



**The New
Vineland**

BETTER PLANTS.
BETTER LIFE.

Determining Consumer Preferences

Isabelle Lesschaeve, PhD

Research Director , Consumer Insights and Product Innovation



What is Vineland?

- A world class horticulture innovation centre and commercial hub
- An independent objective not-for-profit corporation
- An engine to drive multiple innovation pipelines for horticulture

Why is Vineland Unique?

- Focus on partnering
- Unique innovation mindset
- Unique set of capabilities

What are the benefits of Vineland?

- Speeds up the delivery of innovation by working along the value chain
- Aggregates fragmented innovation capabilities into highly effective pipelines
- Enables better products for Canadian consumers
- Creates a stronger and more competitive horticulture industry



Research Expertise

Applied Genomics

Production Systems

Consumer and
Sensory

Bioinformatics

Biological Control

Horticultural
Economics

Ornamental Breeding

Plant Pathology

Postharvest
Technology

Vegetable Breeding

Greenhouse
Technology

Tree Fruit Breeding

Environmental
Horticulture

PARTNERSHIPS

BUSINESS DEVELOPMENT



Vineland's Partnerships



Consumer Insights and Product Innovation

Mandate @ Vineland

To expand markets for horticultural products

Method

Science Based Innovation Development Approach For
Consumer Market Success



Science Based Innovation Development Approach For Consumer Market Success



New Dried Fruit Concept



New Dried Fruit Concept

What do consumers think about dried fruits?

What do they eat, buy?



www.brickmanproduceandseafood.com -

What is the landscape of opportunities?



