AARHUS
UNIVERSITY
BUSINESS AND SOCIAL SCIENCES

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WP29: CROSS-NATIONAL CONSUMER SEGMENTATION

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DIVERSIFY

pRÆSEN

WP29 PARTNERS

- **AU** (lead WP and tasks 29.1, 29.3)
- **IRTA** (lead task 29.2)
- **HCMR**
- **DLO**
- **CTAQUA**
- **HRH**

WP29 ID

- **Start-end months**: 1-45
- **Total capacity**: 73.78 PMs.
- **Total budget**: 533,285 €
- **Structure**:
  - ✓Task 29.1: M1-24
  - ✓Task 29.2: M25-30
  - ✓Task 29.3: M28-36
  - ✓Task 29.4: M37-45

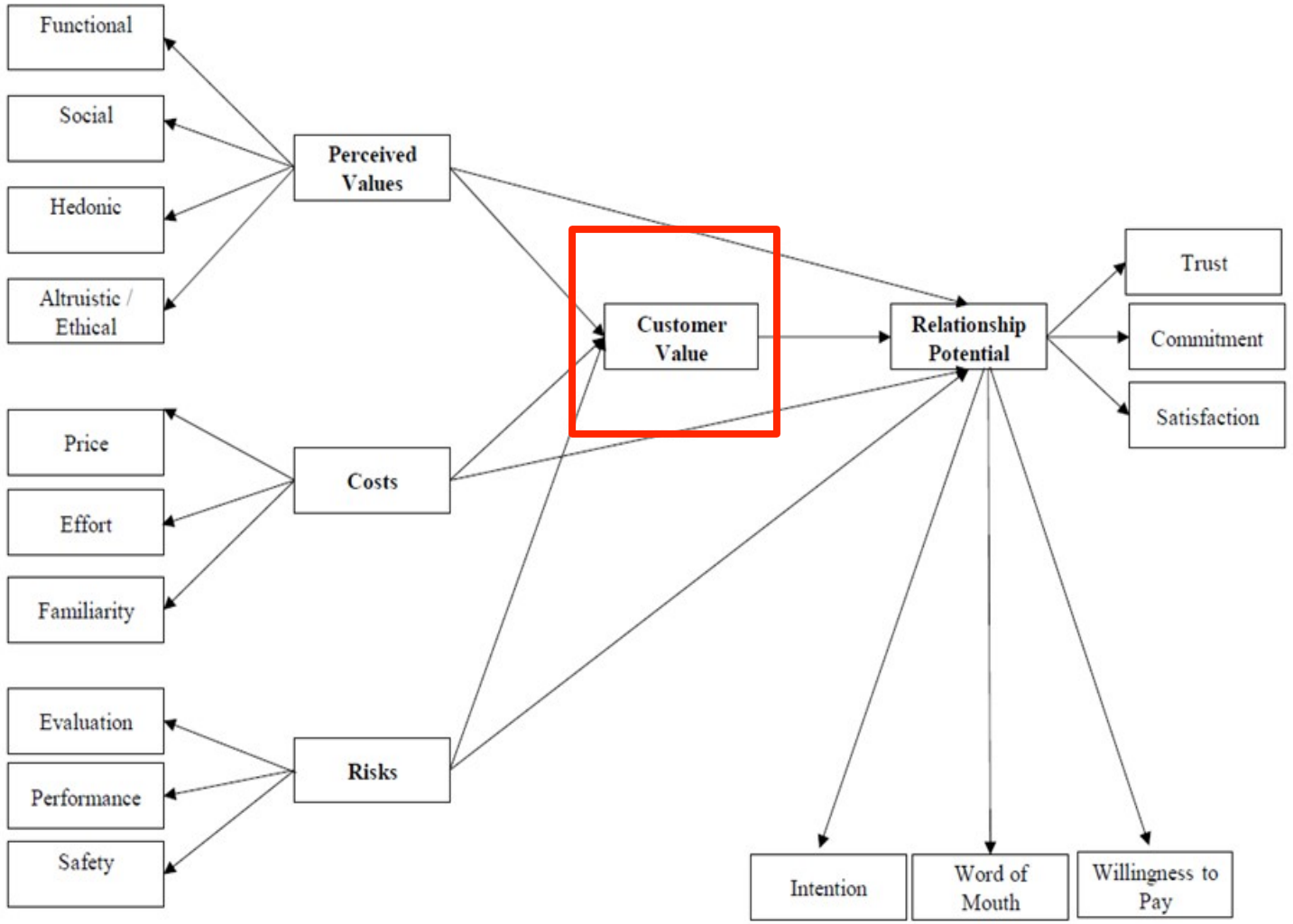
WP29 OBJECTIVES

1. **Analyze & understand** consumers' overall value perceptions with regard to cultured fish in general, and the DIVERSIFY fish species in particular;
2. **Evaluate** consumer sensory perceptions towards the DIVERSIFY species' products;
3. **Optimize** the DIVERSIFY species' products in terms of extrinsic product attribute combinations that can generate best value perceptions;
4. **Determine** effectiveness of market communication in consumer behaviour change in relation to the DIVERSIFY species' products developed.

TASK 29.1: CONSUMER VALUE PERCEPTIONS & SEGMENTATION (AU, M1-24)

- **Sub-task 29.1.1 (DLO)** -> Deliverable D29.1 (M9), Milestone MS63 (M11)
  - International online consumer survey in 5 countries (UK, GE, SP, FR, IT; n=500/country, nationally representative samples) to investigate **consumers' associations with and perceptions of the new products, attitudes towards established and new aquaculture as opposed to wild fish, buying intentions, current/future fish consumption, WTB&P, & overall value trade-offs** (DLO, IRTA, HRH).
- **Sub-task 29.1.2 (AU)** -> Deliverable D29.2 (M24)
  - Segmentation study to give insights into consumer sub-markets (i.e., segments) across and within the 5 countries examined with the highest **potential for maximized consumer value perceptions** (AU, DLO, IRTA, HRH).

CONCEPTUAL FRAMEWORK: THE 'CUSTOMER VALUE' MODEL


Functional
Social
Hedonic
Altruistic / Ethical
Perceived Values
Price
Effort
Familiarity
Costs
Evaluation
Performance
Safety
Risks
Customer Value
Relationship Potential
Trust
Commitment
Satisfaction
Intention
Word of Mouth
Willingness to Pay

THE STORY BEHIND THE FISH

Please read the story below carefully:

In this picture you see a new marine finfish species from the European aquaculture industry that has entered the market recently. The **size of this fish is similar to that of Atlantic Salmon**. This fish can be found in the Mediterranean and Black Sea, and along the eastern Atlantic coast.

This fish is a **high quality meal** choice, has a **lower fat content** than the average farmed fish, **excellent taste** and **firm, yet juice flesh**. Due to these characteristics, this fish is very suitable to be **served at special occasions**. Moreover, this species is very suitable for the **development of value-added products**. As such, compared to other possible choices, this fish has the potential to **gain a popular image**. Finally, the development of this fish will **be more environmentally friendly**, compared to other species, and takes place in a **controlled production system**. This new finfish, therefore, suits the needs of consumers who demand **sustainability** and **low environmental impact**.

As a result of its high quality, this fish might be **more expensive** than the average farmed fish. In addition, since both its **production and market are still small**, it is likely that it will **not be widely available** in the 'usual' retail outlets. Although this fish is praised for its taste, this **taste might seem different than usually expected** from farmed fish, a taste that not everyone would appreciate. Moreover, due to its different quality, this fish might **demand extra skills to cook** compared to other farmed or wild species. Overall, despite sufficient experience with its production system, the exact **rearing methods for this fish are still not perfected** as yet.

