



SEAFOOD
FRZ

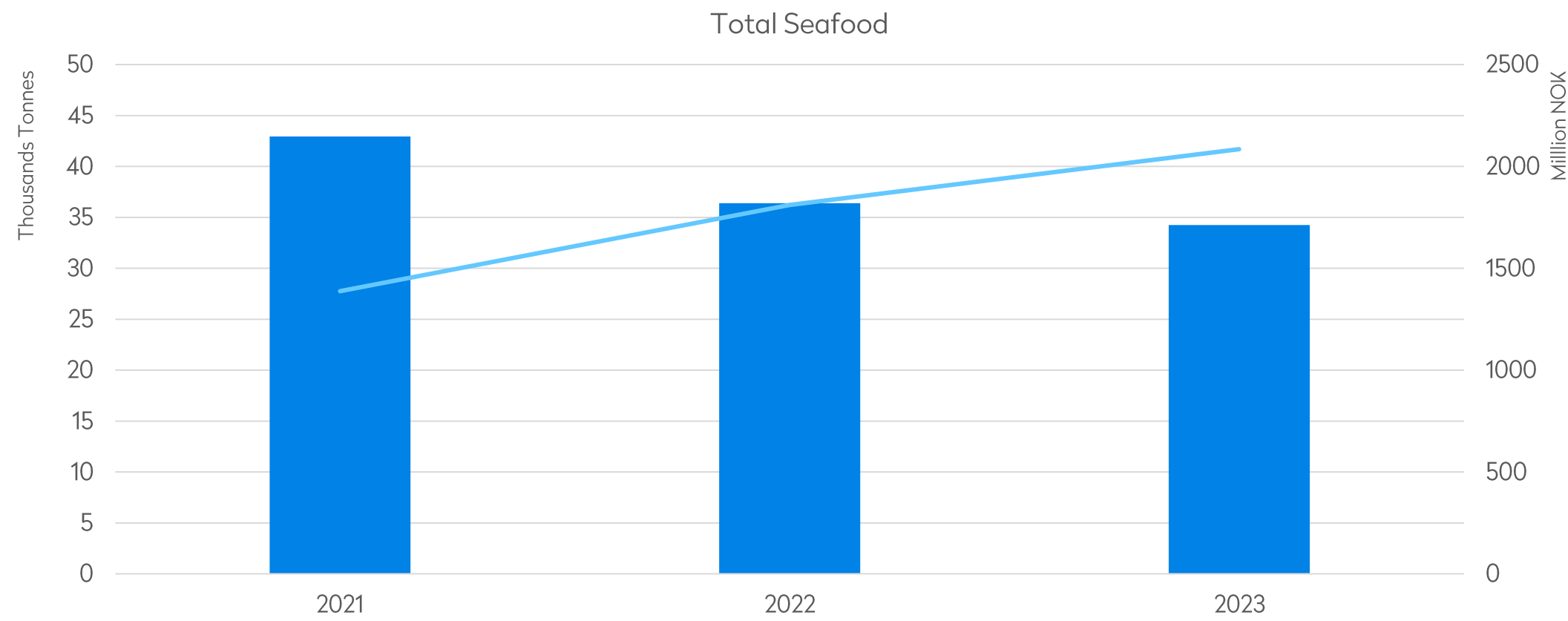
The Story from the North

South-East Asia, 2023

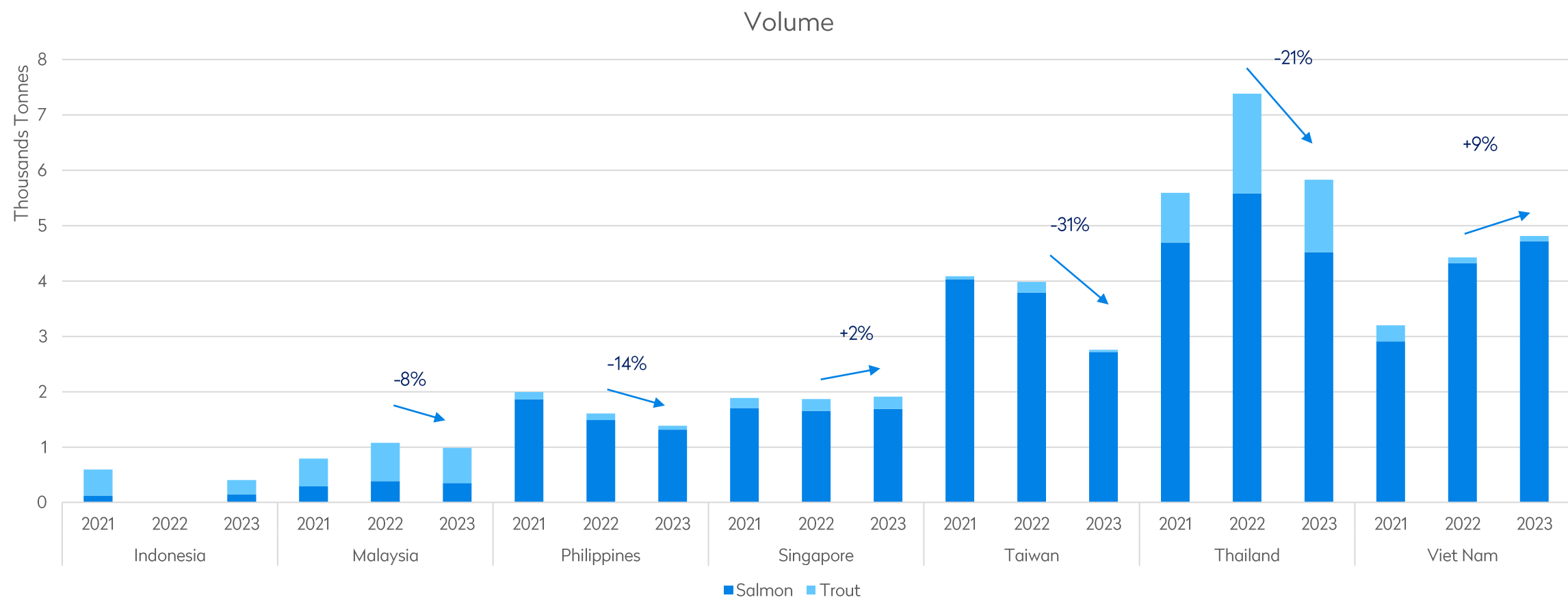
Asbjørn Warvik Rørtveit, Director South-East Asia Norwegian Seafood Council



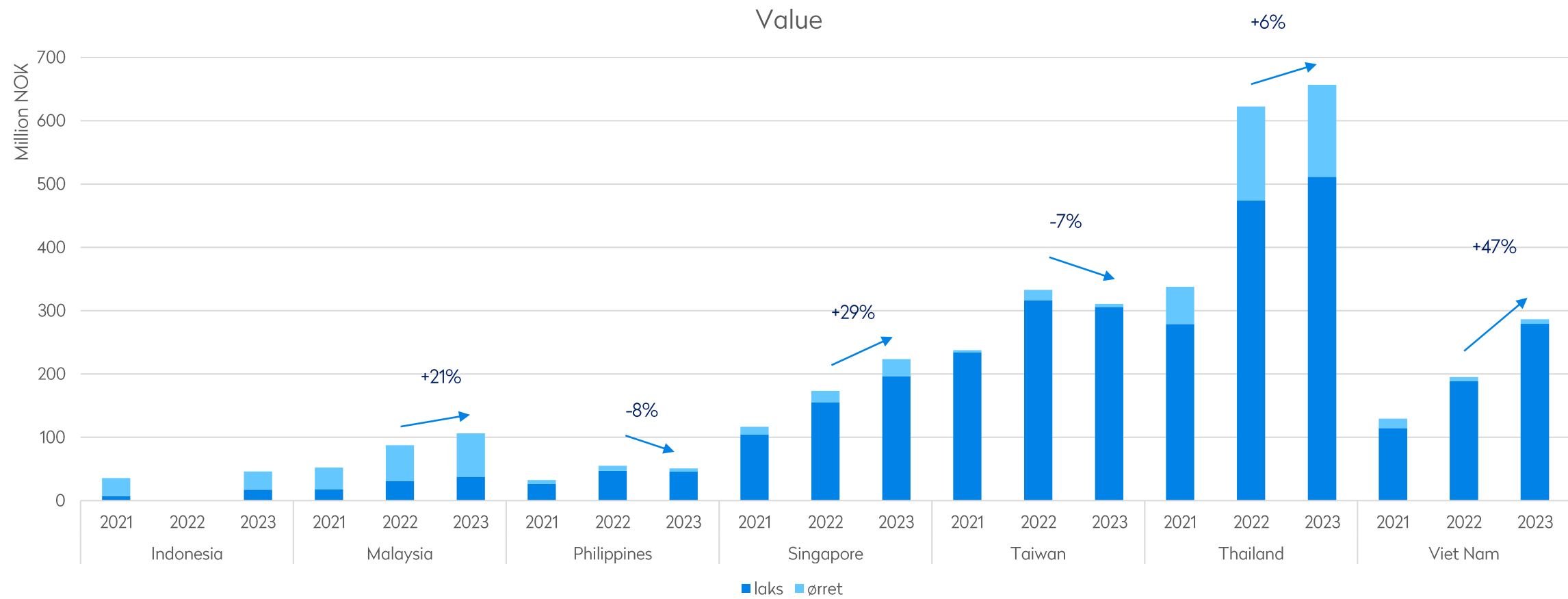
Total seafood export to South-East Asia January – March 2023, Volume -6%, Value +15%



Salmon and Fjord Trout to South-East Asia January - March 2023, Volume -11%, Value +15%



Salmon and Fjord Trout to South-East Asia January - March 2023, Volume -11%, Value +15%



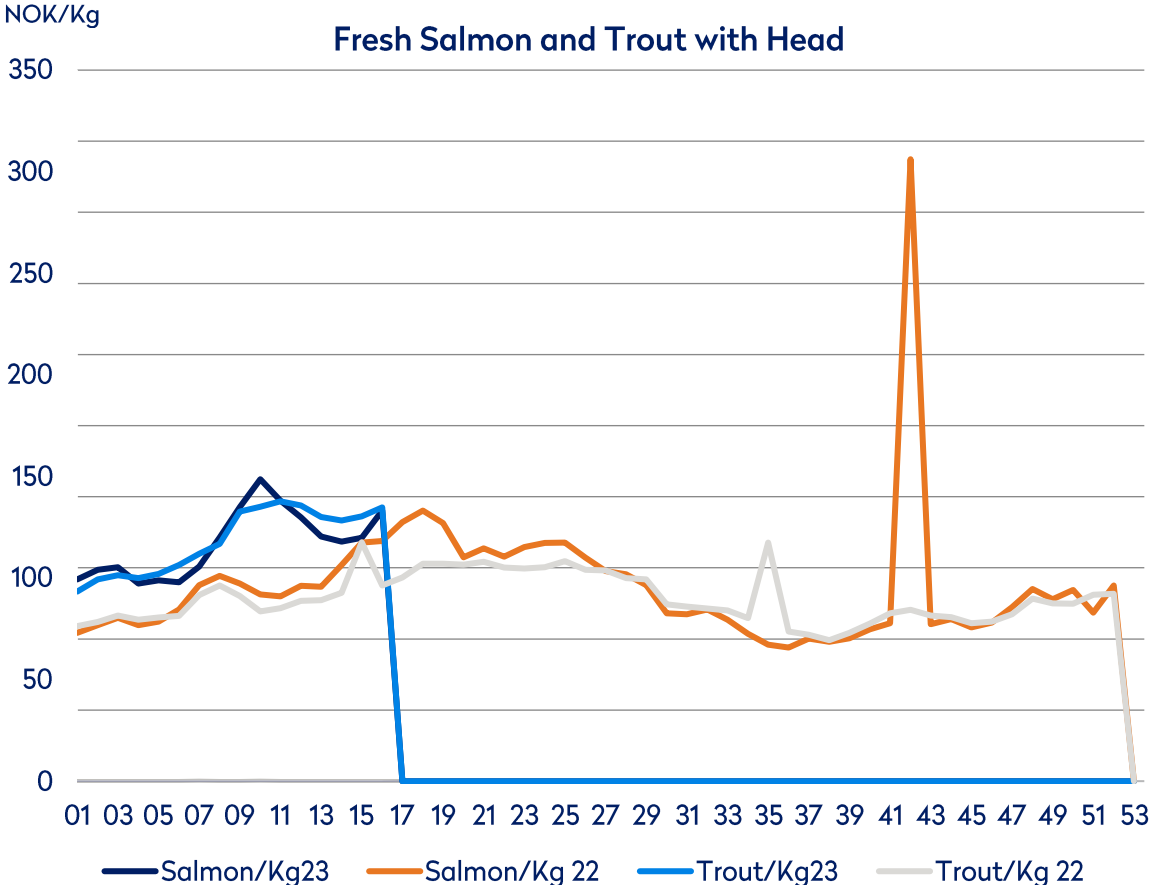
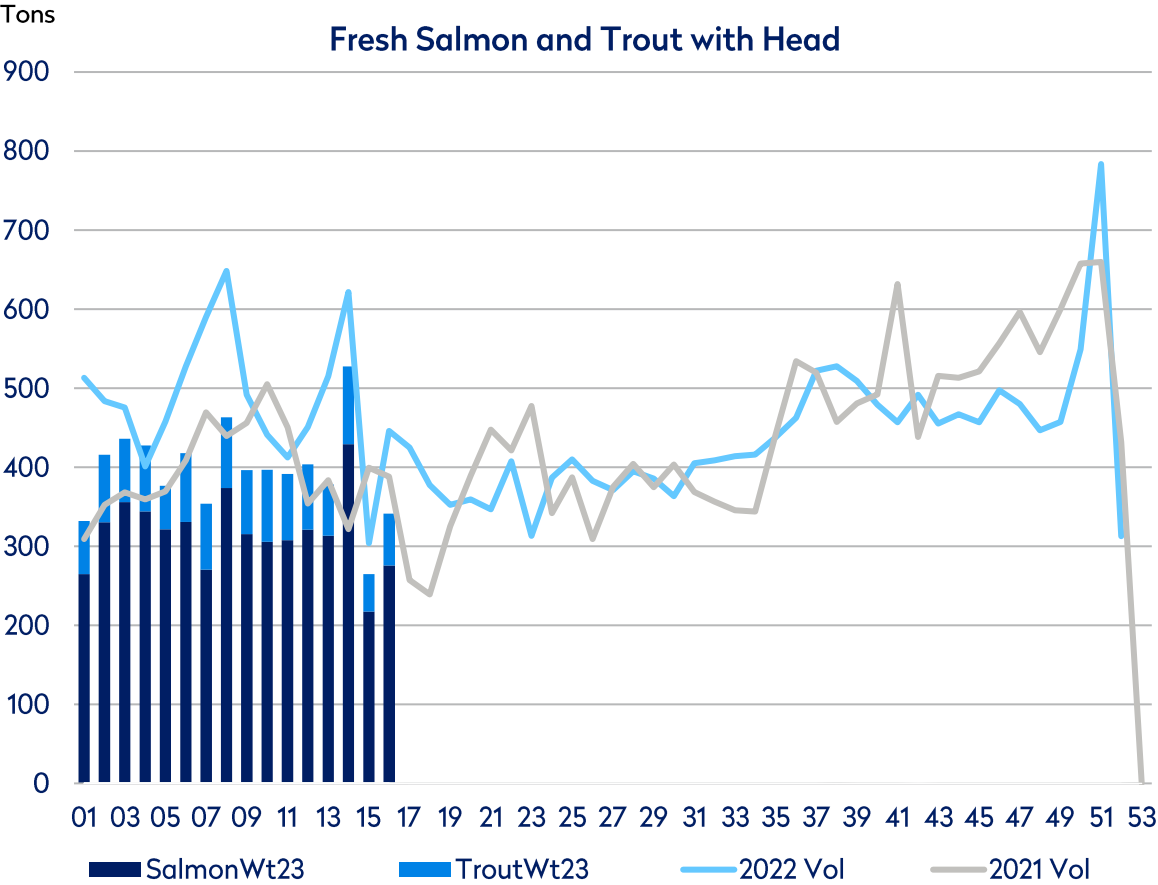