Science Based Innovation Development Approach For Consumer Market Success

WHAT

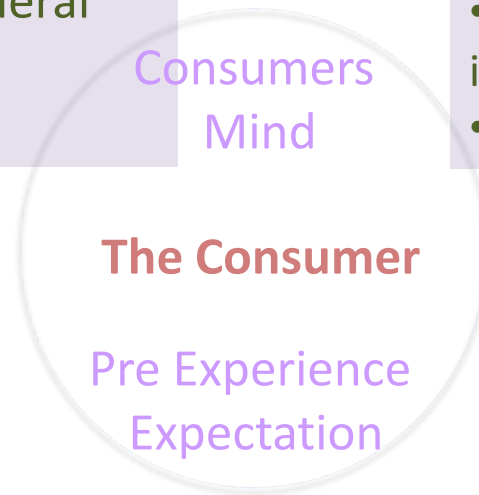
BELIEFS, VALUES, ATTITUDES, HABITS

- About dried fruits in general
- About healthy snacking

HOW

ON LINE STUDY

- Test outside of the box ideas
- Explore product options



WHAT YOU GET

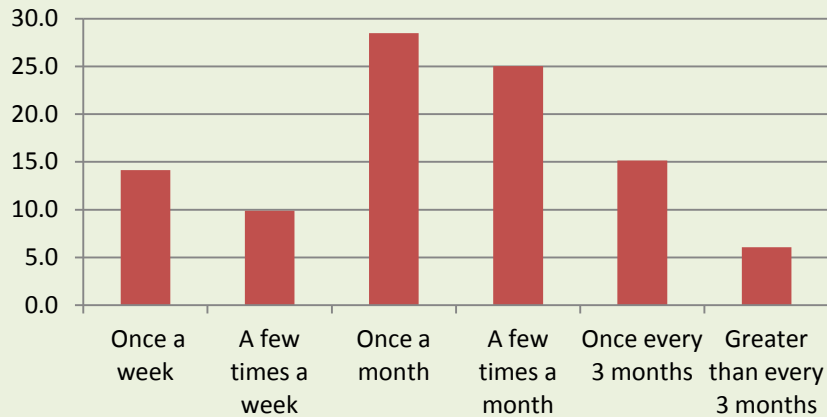
- Market landscape

Consumer Science | Economics

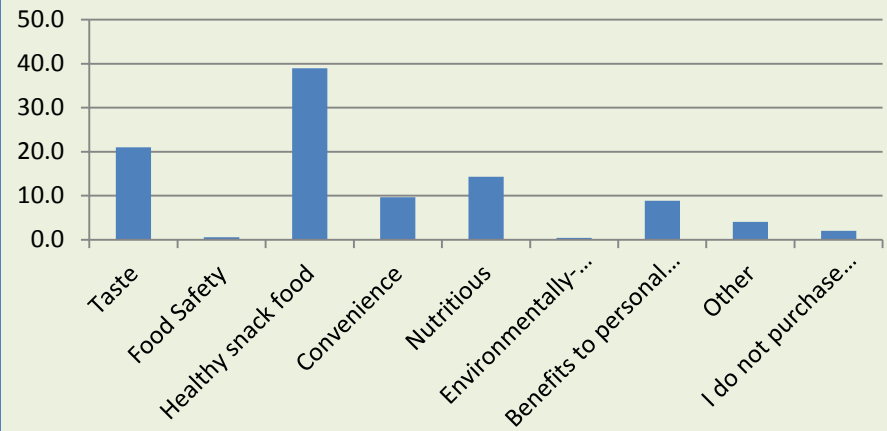


Learning about DF consumers

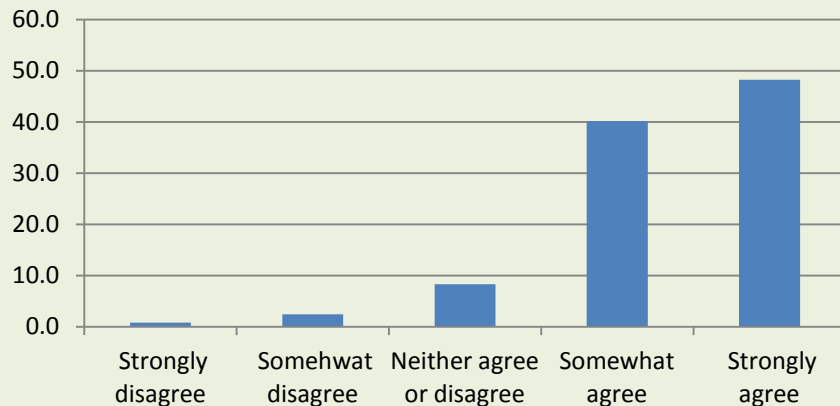
How often do you purchase dried fruits (either alone or in a trail/snack mix)?



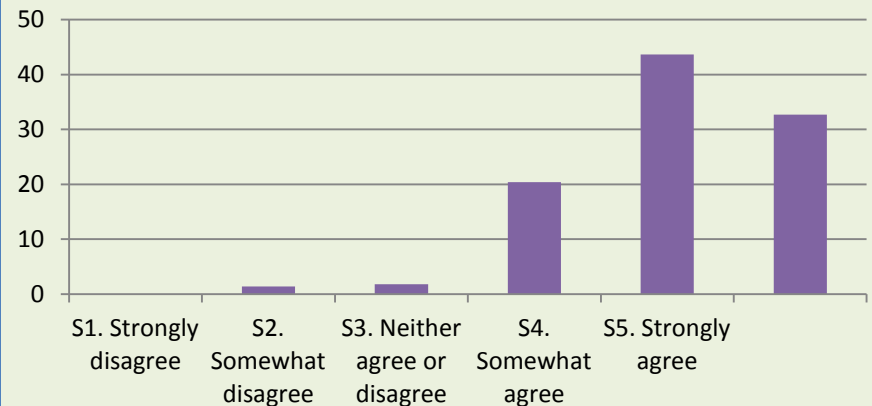
Please indicate the main reason why you purchase dried fruits.



Dried fruit are nutritious.



Dried fruit are high in fibre.



Science Based Innovation Development Approach For Consumer Market Success

WHAT

SENSORY & NON SENSORY TRIGGERS

- Taste, Aroma, Texture, appearance
- Context of Experience (Package, Price, Claims)

Consumer Typing



Consumer Segmentation

HOW

SENSORY & NON SENSORY TRIGGERS

- Sensory preference test
- Purchase intent for conceptual products
- Market segmentation, size and value

Breeding | Development | Sensory & Consumer Science

Online Test on New Dried Fruit Concepts: Understanding drivers of purchase

This survey is designed to understand what you, the consumer, thinks when purchasing food products; specifically dried fruits.