DATA COLLECTION IN 5 EU COUNTRIES: JULY 2014

PERCEIVED 'VALUES' AND 'COSTS'

Construct	Germany (n = 506)	France (n = 500)	UK (n = 505)	Spain (n = 500)	Italy (n = 500)	Mean difference-test (*F*-value)	Pooled sample (N = 2511)
Functional value	***α = .91***	***α = .95***	***α = .95***	***α = .96***	***α = .96***		***α = .95***
1. This fish would have consistent quality	2.92	3.28	3.30	3.17	3.07	5.61***	3.15
2. This fish would be well produced	3.04	3.29	3.19	3.23	3.12	2.03	3.17
3. This fish would be a tasty dish	2.85	3.19	3.20	3.12	3.03	4.84**	3.08
4. This fish would be a nutritious food choice	2.65	3.19	2.95	3.04	2.95	8.11***	2.96
5. This fish would be a healthy food choice	2.62	3.24	2.97	3.02	2.99	10.12***	2.97
Social value	***α = .88***	***α = .89***	***α = .89***	***α = .87***	***α = .88***		***α = .88***
6. This fish would be purchased by many people I know	3.65	3.66	3.90	3.54	3.32	9.16***	3.61
7. This fish would improve the way other people perceive me	4.29	4.26	4.28	4.05	3.97	3.57**	4.17
8. Buying this fish would make a good impression on other people	3.79	3.96	3.94	3.63	3.59	5.48***	3.78
9. This fish would give those who buy it social approval	4.16	3.77	3.85	3.49	3.73	10.28***	3.80
Hedonic value	***α = .89***	***α = .91***	***α = .90***	***α = .88***	***α = .90***		***α = .90***
10. I would like this fish	2.90	3.30	3.25	2.99	3.12	5.82***	3.11
11. I would feel relaxed consuming this fish	3.42	3.46	3.37	3.46	3.54	0.76	3.45
12. This fish would make me feel good	3.39	3.65	3.54	3.42	3.31	3.57**	3.46
Ethical value	***α = .79***	***α = .90***	***α = .89***	***α = .91***	***α = .90***		***α = .88***
13. Buying this fish is coherent with my ethical values	3.03	3.48	3.42	3.34	3.25	6.31***	3.30
14. Buying this fish would make good to the environment	3.09	3.25	3.31	3.20	3.06	2.18	3.18
15. Buying this fish would contribute to the survival of the aquaculture industry	3.02	3.27	3.20	3.13	3.10	1.92	3.14
16. Buying this fish would be beneficial to social groups in need (e.g. the children)	4.07	3.58	3.56	3.25	3.47	16.81	3.59
Emotional value	***α = .88***	***α = .92***	***α = .93***	***α = .92***	***α = .91***		***α = .91***
17. Buying this fish makes me feel excited	3.94	3.63	3.87	3.93	4.14	5.88***	3.90
18. Buying this fish makes me enthusiastic	3.64	3.71	3.74	3.76	3.65	0.55	3.70
19. Buying this fish makes me feel happy	3.85	3.88	3.63	3.77	3.71	1.98	3.77

Notes: Answer scales ranged from 1 = 'strongly agree' to 7 = 'strongly disagree'; ***significant at p < .001; **significant at p < .01; *significant at p < .05.

Construct	Germany (n = 506)	France (n = 500)	UK (n = 505)	Spain (n = 500)	Italy (n = 500)	Mean difference-test (*F*-value)	Pooled sample (N = 2511)
Price	***α = .74***	***α = .80***	***α = .80***	***α = .82***	***α = .86***		***α = .80***
20. This fish would not be reasonably priced	3.85	3.59	3.49	3.71	3.42	7.33***	3.61
21. This fish would not be as good a product as its price indicates	n.a.[1]	n.a.[1]	n.a.[1]	n.a.[1]	n.a.[1]		n.a.[1]
22. This fish would have higher price than the average of farmed fish	2.84	3.15	3.11	3.36	3.02	7.42***	3.10
23. This fish would not be economical	2.97	3.42	3.80	3.55	3.21	23.87***	3.39
Effort	***α = .87***	***α = .84***	***α = .89***	***α = .88***	***α = .87***		***α = .87***
24. This fish would require too much time to find	3.58	3.55	3.68	3.68	3.39	3.28*	3.58
25. This fish would require too much effort to find	3.55	3.61	3.76	3.77	3.45	4.39**	3.63
26. This fish would be hard to find	3.38	3.57	3.50	3.53	3.12	7.67***	3.42
Unfamiliarity	***α = .77***	***α = 79***	***α = .84***	***α = .79***	***α = .81***		***α = .81***
27. I won't be able to understand everything about this fish	3.92	4.15	3.99	4.27	3.52	16.70***	3.97
28. I won't be able to know all I need about this fish	3.48	4.08	3.86	4.05	3.35	22.90***	3.76
29. I won't feel as familiar as I want with this fish	3.46	4.12	3.78	3.83	3.43	18.65***	3.72
Evaluation costs	***α = .83***	***α = .73***	***α = .84***	***α = .83***	***α = .80***		***α = .81***
30. It would be difficult to recognize this fish	3.41	3.72	3.71	3.80	3.16	15.86***	3.56
31. I could not afford the time to get the information to fully evaluate this fish	3.88	3.92	4.04	4.15	3.85	3.11*	3.97
32. Comparing the benefits of my previous preferred fish with this fish would take too much time and effort	3.82	4.21	3.94	4.13	3.55	15.45***	3.93
33. If I would change my previously preferred fish, I would have to search very much to find this fish	3.64	3.91	3.62	3.64	3.38	8.24***	3.64
Performance risk	***α = .81***	***α = .81***	***α = .84***	***α = .79***	***α = .84***		***α = .82***
34. There might be a chance that this fish would not taste properly	3.94	3.89	3.76	3.76	3.25	17.50***	3.72
35. There might be a chance that I lose money, e.g. if the taste of this fish would be too different from the fish I usually buy	3.96	3.92	3.76	3.79	3.54	6.11***	3.79
36. This fish would come from a production method that I cannot trust	4.11	4.13	4.16	4.27	3.56	16.74***	4.05
37. This fish would not have any extras to offer	4.30	4.58	3.93	4.20	4.03	14.27***	4.21
Safety risk	***α = .78***	***α = .71***	***α = .84***	***α = .75***	***α = .83***		***α = .79***
38. This fish would not be safe to consume	4.34	4.94	4.60	4.47	3.87	30.74***	4.44
39. Not enough experience is gained in this fish so as to ensure safety	3.73	3.56	3.81	3.71	3.40	5.67***	3.64
40. There might be a risk if the safety of consuming this fish is not warranteed	3.53	3.59	3.86	3.55	3.32	7.49***	3.57

Notes: Answer scales ranged from 1 = 'strongly agree' to 7 = 'strongly disagree'; ***significant at p < .001; **significant at p < .01; *significant at p < .05.

[1] Based on the outcomes of the pilot-test, this item was dropped in the analyses.