Weekly Export Statistics 2023 – W16

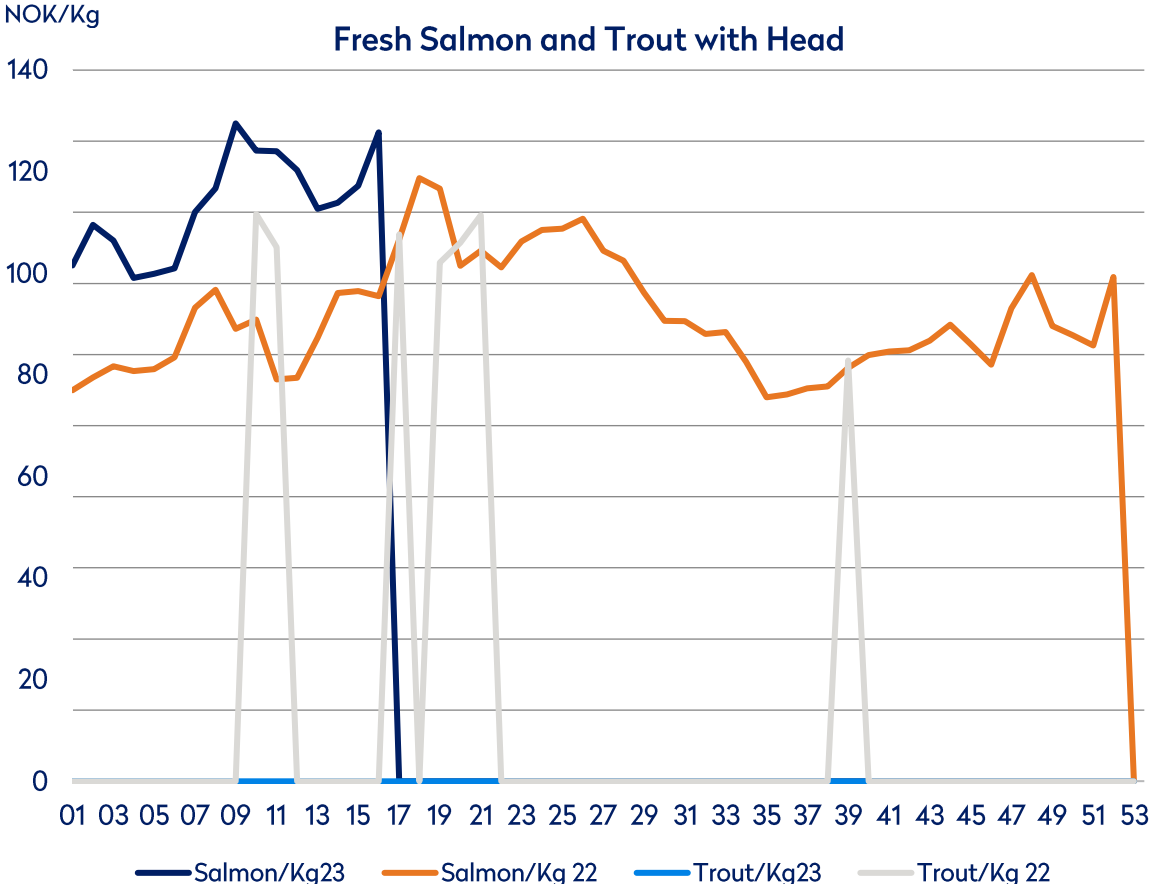
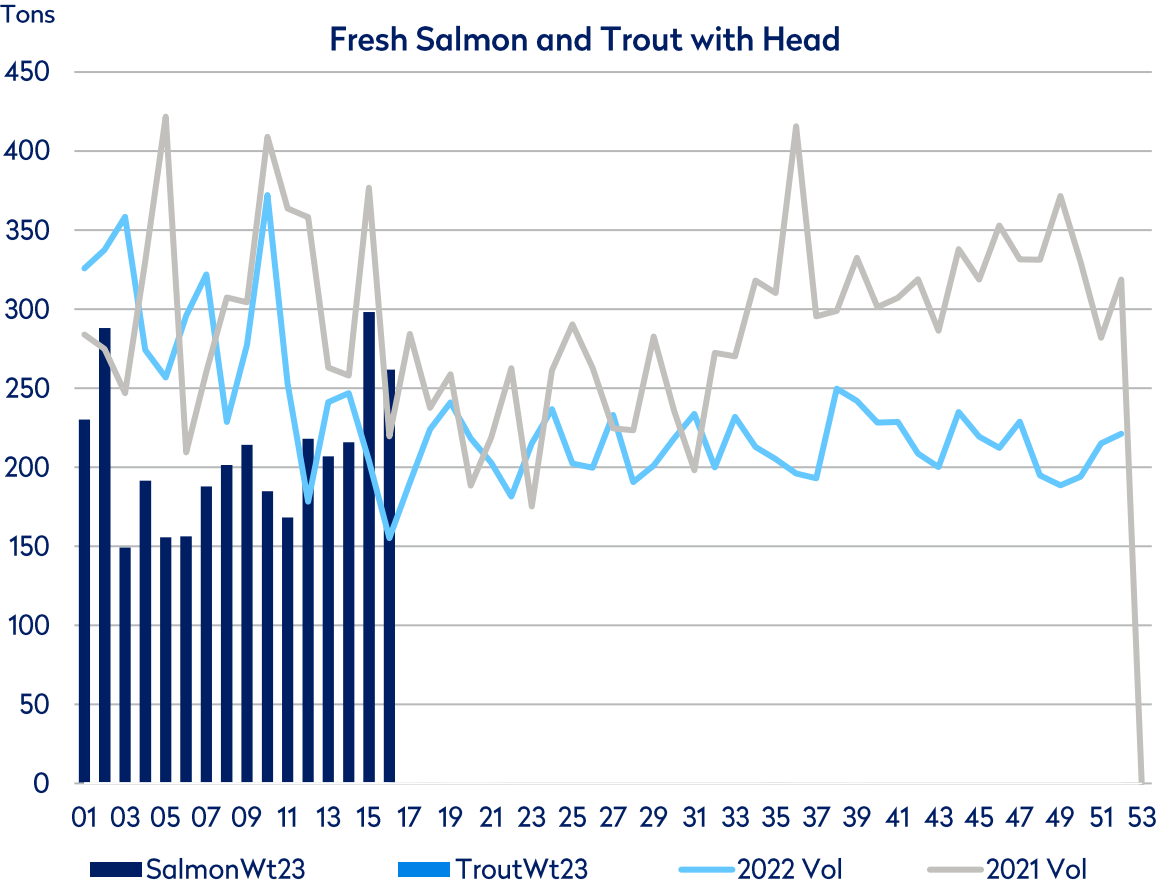
Southeast Asia
26 April 2023



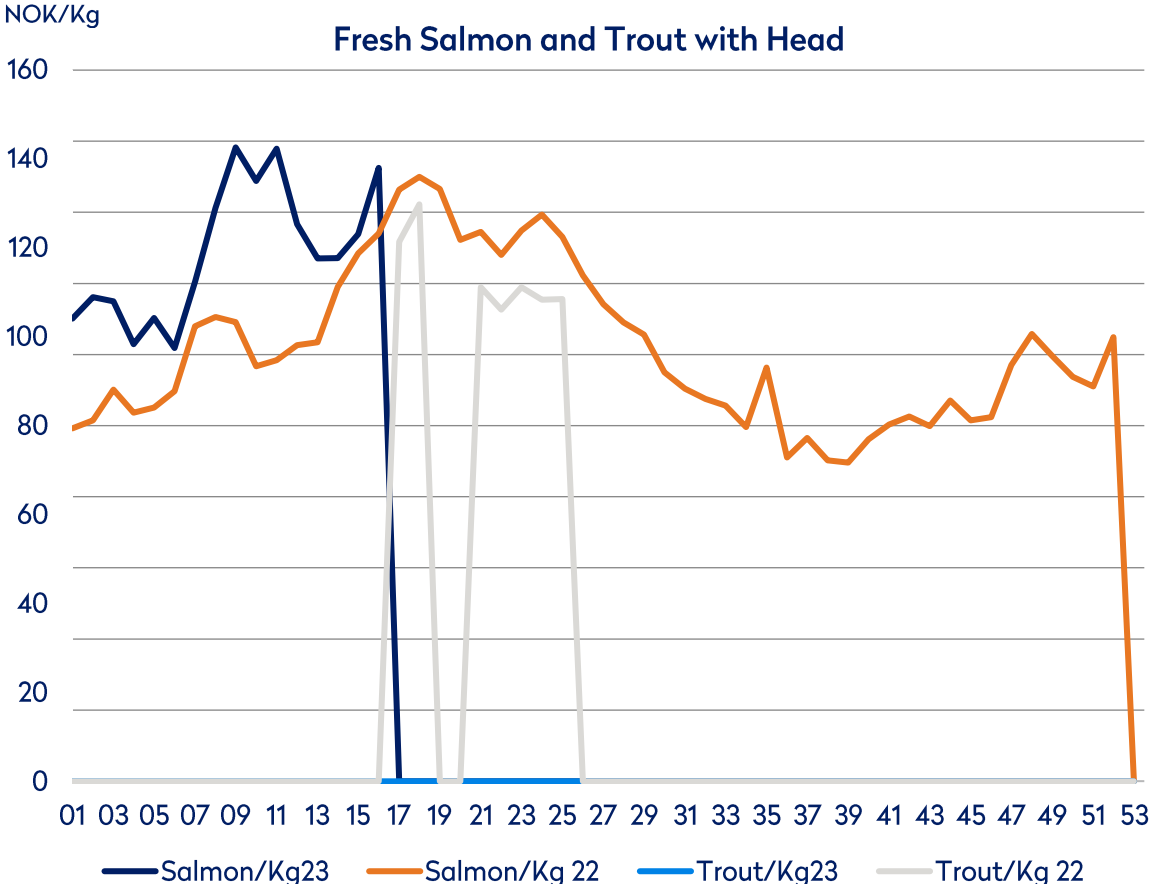
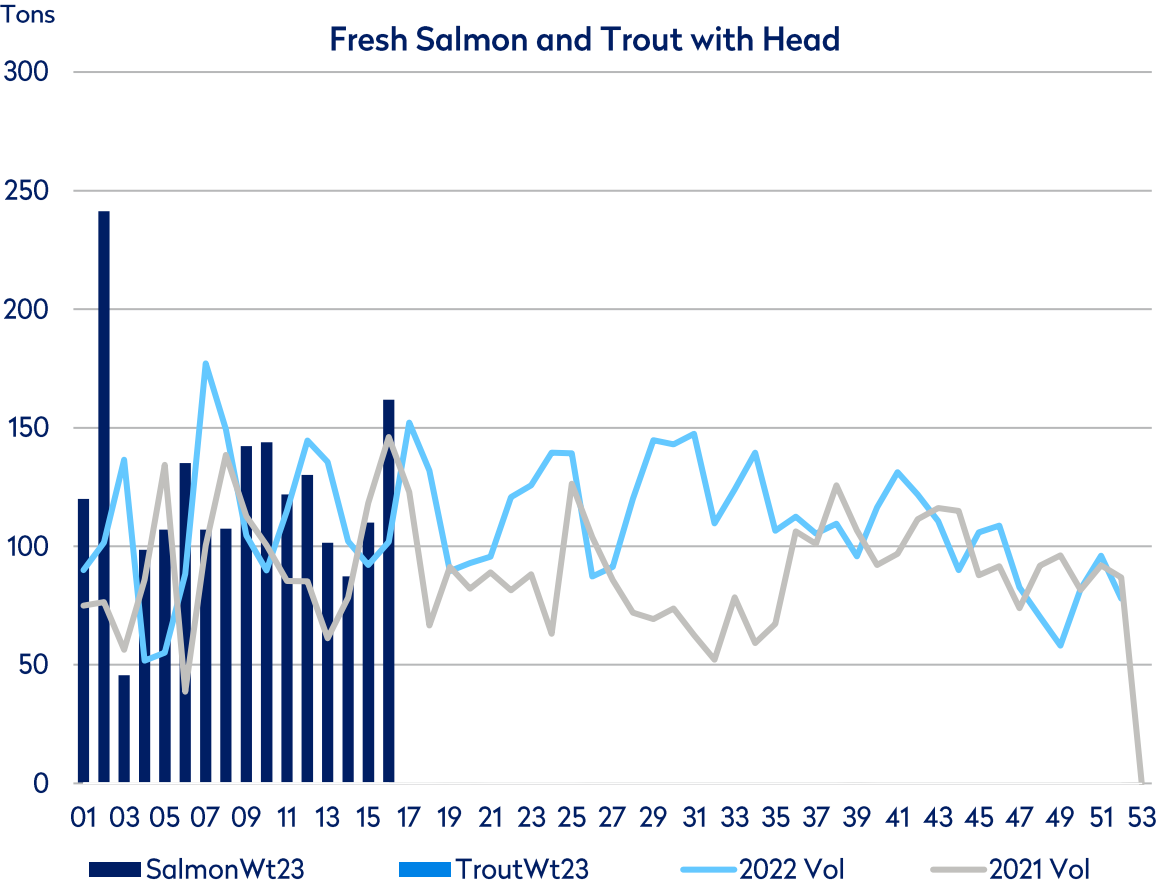
Export to Thailand 2023 – W16



