

What's important for the Italian stockfish and baccalà consumers, and how to reach them?

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INCREASE THE VALUE OF NORWEGIAN SEAFOOD

Increase the knowledge of,
and demand for
Norwegian seafood



Insight to Impact: Driving strategy with market intelligence



Conventional species strategy

Overarching goal:
Increase the value of Norwegian conventional products

GOAL 1: Increase the total market by improving attitudes and increasing consumption of Norwegian conventional products.

→ For example, Portugal, Italy and Brazil

GOAL 2: Increase market share by improving attitudes towards Norwegian conventional products among key decision makers in the value chain and/or consumers.

→ For example, Spain (salted fish) and Italy

GOAL 3: Arrange for growth of Norwegian conventional products.

→ For example, Central and West Africa



Overall corporate strategy:

Long-term guide for NSC's work

Species strategy:

Developed in close collaboration with the Norwegian seafood industry

Market plan for Italy:

Tailor-made for the markets

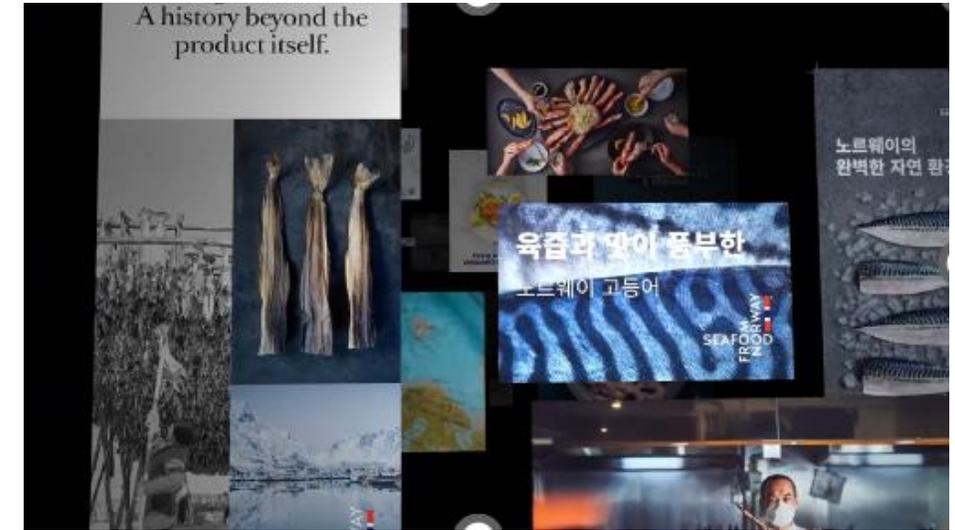
Our marketing objectives

The customer should **want** to choose Norwegian seafood

The customer should **be able** to knowingly choose Norwegian seafood

To achieve this, we need focus on:

- Increasing the **visibility** for Norwegian seafood to **boost awareness**
- Building a **preference** for Norwegian seafood
- Implementing **origin labeling**





Seafood Consumer Insight #1

Origin matters



7 out of 10 seafood consumers worldwide:
“Origin is important when buying seafood”

Source: Seafood study in 27 of the most important countries for Norwegian seafood.

The pillars of our storytelling.





Seafood Consumer Insight #2

Awareness & Mental market share

Italian seafood consumers about Country of Origin

Stockfish	Norway	Italy	Iceland
Total awareness	69 %	24 %	29 %
Mental market share	47 %	16 %	10 %

Baccalà	Norway	Italy	Iceland
Total awareness	54 %	23 %	28 %
Mental market share	37 %	18 %	13 %



Origin matters.