This survey will take 15-20 minutes to complete. You will be presented with 48 screens that contain a description of a product that has 2-4 elements in each screen.

Although screens may appear similar or repetitive, **each screen is unique**.

PLEASE RATE YOUR REACTION TO EACH SCREEN AS A WHOLE.

You will be asked two questions about each screen:

Question 1: How likely are you to choose this product?

Question 2: How much would you be willing to pay for this product (per pound)?

Click the ">>" below to begin the survey



Golden Prunes

Certified Organic

Uses lemons to preserve its excellent quality

How likely are you to CHOOSE this product?

1 2 3 4 5 6 7 8 9



Prunes

A leathery texture

Locally grown

Contains no preservatives

How likely are you to CHOOSE this product?

1 2 3 4 5 6 7 8 9



Golden Raisins

A snack with a delicious caramelly taste

Good source of Vitamin A

How likely are you to CHOOSE this product?

1 2 3 4 5 6 7 8 9

Enjoy a great tasting, fruity flavoured snack

Traditionally grown

Very high source of fibre

Preserved for tastier fruit

How likely are you to CHOOSE this product?

1 2 3 4 5 6 7 8 9

Dried Fruits (DF) Consumers are Segmented

42%

- **Not interested in DF, especially not prunes!**
- Like flavoured DF snacks
- Don't like DF texture
- All production methods are fine, but prefer Organic and Ontario
- Pesticide free
- Health benefits ok
- Preservatives okay but prefer natural

26%

- **Like DF, ok w blue prunes**
- Avoid salty bitter, and caramel flavours
- Smooth and velvety texture, not sticky or leathery
- Pesticide free production
- Seek health benefits
- Preservatives: no sulfites

32%

- **Love all DF**
- Enjoy sweet snacks, not tart
- Soft and dry texture, not sticky
- Fruit traditionally grown and pesticide free
- Health benefits: VitC, Antiox, Fibers
- Don't mind preservatives, but prefer without any



Outcomes:

Identified target consumers

Understand their preferences, values, and beliefs

Introducing the consumer typing tool

Imagine you are shopping for dried fruit. Read each statement or look at a picture describing one type of dried fruit.

Will this DF product interest you?

YES - MAYBE - NO

A delicious snack without a bitter aftertaste

- ☐ No
- ☐ Maybe
- ☐ Yes



No	Maybe	Yes
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Excellent source of potassium

