Positions of Norwegian Herring:
Preliminary Results from International Survey

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NORGE
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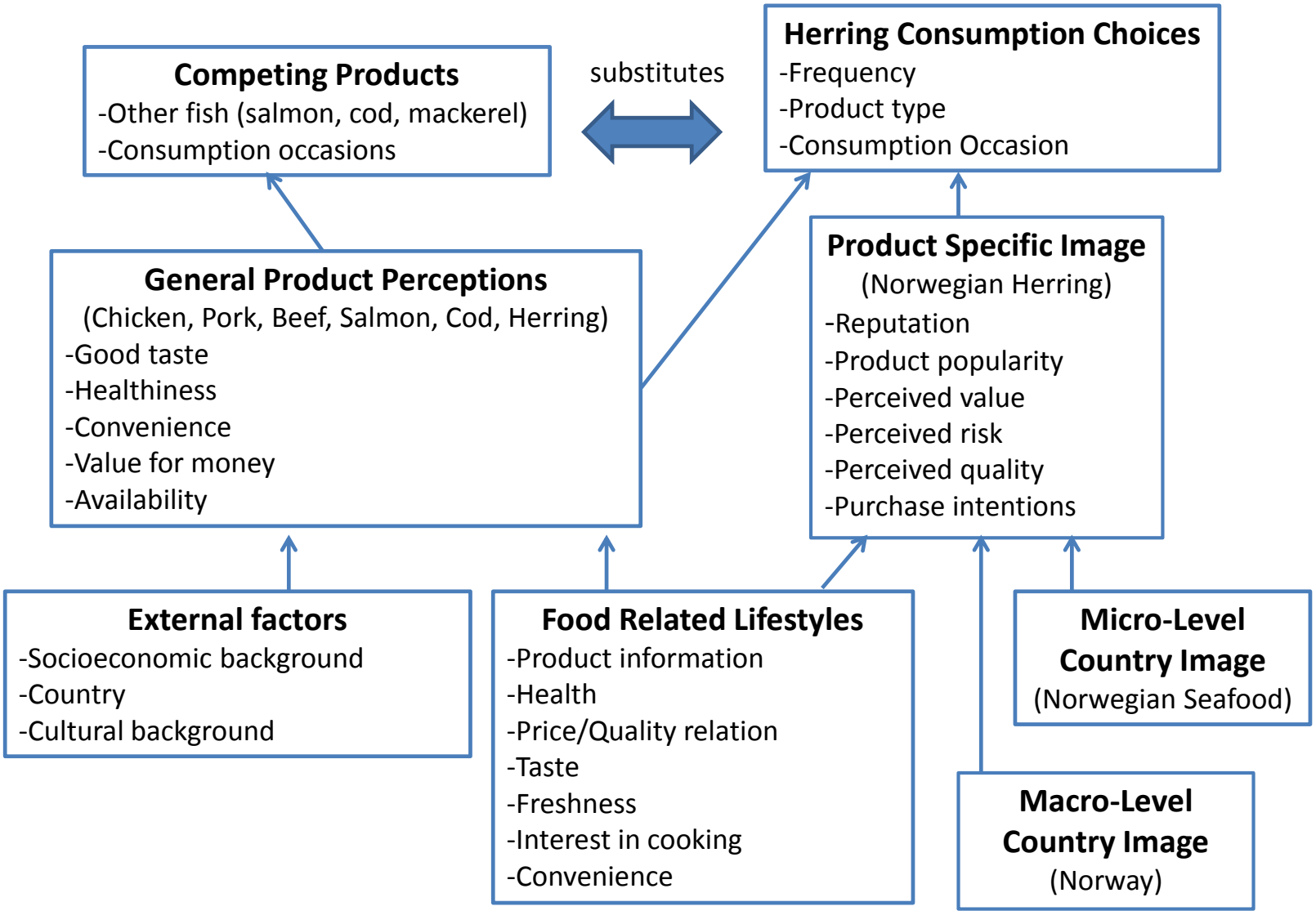
Positions

- Positions—How is a product perceived within consumers' mind relative to other products, in various dimensions relevant to that product?
- Positions of Norwegian herrings—more difficult to obtain
- Consider the position in relation to other meat and fish categories
- Comparisons in different countries

Conceptual Diagram



Herring Survey

- In multiple countries
  - Russia, Germany, Poland, Sweden
  - 500 consumers in sample from each country

- Part of a larger project
  - Salmon (UK, Russia, Germany, France, Sweden)
  - Cod (UK, France, Germany, Sweden)

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Today's Presentation

- Preliminary results from the herring survey
  - Comparisons of Germany, Russia, Poland, Sweden
- Eating frequencies
- Reasons to eat herring
- Food related lifestyle
- General product perceptions of various meat
  - Taste, Healthiness, Value for money, Convenience, and Availability
  - Chicken, pork, beef, and salmon/trout, cod, herring