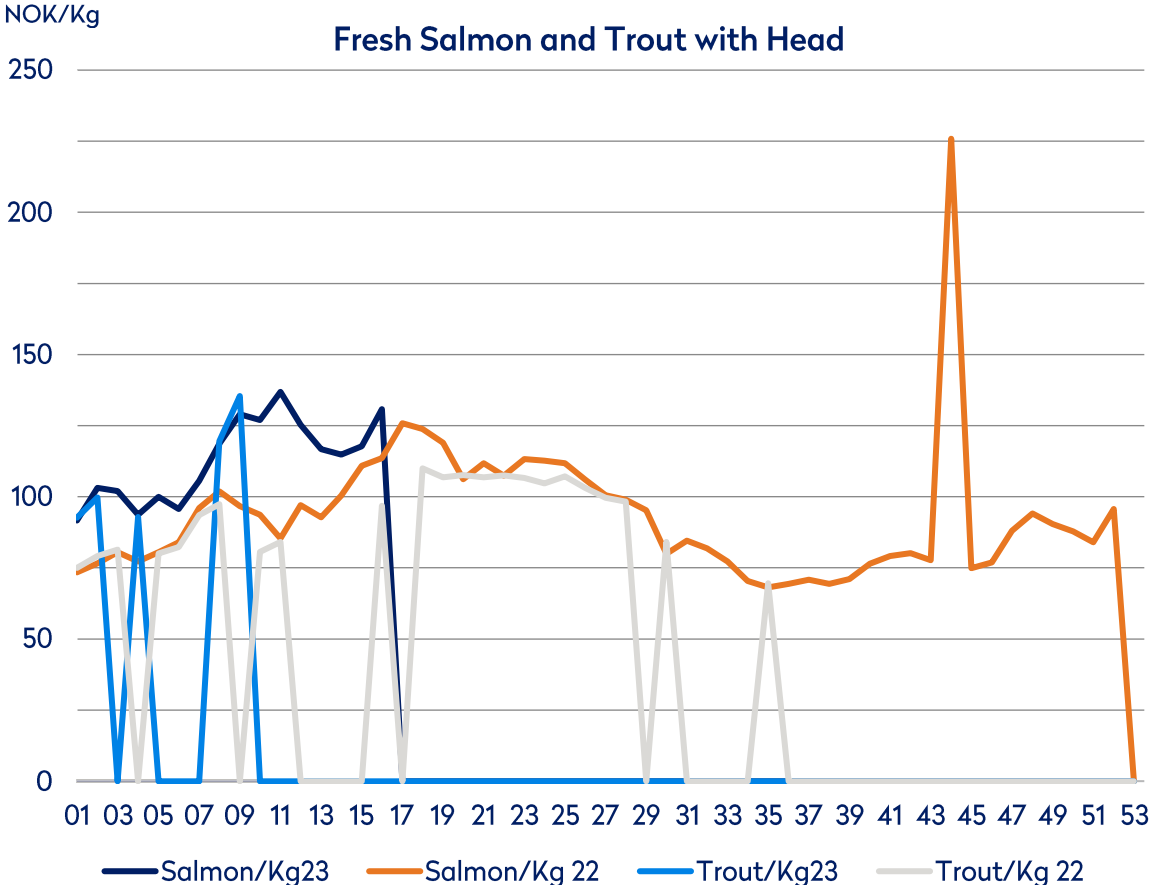
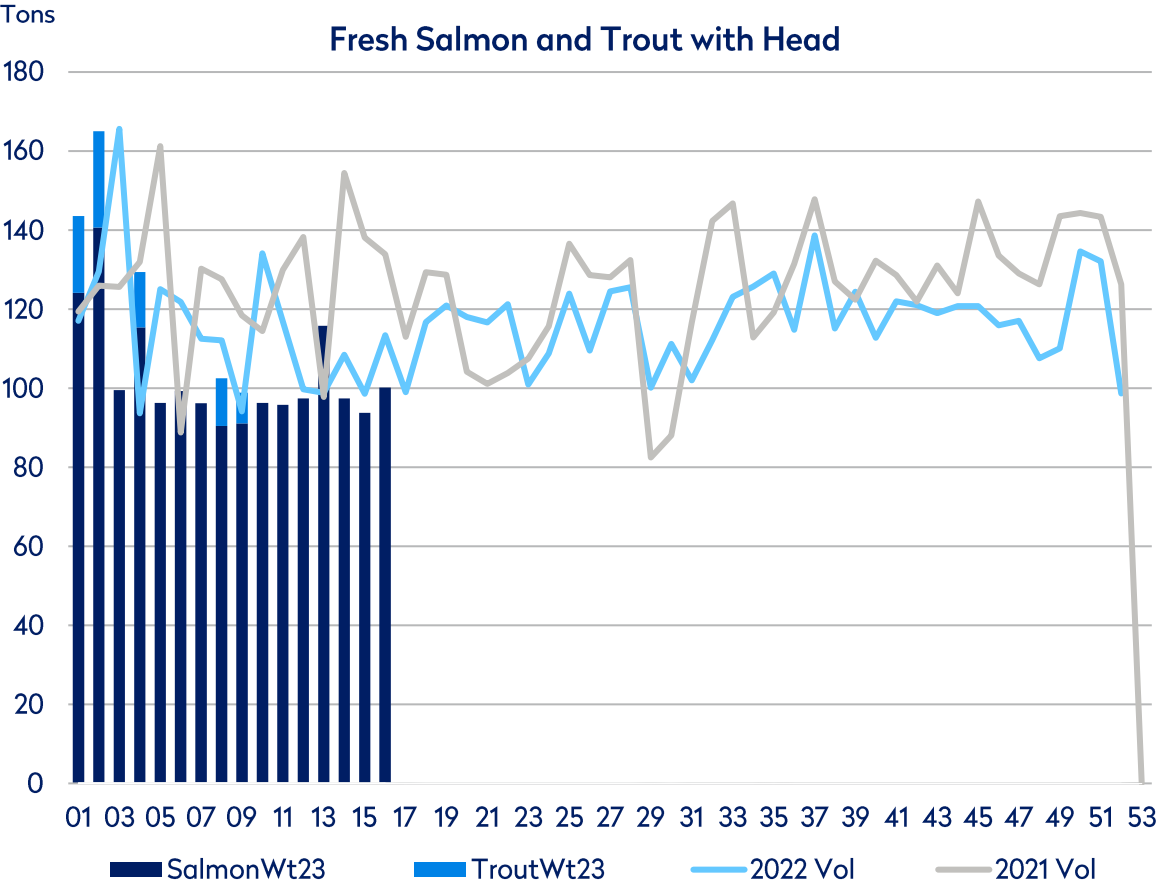
Export to Taiwan 2023 – W16



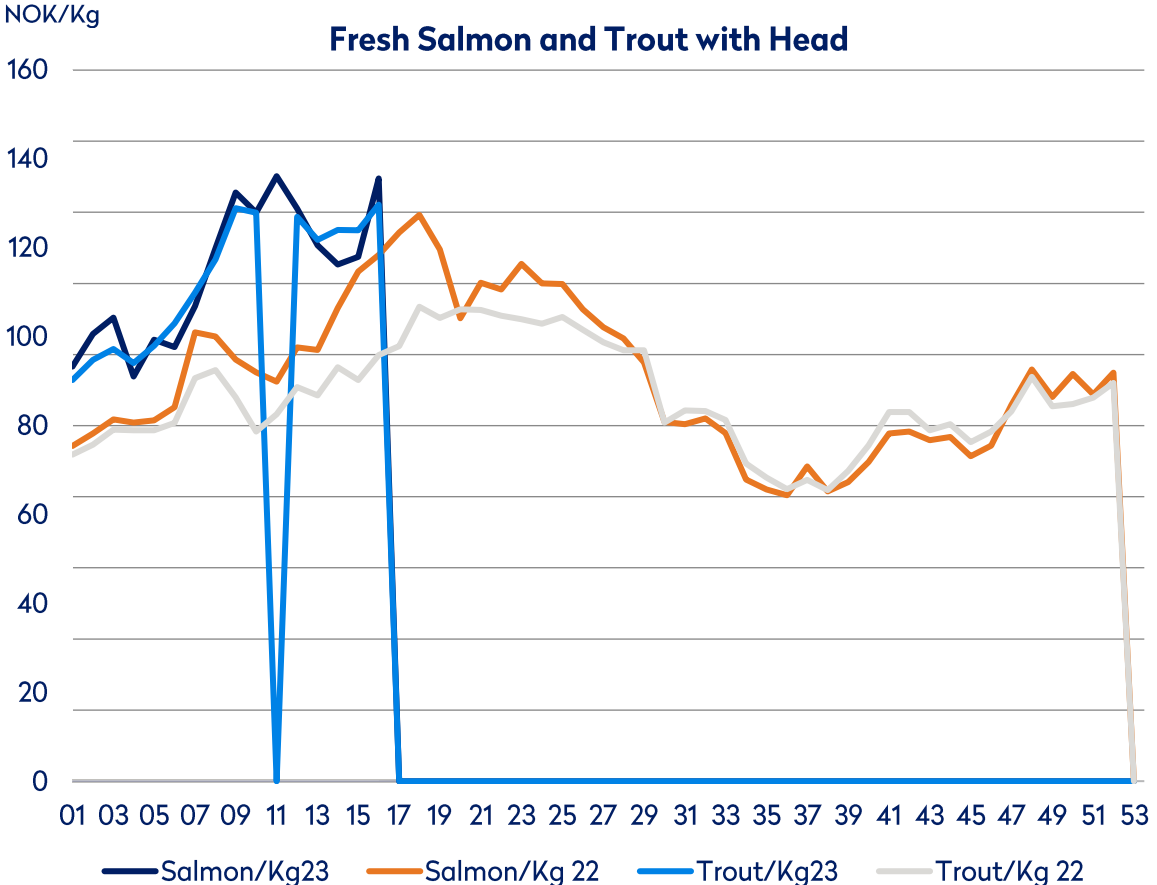
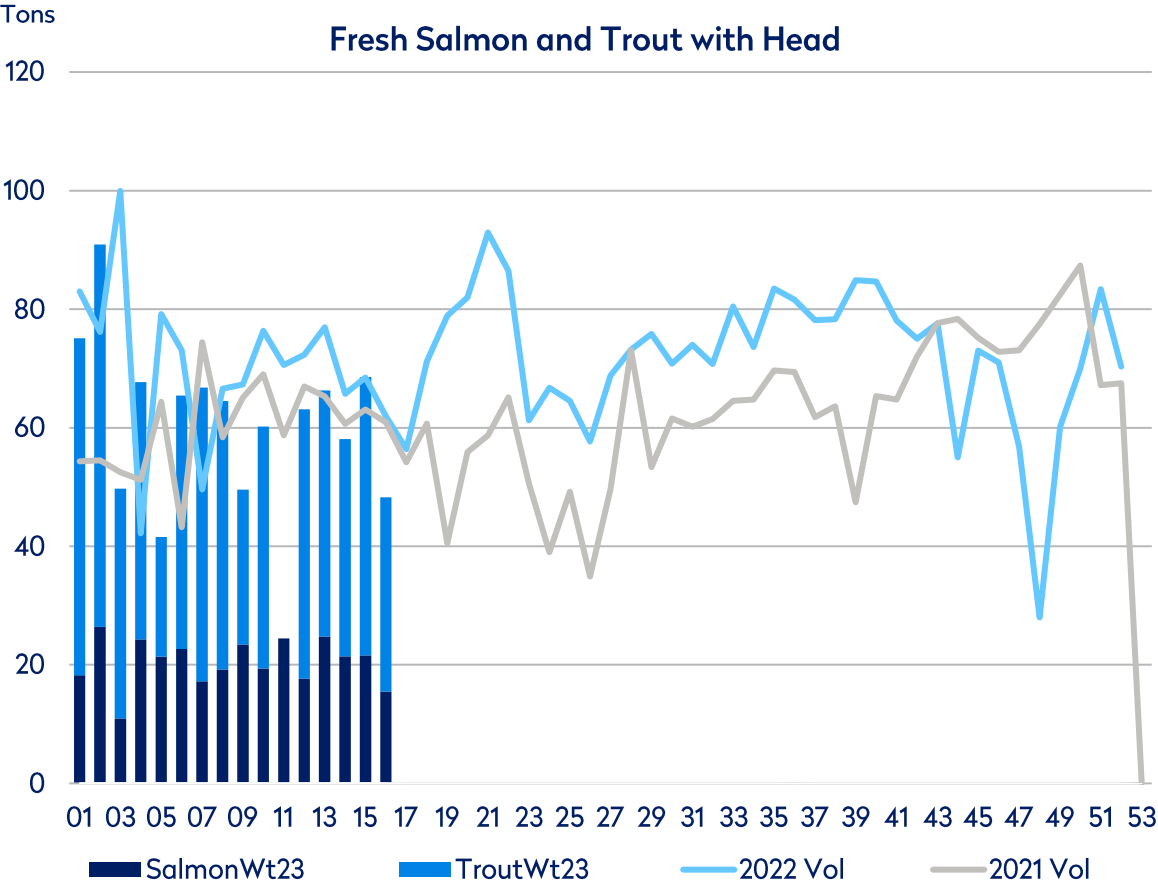
Export to Vietnam 2023 – W16