SEAFOOD FROM NORWAY

Baccalà Norvegese

L'origine conta

Lasciatevi ispirare su pescenorvegese.it



STOCCAFISSO NORVEGESE

Il gusto della tradizione, reso semplice

L'origine conta

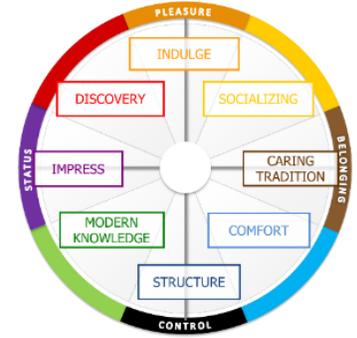
SEAFOOD FROM NORWAY



Seafood Consumer Insight #3

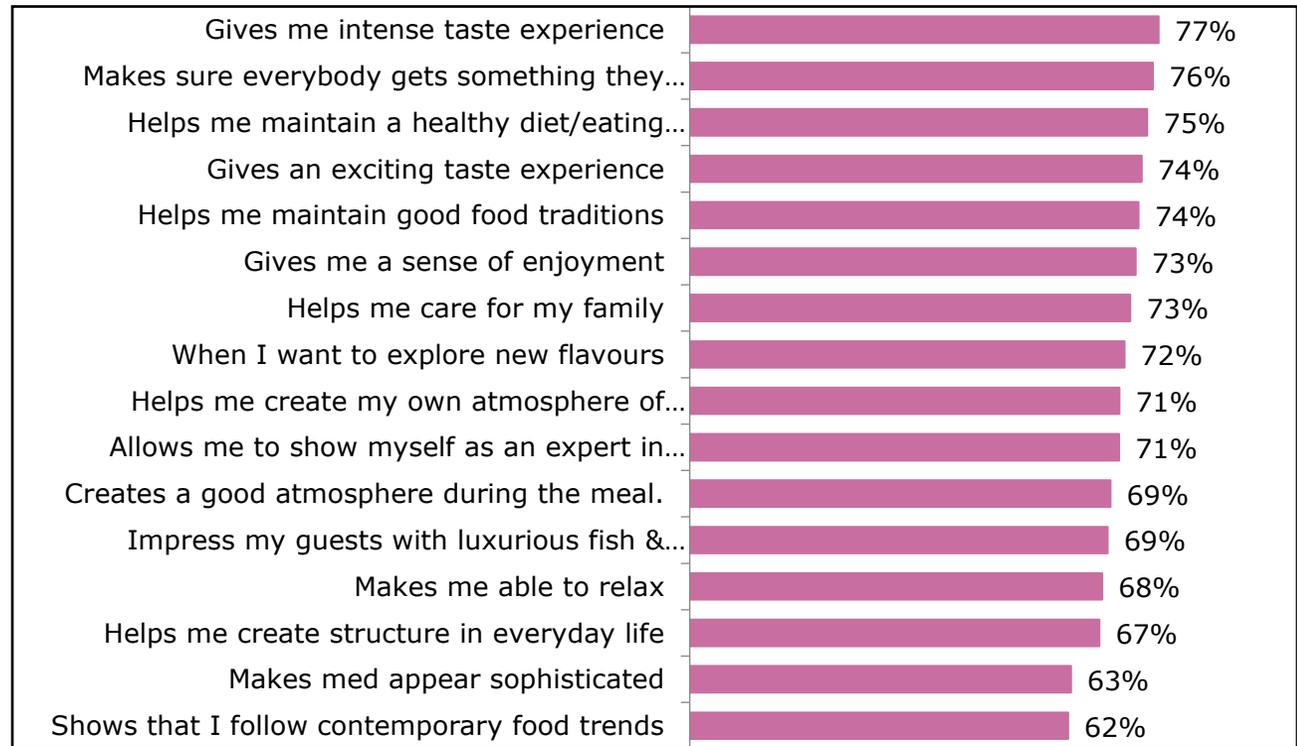
Drivers

Drivers for stockfish consumption:



The most important drivers for eating stockfish:

- Intense and exciting **taste**
- **Healthy** eating habits
- **Care for family** and friends
- **Food traditions**
- Clearly marked with the **country of origin**



Food is our core



Taste, health and traditions matter.