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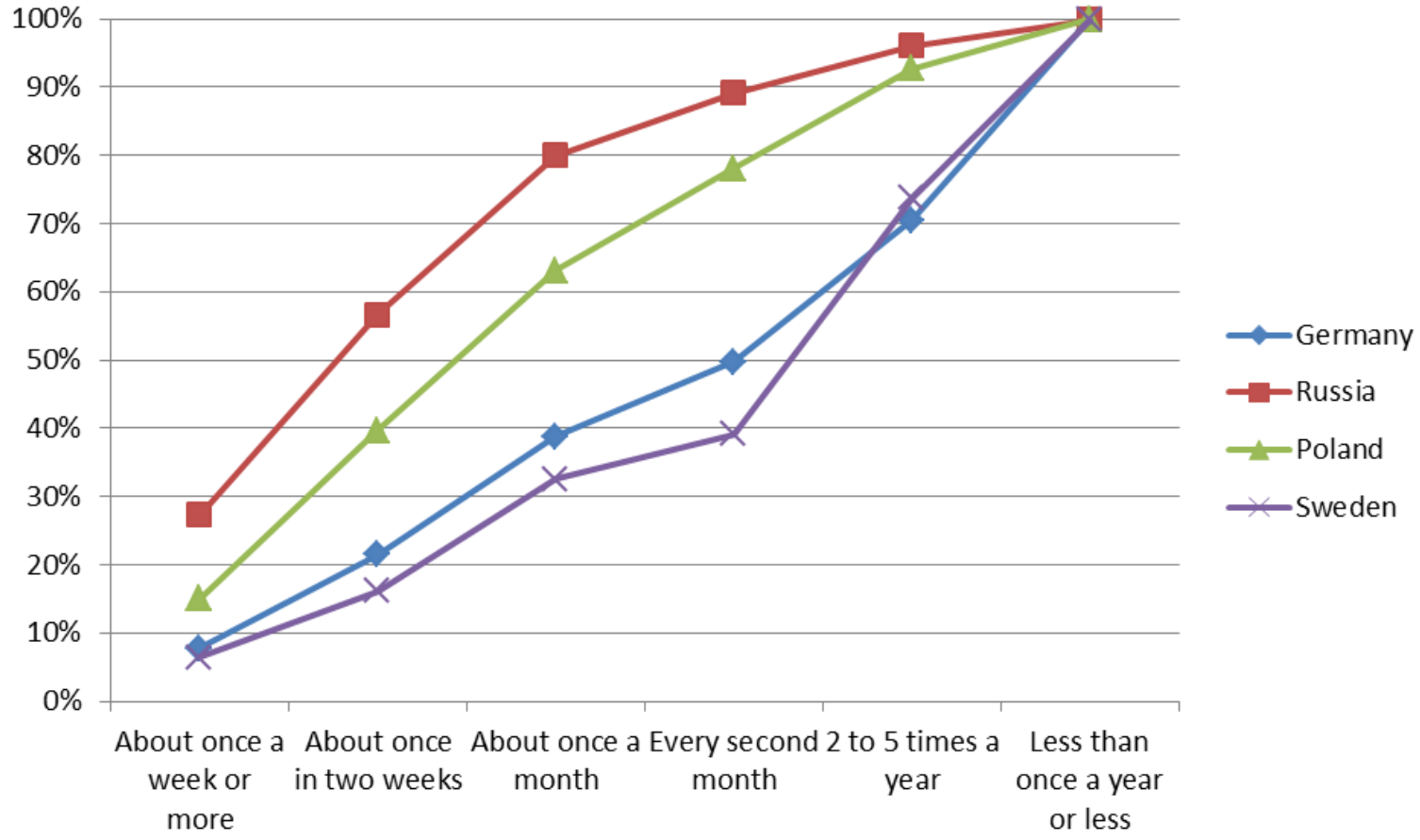
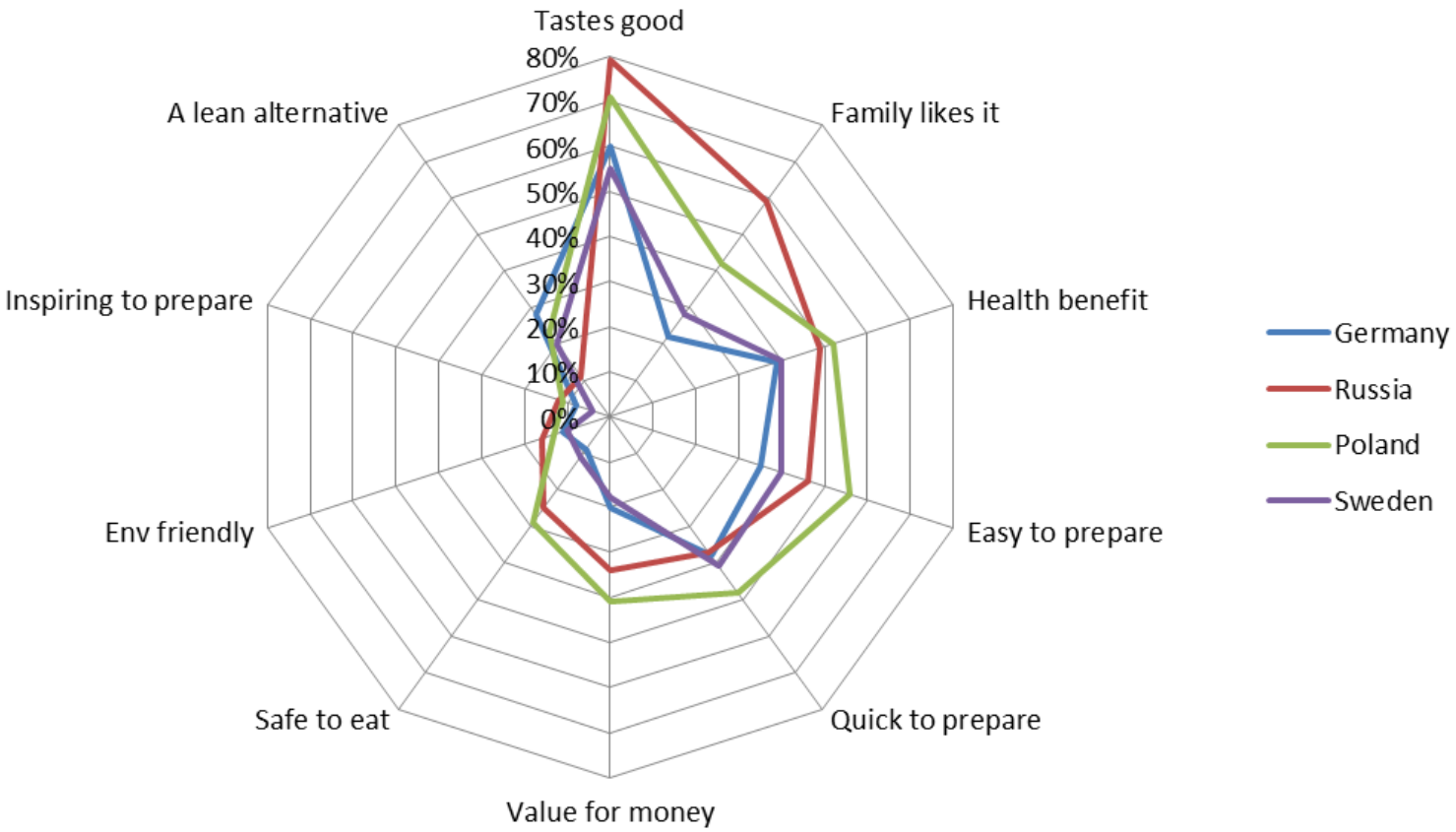
Cumulative Consumption frequencies (herring at home)