- ☐ No
- ☐ Maybe
- ☐ Yes

Enjoy a great tasting, fruity flavoured snack

- ☐ No
- ☐ Maybe
- ☐ Yes



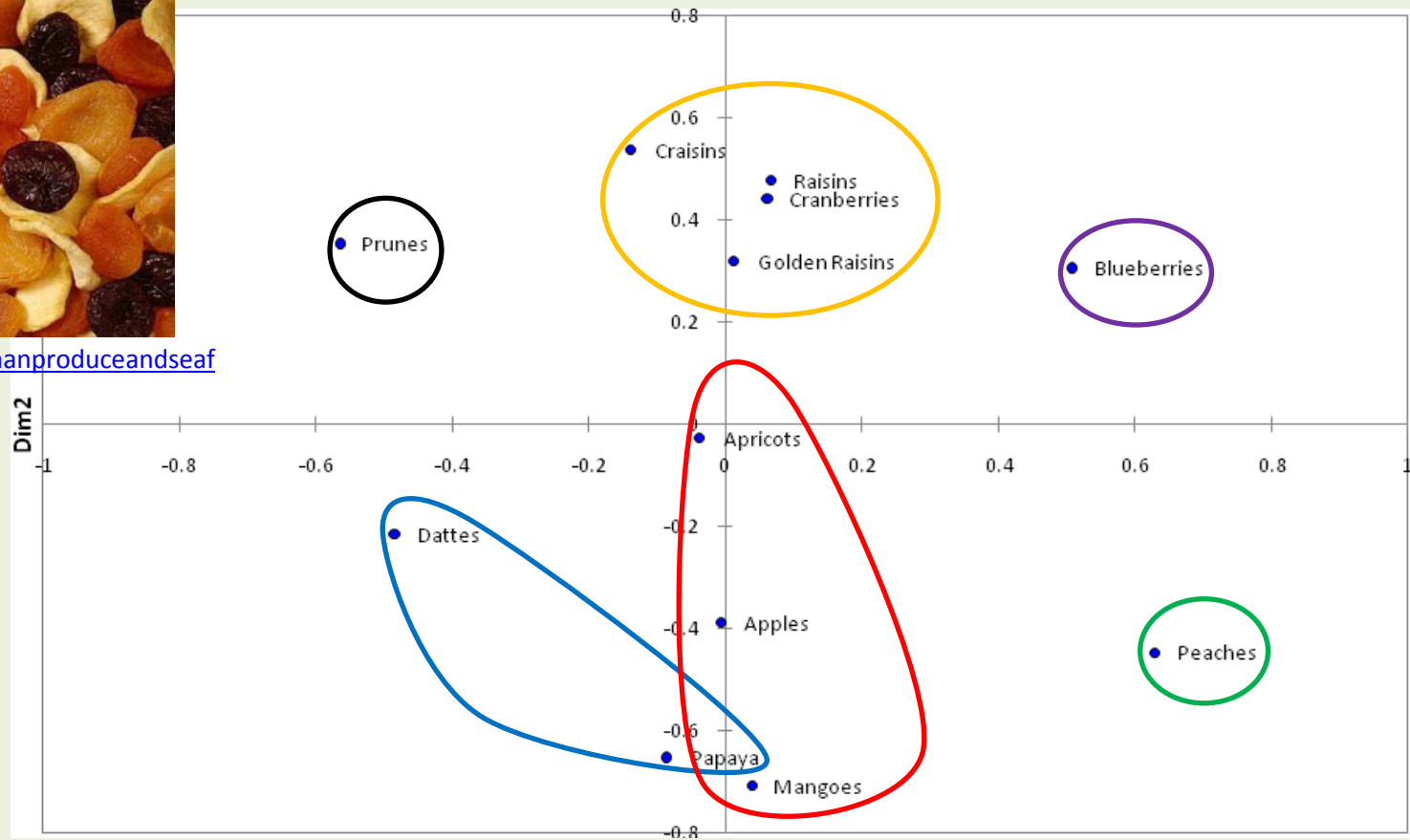
No	Maybe	Yes
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Submit

What is the dried fruit sensory competitive landscape?