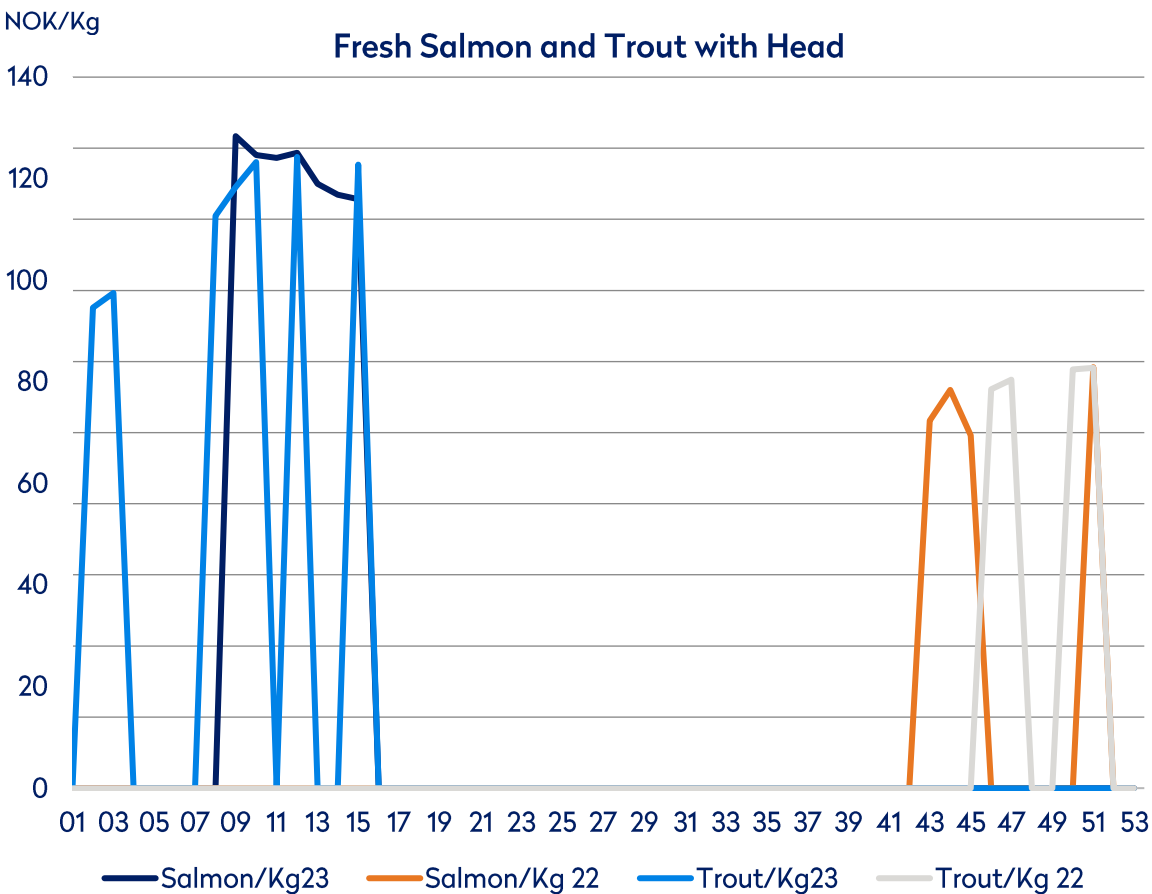
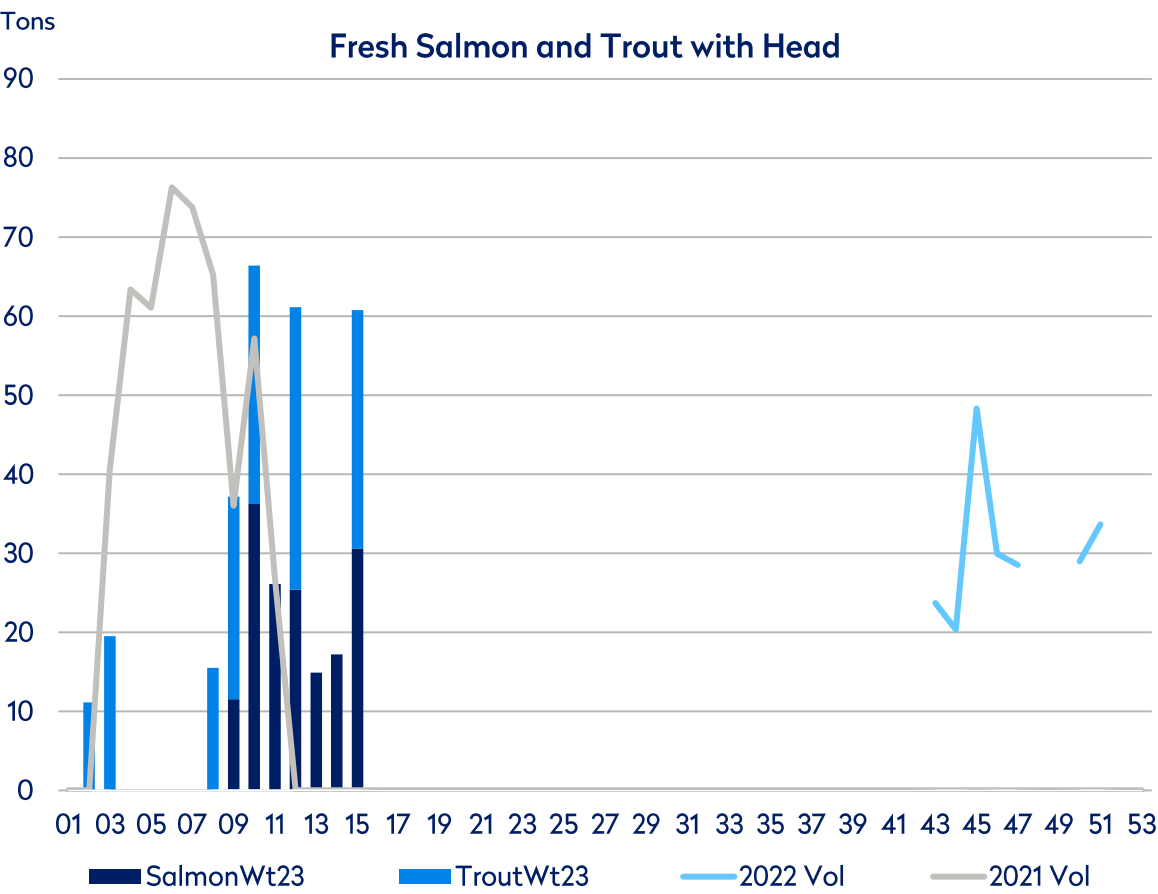
Export to Singapore 2023 – W16



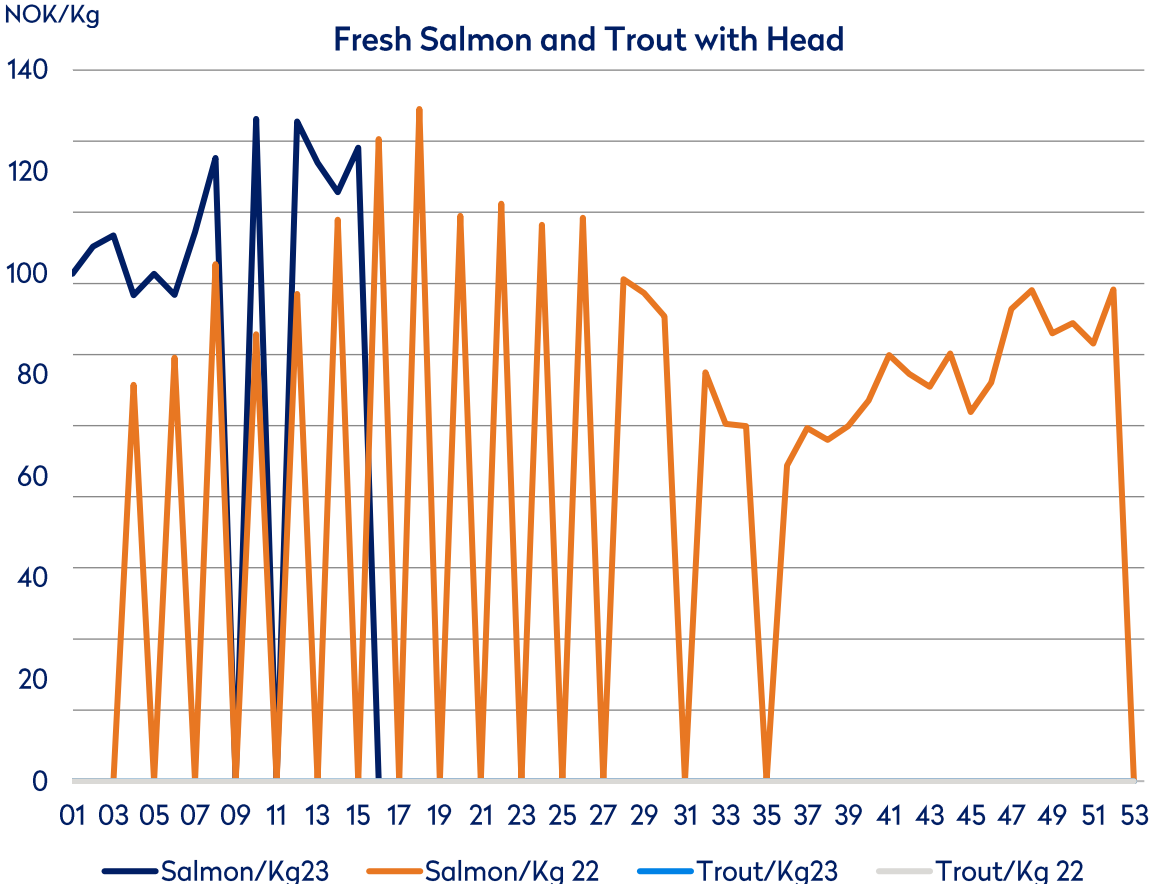
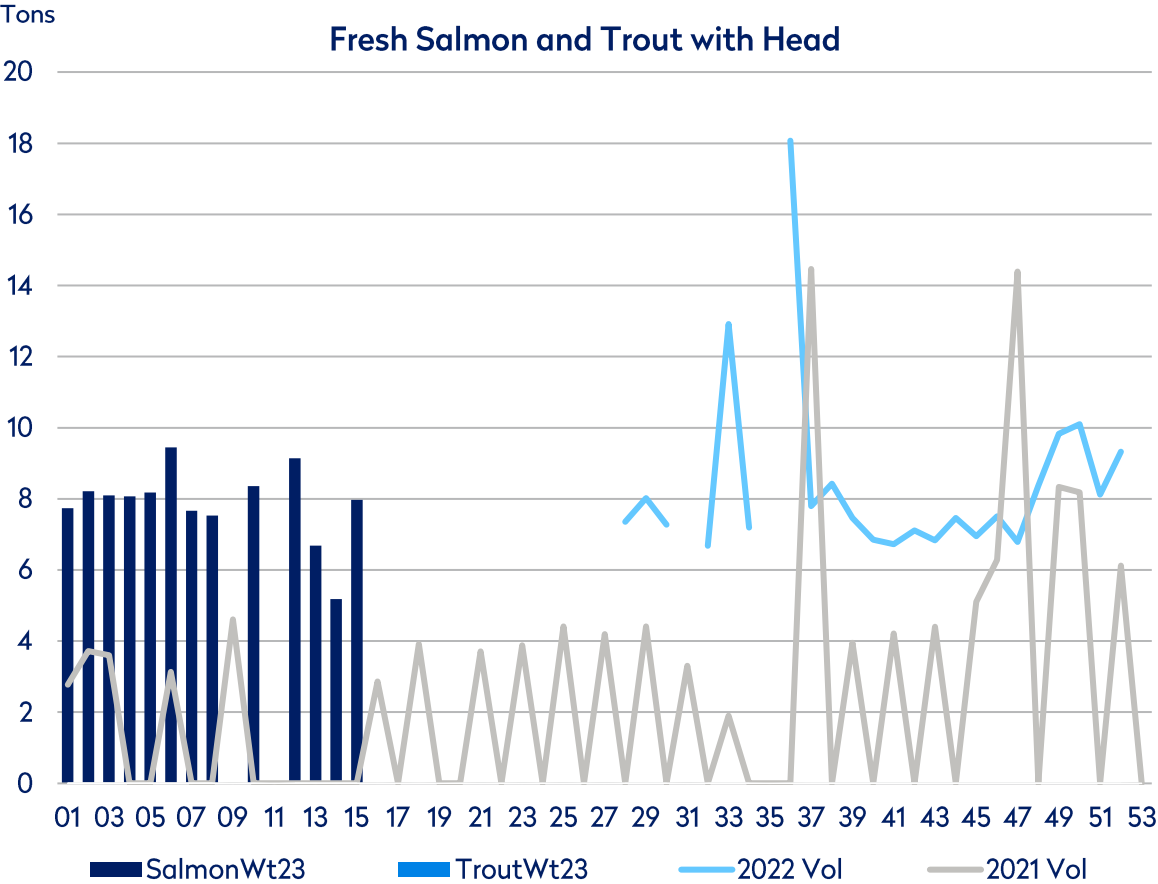
Export to Malaysia 2023 – W16