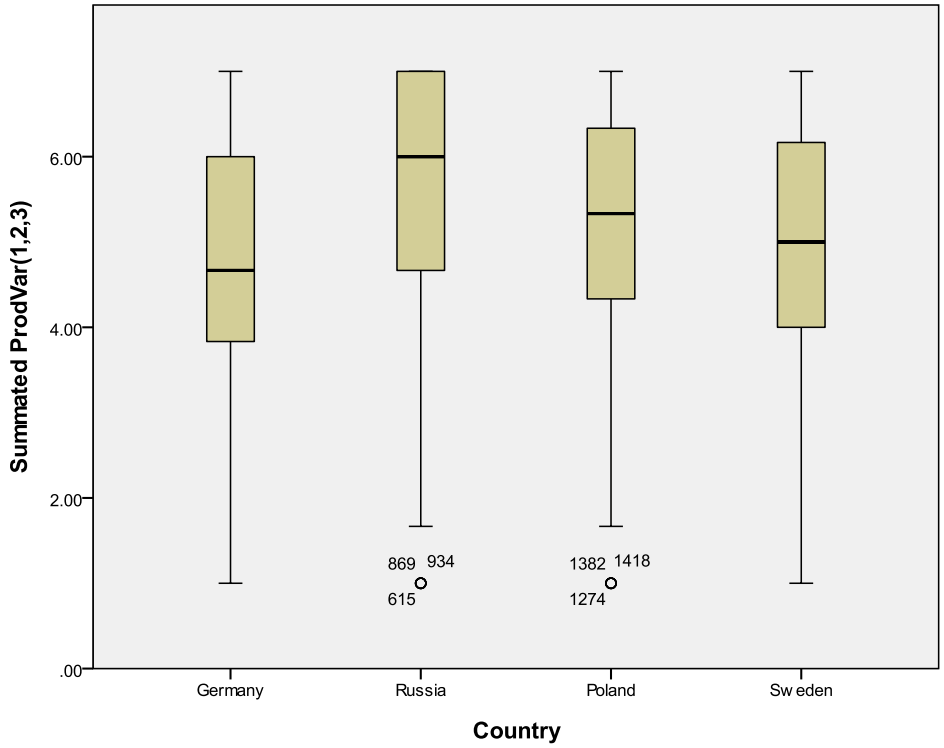
Reasons to eat herring



Percent of respondents who said YES

Perception about herring product assortment

- When buying herring, I find the assortment of available products to satisfy my needs.
- Whatever the occasion is, there is usually a wide range of herring product alternatives to choose from.
- Scales from 1 (strongly disagree) to 7 (strongly agree)



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Food Related Lifestyles (FRL)

- "Lifestyle" function as an intervening factor between abstract cognitive categories (e.g., personal values) and situation specific product perceptions
- Validated over different countries
- Widely used in European and non-European countries over years
- 7 dimensions (Importance of product information, Health, Price/Quality relation, Taste, Freshness, Interest in cooking, and Convenience)