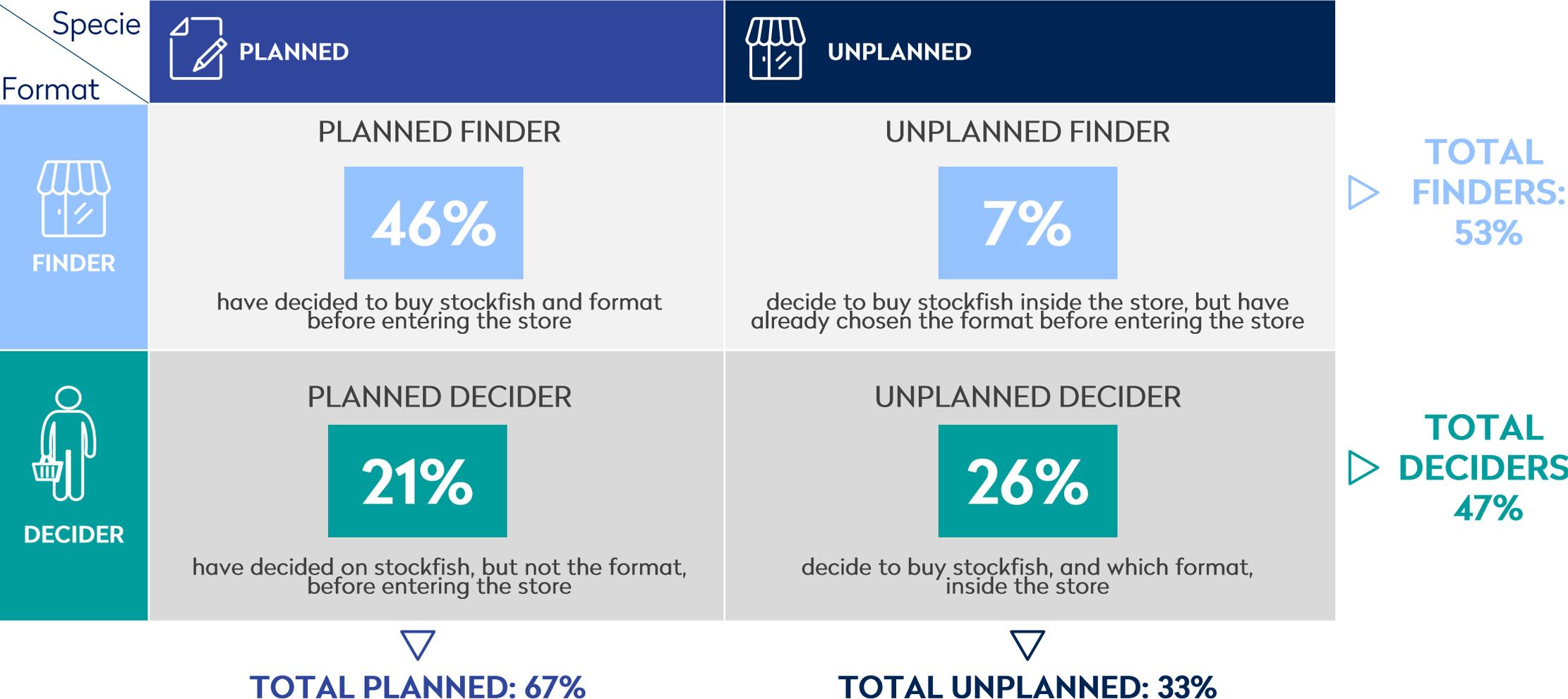




Seafood Consumer Insight #4

Purchase behaviour

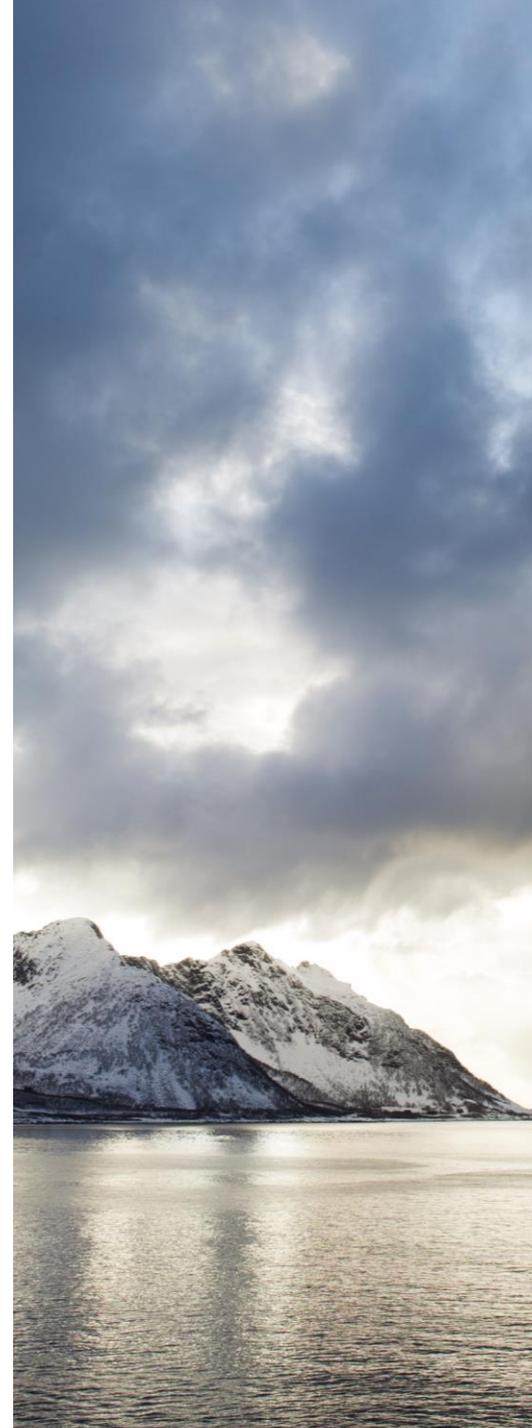
67% of Stockfish buyers plan their shopping before entering the shop