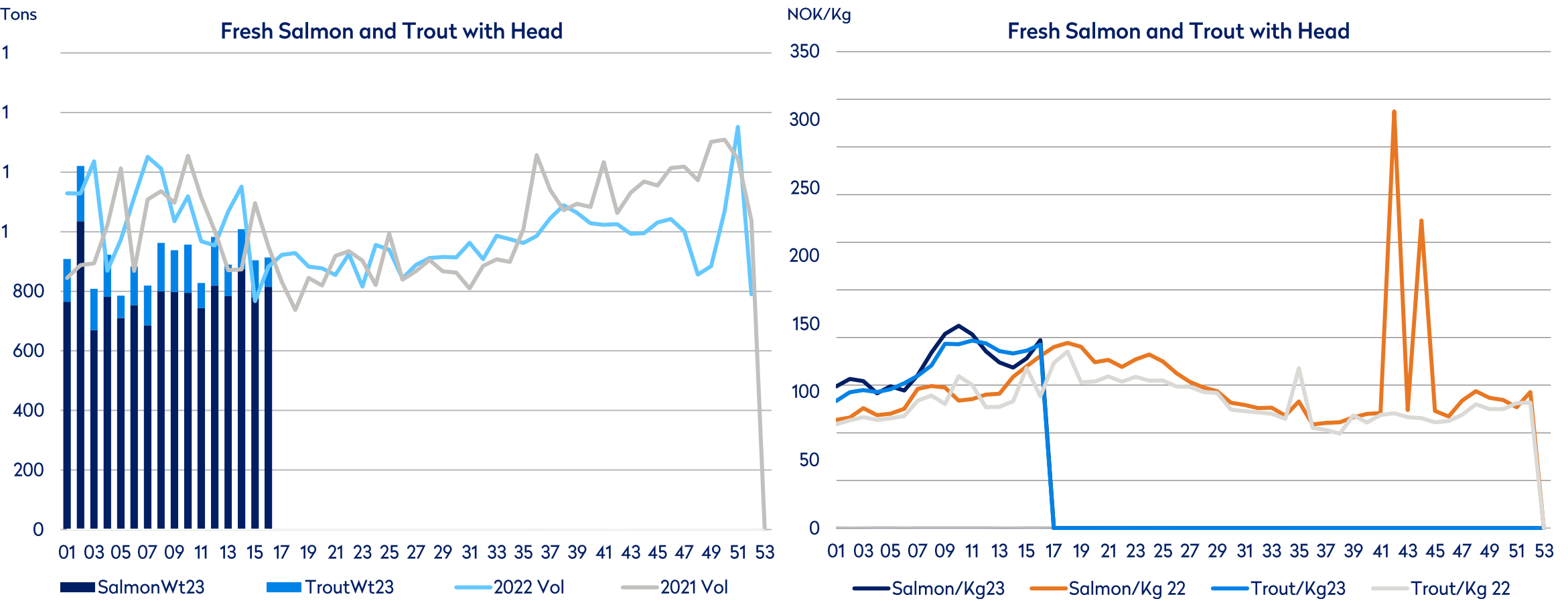
Export to Indonesia 2023 – W16



Export to the Philippines 2023 – W16



Export to Asia 7 (TH+TW+VN+SG+MY+ID+PH) 2023 – W16



A close-up photograph of a gourmet salmon dish. A piece of salmon is topped with a thick layer of black caviar. Above the salmon is a pile of golden-brown, crispy fried onions, garnished with fresh green herbs. The dish is presented on a white plate.

Salmon Campaign Evaluation Thailand 2022

Asbjørn Warvik Rørtveit / Director South-East Asia / Norwegian Seafood Council



TARGET AUDIENCES:
Urban, modern mid/high income
discerning seafood consumers
aged 20-50

Marketing Objective

- The NSC shall work to increase the total market by **increasing the consumption frequency for different meal occasions**, as well as convincing more consumers to choose Norwegian salmon.
- Increase the use of the SFN-trademark in retail and food service

TARGET AUDIENCES:
Urban, modern mid/high income
discerning seafood consumers aged 20-50

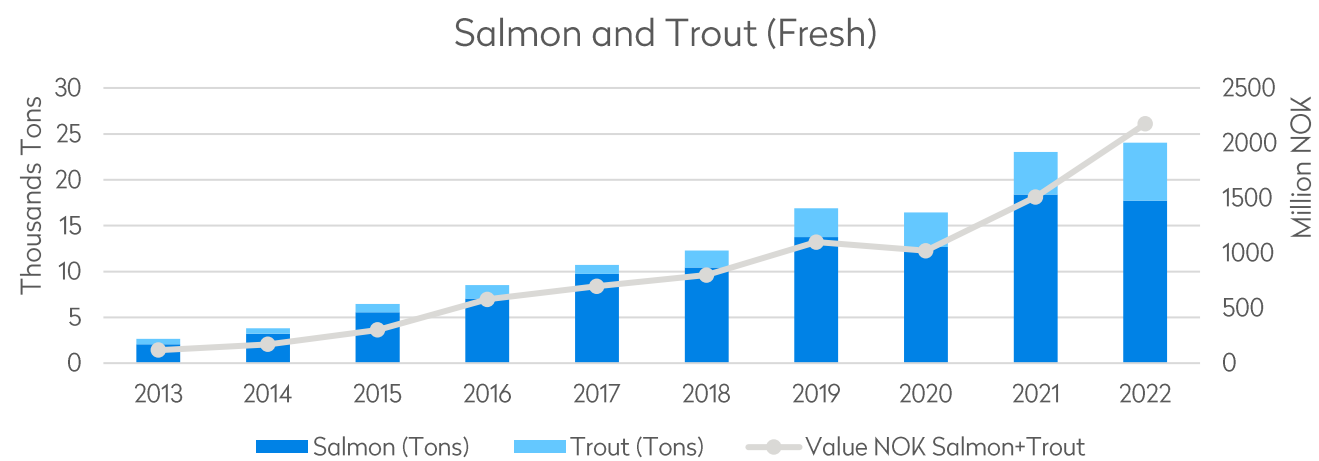
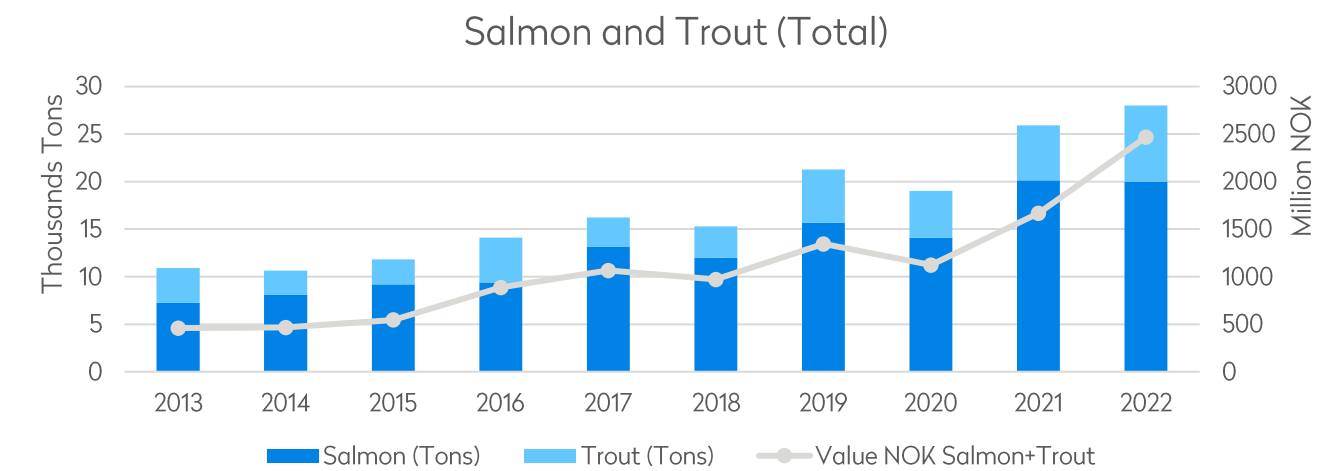


Salmon Budget 2022

16,5 MNOK (8,0+8,5)

Media	Budget
Media spending (TV, digital, OHH)	10 MNOK
Point of Sales Activities	1,5 MNOK
PR Activities (Events, Press Trip, KOL)	2,3 MNOK
B2B Activities (Exhibition, Seminars SØA)	1,5 MNOK
Market Insight and Effect studies	0,5 MNOK
Agency costs	0,7 MNOK

Salmon and Trout Export from Norway to Thailand 2013 - 2022



Market strategy (revised)

NSC will invest in visibility through media campaigns linked to point-of-sales, to build a clear idea of Norwegian salmon and increase the preference for Norwegian origin.

Target group
Urban, modern mid/high income discerning seafood consumers
B2B: Importers, foodservice and retail that focus on the Norwegian origin

KPIs

Consumer behaviour	<ul style="list-style-type: none">Long term increase consumption frequency
Consumer attitudes	<ul style="list-style-type: none">Increase unaided knowledge from 29% to 40%Increase aided knowledge from 63% to 70%Increase consideration from 54% to 56%Increase Knowledge of SFN from 43% to 45%
Stakeholder/decision makers attitudes	<ul style="list-style-type: none">Increase sales among partners during campaign period

KPI's

- Increase unaided knowledge from 29% to 40%
- Increase aided knowledge from 63% to 70%
- Increase consideration from 54% to 56%
- Increase Knowledge of SFN from 43% to 45%



Media

TV/Digital



Boards/screens



POS



PR



TV Sponsorship



NORWEGIAN SEAFOOD COUNCIL



Media

Traditional TV, Population in Target group 19,5 million



	AUGUST	SEPTEMBER	NOVEMBER	TOTAL
Total GRPs	651	425	416	1 492
Impression	127 489 339	83 206 165	81 397 251	292 092 755
Reach 1+ views	12 090 000 (62%)	10 920 000 (56%)	11 310 000 (58%)	
Reach 3x+ views	9 165 000 (47%)	7 410 000 (38%)	7 605 000 (39%)	

NORWEGIAN SEAFOOD COUNCIL

Digital and SoMe

Digital views:
25 Million

TV Sponsorship



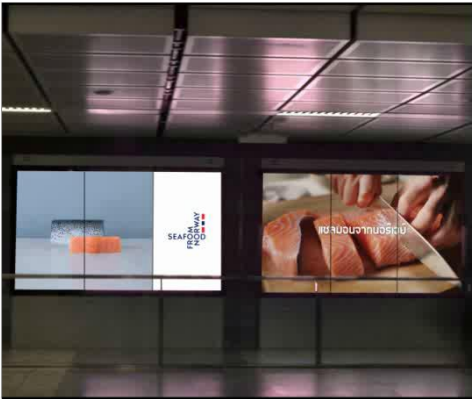
Program views
1,7 Million

Media

420
Million,
Eyeball

Out Off Home

DIGITAL MRT
DIGITAL WALL 6 Screens



Plan-B media



POS



15,000 Cooler bag
NORWEGIAN SEAFOOD COUNCIL



45,000 Shopping bag

486
Retail stores

makro

Salmon

1. Makro 146 branches
2. Tops supermarket 150 branches
3. Thammachart Seafood 190 branches
4. Pan food
5. J Gourmet

Chain – Restaurants

1. Sushi Den 12 branches
2. Don 5 branches
3. Sushi Hiro 16 branches
4. Zen 45 branches
5. Sushi Hana 8 branches
6. Sukishi 59 branches
7. Shinkanzen 49 branches

ท็อปส์ มาร์เก็ต
Tops
market



194
Restaurants

PR

Press conference alone
generated 101 press
clippings

11 Million
Views



PR Value
4,5 MNOK



PR

- 3 programs 20-40 minutes
- Each program 200k-400k
- FB-Ad's for program 5M views +

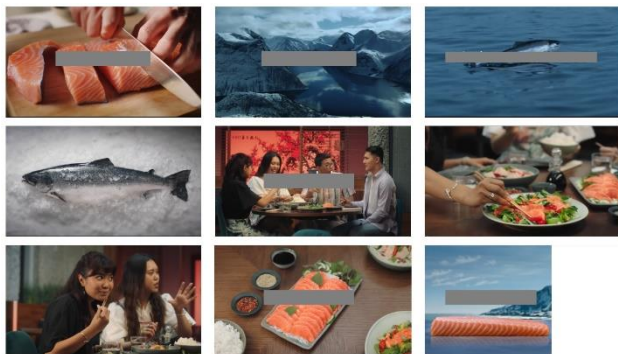


Evaluation elements

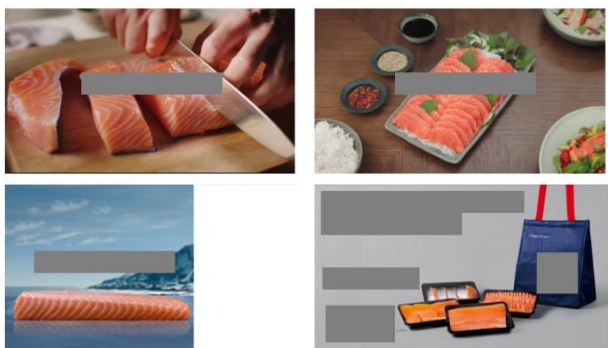
- Campaign Creative Impact measurement
 - Pre-test July 2022
 - Post-test September 2022
 - Post-test February 2023 - Yaya
- Tracker measurement, Wave 1, 2 and 3



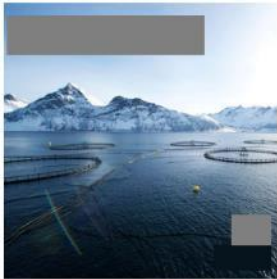
POST TEST SEPTEMBER - CAMPAIGN ELEMENTS TESTED



TV & DIGITAL 30 SEC.