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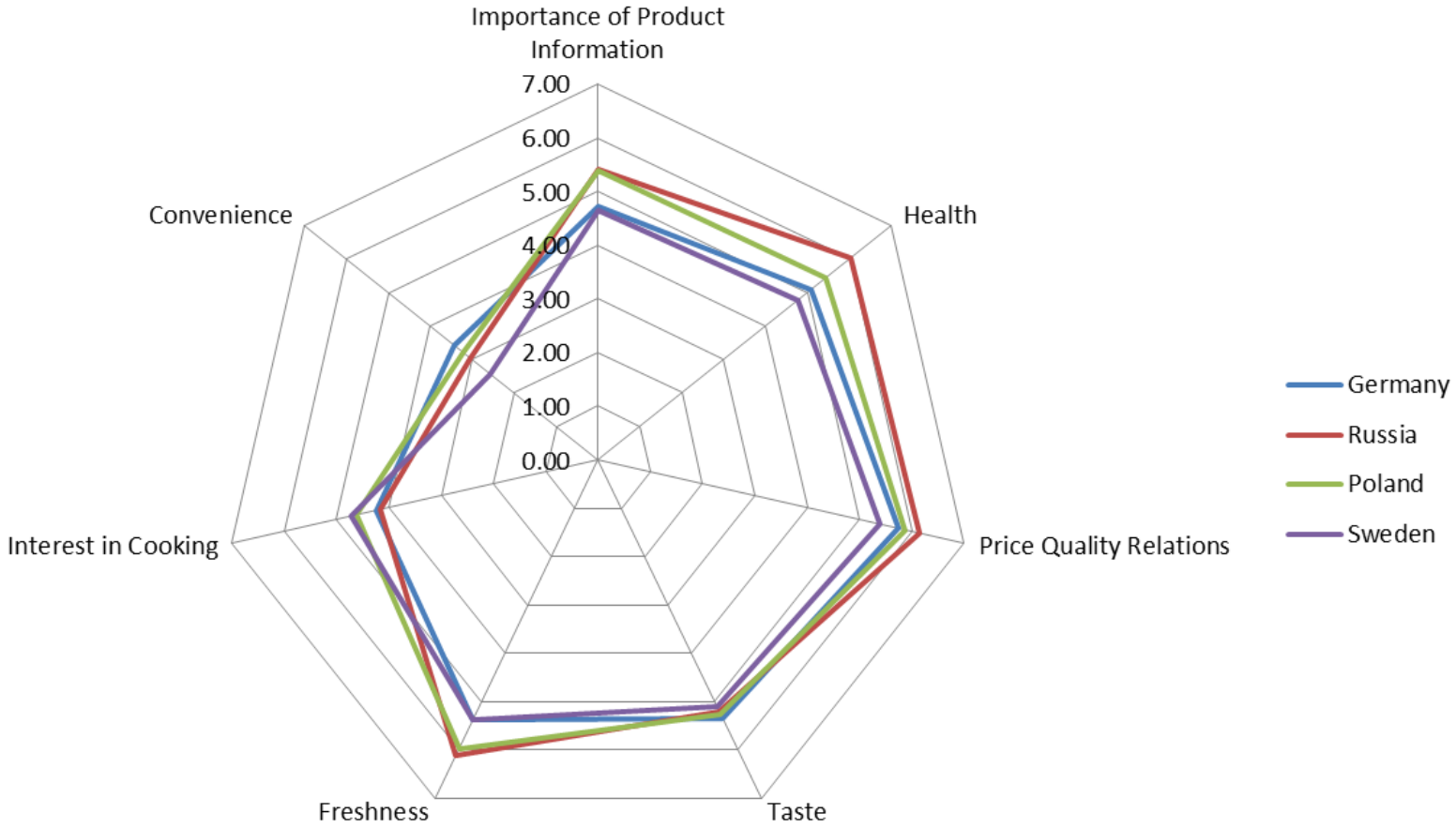
FRL Country Comparisons



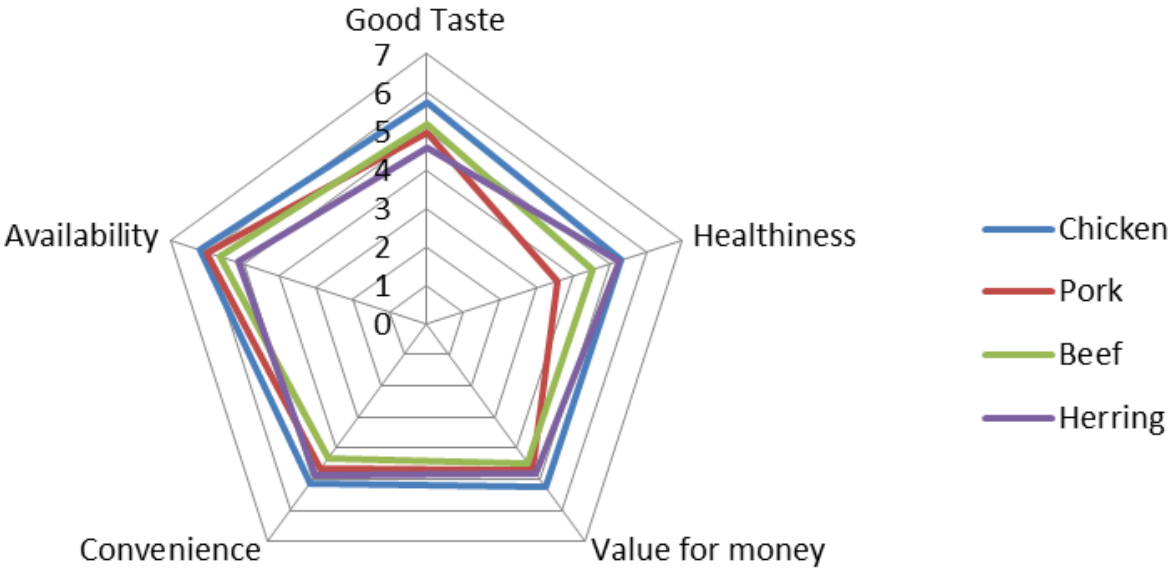
General product perceptions

- How would you rate each of the following meat categories in terms of good taste, healthiness, value for money, convenience, and availability? (scale from 1=extremely poor to 7=superior)