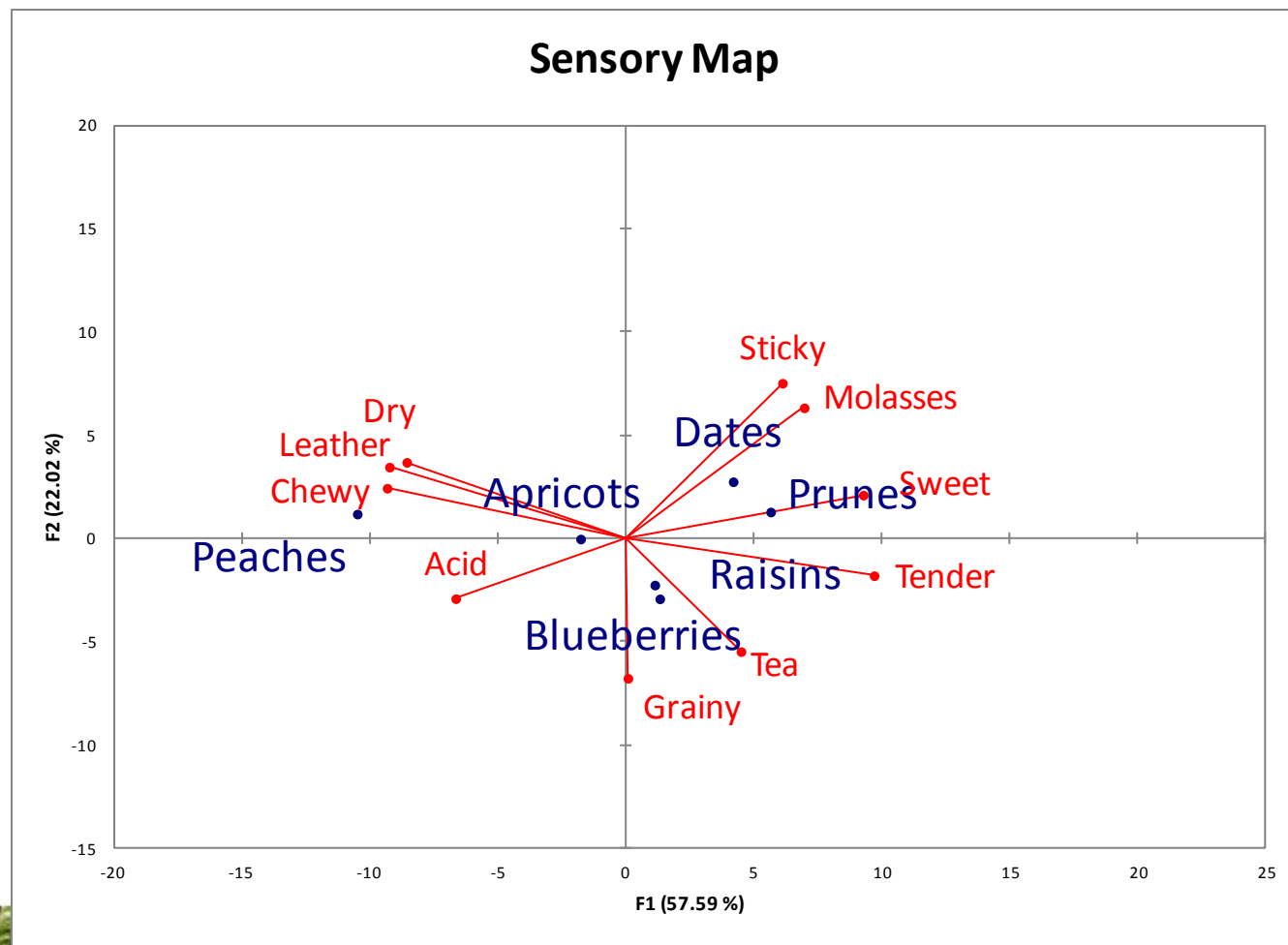
www.brickmanproduceandseafood.com



What are the traits of the DF sensory landscape?



www.brickmanproduceandseafood.com -



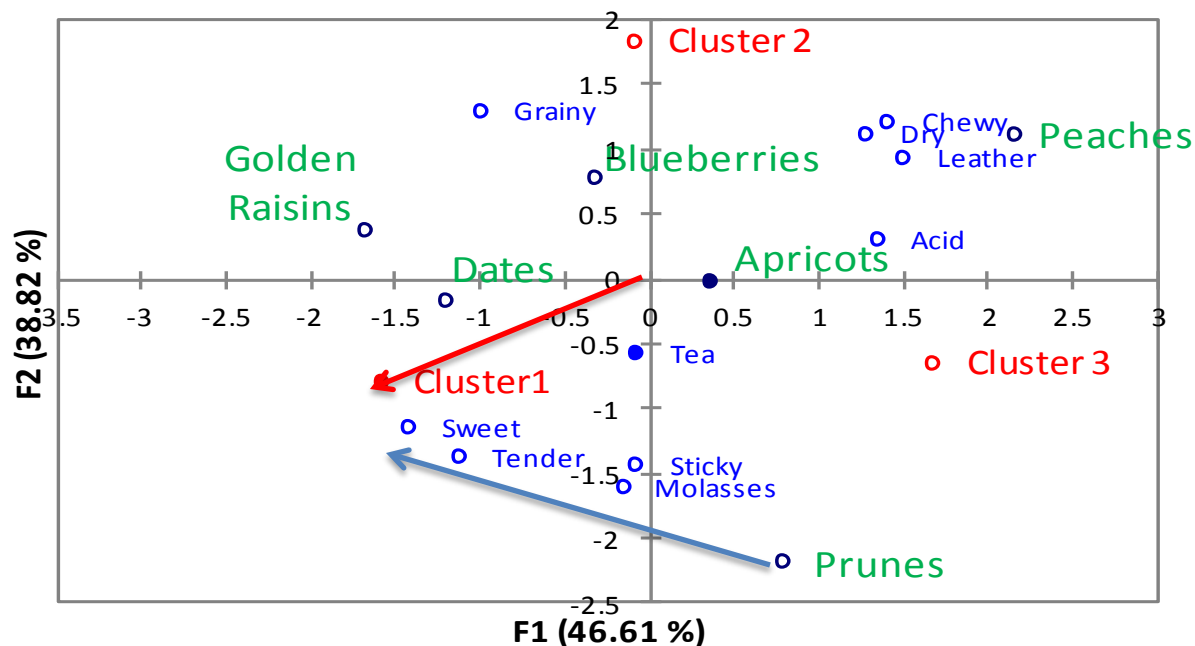
What are the DF sensory traits desired by consumers?