PERCEIVED 'RELATIONAL OUTCOMES'

Construct	Germany (n = 506)	France (n = 500)	UK (n = 505)	Spain (n = 500)	Italy (n = 500)	Mean difference-test (*F*-value)	Pooled sample (N = 2511)
Customer value	***α = .90***	***α = .86***	***α = .92***	***α = .91***	***α = .90***		***α = .90***
41. I would consider this fish to be good value for money	3.54	3.71	3.65	3.50	3.60	2.04	3.60
42. I would consider this fish to be a good buy	3.23	3.47	3.47	3.23	3.27	4.15**	3.33
43. The value of this fish to me would be high	3.38	3.43	3.48	3.34	3.46	0.88	3.42
44. Compared to what I would have to give up, the overall ability of this fish to satisfy my needs would be high	3.21	3.18	3.46	3.49	3.54	7.72***	3.38
45. This fish replace old fish products with new valuable products	3.34	3.45	3.41	3.52	3.54	1.63	3.45
46. This fish is a promising fish product	2.93	3.30	3.10	3.07	3.13	4.41**	3.11
Satisfaction	***α = .94***	***α = .94***	***α = .94***	***α = .93***	***α = .94***		***α = .94***
47. It would be a wise choice to buy this fish	3.16	3.51	3.49	3.25	3.35	5.42***	3.35
48. Overall, I would be satisfied with this fish	3.19	3.49	3.40	3.27	3.38	3.52**	3.35
49. It would be the right thing to choose this fish	3.18	3.47	3.38	3.40	3.30	2.89*	3.34
Trust	***α = .94***	***α = .94***	***α = .91***	***α = .95***	***α = .94***		***α = .94***
50. I would trust this fish	3.32	3.62	3.43	3.29	3.42	4.09**	3.42
51. I would rely on this fish	3.40	3.76	3.90	3.23	3.37	18.18***	3.53
52. I would consider this fish to be an honest product	3.22	3.46	3.31	3.28	3.42	2.63*	3.34
53. This fish would be safe to buy	3.35	3.59	3.29	3.29	3.46	4.16**	3.40
Word of Mouth	***α = .90***	***α = .91***	***α = .91***	***α = .86***	***α = .92***		***α = .90***
54. I would recommend this fish to my friends and family	3.43	3.69	3.72	3.42	3.48	4.54**	3.55
55. I would talk favorably about this fish	3.22	3.62	3.57	3.13	3.37	10.77***	3.38
Willingness to pay	***α = n.a.***	***α = n.a.***	***α = n.a.***	***α = n.a.***	***α = n.a.***		***α = n.a.***
56. I am willing to pay a premium price to buy this fish	3.59	4.05	4.01	3.97	4.05	6.96***	3.93
Intention to buy	***α = .86***	***α = .86***	***α = .88***	***α = .82***	***α = .82***		***α = .85***
57. I intend to purchase this fish next time I buy fish	3.51	3.78	3.88	3.42	3.52	7.65***	3.62
58. I intent to replace my current fish with this fish	3.94	4.11	4.21	3.98	4.03	2.44*	4.05

Notes: Answer scales ranged from 1 = 'strongly agree' to 7 = 'strongly disagree'; ***significant at p < .001; **significant at p < .01; *significant at p < .05.

SOCIO-DEMOGRAPHIC CHARACTERISTICS

Construct	Germany (n = 506)	France (n = 500)	UK (n = 505)	Spain (n = 500)	Italy (n = 500)	Country difference-tests	Pooled sample (N = 2511)
Mean age (in years)	41.75	41.72	42.29	41.11	40.28	$F = 1.82$	41.43
Gender							
Male	49.2%	48.6%	51.1%	50.4%	46.8%	$X^2 = 2.23$	49.2%
Female	50.8%	51.4%	48.9%	49.6%	53.2%		50.8%
Education							
No formal education	0%	0.4%	0.2%	0%	0%		0.1%
Primary school	3.0%	1.2%	0%	1.4%	0.4%		1.2%
Secondary school	41.9%	25.0%	27.1%	18.0%	23.8%	$X^2 = 218.46$***	27.2%
Technical School	23.9%	19.8%	25.5%	28.6%	28.6%		25.3%
University Degree	23.7%	30.0%	33.9%	46.6%	34.4%		33.7%
Post-graduate Degree	7.5%	23.6%	13.3%	5.4%	12.8%		12.5%
Income level							
Lower than average	25.3%	25.0%	27.9%	26.4%	30.6%		27.0%
About average	53.8%	61.4%	55.4%	62.2%	64.0%	$X^2 = 60.67$***	59.3%
Higher than average	20.9%	13.6%	16.6%	11.4%	5.4%		13.6%
Socio-economic class							
Social Class A/B	11.7%	19.0%	12.5%	11.8%	20.0%		15.0%
Social Class C1	27.3%	31.6%	38.8%	34.4%	25.0%		31.4%
Social Class C2	45.3%	36.4%	32.7%	38.8%	41.2%	$X^2 = 59.47$***	38.9%
Social Class D	15.8%	13.0%	15.8%	14.8%	13.8%		14.7%
Social Class E	0%	0%	0.2%	0.2%	0%		0.1%
Who is responsible for doing the grocery shopping in your household?							
I am the main decision maker of the household	80.4%	78.0%	71.5%	62.6%	73.6%	$X^2 = 48.85$***	73.2%
I am the joint decision maker of the household	19.6%	22.0%	28.5%	37.4%	26.4%		26.8%
Marital status							
Single	34.4%	32.4%	35.2%	33.2%	35.8%		34.2%
Co-habiting	17.8%	9.2%	20.2%	18.0%	16.2%	$X^2 = 33.98$***	16.3%
Married	47.8%	58.4%	44.6%	48.8%	48.0%		49.5%
Are there children in your household?							
Yes	37.7%	55.2%	40.4%	49.6%	45.2%	$X^2 = 39.93$***	45.6%
No	62.3%	44.8%	59.6%	50.4%	54.8%		54.4%
Are you the main wage earner of household?							
Yes	68.4%	71.0%	71.9%	59.6%	51.0%	$X^2 = 69.51$***	64.4%
No	31.6%	29.0%	28.1%	40.4%	49.0%		35.6%

Notes: ***significant at p < .001; **significant at p < .01; *significant at p < .05.

BEHAVIOUR TOWARDS FISH

Construct		Germany (n = 506)	France (n = 500)	UK (n = 505)	Spain (n = 500)	Italy (n = 500)	Country difference-tests (Chi-square)	Pooled sample (N = 2511)
How often did you eat the following fish products in the last month? (in percentages)								
25. Farmed fish (aquaculture)	Never	12.3%	8.6%	5.5%	4.8%	10.0%		8.2%
	Once a month or less	40.7%	38.8%	32.5%	30.8%	30.6%		34.7%
	2-3 times a month	25.3%	30.8%	30.3%	29.6%	33.0%	135.78***	29.8%
	Once a week or more	10.1%	17.0%	23.2%	29.8%	23.8%		20.7%
	I don't know	11.7%	4.8%	8.5%	5.0%	2.6%		6.5%
26. Wild fish	Never	16.8%	13.6%	23.0%	20.2%	3.6%		15.5%
	Once a month or less	40.9%	40.2%	35.6%	26.4%	28.4%		34.3%
	2-3 times a month	25.3%	25.8%	20.2%	22.4%	34.6%	212.51***	25.6%
	Once a week or more	10.5%	15.0%	10.9%	19.6%	28.6%		16.9%
	I don't know	6.5%	5.4%	10.3%	11.4%	4.8%		7.7%
27. Seafood	Never	23.3%	12.2%	8.3%	6.8%	8.2%		11.8%
	Once a month or less	36.0%	47.0%	26.9%	44.4%	30.8%		37.0%
	2-3 times a month	26.9%	25.2%	31.5%	31.0%	38.8%	213.04***	30.7%
	Once a week or more	10.9%	13.8%	30.3%	17.0%	21.6%		18.7%
	I don't know	3.0%	1.8%	3.0%	0.8%	0.6%		1.8%
28. Frozen fish	Never	5.5%	10.0%	6.9%	5.0%	7.2%		6.9%
	Once a month or less	25.3%	30.8%	25.5%	22.0%	28.2%		26.4%
	2-3 times a month	41.3%	35.8%	35.8%	35.0%	33.6%	44.29***	36.3%
	Once a week or more	26.9%	22.6%	30.5%	37.0%	30.4%		29.5%
	I don't know	1.0%	0.8%	1.2%	1.0%	0.6%		0.9%
29. Whole fish	Never	21.9%	16.2%	12.7%	4.8%	9.6%		13.1%
	Once a month or less	36.6%	36.6%	35.6%	24.8%	29.4%		32.6%
	2-3 times a month	22.5%	27.0%	26.9%	32.2%	31.8%	169.92***	28.1%
	Once a week or more	14.2%	16.4%	21.6%	35.6%	27.8%		23.1%
	I don't know	4.7%	3.8%	3.2%	2.6%	1.4%		3.1%
30. Processed fish (e.g., fish-fingers)	Never	11.9%	14.8%	13.1%	18.6%	10.8%		13.8%
	Once a month or less	33.4%	32.8%	33.3%	29.0%	25.6%		30.8%
	2-3 times a month	31.8%	25.6%	28.5%	27.0%	34.8%	80.52***	29.5%
	Once a week or more	21.9%	25.6%	23.4%	19.8%	28.2%		23.8%
	I don't know	1.0%	1.2%	1.8%	5.6%	0.6%		2.0%