DIGITAL 15 SEC. / OOH / STREETVIEW



DIGITAL BANNERS FOOD DELIVERY

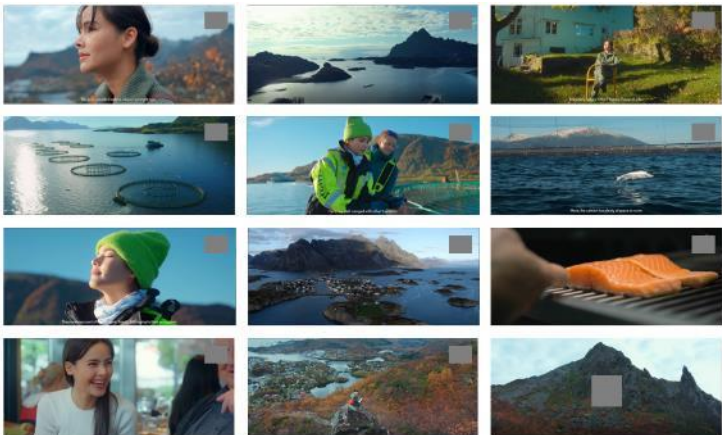
Logo tested:



Shopping bags tested:



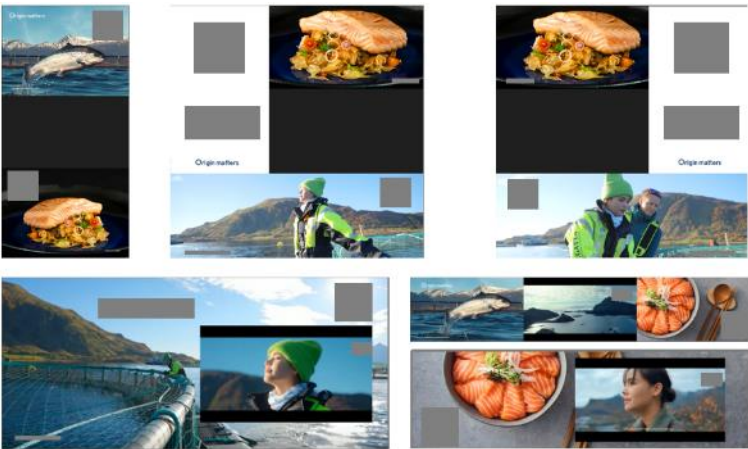
POST TEST FEBRUARY 2023 - CAMPAIGN ELEMENTS TESTED



DIGITAL 2:40-MIN.



DIGITAL 20 SEC.



OOH

Logo tested:







Influencer tested:



PRE-POST CAMPAIGN EFFECTS – BEHAVIOUR CHANGE – TOTAL SAMPLE

Did the campaign manage to impact the main brand KPIs related to short term choice?

Norwegian salmon continues improving its position and increasing the distance from Japanese salmon. The position of Norwegian salmon after the Yaya campaign is in significant positive dynamics, while Japanese salmon remains stable and even demonstrates signs of a downtrend. Norwegian salmon enjoys a leading position in terms of all KPIs.

Main KPIs	NORWEGIAN salmon  Diff	JAPANESE salmon  Diff	NEW ZEALAND salmon  Diff	ALASKA / USA salmon  Diff
Aided Awareness	<div><div>88</div><div>84</div><div>81</div></div> <div><div>+4</div><div>+4</div></div>	<div><div>81</div><div>82</div><div>77</div></div> <div><div>-1</div><div>+5</div></div>	<div><div>54</div><div>56</div><div>52</div></div> <div><div>-2</div><div>+4</div></div>	<div><div>44</div><div>45</div><div>42</div></div> <div><div>-1</div><div>+3</div></div>
Top of Mind Unaided Awareness	<div><div>64</div><div>60</div><div>57</div></div> <div><div>+4</div><div>+3</div></div>	<div><div>22</div><div>24</div><div>24</div></div> <div><div>-2</div><div>0</div></div>	<div><div>3</div><div>3</div><div>3</div></div> <div><div>0</div><div>-1</div></div>	<div><div>2</div><div>0</div><div>0</div></div> <div><div>+2</div><div>0</div></div>
Total Unaided Awareness	<div><div>72</div><div>68</div><div>63</div></div> <div><div>+4</div><div>+5</div></div>	<div><div>51</div><div>48</div><div>49</div></div> <div><div>+3</div><div>0</div></div>	<div><div>12</div><div>7</div><div>10</div></div> <div><div>+5</div><div>-2</div></div>	<div><div>16</div><div>1</div><div>1</div></div> <div><div>*+15</div><div>0</div></div>
Purchase Intent (Top 2 Box)	<div><div>83</div><div>79</div><div>76</div></div> <div><div>+4</div><div>+3</div></div>	<div><div>77</div><div>76</div><div>70</div></div> <div><div>+1</div><div>+6</div></div>	<div><div>48</div><div>49</div><div>46</div></div> <div><div>-1</div><div>+3</div></div>	<div><div>40</div><div>40</div><div>36</div></div> <div><div>0</div><div>+4</div></div>
First choice	<div><div>63</div><div>56</div><div>54</div></div> <div><div>+7</div><div>+3</div></div>	<div><div>25</div><div>27</div><div>26</div></div> <div><div>-2</div><div>+1</div></div>	<div><div>4</div><div>4</div><div>6</div></div> <div><div>0</div><div>-2</div></div>	<div><div>1</div><div>3</div><div>4</div></div> <div><div>-2</div><div>-1</div></div>

Post – W3 Post – W2 Pre – W1

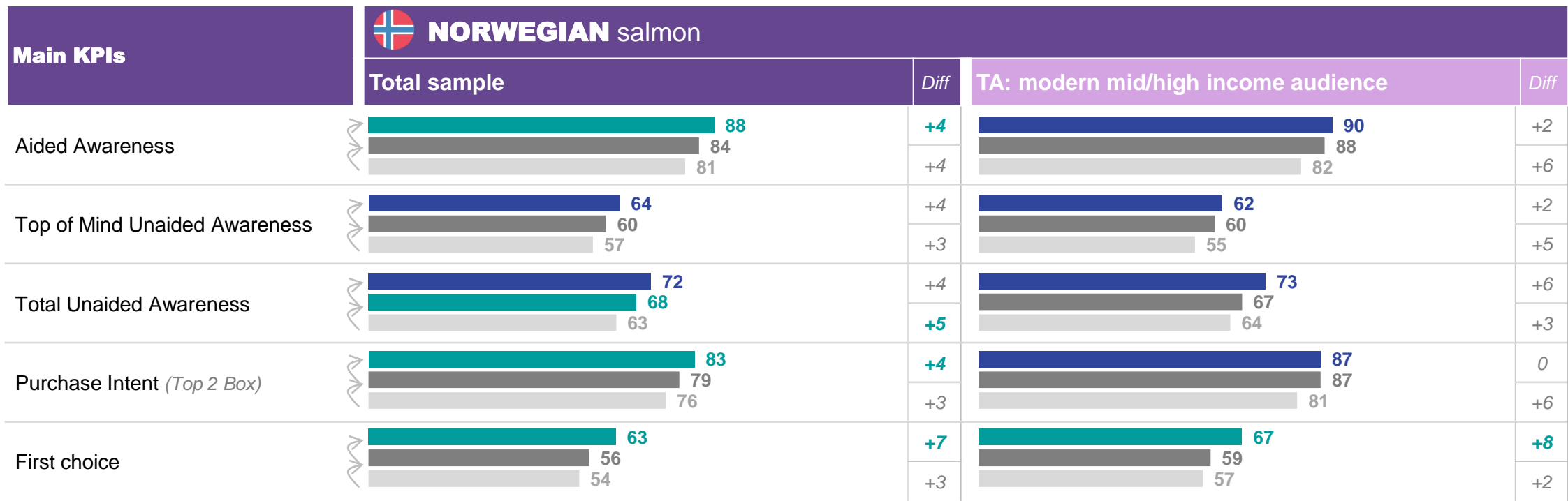
* changed the coding logic for Alaska/USA, added codes for the USA only

Aided Awareness: Which of these brands are you aware of, even if only by name? Unaided Awareness: Which origins of salmon are you aware of, even if only by name? Intent: How likely would you be to buy each origins of salmon?
First Choice: If you were going to choose salmon today, which one would you choose?
Base: Total Sample, Pre-W1 n=500, Post-W2 n=1200, Post-W3 n=750 | All data in %

PRE-POST CAMPAIGN EFFECTS – BEHAVIOUR CHANGE – TARGET AUDIENCE

Did the campaign manage to impact the main brand KPIs related to short term choice?

Among the target group, Norwegian salmon's level of aided awareness reaches 90%, while first-choice preference is in significant positive dynamics compared with last year's results



Post – W3 Post – W2 Pre – W1

Aided Awareness: Which of these brands are you aware of, even if only by name? Unaided Awareness: Which origins of salmon are you aware of, even if only by name? Intent: How likely would you be to buy each origins of salmon?
First Choice: If you were going to choose salmon today, which one would you choose?
Base: Total Sample, Pre-W1 n=500, Post-W2 n=1200, Post-W3 n=750 | All data in %
Base: TA, Pre-W1 n=114, Post-W2 n=336, Post-W3 n=259 | All data in %



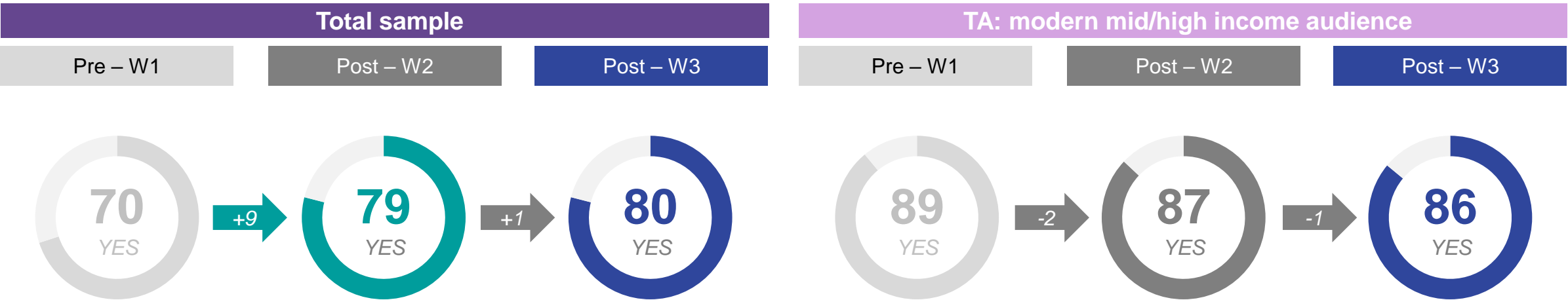
PRE-POST CAMPAIGN EFFECTS – LOGO RECOGNITION

Did the campaign manage to impact the logo recognition?

The Seafood from Norway logo recognition score remains high among salmon buyers after a significant increase last year. Among the target group, the level of logo recognition is even higher.



SEAFOOD FROM NORWAY LOGO RECOGNITION



Post – W3 Post – W2 Pre – W1

AdhocD2. Can you remember having seen this logo before taking this survey?
Base: Total Sample, Pre-W1 n=500, Post-W2 n=1200, Post-W3 n=750 | All data in %
Base: TA, Pre-W1 n=114, Post-W2 n=336, Post-W3 n=260 | All data in %



PRE-POST CAMPAIGN EFFECTS – BEHAVIOUR CHANGE – GROUPS

Did the campaign manage to impact the main brand KPIs related to short term choice?

We observe a positive shift after the campaign with Yaya among all subgroups. However, the main contributors to the total uplift of Norwegian salmon scores are males.