116 consumers tasted 6 dried fruits and rated their liking

3 groups or clusters liking different sensory characteristics in dried fruits

- Cluster 1: 76% market
- Cluster 2: 18%
- Cluster 3: 5%

Preference map



Science Based Innovation Development Approach For Consumer Market Success

WHAT

SENSORY & NON SENSORY TRIGGERS

- Context of Experience (Location, Package, Price, Claims)
- Taste, Aroma, Texture, Appearance

HOW

SENSORY & NON SENSORY TRIGGERS

- Purchase intent for conceptual products
- Sensory preference test

Consumer Typing



Consumer Segmentation



WHAT You GET

SENSORY & NON SENSORY TRIGGERS

- Preference map to guide product development
- Non sensory attributes that resonate to potential buyers, WTP
- Consumer segments of interest: **mind + sensory + \$**

Breeding | Development | Sensory & Consumer Science

Consumer driven New Prune Development

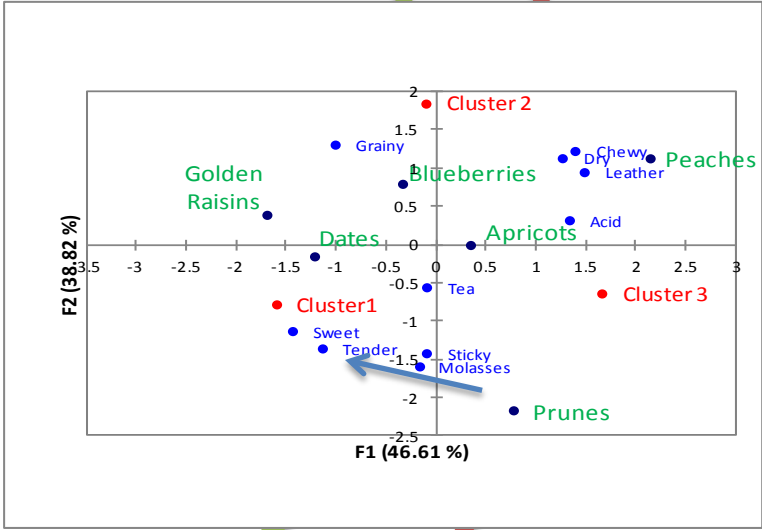
- 80 trials to find the right drying conditions (colour and texture)
- Applications to four cultivars



- Consumer taste preferences are evaluated as we speak....

Science Based Innovation Development Approach For Consumer Market Success

Winning Concept Territory



Communication & Concept Drivers Design

Production | Postharvest | Consumer Science | BDO

Science Based Innovation Development Approach For Consumer Market Success

Winning Experience

Winning Concept Territory

Consumer Driven NPD

- Dried fruit
- Package/Claims/Price
- Brand
- Merchandising



Communication & Concept
Drivers Design

Winning Product &
Brand Experience

Production | Postharvest | Consumer Science | BDO

Summary

A consumer driven product development allows your company

- To define and target consumer segments
- To define and develop products to consumers' specifications
- To define the size of the new product opportunity
- To define and create a winning concept and a winning shopping experience





**The New
Vineland**

BETTER PLANTS.
BETTER LIFE.



**The New
Vineland**