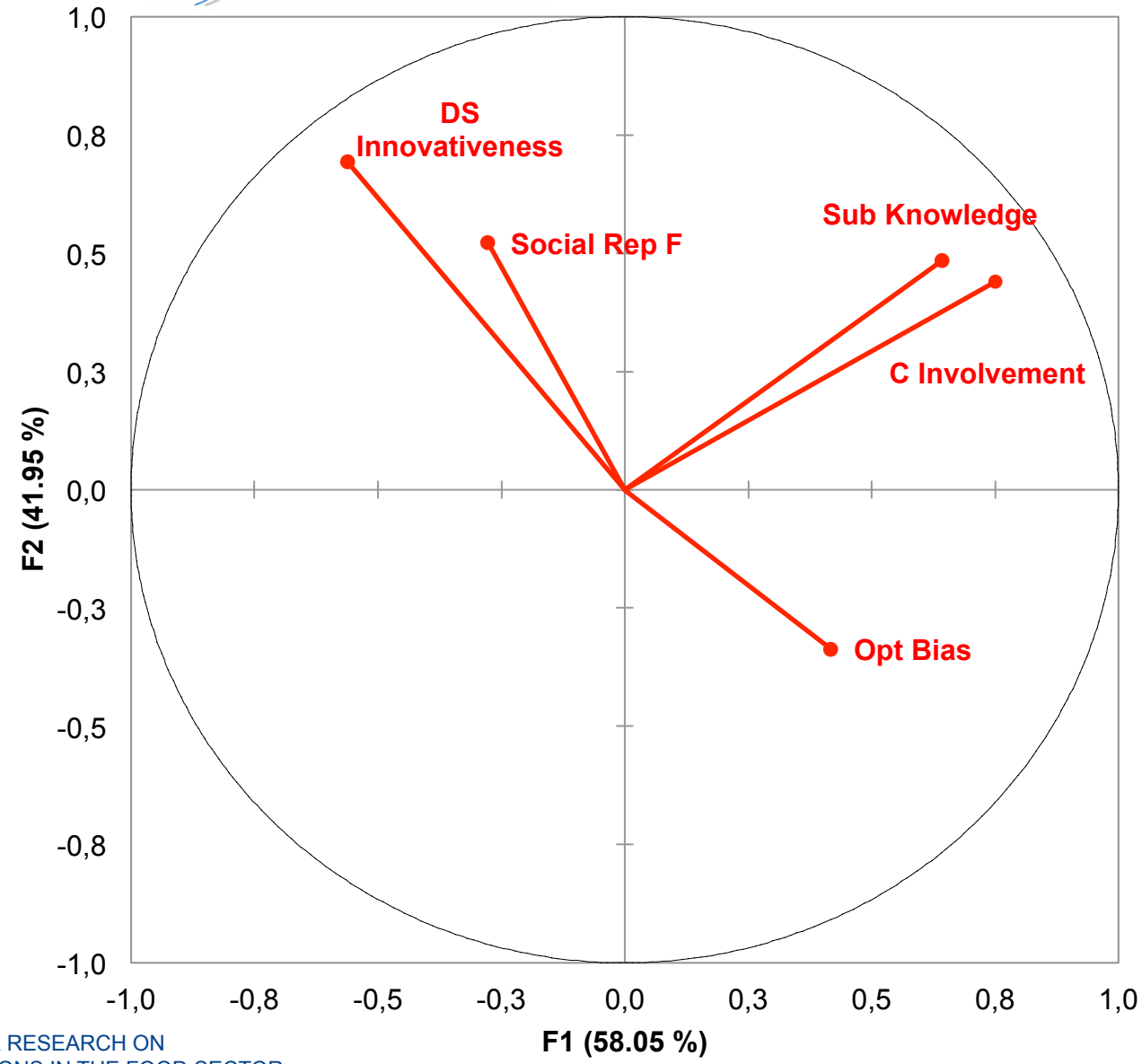
Notes: ***significant at p < .001; **significant at p < .01; *significant at p < .05.

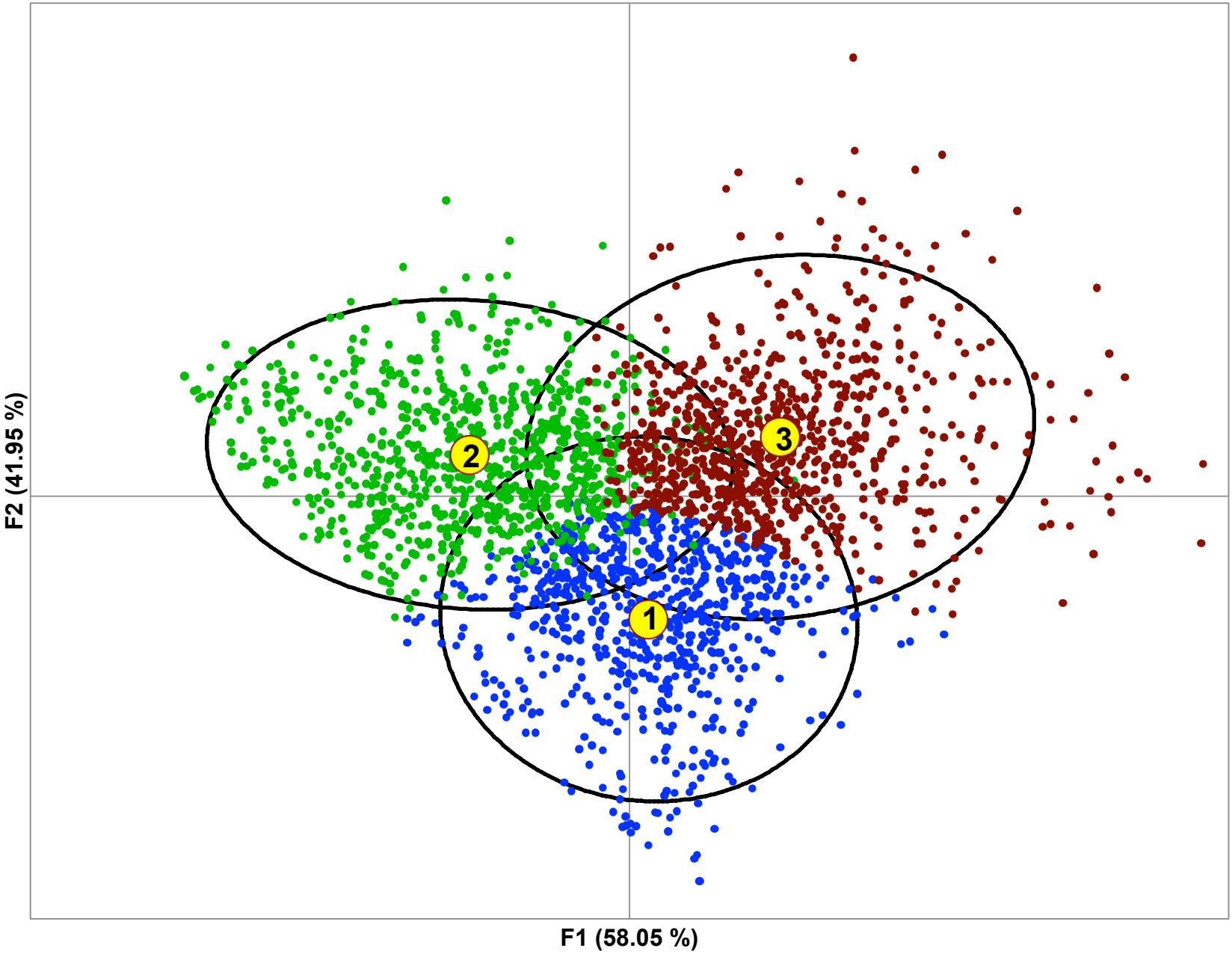
PSYCHOGRAPHIC SEGMENTATION: RESULTS POOLED SAMPLE (N=2511)

