AQUACULTURE PRODUCTS FOR THE LONG RUN:

Consumer-driven product idea development from Diversify

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FISH FOR THOUGHT

- How can you uncover the next-generation products with the power to grow?
- How can you address the needs of future consumers while providing the path for current consumers to migrate from the habitual products?
‘IF YOU BUILD IT THEY WILL COME’

- R&D often provide a brilliant product market-ready ideas poised for success, without involving the end-user who uses these solutions
- Consumer-driven concept development and co-creation involves user from the beginning
- Under new common organisation of the markets (CMO) in fishery and aquaculture products (FAPs), consumers play a pivotal role:

  “Consumers should be enabled to make informed choices but also a more responsible sustainable consumption.”

(Banovic et al., 2016a; Füller et al, 2011; Potts et al., 2008; Von Hippel, 2005)
FISH TODAY

Consumers facing a choice overload

(Mintel, 2016)
INFORMATION & CLAIM BOMBARDMENT

Consumers facing information overload

(Mintel, 2016)
MIXED MESSAGES DON’T HELP

Aquaculture

Farming finfish, shellfish and aquatic plants is one of the world’s fastest growing food sectors; it already provides the planet with about half of all the fish we eat.

EU Aquaculture Online

MIXED MESSAGES DON’T HELP

Invest in sustainable aquaculture

Eat more seafood

Choose certified seafood

Learn about aquaculture

Eat more local freshwater fish

Eat more mussels

Aquaculture is negative

Ask your fishmonger

Eat more aquaculture products

Eat more farmed salmon

Eat more local carp

Eat more local fish

Invest in communication

Beware of unsustainable aquaculture

Boycott farmed salmon

Discover “Ombrine mascarae”

Discover aquaculture

Discover fish

Eat more trout

Eat more certified seafood

Eat more European products

Eat more local farmed fish

Eat more local trout

Eat more oysters

Eat more sustainable seafood

Read the labels

Stop industrial aquaculture

Stop local aquaculture expansion

EU communication campaigns’ on Aquaculture (EC, 2014; N=85)
FISH PUZZLE

Do consumers distinguish products coming from...

- Wild fish
- Farmed fish
AQUACULTURE PRODUCTS (IN)VISIBLE?

**What ads say**
FAST AND TASTY
FARmed FISH! A LEAP FORWARD IN PRICES YOU CAN'T IGNORE!

**What consumers hear**
FAST blah blah
blah blah blah blah
FORWARD blah blah blah
blah IGNORE!

Adapted from @marketoonist.com

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You prefer wild products; 34
You prefer farmed products; 8
You have no preference; 31
You do not know if the products you buy or eat are wild or farmed; 14
It depends on the type of product; 11
Don't know; 2

(Special Eurobarometer 450: EU28, N=24452; year 2017)
CONSUMER IS LIKELY TO IGNORE YOUR PRODUCT TOO…

Unless you can make it to…. 

Stand out in a crowd: 
Cognitive ease

Feels familiar 
(Gigerenzer & Gaissmaier, 2011)

Feels true 
(Oppenheimer, 2005)

Feels good 
(Stepper & Strack, 1993)

Feels effortless 
(Gigerenzer & Goldstein, 1996)

(Kahneman, 2003)
CONSUMER-DRIVEN PRODUCT IDEAS

INVOLVE THE RIGHT CONSUMERS (consumer as resource)
- Segments
- Early adopters

STRUCTURE THE CREATIVE PROCESS (consumer as co-creator)
- Design & development of product ideas

Experts
- Monitoring & control of design and development
- Building product prototypes

CONTINUE WORKING WITH CONSUMERS (consumer as user)
- Product testing & support

(Banovic et al, 2017a; Banovic et al., 2016a)
CONSUMERS AS RESOURCE

- Involving the right consumer - Online survey in five focal EU fish markets
  (i.e. FR, GER, IT, SP & UK; N=2500)

Early adopters:
Consumers who count

Involved traditional
(N=728; 30%)

Involved innovators
(N=911; 36%)

Ambiguous indifferent
(N=872; 34%)

(Banovic et al., 2016b,c; Reinders et al., 2016; D29.2)
CONSUMER AS CO-CREATOR

- Ten focus groups in five focal EU fish markets with early adopters (i.e. FR, GER, IT, SP & UK; N=60)

STARTER IDEAS EXPRESSED SIMPLY AND CLEARLY

STRUCTURES THAT GIVE THEM CLEAR PROBLEMS TO SOLVE

CREATIVE STIMULUS TO DRAW INSPIRATION

(Fanovic et al, 2016a)
‘ALL THE PLEASURE WITH LITTLE EFFORT’

- Profiling (empathizing with) the consumer
  - preference for products that are quick and easy to cook
  - aquaculture products need to be natural, respect the environment and provide good eating experience
  - benefits of the aquaculture products linked to the overall feeling of health and well-being

