Consumer preferences on fish (carp) processing products market

Tomasz Kulikowski, Olga Szulecka

4th International Carp Conference
Zagreb, October 21-22, 2017
SUCCESS

Strategic Use of Competitiveness towards Consolidating the Economic Sustainability of the European Seafood sector
Quantitative research

- Focus Groups (FG)
- 3 FG in Poland (3 cities)
- 3 FG in Germany (2 cities)
- 9-10 participants per FG
- Ca. 2 hours per FG

Source:
Feucht Y., Zander K., Report of the focus groups in Germany, internal report - Strategic Use of Competitiveness towards Consolidating the Economic Sustainability of the European Seafood sector
Kulikowski T., Rakowski M., Report of the focus groups in Poland - internal report - Strategic Use of Competitiveness towards Consolidating the Economic Sustainability of the European Seafood sector
Scope of the study

- general perception of carp
- knowledge about the sustainability of carp farming
- perception of innovative (processed) carp products
- options to motivate carp consumption
- perception of organic fish
ProHealth

Innovative processing to preserve positive health effects in pelagic fish products.
Qualitative research

- Computer-Assisted Web Interview (CAWI)
- 1009 interviews
- ca. 250 per country
- panel representative in terms of gender and age
- only persons responsible for food purchasing in households

Source: Kulikowski T., Mytlewski A., Survey on consumer preferences for fish product purchasing decisions, Results of market research in four European countries, National Marine Fisheries Research Institute, Gdynia, 2016
Scope of the study

- opinion about the role of a diet in maintaining good health
- opinion on needed and important changes in a diet
- frequency of fish consumption by different fish products categories
- factors influencing the purchasing of fish products
- determining selection factors during purchasing of a new seafood product
- expectations on new healthy fish products
- fish species considered as the best for health
"Carp feed from the bottom and it eats all this dirt and this idea is – no thanks." FG/DE

„Well, the ponds exist since the Middle Ages. They are just there" FG/DE

„I was in carp farm, they say feed carp by cereals but I saw personally bags with artificial feed” FG/PL

„Carp lives in dirty water. I’m pretty sure that farmers give antibiotics to prevent its heath, like in all animal farms” FG/PL
"When I think of my grandmother and my mother, aunt, the elderly were the ones who knew how to prepare carp. The younger generations do not deal so much with the whole fish.” FG/DE

"My mother-in-law makes delicious carp, my mother not.” FG/PL

"I eat only if my sister prepare” FG/PL

“Christmas. Sweet meat. The best for soup” FG/PL

“Carp should be fried on butter. Carp is the best for soup. We buy more carp in December to freeze it” FG/PL
Carp associations - summarized

<table>
<thead>
<tr>
<th>Germany:</th>
<th>Poland:</th>
</tr>
</thead>
<tbody>
<tr>
<td>fish for festive occasions</td>
<td>Christmas Eve</td>
</tr>
<tr>
<td>seazonal availability</td>
<td>carp is not easy to purchase out-of-season</td>
</tr>
<tr>
<td>moldy fish</td>
<td>muddy taste</td>
</tr>
<tr>
<td>rich in bones</td>
<td>tasty and fatty</td>
</tr>
<tr>
<td>idyllic environment</td>
<td>delicate, tasty, fresh fish</td>
</tr>
<tr>
<td>living in muddy surrounding</td>
<td>fishbones</td>
</tr>
<tr>
<td>too soft</td>
<td>not easy to prepare</td>
</tr>
<tr>
<td>Christmas and New Year's Eve</td>
<td>carp is good but from local farm</td>
</tr>
<tr>
<td>low contamination level</td>
<td>dirty water</td>
</tr>
</tbody>
</table>
Main carp consumption constraints

- Product characteristic: fishbones
- Product characteristic: not easy-to-prepare
- Market issue: seasonal/regional availability only
- Image/production issue: water cleanliness / production conditions

Main carp consumption increase options (4P)

- Products: new carp convenience products
- „Place”: better (year-long) availability
- Promotion: education in the area of production conditions, sustainability
- Price: It is always important, even if not mentioned
Is convenience really important?

Fresh fish is popular mostly among elder people, younger prefer frozen and fresh convenience (incl. ready-to-eat)
When consumers choose new fish products they are checking mostly:

Fish species, price and trusted brand are basic purchasing factors on fish mass market

Higher (abstract) needs create niche markets
Polish consumers expectations on future pro-healthy fish products:

We are talking on innovations, consumers need something pure.
Carp products shown to FG participants in Germany

1. Boneless filet

2. Carp crisps

3. Carp meat balls

4. Carp sausage
Carp products shown to FG participants in Poland

- Carp meatball
- Carp’s ham
- Carp’s crisps
- Carp boneless fillet
- Carp smoked fillet
Carp processed products perception

“The carp crisps are strange.” FG/DE

“They surely put the same shredded rubbish in the sausages as they put in the meat balls” FG/DE

“In the carp sausage and the carp meatballs everything can be inside.” FG/DE

“I would like to try boneless fillets, smoked carp. Carp ham probably will be to expensive. Meatbaals – who guarantee that raw material was fresh and only natural ingredients were used?” FG/PL
Processing products acceptance - summarized

- Generally good perception of some low-processed products (boneless fillet, smoked fillet, ham).
- More processed products - more controversial (e.g. carp meatballs, sausages, carp crisps – uncertain on raw material, additives, healthy values)
- Question on product price? It is hard to evaluate consumer acceptancy for new product without asking on price.
Carp products - so how to go to the market

“After product tasting I should be informed where to buy the product” FG/PL

“It should be first, known producer with traditional products. Then it could introduce such innovative products” FG/PL

“Maybe it needs to be highlighted which kind of lipids carp contains (Omega-3)” FG/DE

“Carp in culinary TV programs, in print media and in food blogs” FG/DE

“The best promotion would be products tasting or free gifts during December alive carp selling” FG/PL
Processing products perception

- For consumers **tasting** is the most important element in the process of encouraging to the new product
- Best **tasting** occasions:
  - healthy food festivals
  - live carp sale
Processed carp products introduction

Producer (brand) awareness

Product concept

Education, promotion

Product availability on shelf

Acceptable price

Product tasting
Introduction of new products is not easy.. Is it worthy

- Carp natural environment (on market) is „pool with water”, where carp has unique and traditional place
- On a shop shelf carp product will be one of many processed fish products (not the cheaper one, nor recognized as the most healthy)

But:
- Convenience carp product - is the **market need**, mostly in terms of younger consumer needs
- **Market pression** for convenience products will increase

So:
- You have no choice (in a longer perspective, but you could ignore this in short or even mid perspective)
And last but not least.
When you try to introduce new product:

- You have no power to change consumer habits (…unless you are Apple Inc.).
- „Average consumer” does not exist
- Consumers have contradictory expectations (price and quality; convenience and health)
- Usual market response: reconciliation & compromise products (money for value, almost delicatessen product… etc).
  It is probably the only possibility when you play with mass market
- To encourage consumer preference try vertical differenciation: make your product unique and consumers clear on its quality (even if is uniqueness on local or regional scale)
Thank you!

IN CARP
WE TRUST

Tomasz Kulikowski
tkulikowski@mir.gdynia.pl
Olga Szulecka
National Marine Fisheries Research Institute
Gdynia, Poland