Construct	Germany (n = 506)	France (n = 500)	UK (n = 505)	Spain (n = 500)	Italy (n = 500)	Mean difference-test (*F*-value)	Pooled sample (N = 2511)
Consumer involvement	***α = .88***	***α = .94***	***α = .94***	***α = .95***	***α = .96***		***α = .94***
59. I am very concerned about what fish products I purchase	2.65	2.49	2.97	2.63	2.29	14.68***	2.61
60. I care a lot about what fish products I consume	2.14	2.46	2.78	2.62	2.44	14.44***	2.49
61. Generally, choosing the right fish products is important to me	2.26	2.42	2.75	2.57	2.28	11.21***	2.46
Domain specific innovativeness	***α = .88***	***α = .86***	***α = .90***	***α = .86***	***α = .86***		***α = .87***
62. In general, I am among the last in my circle of friends to purchase new fish products.	4.22	4.17	4.20	4.18	3.95	2.10	4.14
63. Compared to my friends, I do little shopping for new fish products.	4.19	4.00	4.25	4.23	3.97	3.04*	4.13
64. I would consider buying new fish products, even if I hadn't heard of it yet.	n.a.[1]	n.a.[1]	n.a.[1]	n.a.[1]	n.a.[1]		n.a.[1]
65. In general, I am the last in my circle of friends to know the names of the latest new fish product trends.	4.17	4.09	4.17	4.14	3.99	1.02	4.11
66. I know more about new fish products than other people do.	n.a.[1]	n.a.[1]	n.a.[1]	n.a.[1]	n.a.[1]		n.a.[1]
Subjective knowledge	***α = .93***	***α = .95***	***α = .94***	***α = .93***	***α = .94***		***α = .94***
67. I consider that I know more about fish than the average person	3.49	3.97	3.60	3.69	3.53	7.50***	3.66
68. I think that I know more about fish than my friends	3.39	3.92	3.48	3.54	3.43	8.96***	3.55
69. I have a lot of knowledge about how to prepare fish	3.12	3.85	3.50	3.36	3.25	16.33***	3.41
70. I have a lot of knowledge about how to evaluate the quality of fish	3.29	3.95	3.63	3.59	3.37	14.00***	3.57
Optimistic bias	***α = .81***	***α = .90***	***α = .88***	***α = .86***	***α = .85***		***α = .86***
71. Compared to the average person of my age and sex, the likelihood of me getting health problems when eating new product from a new farmed fish is *[-3/+3: much less/more likely than the average person]*	-0.73	-0.15	-0.27	-0.46	-0.51	12.95***	-0.42
72. The health risks associated with eating a new product from a new farmed fish to me personally are *[1=very low to 7=very high]*	2.87	3.57	3.11	2.95	3.10	16.73***	3.12
73. The health risks associated with eating a new product from a new farmed fish to the average [Spanish / ..... / ..... / ..... / .....] are *[1=very low to 7=very high]*	3.06	3.62	3.24	3.05	3.36	13.22***	3.27
Social representations of food	***α = .73***	***α = .74***	***α = .76***	***α = .74***	***α = .79***		***α = .75***
74. I value things being in accordance with nature.	n.a.[2]	n.a.[2]	n.a.[2]	n.a.[2]	n.a.[2]		n.a.[2]
75. I feel good when I eat clean and natural food.	n.a.[2]	n.a.[2]	n.a.[2]	n.a.[2]	n.a.[2]		n.a.[2]
76. I would like to eat only food with no additives.	n.a.[2]	n.a.[2]	n.a.[2]	n.a.[2]	n.a.[2]		n.a.[2]
77. Eating is very important to me	n.a.[2]	n.a.[2]	n.a.[2]	n.a.[2]	n.a.[2]		n.a.[2]
78. For me, delicious food is an essential part of weekends.	n.a.[2]	n.a.[2]	n.a.[2]	n.a.[2]	n.a.[2]		n.a.[2]
79. I treat myself to something really delicious.	n.a.[2]	n.a.[2]	n.a.[2]	n.a.[2]	n.a.[2]		n.a.[2]
80. New foods are just a silly trend.	4.43	4.47	4.38	4.58	4.44	1.01	4.46
81. Consequences of eating new foods are unknown.	3.31	3.18	3.53	3.53	3.50	5.41***	3.41
82. I have some doubts about food novelties.	3.67	3.49	3.59	3.51	3.68	1.64	3.59

Notes: Answer scales ranged from 1 = 'strongly agree' to 7 = 'strongly disagree'; ***significant at p < .001; **significant at p < .01; *significant at p < .05.

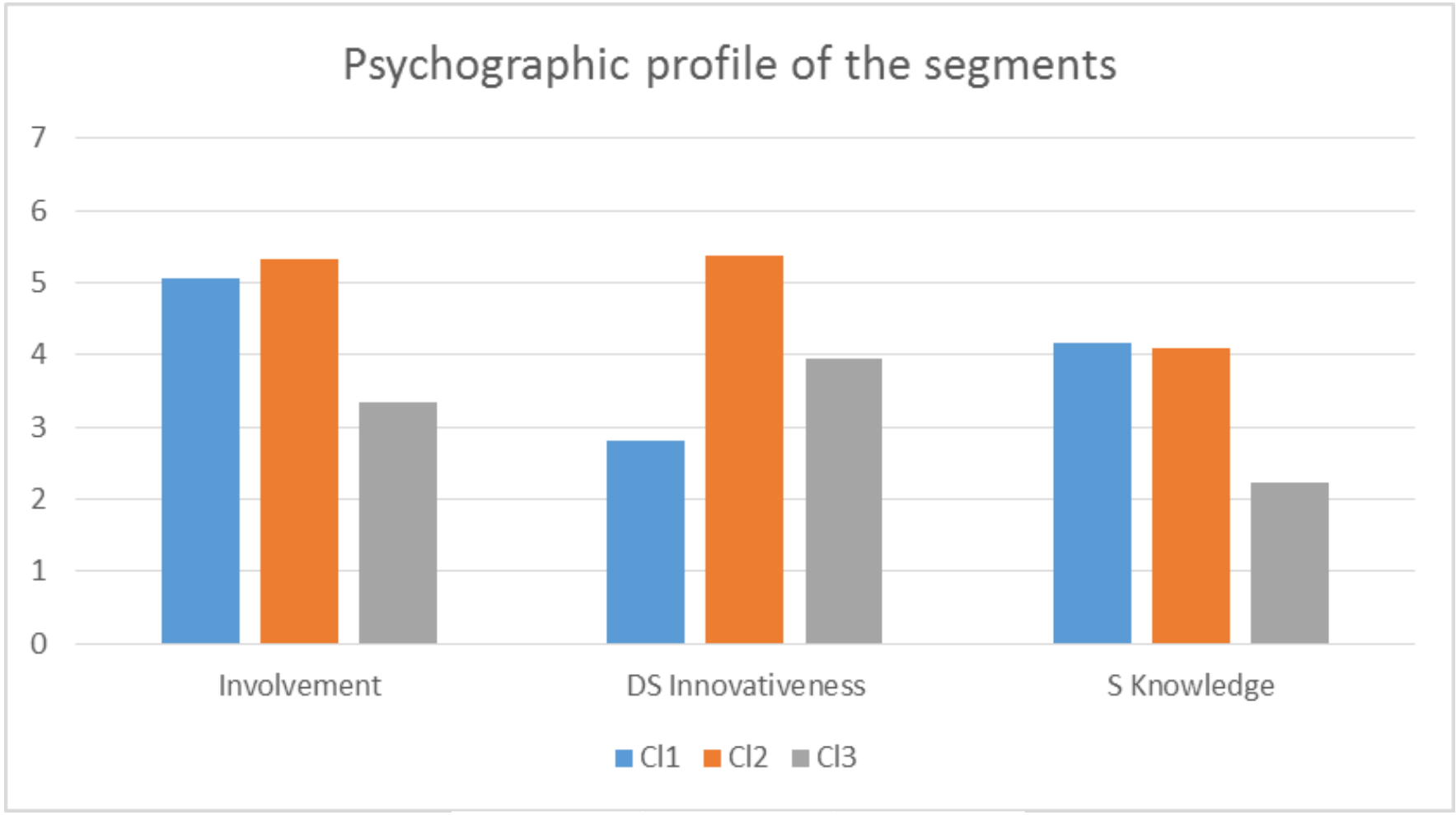
[1]Based on the outcomes of the pilot-test, the reversely formulated items were dropped in the analyses; [2] Items A74-79 were dropped from the analysis; only items A80-82 ('novel food' dimension)


