” “environmental” and “ethical” as the reasons not to eat salmon in the U.S. but not in other life stage groups. In the U.K., there are no obvious differences among life stage groups. In France, “environment” and “ethical” are selected to a higher degree in all life stage groups, and the “ethical” concern seems high among younger consumers in Germany.

Figure 2. Reason Not to Eat Salmon (Multiple Responses)



Percentage of respondents among non-salmon eaters who identify each of the criteria as reason not to eat salmon. Each person could choose multiple criteria.

QUALITY RATINGS

Now we will focus on the salmon users and investigate if there are differences in how they evaluate quality of salmon, in terms of taste, healthiness, convenience, and value for money. The average rating (1=lowest, 7=highest) by life stage groups and by countries are provided in Figure 3.

In all countries, the average ratings are flat across life stage groups, indicating that the valuation of salmon are not so different based on the life stage groups. However, there may be a tendency that younger groups seem to rate salmon lower than other groups.

EATING FREQUENCIES

Now we will look at how often respondents eat salmon and how. Respondents were asked how often they eat salmon (more than once a week, about once a week, about once in two weeks, about once a month, about every two months, two to five times a year, once a year or less). The types of salmon are: salmon for warm meals bought fresh or frozen; prepared or cooked salmon, smoked salmon, and salmon for cold meals (e.g., sushi and wraps).

Figure 4 shows the proportion of consumers who reported that they eat salmon once a week or more, for each life stage group and county. In all countries, the highest proportion of frequent salmon consumers are the *U35Parents*, those who are younger than 35 and have young children at home. The *MidNoChild* group (age 35-44 without young children at home) has the lowest proportion of frequent consumers. Older consumers seem to be the frequent consumers to a lesser degree, as well as the young consumers without children, except for in France where under 25 no kids consumers have slightly higher percentage of being frequent consumers than older consumers.

In terms of the type of salmon, the most frequently consumed is salmon for warm meals in the U.S. and in the U.K. In these countries, other types of salmon have similar proportions of high frequency consumers. In France and Germany, however, all the types have similar proportions.

Figure 3. Quality Ratings



Average quality ratings regarding taste, healthiness, convenience and value for money. Rating is from 1 (=lowest) to 7 (=highest).

Figure 4. Proportion of Consumers Who Eat Salmon At Least Once A Week



Proportion of respondents who indicated that they eat the following types of salmon for at least once a week. Salmon for warm meals bought fresh or frozen; Prepared or cooked salmon; Smoked salmon; and Salmon for cold meals (e.g., sushi or wrap).

DESCRIPTIONS OF TYPE OF SALMON CONSUMED

In the survey, respondents were asked to select the descriptions of the kind of salmon they eat at home. The descriptions include Norwegian, Scottish, Chilean, wild-caught, farmed, sashimi-grade, sustainably fished, and organic. Figure 5 shows the proportion of respondents in each country who selected each of the description by the life stage groups.

The U.S. consumers have the highest proportion of “wild” salmon, and it is also high in Germany. In the U.K., “Scottish” had the highest proportion whereas in France “Norwegian” was the highest. There are some differences among the life stage groups. For example, “sashimi-grade” seem to be selected more by younger cohorts.