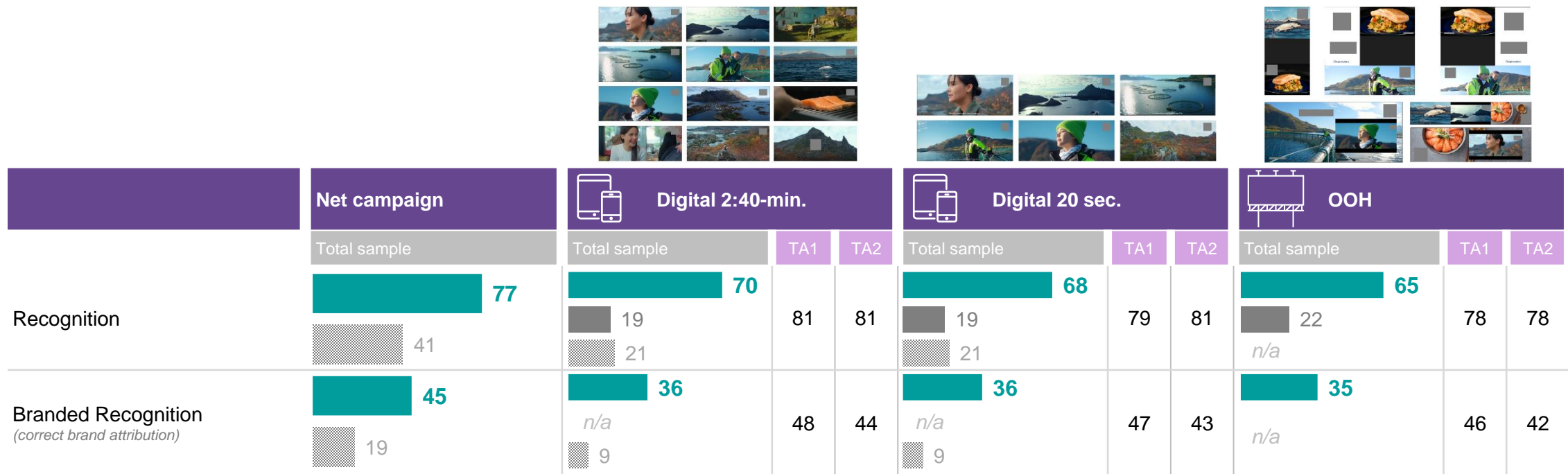
 Main KPIs NORWEGIAN salmon	Total sample					Female					Male					20 – 30 y.o.					31 – 40 y.o.					41 – 60 y.o.				
	Pre W1	Post W2	Diff	Post W3	Diff	Pre W1	Post W2	Diff	Post W3	Diff	Pre W1	Post W2	Diff	Post W3	Diff	Pre W1	Post W2	Diff	Post W3	Diff	Pre W1	Post W2	Diff	Post W3	Diff	Pre W1	Post W2	Diff	Post W3	Diff
<i>Base</i>	500	1200		750		265	636		398		235	564		353		125	300		188		120	288		180		255	612		382	
Aided Awareness	81	84	+4	88	+4	81	87	+6	88	+1	80	81	+1	88	+7	79	82	+3	82	0	77	87	+10	90	+3	83	84	+1	89	+5
Top of Mind Unaided Awareness	57	60	+3	64	+4	60	62	+2	60	-2	54	59	+5	68	+9	50	52	+2	56	+4	57	63	+6	63	0	61	64	+3	68	+4
Total Unaided Awareness	63	68	+5	72	+4	63	69	+6	68	-1	63	67	+4	77	+10	54	60	+6	64	+4	62	70	+8	69	-1	68	72	+4	77	+5
Purchase Intent (<i>Top 2 Box</i>)	76	79	+3	83	+4	76	82	+6	83	+1	75	76	+1	83	+7	75	77	+2	80	+3	70	84	+14	84	0	78	78	0	84	+6
First choice	54	56	+3	63	+7	55	59	+4	63	+4	52	53	+1	62	+9	46	47	+1	51	+4	59	58	-1	61	+3	55	60	+5	69	+9
<i>Performance (based on aware)</i>	9.0	9.1	+0.1	9.1	0.0	9.0	9.0	0.0	9.0	0.0	8.9	9.2	+0.3	9.3	+0.1	8.9	9	+0.1	9.1	+0.1	8.6	9.1	+0.5	9	-0.1	9.1	9.1	0.0	9.2	+0.1
<i>Closeness (based on aware)</i>	8.6	8.6	0.0	8.8	+0.2	8.5	8.5	0.0	8.7	+0.2	8.7	8.7	0.0	8.8	+0.1	8.3	8.4	+0.1	8.6	+0.2	8.4	8.8	+0.4	8.6	-0.2	8.8	8.6	-0.2	8.9	+0.3

Aided Awareness: Which of these brands are you aware of, even if only by name? Unaided Awareness: Which origins of salmon are you aware of, even if only by name? Intent: How likely would you be to buy each origins of salmon? First Choice: If you were going to choose salmon today, which one would you choose? Performance: How would you rate each country of origin in terms of what you are looking for when purchasing salmon? Closeness: How close do you feel to <insert brand name>?

SHARE OF MIND – VISIBILITY OF CAMPAIGN

Did your campaign cut through and reach your target group?

The visibility and branding of the campaign are high. 77% of the audience claimed they had seen at least one of the key campaign elements, and 45% correctly identified the brand. All scores are above both norms.



■ Total Sample ■ Ipsos APAC norm ■ NSC norm TA1 = modern mid/high income audience TA2 = Yaya followers

Recognition: Have you seen this advertisement recently? Branded Recognition: Who was this ad for (Brand/country of origin)? Be as specific as possible. Include the full name and any featured variety?

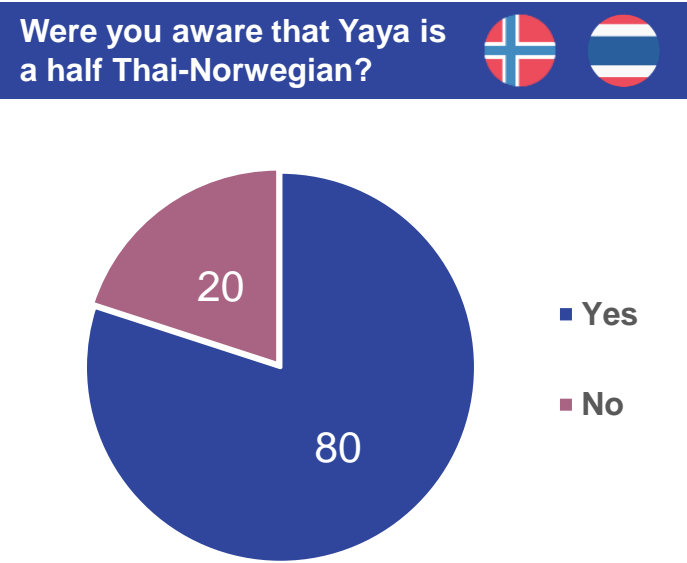
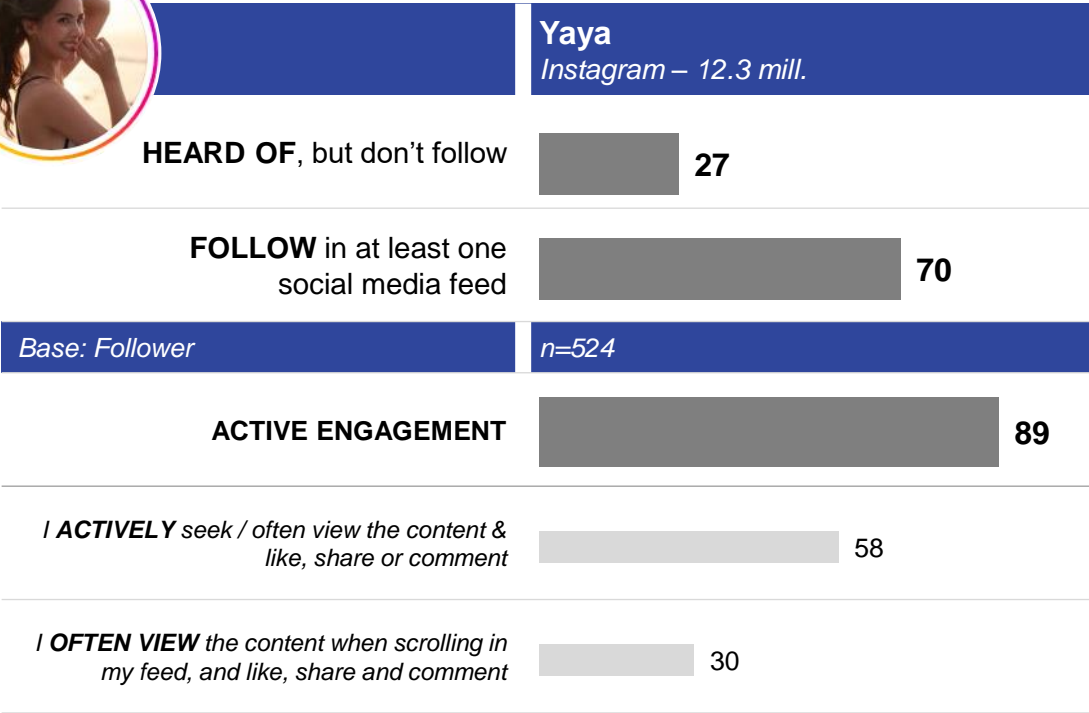
Base: Total Sample n=750

Base: TA1 n=259, TA2 n=524

INFLUENCER PERFORMANCE – RELATIONSHIP

Is the influencer a relevant source of information and engagement among the target audience?

The majority of salmon buyers from Bangkok were aware that Yaya is a half Thai-Norwegian, probably because most of them know and follow her. Active engagement with her content is also high. Thus Yaya is the main driver of the strong performance of the campaign.



Aware/Follow: Yaya is the main character in this advertising campaign. Thinking of {Yaya}, which of the following statements apply to you? (Follow in at least one social media channel, Heard of but don't follow, never heard of)
Engagement: Which of the following best describes your behaviour towards the content and posts of {Yaya}?



INFLUENCER PERFORMANCE – IMAGE & BRAND FIT

What is the image perception of the influencer, and how well do the influencer and brand fit?

Yaya has a strong fit for Seafood from Norway brand, and the audience has a powerful image perception of her. First of all, they believe Yaya is conscious about nature, relatable to Norway, trustworthy, and likable.



Image of Influencer		
CONSCIOUS ABOUT NATURE	<div></div>	82
RELATABLE TO NORWAY	<div></div>	80
TRUSTWORTHY	<div></div>	78
LIKEABLE	<div></div>	77
authentic	<div></div>	76
relatable to Norwegian Seafood	<div></div>	76
conscious about the origin of food (seafood)	<div></div>	76
conscious about sustainable food production	<div></div>	72
conscious about what to eat	<div></div>	71
inspiring	<div></div>	70

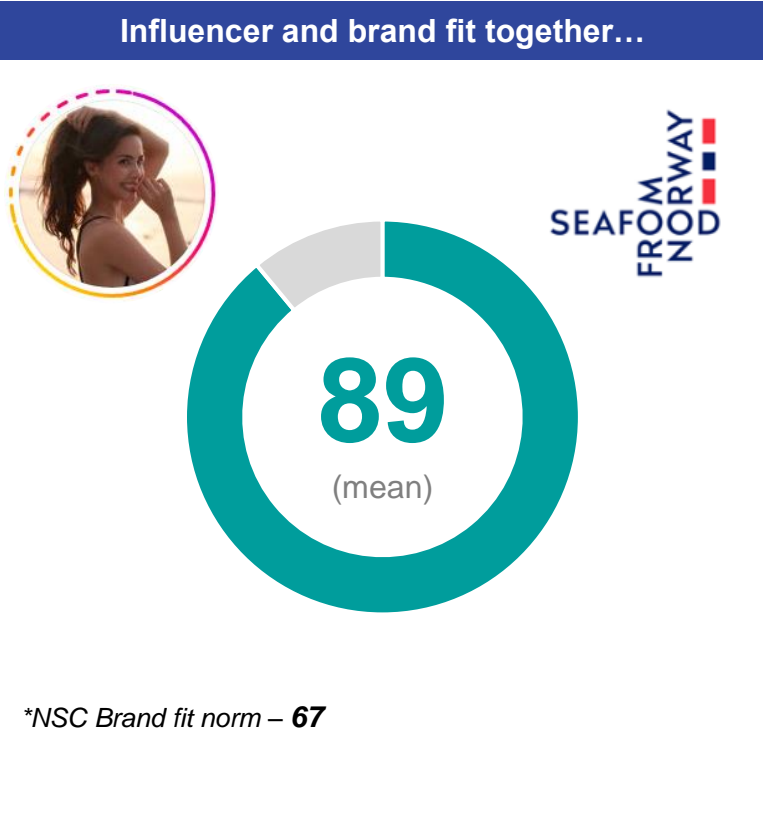
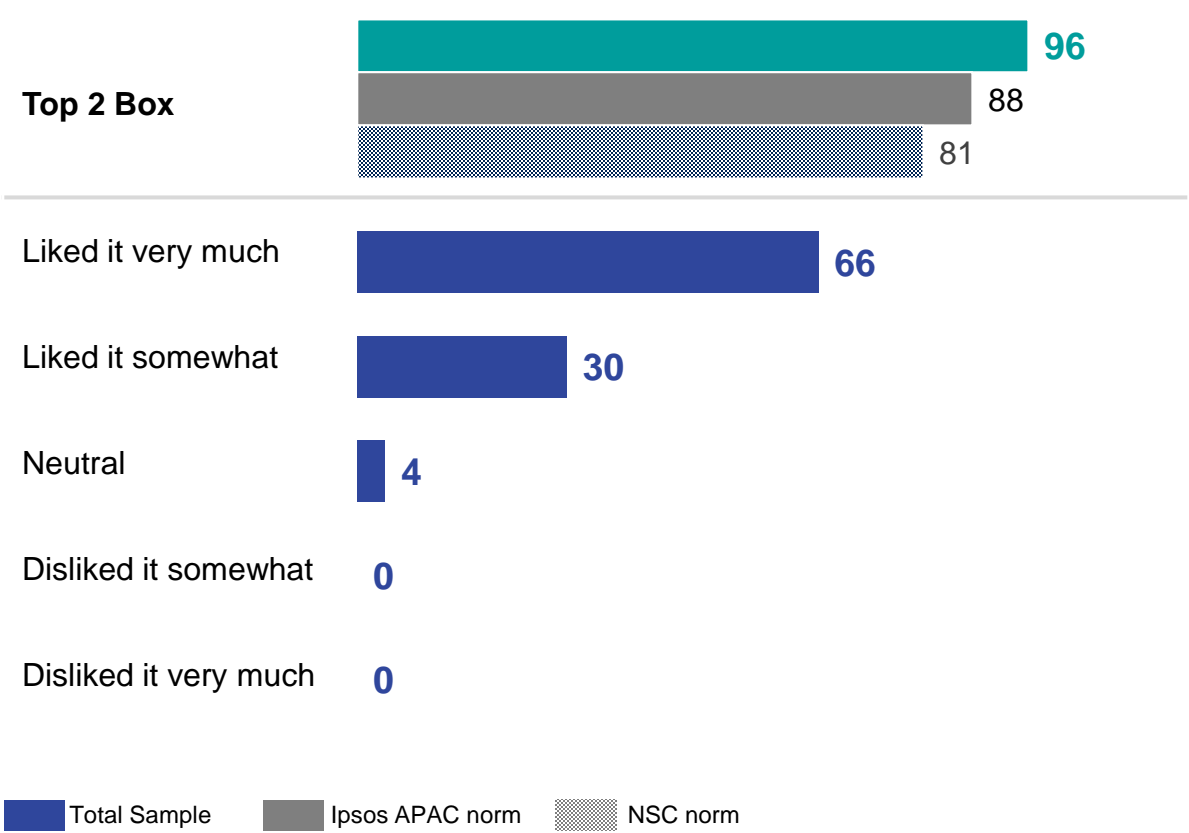
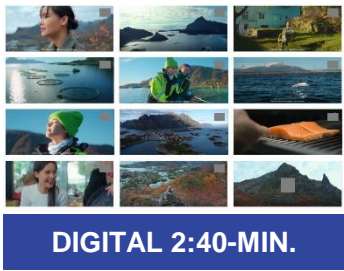


Image of Influencer: How much do you agree that {Yaya} ...is? Brand Fit Influencer: Please rate how much {Yaya} and {Seafood from Norway} fit together.
Base: Aware of influencer n=726

LIKEABILITY

Overall, how pleasant did people perceive the creative?