- Asked about Chicken, pork, beef, salmon, herring, and mackerel

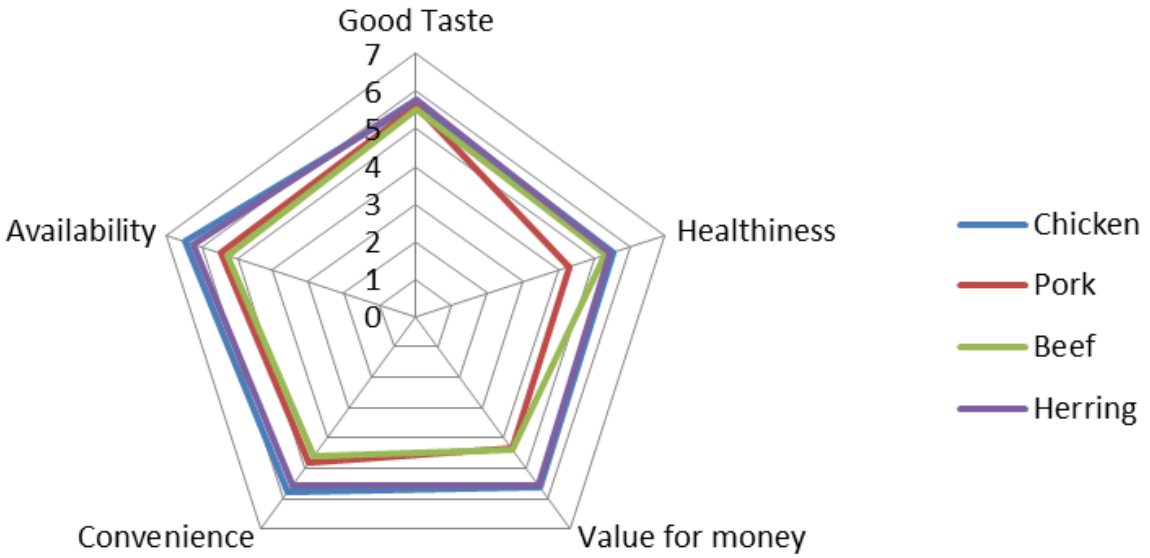
  → How is herring positioned compared to other meat?

Product Perceptions
Herring vs. Other Meat (Germany)



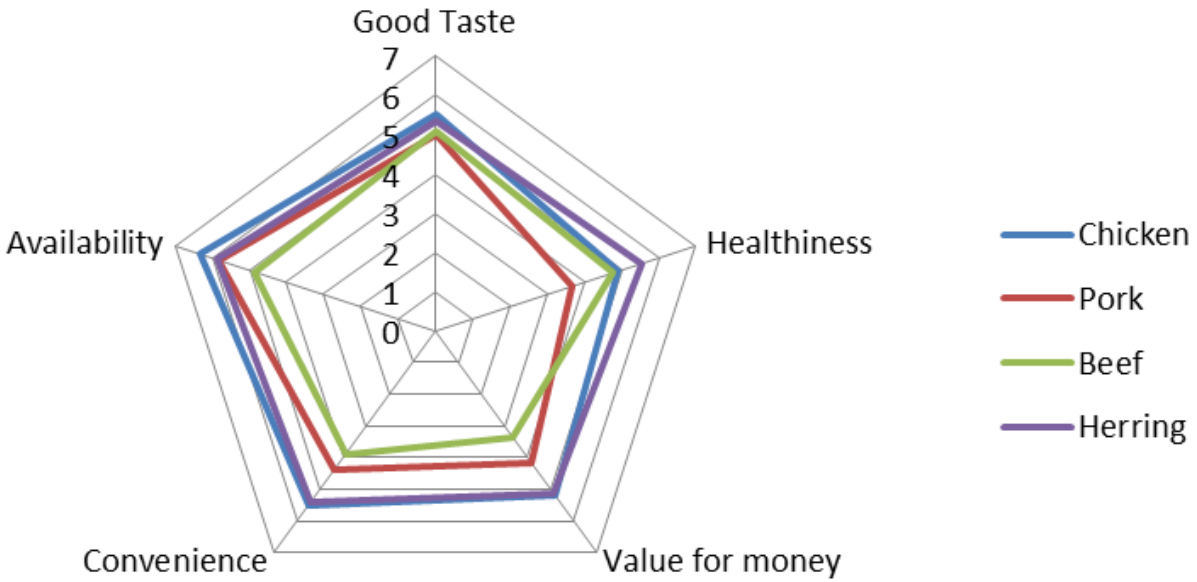
- Strong position of chicken in all dimensions
- Herring close to chicken in Healthiness, Value for Money, Convenience
- Herring low in Availability and Good Taste

Product Perceptions
Herring vs. Other Meat (Russia)