HEALTH PERCEPTIONS ABOUT SALMON

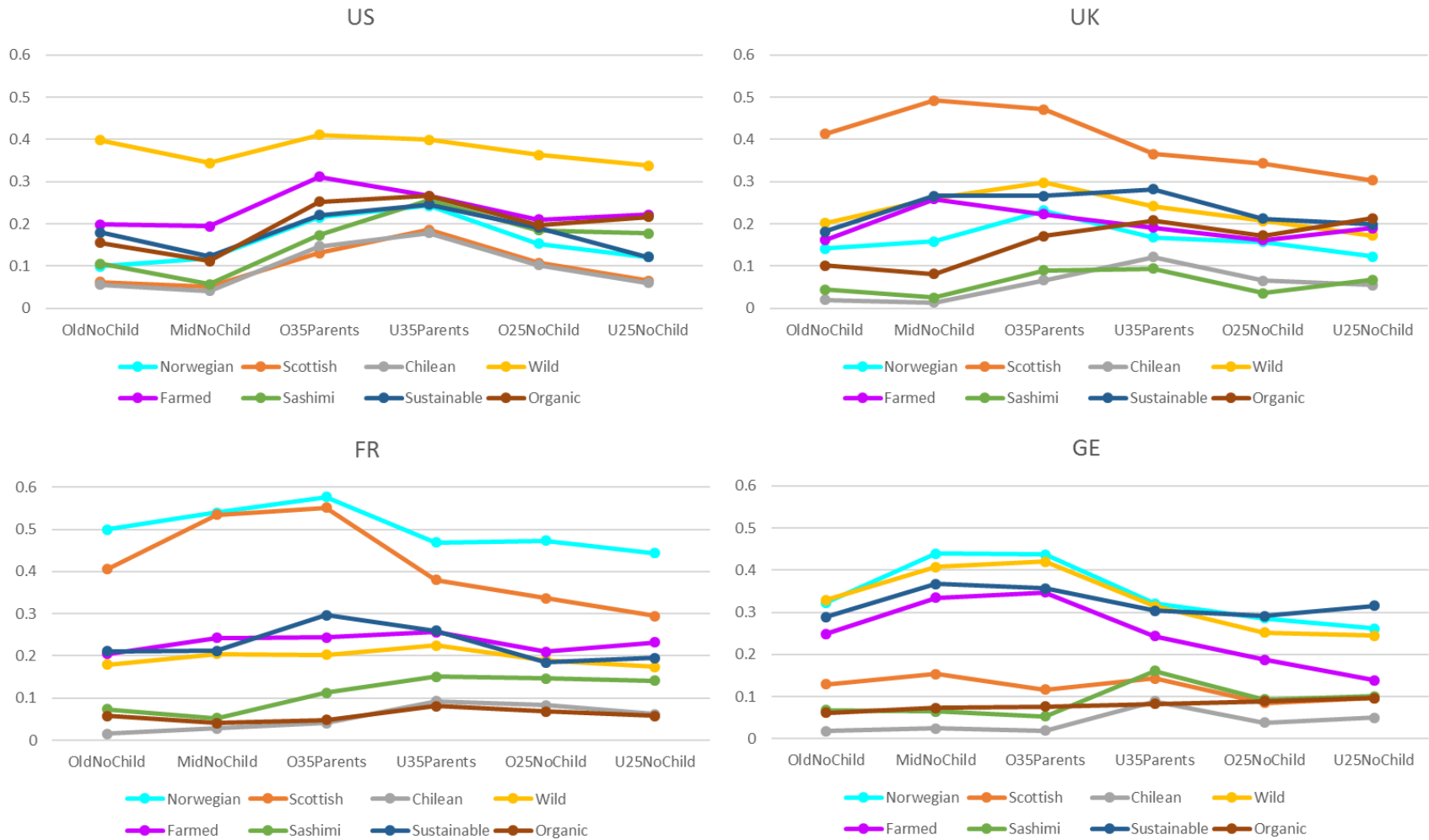
In the survey, respondents were asked about their perceptions regarding the health benefits and risks from the regular salmon consumptions. They were asked to agree or disagree with six statements. “A regular salmon consumption would...”

1. Reduce the risk for coronary heart disease
2. Reduce the risks for certain cancers
3. Improve the bone development
4. Stimulate the brain development
5. Increase the risks for food borne illnesses or food poisoning
6. Increase the risks for certain cancers

The proportions of respondents who agree with each statement (aggregated strongly agree and agree) are summarized in Figure 6.

Younger consumers in all countries seem to report higher level of agreement with risks than older consumers in all countries. Benefits are agreed in lesser proportion among young consumers in the U.S., but somewhat higher in France (particularly the brain development). *U35Parents* seem to report higher level of agreement to risks than other groups, but German *U35Parents* reported higher agreement in benefits than other groups (except for the coronary heart disease).

Figure 5. Descriptions of the Type of Salmon Consumed at Home



Proportion of respondents who selected the description (Norwegian, Scottish, Wild-caught, Farmed, Sashimi-Grade, Sustainably-Fished, and Organic) as the type of salmon they buy, for each country and life stage group.

Figure 6. Health Perceptions about Salmon (Proportion of Agreement to Each Statement)