Balance in the marketing mix matters

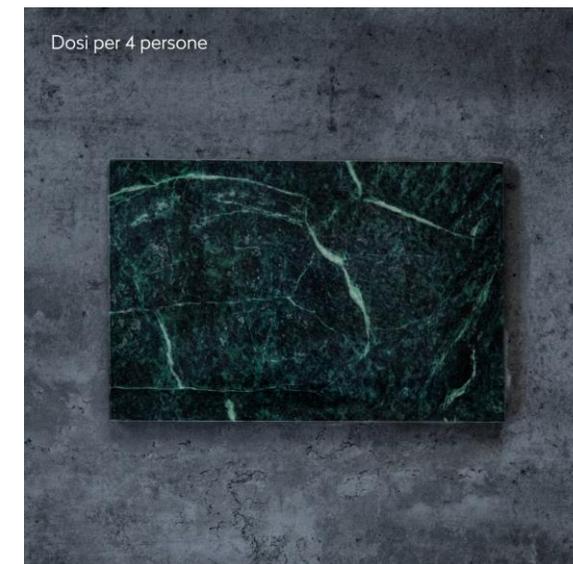
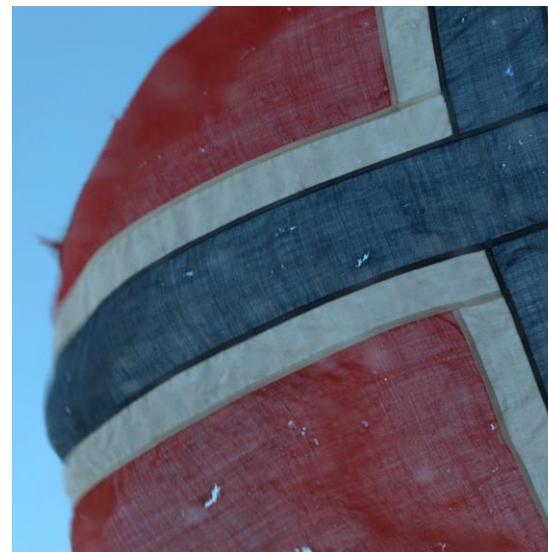
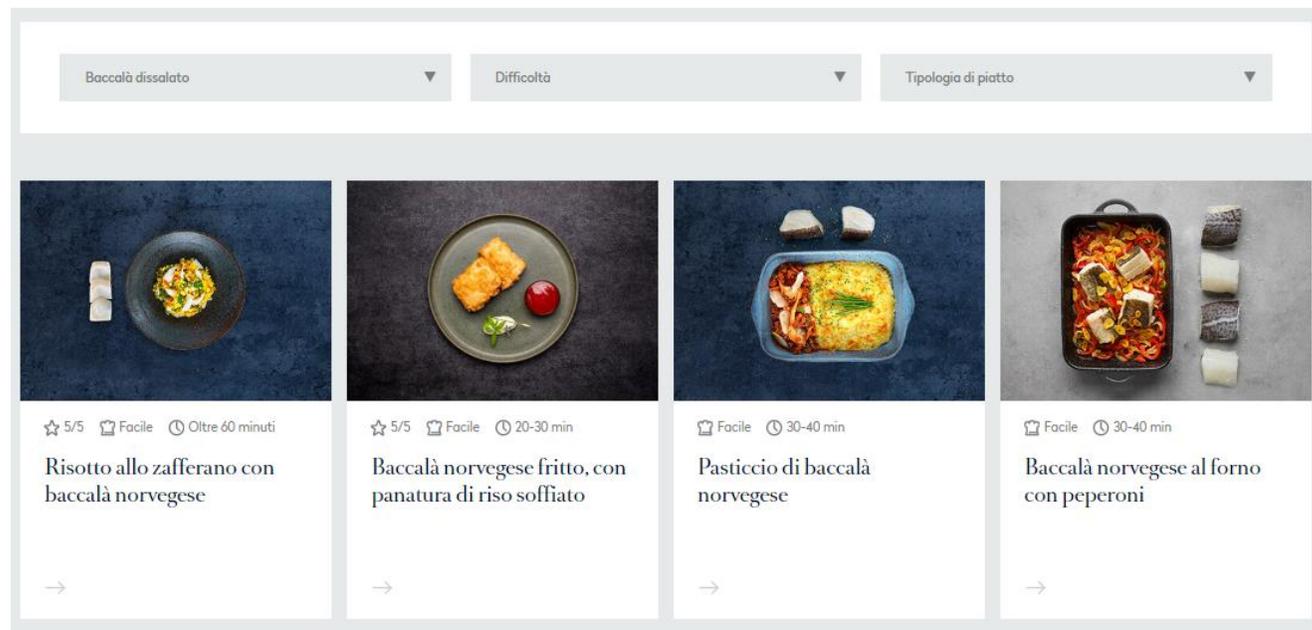
The different channels give different opportunities