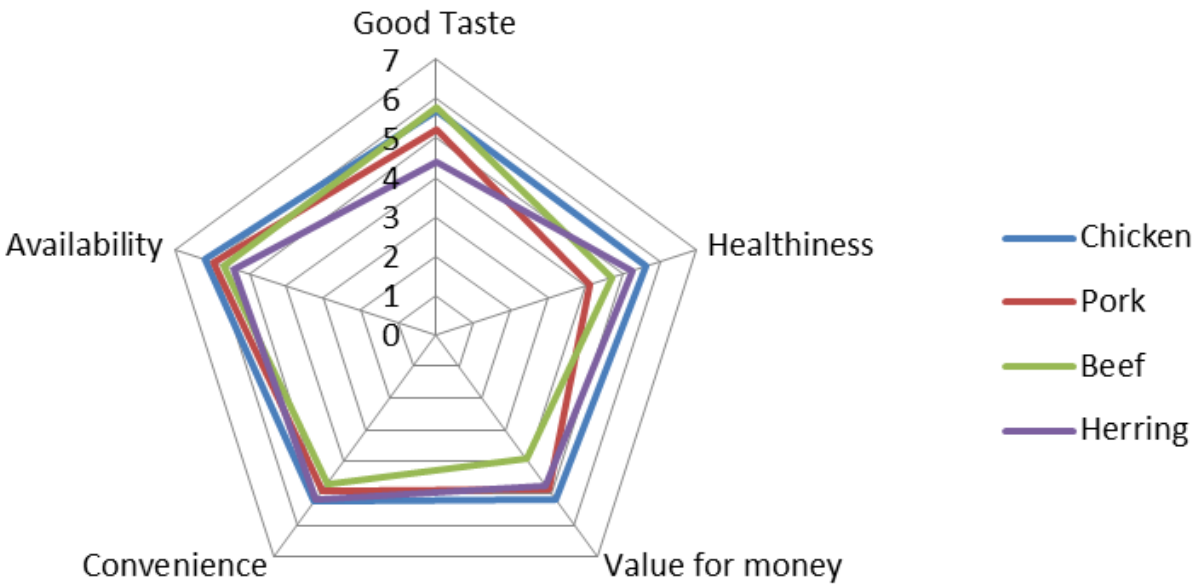
- Chicken and herring are very close in all dimensions
- Pork and beef behind herring in many dimensions

Product Perceptions
Herring vs. Other Meat (Poland)



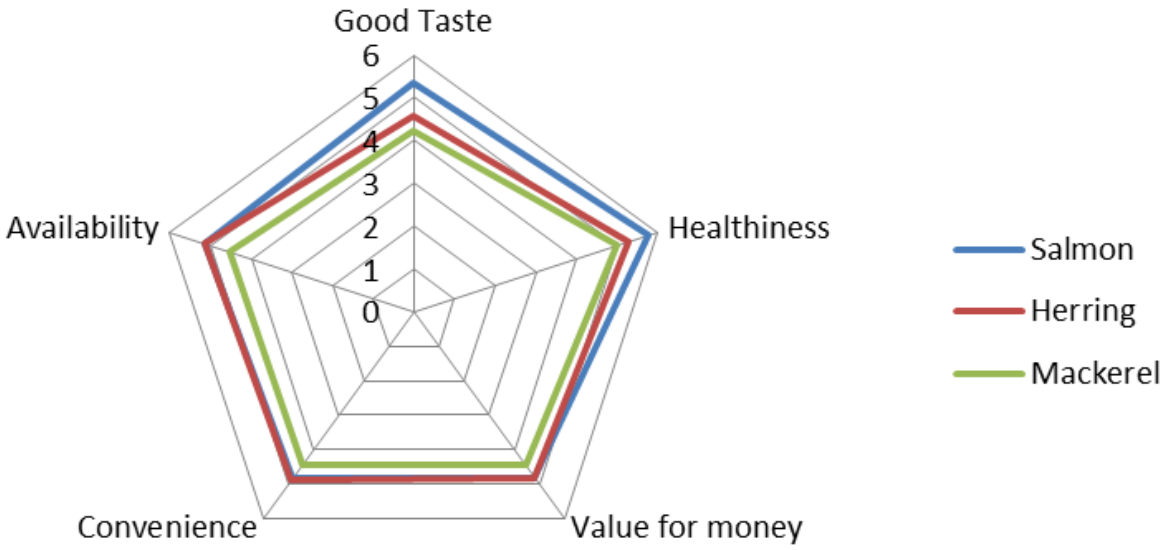
- Chicken and herring are close in all dimensions
- Herring ranked highest in healthiness
- Beef and pork mostly behind

Product Perceptions
Herring vs. Other Meat (Sweden)



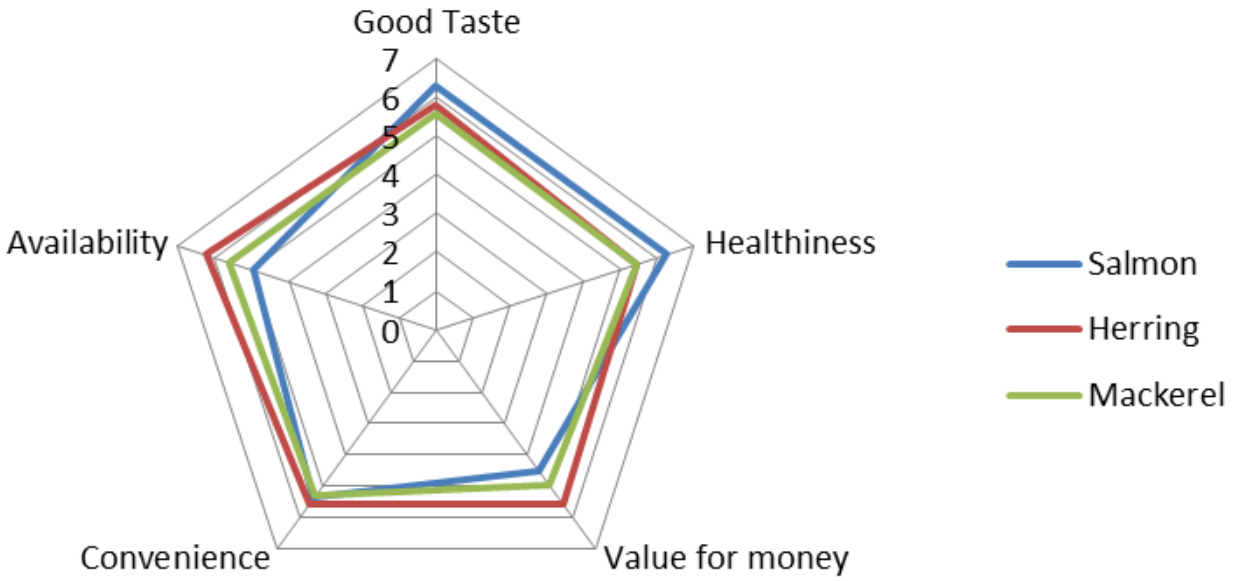
- Chicken has the best positions
- Herring scored high in healthiness and convenience but low in taste and availability
- Position of beef somewhat stronger than other countries