DS Innovativeness
Social Rep F
Sub Knowledge
C Involvement
Opt Bias
F2 (41.95 %)
F1 (58.05 %)
1,0
0,8
0,5
0,3
0,0
-0,3
-0,5
-0,8
-1,0
-1,0
-0,8
-0,5
-0,3
0,0
0,3
0,5
0,8
1,0


F2 (41.95 %)
F1 (58.05 %)
1
2
3

Confusion matrix

From \ to	Cluster 1	Cluster 2	Cluster 3	Total	% correct
Cluster 1	671	34	23	728	**92.17%**
Cluster 2	16	863	32	911	**94.73%**
Cluster 3	5	16	851	872	**97.59%**
Total	692	913	906	2511	**94.98%**

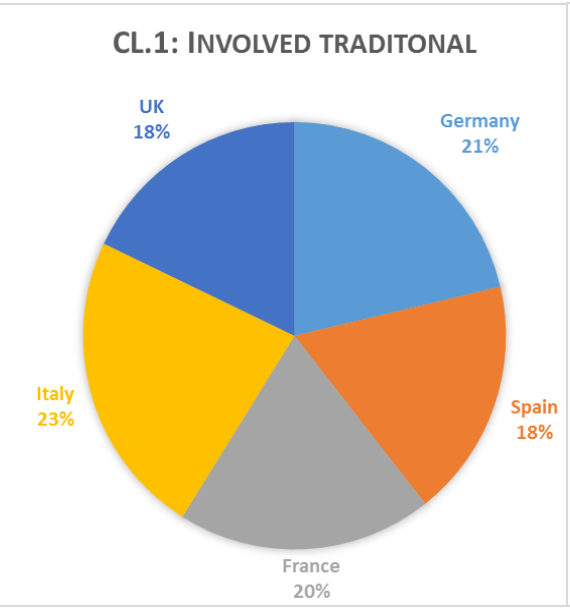


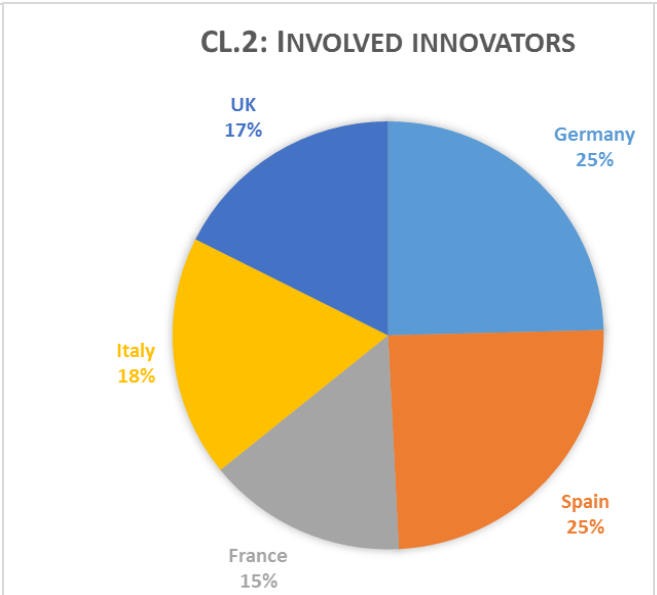
Cl1 Involved traditional N=728, 30%

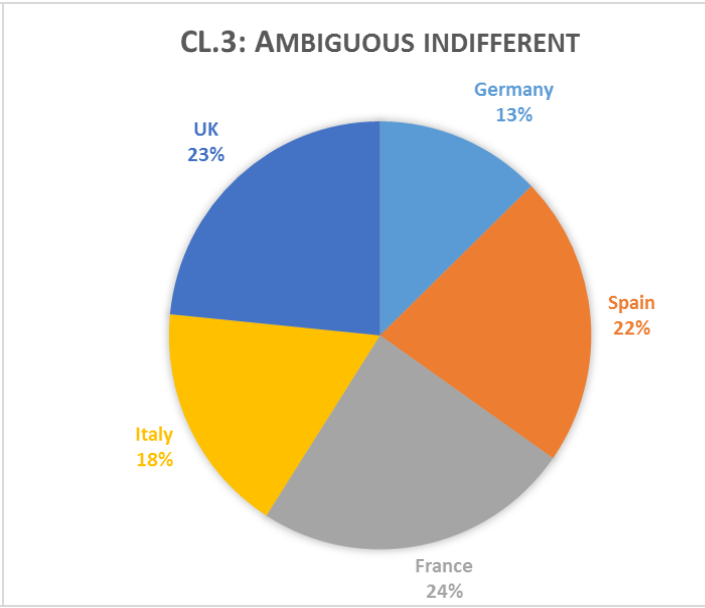
Cl2 Involved Innovators N=911, 36%

Cl3 Ambiguous indifferent N=872, 34%

Country participation







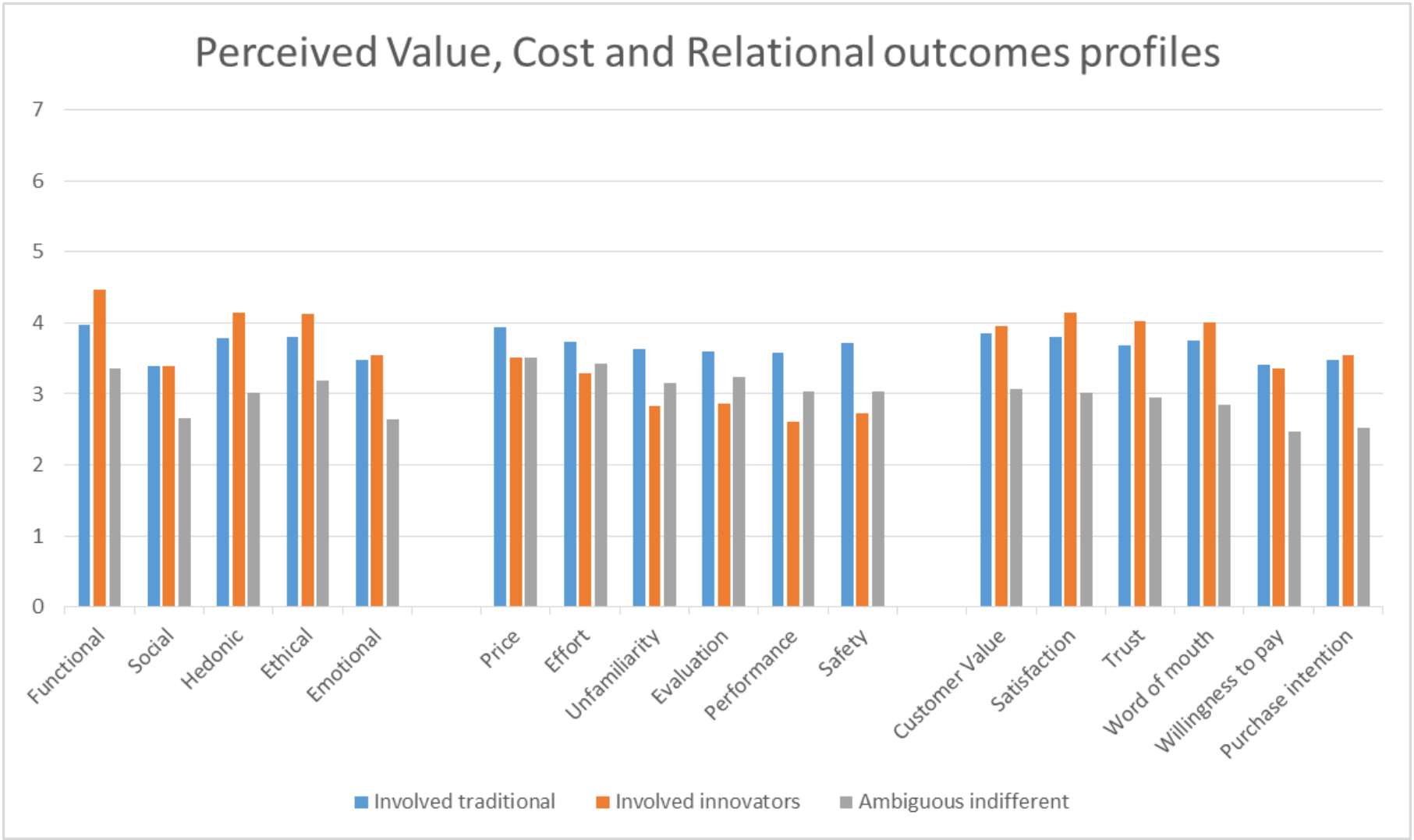
CI1 Involved traditional N=728, 30%	CI2 Involved Innovators N=911, 36%	CI3 Ambiguous indifferent N=872, 34%

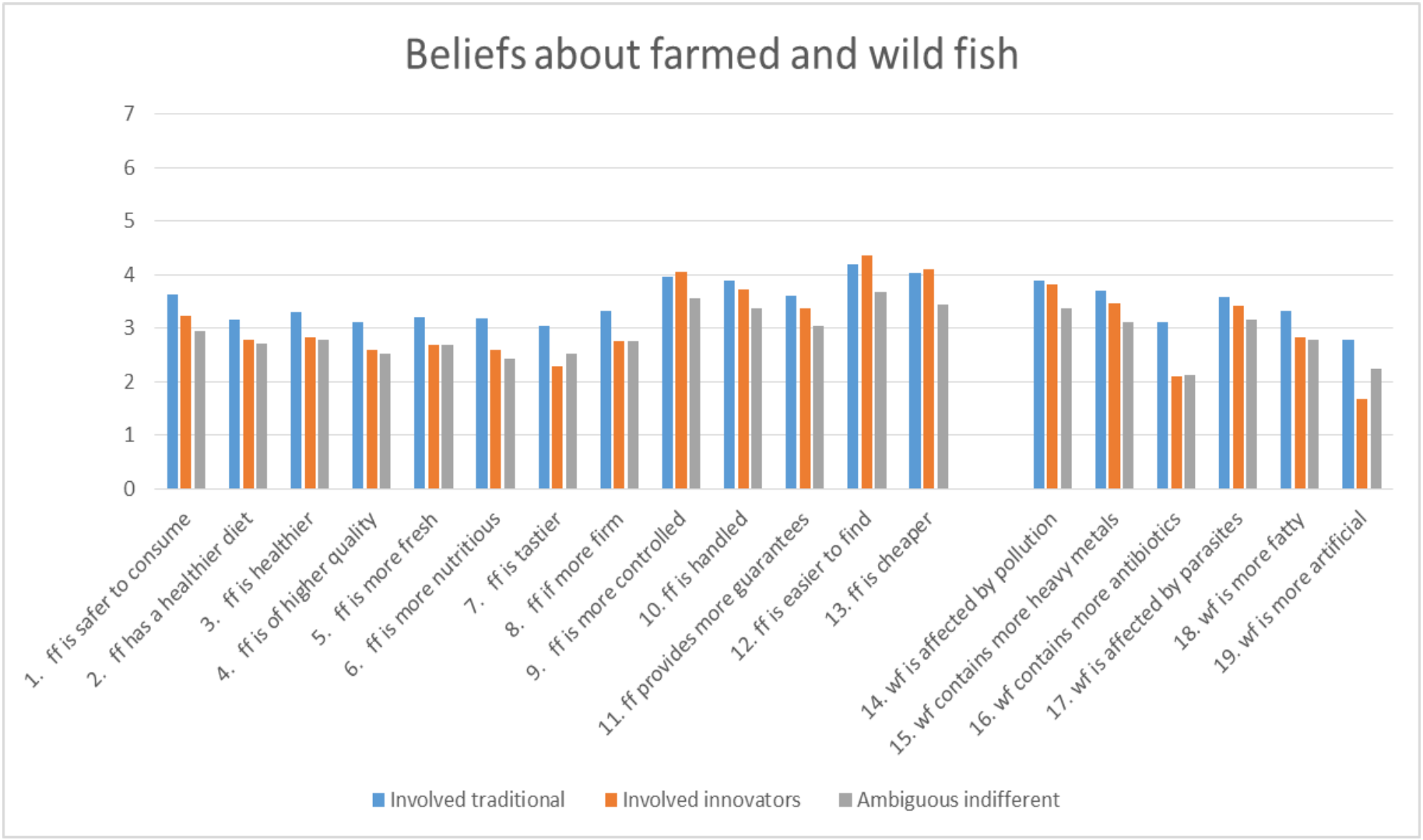
Socio-demographic profile, % (only statistically significant differences)

Characteristic		Involved traditional (N=728) 30%	Involved innovators (N=911) 36%	Ambiguous indifferent (N=872) 34%	Sig.
Age	(mean in years)	40.7	**43.7**	39.6	.002
Marital status	(married)	51.6	**53.9**	43.1	.000
Employment	(employee various)	**32.2**	30.5	30.6	.026
	(non-working)	11.7	14.3	**15.3**	