(Banovic et al., 2016a)
<table>
<thead>
<tr>
<th>Country</th>
<th>Best voted ideas</th>
<th>Ratings* (Max.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>France</td>
<td>Fresh fish Carpaccio that can be used as starter for a hot meal or as sandwich filling. This Carpaccio is seasoned with ginger and chili and presented as scales of the fish. The product is produced environmentally sustainable. The packaging is a plate that looks like a round box with the compartments and transparent wheel on the top that you can turn to reach different sections.</td>
<td>38</td>
</tr>
<tr>
<td>Germany</td>
<td>Fresh fish fillet covered with herbs and spices in the transparent packaging. Different fillet size in the packaging conveying the product message through images and voice: 'For him – Fish for the triathletes'; 'For her – vacation in Provence'.</td>
<td>27</td>
</tr>
<tr>
<td>Italy</td>
<td>Fresh fish steak for grilling in the pan. Transparent packaging with a label that guarantees the origin of the product and communicates its quality, signs and references to tradition and respect for the environment.</td>
<td>33</td>
</tr>
<tr>
<td>Spain</td>
<td>Fish sausages and fish hamburgers. The main advantage of this product is that the product has no bones. The seasoning is very mild and therefore this product is therefore suitable for children. The product is produced environmentally sustainable.</td>
<td>30</td>
</tr>
<tr>
<td>UK</td>
<td>Fresh fish fillet with different ‘healthy’ seasoning and marinades separately packed that consumer can choose and vary depending on the occasion. This product is sold with recommendation for the appropriate vegetables and wine to accompany the dish. Product message: ‘Not two same dishes in a row’; ‘You have it ready for you, healthy but still have the hectic lifestyle.’</td>
<td>33</td>
</tr>
</tbody>
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* Each idea could be rated from 0 to 72.

‘Happiness can be complete, tasty and easy to cook’ (male and female group, Spain)

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(Banovic et al., 2016a)
<table>
<thead>
<tr>
<th>Fish species</th>
<th>Developed DIVERSIFY product prototypes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meagre</td>
<td>Idea 6: Fish burgers shaped as fish (High processing)</td>
</tr>
<tr>
<td></td>
<td>Idea 4: Ready to eat meal: salad with fish (Low processing)</td>
</tr>
<tr>
<td>Pikeperch</td>
<td>Idea 9: Fish spreads/pate (High processing)</td>
</tr>
<tr>
<td>Grey mullet</td>
<td>Idea 2: Thin smoked fillets (Medium processing)</td>
</tr>
<tr>
<td></td>
<td>Idea 33: Ready-made fish fillets in olive oil (Medium processing)</td>
</tr>
<tr>
<td>Greater Amberjack</td>
<td>Idea 34: Fresh fish steak for grilling in the pan (Low processing)</td>
</tr>
</tbody>
</table>
CONSUMER AS USER

- Continue working with consumer – Choice experiments in focal EU fish markets, 3 products (i.e. FR, GER, IT, SP & UK; N=1500)

PRODUCT MOCK-UPS

ATTRIBUTE MANIPULATION

Medium processed

Low processed

Nutrition claim

Health claim

Certification logo

Price

Country of Origin

(Banovic et al., 2017b; D29.6)
LIKELIHOOD OF CHOICES FOR NEWLY DEVELOPED MOCK-UPS

Produced in own country
ASC logo
Price
Omega 3 & heart function claim

(Banovic et al., 2017b; D29.6)
MANAGERIAL IMPLICATIONS

GOOD NEWS!

It is possible to create new aquaculture products targeting early adopters ACROSS all big EU markets

▶ Homogeneous, converging fish-related culture, opportunity to fashion new product concepts at the cross-border European level

▶ Similar pattern in consumer choice-drivers, i.e.
  › COR and price come first, followed by quality certification, while nutrition/health claims appear to have varying and minimal impact and are highly depend on the type of product (e.g. level of processing) and EU country

▶ Although...
  › A certain degree of customisation needed for certain products and countries
WHAT DID WE LEARN?
CREATING NEW AQUACULTURE PRODUCTS

New aquaculture products

- Needs to feel familiar
  - Adapt information to the type of aquaculture, highlight the most valuable - objective benefits

- Needs to feel true
  - Better link between environmental concerns, responsible consumption and aquaculture

- Needs to feel effortless
  - ‘Less is more, more is less’; ‘All the pleasure with little effort’
  - Less clutter - convenience at the purchase point and at home - branding, storytelling, recipes essential

- Needs to feel good
  - Associations to responsible consumption and healthy diet

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BREMIN, 24TH OF MAY 2017
FUTURE PROSPECTS

- Explore consumers *romantic notion of the nature* as potential for further development and growth of aquaculture production highly influenced by ethical concerns related to environmental and fish welfare issues.

- The more we provide solutions for these consumers’ concerns, the more positive value perceptions they will have towards aquaculture products, and the more likely it is that they will trust and buy these products (Banovic et al., 2016a,b,c).

- However, *never neglect the effect of functional value and sensory aspects* on consumer value perception and its impact on final acceptance of aquaculture products.

“[...] the wilderness is the salvation of the world.” (Walden by Henry David Thoreau, 1817-1862)

“Happiness can be complete [...]” (male/female group, Banovic et al., 2016a)
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http://www.diversifyfish.eu/

THANK YOU
FOR
YOUR ATTENTION!

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