Product Perceptions
Herring vs. Other fish (Germany)



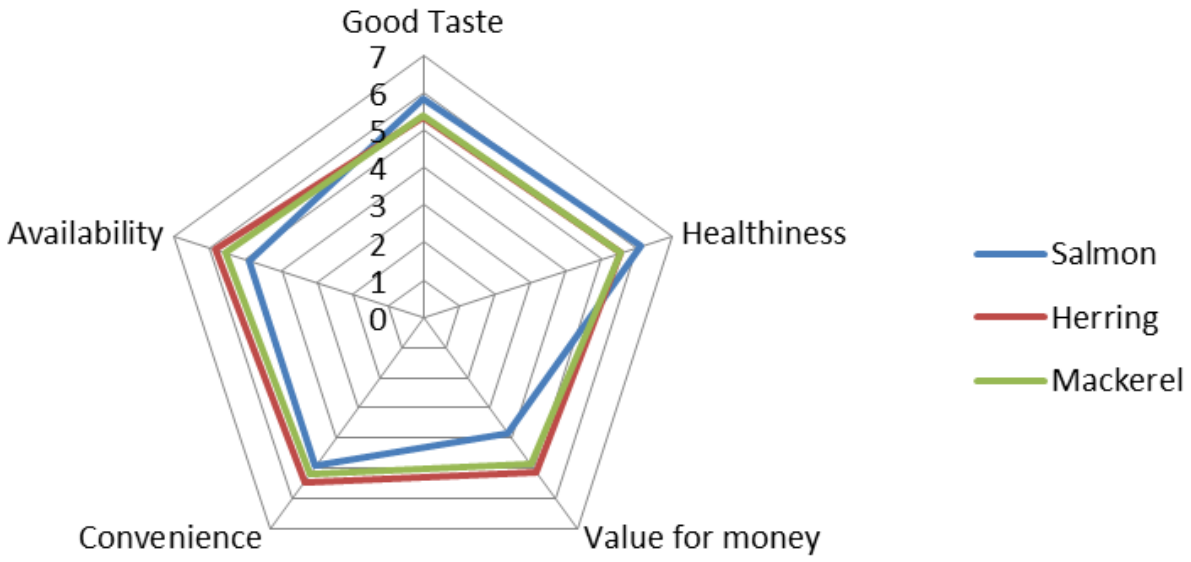
- Salmon superior in taste and healthiness
- Herring similar to salmon in Availability, Convenience, Value for money
- Mackerel lowest in all dimensions

Product Perceptions
Herring vs. Other fish (Russia)



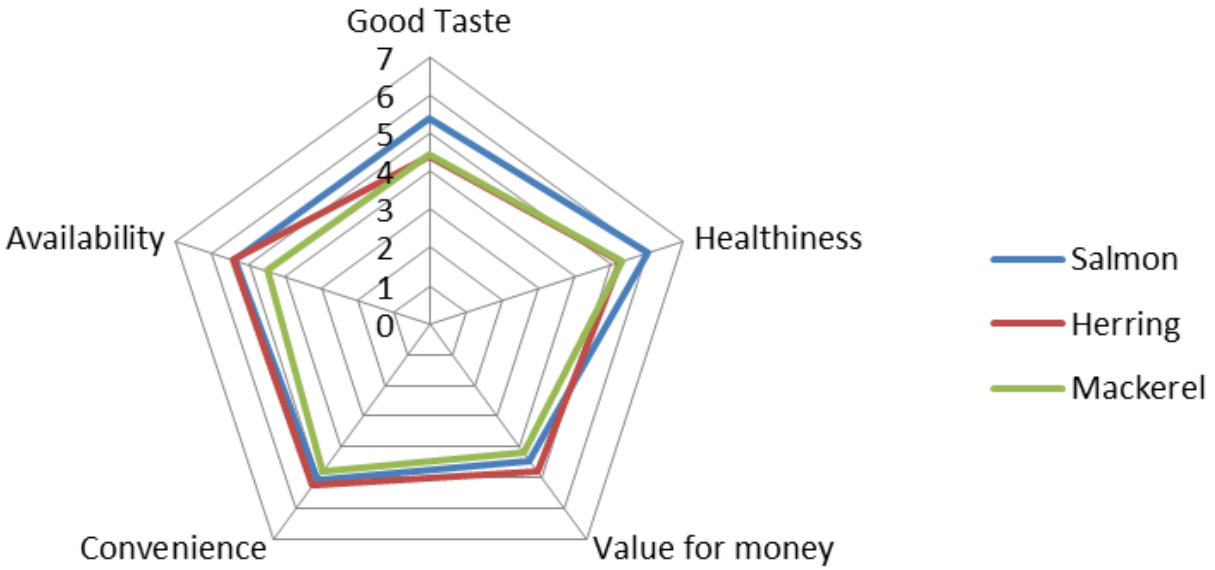
- Salmon superior in taste and healthiness
- Herring superior in availability and value for money
- Herring and mackerel similar in taste, healthiness, and convenience