Income	(more than average)	13.5	**17.3**	9.9	.000
	(average)	**61.1**	59.5	57.7	
	(less than average)	25.4	23.2	**32.5**	

Behavioural profile, %

Characteristic	Involved traditional (N=728) 30%	Involved innovators (N=911) 36%	Ambiguous indifferent (N=872) 34%	Sig.
Consumption of farmed fish:				
Once a week or more	**23.1**	**22.9**	*16.5*	
Two-three times a month	**29.7**	**32.4**	*27.2*	.000
Once a month or less	32.6	32.6	**38.6**	
Never	**9.8**	*7.2*	8.0	
Consumption of wild fish:				
Once a week or more	**21.6**	17.9	*11.9*	
Two-three times a month	**27.9**	26.8	*22.6*	.000
Once a month or less	*33.1*	**35.7**	**33.9**	
Never	*11.1*	12.5	**22.1**	
Consumption of seafood:				
Once a week or more	**22.1**	20.6	*13.9*	.000
Consumption of frozen fish:				
Once a week or more	**31.7**	**31.8**	*25.1*	.003
Consumption of whole fish:				
Once a week or more	**28.7**	24.4	*17.1*	.000
Consumption of processed fish:				
Once a week or more	**29.3**	*21.7*	*21.3*	.001


Perceived Value, Cost and Relational outcomes profiles
7
6
5
4
3
2
1
0
Functional
Social
Hedonic
Ethical
Emotional
Price
Effort
Unfamiliarity
Evaluation
Performance
Safety
Customer Value
Satisfaction
Trust
Word of mouth
Willingness to pay
Purchase intention
Involved traditional
Involved innovators
Ambiguous indifferent