The ad has an exceptional level of likability. There are no respondents who don't like the ad, and the level of likability reaches 96%.



“I like it because I see nature, sustainability, being the world’s best source of salmon”

“This ad conveys nature, freedom, safety. Farmed fish is a good and perfect natural source”

“The advertisement made people feel the abundance of nature. The quality of raw materials and food as well as advanced technology make it look reliable and fascinated by Norway”

“Made me want to buy salmon from Norway even more”

Likeability: Overall, how did you feel about the ad?
Base: Total Sample n=750

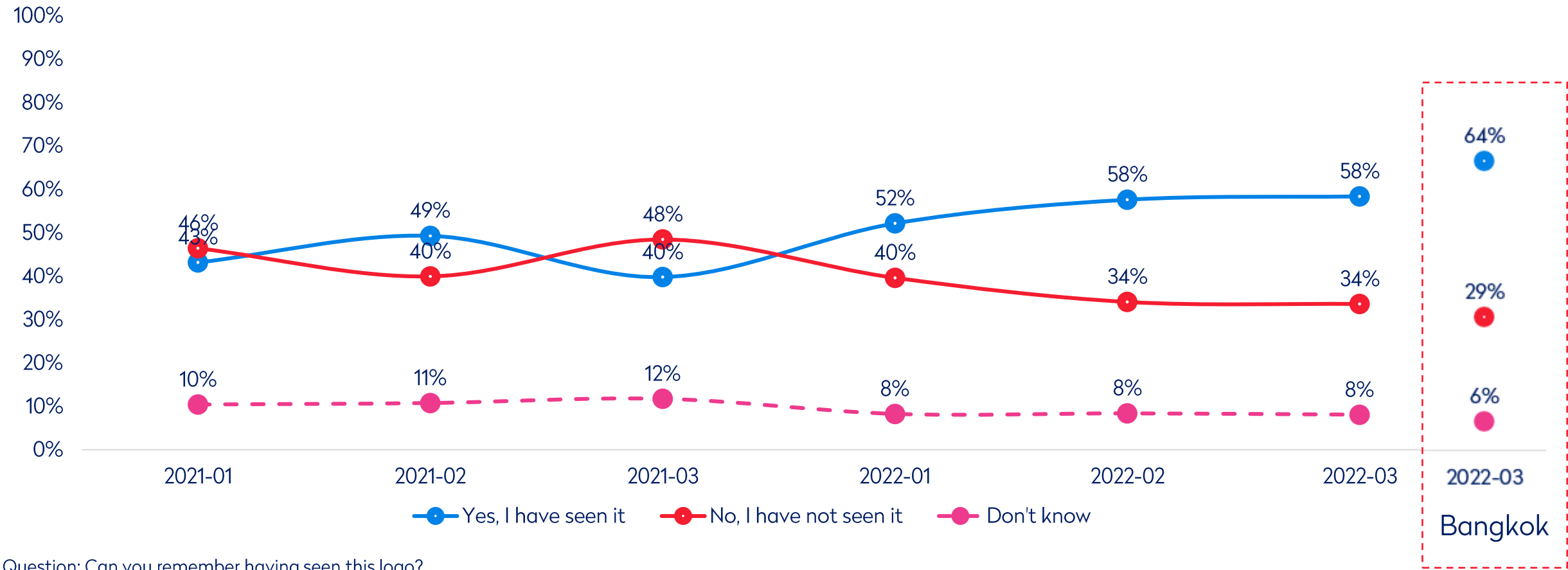




Consumer tracking

2022-03, Thailand

Awareness of logo



Question: Can you remember having seen this logo?

Base Total: 750

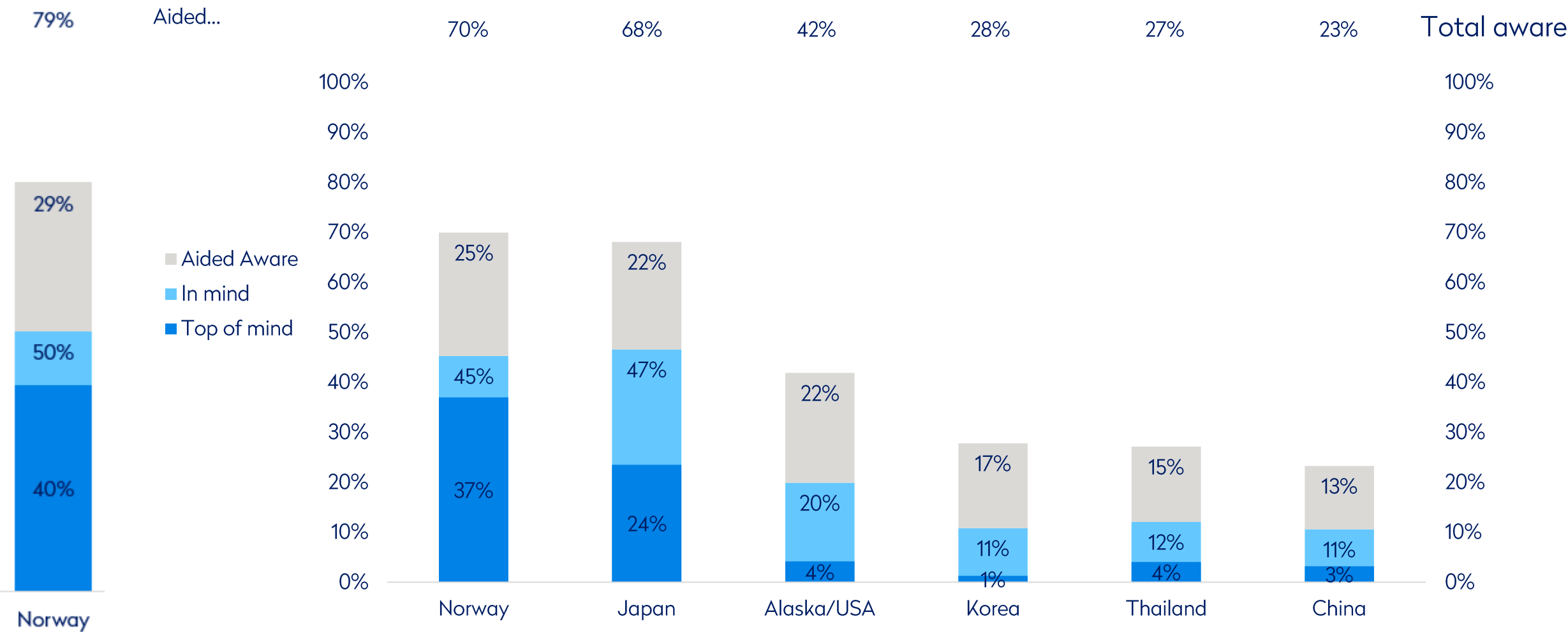
NORWEGIAN

2022-03, Thailand

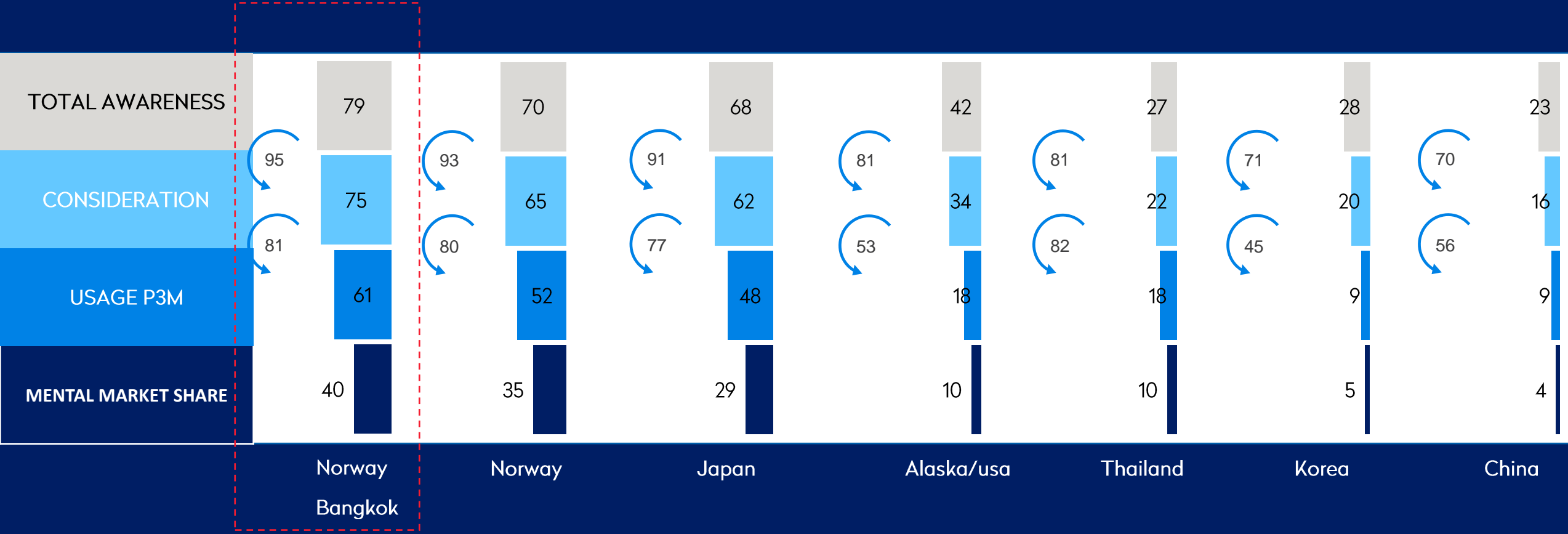


Composition of Awareness current wave

Top of mind + other mentioned = total unaided + aided = total awareness



Brand funnel Salmon



Base Total Salmon: 568

NORWEGIAN SEAFOOD COUNCIL

2022-03, Thailand





Learnings

Negative

- High risk working with influencers
- Activation of sponsorship need budget allocation
- Adaption can be challenging with in the brand concept
- Fame can stand in the way of brand messaging
- Too many sponsors weakens the effect of the sponsorship

Positive

- Door opener to media and campaign partners
- Good match between influencer and SFN
- Create attention and put SFN in the top league
- Gives self confidence



Market plan 2023

Asbjørn Warvik Rørtveit, Director, South-East Asia, Norwegian Seafood Council



Budget South-East Asia 2023

27,5 MNOK

Media	Budget
Thailand <ul style="list-style-type: none">• Salmon 10 MNOK• Pelagic 3 MNOK• Fjord Trout 2 MNOK	15 MNOK
Taiwan <ul style="list-style-type: none">• Pelagic 3,5 MNOK• Salmon 2,5 MNOK	6 MNOK
Vietnam <ul style="list-style-type: none">• Salmon 2 MNOK• Shellfish 1 MNOK• Whitefish 0,5 MNOK	3,5 MNOK
Malaysia <ul style="list-style-type: none">• Fjord Trout 3 MNOK	3 MNOK

THAIFEX – ANUGA 2023, 23.-27. MAI



SEAFOOD EXPO – SINGAPORE 11-13 SEPTEMBER 2023

- Seafood From Norway Stand/Seafood Lounge 54 sqm
- Seafood Reception at The Norwegian Ambassadors residence 11. September
- Seafood Seminar at the Expo venue Afternoon 12 September.
- Seafood BBQ, Evening 12 September



Vietfood, Hanoi 9-11 November 2023,



NATURE MATTER

SEA FROM
NORWAY

SUSTAINABILITY MATTER

SEA FROM
NORWAY



SALMON

SEAFOOD
FROM
NORWAY



PEOPLE MATTER

SEAFOOD
FROM
NORWAY



NORWEGIAN
SEAFOOD COUNCIL

Proudly representing

SEAFOOD
FROM
NORWAY

The Norwegian flag is positioned vertically to the right of the text 'FROM NORWAY'. It consists of three horizontal stripes of red, white, and blue.