Product Perceptions
Herring vs. Other fish (Poland)



- Salmon superior in taste and healthiness but lowest in all other dimensions
- Herring superior in availability, convenience, value for money
- Herring and mackerel similar in taste and healthiness

Product Perceptions
Herring vs. Other fish (Sweden)



- Salmon superior in taste and healthiness
- Herring superior in availability, convenience, value for money
- Herring and mackerel similar in taste and healthiness

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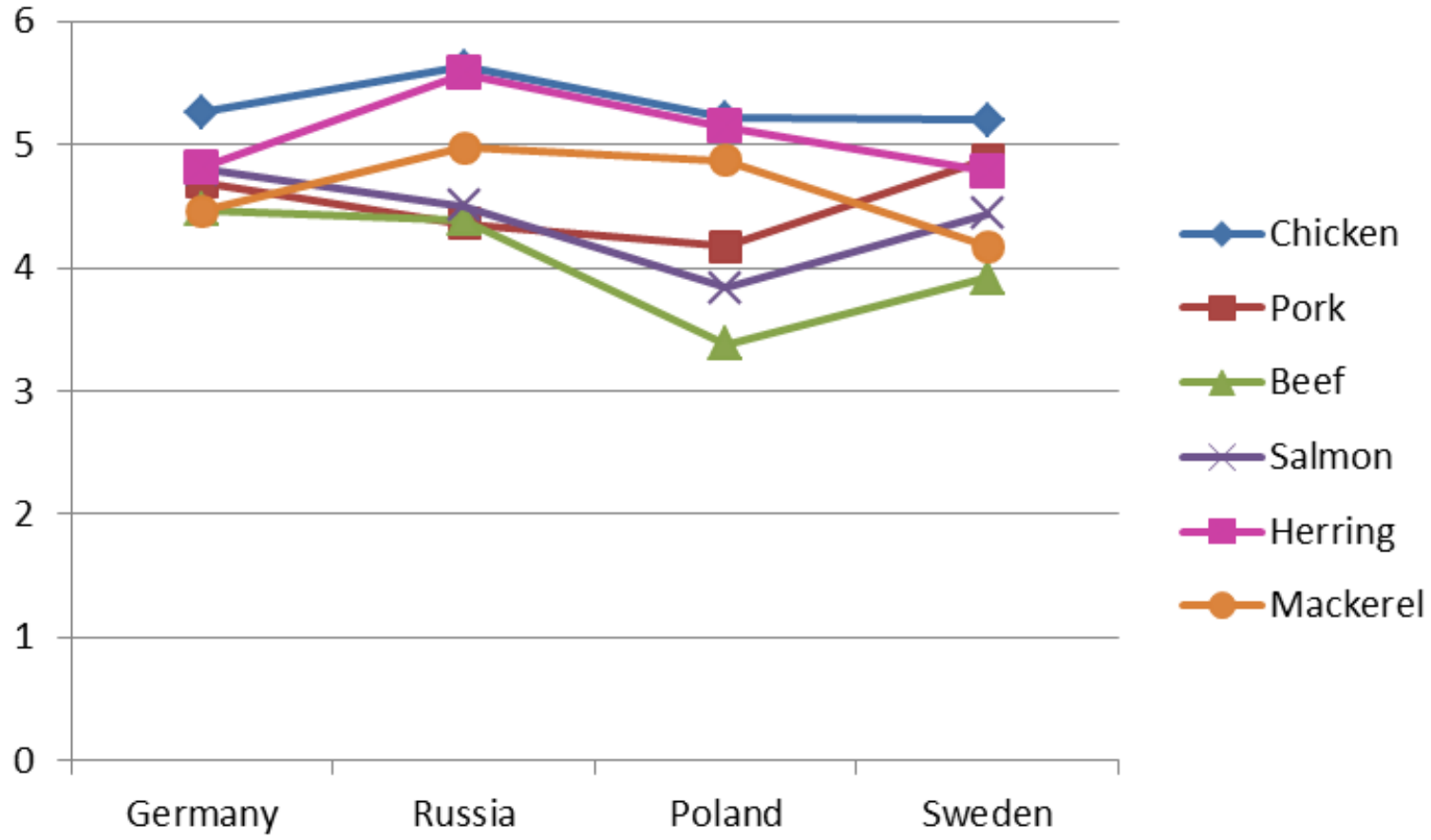
«Value for Money»



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Summary

- Large variation among countries in eating frequencies, food related lifestyles, and perceptions about herring

- Positioning of herring
  - Strong in “value for money” “availability” and “convenience” dimensions in all countries
  - Salmon scored higher in “taste” and “healthiness” in most cases but herring similar or higher in “availability” “convenience” and “value for money”
  - Mixed result in “taste” for herring

Summary (cont'd)

- Reasons to eat herring
  - Most agreed criteria is "taste good"
  - Other common relevant factors are "Health Reasons" "Easy to Prepare" "Quick to Prepare"
  - "Family" is a big reason for Russians

- Consumers are in general happy with the product assortment

Thank you!