Beliefs about farmed and wild fish
7
6
5
4
3
2
1
0
1. ff is safer to consume
2. ff has a healthier diet
3. ff is healthier
4. ff is of higher quality
5. ff is more fresh
6. ff is more nutritious
7. ff is tastier
8. ff if more firm
9. ff is more controlled
10. ff is handled
11. ff provides more guarantees
12. ff is easier to find
13. ff is cheaper
14. wf is affected by pollution
15. wf contains more heavy metals
16. wf contains more antibiotics
17. wf is affected by parasites
18. wf is more fatty
19. wf is more artificial
Involved traditional
Involved innovators
Ambiguous indifferent

Logo recognition and attitude, mean scores

Statement	Involved traditional (N=728)	Involved innovators (N=911)	Ambiguous indifferent (N=872)	Sig.
I am aware of this logo	4.36	*4.22*	**4.64**	.000
The quality of products carrying this logo is very high	**4.04**	*3.80*	**4.09**	.000
Products carrying this logo would be my first choice	**4.09**	*3.95*	**4.28**	.000
I find this logo trustworthy	4.01	*3.81*	**4.11**	.000
I value this logo	**4.05**	*3.88*	**4.12**	.000
I am aware of this logo	*4.34*	*4.34*	**4.71**	.000
The quality of products carrying this logo is very high	3.87	*3.72*	**4.00**	.000
Products carrying this logo would be my first choice	4.02	*3.87*	**4.18**	.000
I find this logo trustworthy	**3.88**	*3.69*	**3.96**	.000
I value this logo	3.95	*3.80*	**4.13**	.000
I am aware of this logo	*4.27*	4.40	**4.59**	.000
The quality of products carrying this logo is very high	3.96	*3.86*	**4.11**	.000
Products carrying this logo would be my first choice	4.10	*4.01*	**4.23**	.000
I find this logo trustworthy	**4.00**	*3.85*	**4.08**	.000
I value this logo	4.07	*3.95*	**4.11**	.000

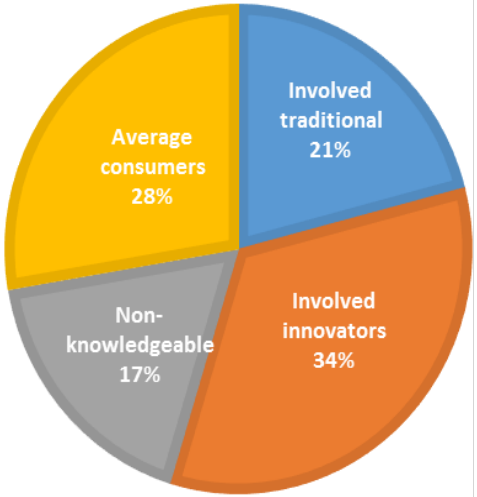
SUMMARY SEGMENT PROFILES - OVERALL

Involved traditional (30%)	Involved innovators (36%)	Ambiguous indifferent (34%)
PSYCHOGRAPHICS -Involved, knowledgeable	-Involved, knowledgeable, **innovative when in comes to new fish**	-Non-involved, non-knowledgeable
DEMOGRAPHICS -In their 40s, higher number of employees, less people out of work, **mostly of average income**	-**Slightly older, more people with above-average income**	-More non-working people, more with below-average income
BEHAVIOUR -**Highest number of regular fish consumers** across all fish types (farmed, wild, etc.)	-**Highest number of regular farmed fish consumers**, highest number of occasional wild fish consumers	-Highest number of occasional of non-consumers of all fish types
PERCEPTIONS OF VALUE & COST -Average perceived value of the new species, **highest perceived cost (i.e. price, safety, effort)**, high WTP and PI	-**Highest perceived value (i.e. functional, hedonic, ethical),** lowest perceived cost, **highest expected outcomes (i.e. satisfaction, trust, WOM)**, high WTP and PI	-Lowest value perceptions and outcomes, average cost perceptions
BELIEFS -**Overall strongest beliefs**: farmed fish is handled, guaranteed, safe, tasty; wild fish suffers pollution, heavy	-**Stronger beliefs about farmed fish**: easier to find, cheaper, more	-Neutral, low-strength beliefs

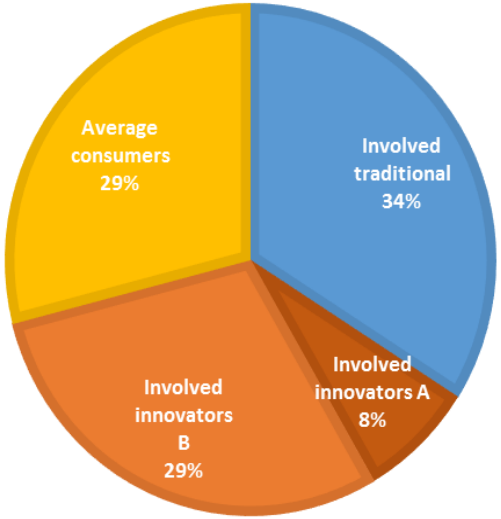
FURTHER STEPS

INDIVIDUAL COUNTRY-LEVEL SEGMENTATION

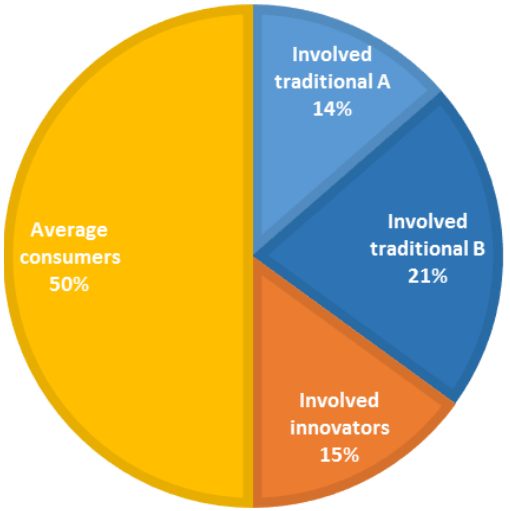
GERMANY



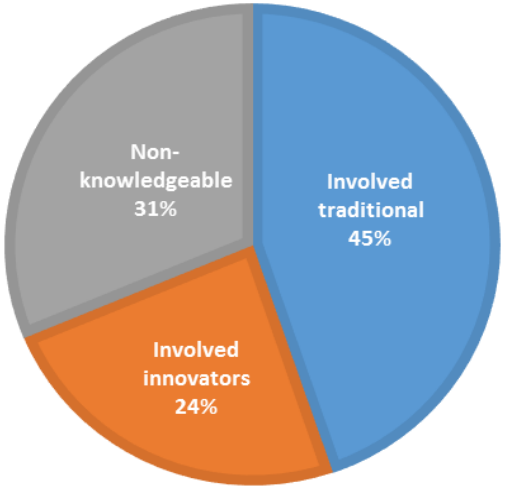
ITALY



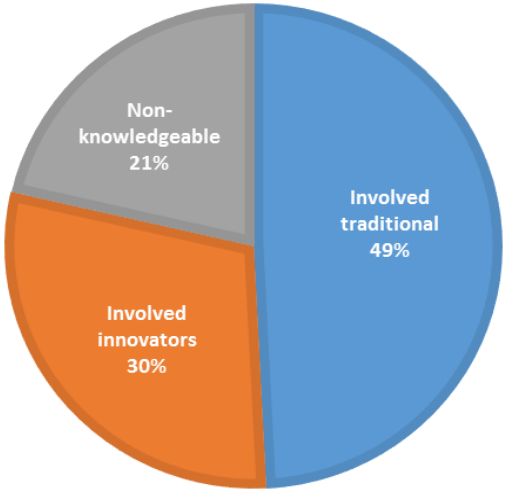
FRANCE



UK



SPAIN



THANK YOU!