- B2B – production focus, long story
- TV – telling the whole story
- Facebook – the short version of the whole story
- Instagram – the inspirational part, taste and feel
- POS – reminder to choose Norwegian



Example: Cross channel balance





Seafood Consumer Insight #5

What drivers should we focus on?

How Norwegian stockfish can increase mental market share

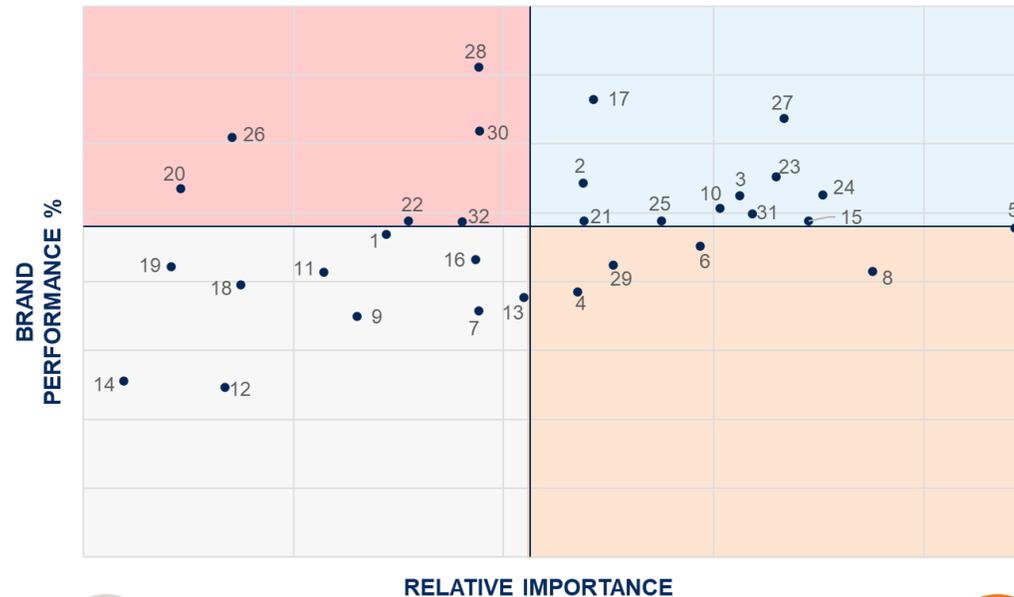
Norwegian Stockfish vs. relative importance

CONSIDER

20	Comes in family pack
22	Are certified as being sustainably caught/produced
26	Are available where I normally buy my groceries
28	Are clearly marked with the country of origin
30	Are a tasty alternative
32	Provides good value for money

NO PRIORITY

1	Gives me a sense of enjoyment
7	Makes me able to relax
9	Helps me create structure in everyday life
11	Allows me to show myself as an expert in fish & seafood
12	Shows that I follow contemporary food trends
13	Impress my guests with luxurious fish & seafood
14	Makes med appear sophisticated
16	When I want to explore new flavours
18	Are packaged environmentally friendly
19	Comes in portion pack



MAINTAIN

2	Gives me intense taste experience
3	Makes sure everybody gets something they enjoy
5	Helps me maintain good food traditions
10	Helps me maintain a healthy diet/eating habits
15	Gives an exciting taste experience
17	Are a healthy alternative
21	Are locally produced
23	Are natural/has no additives
24	Are caught/produced in an environmentally friendly way
25	Are caught wild/not farmed
27	Are traditional/follows tradition
31	Are versatile

AMPLIFY

4	Creates a good atmosphere during the meal.
6	Helps me care for my family
8	Helps me create my own atmosphere of calm and comfort
29	Are quick and easy to prepare

New marketing concept 2024: Pass the baccalà, the tradition and the stockfish recipe. Atmosphere matters.





Tusen takk!