NORWAYS POSITION AS A HOLIDAY DESTINATION - 2016

INNOVASJON NORGE

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CONTENT

BACKGROUND AND DATA

BACKGROUND

This report looks into Norway's brand as a holiday destination in the seven European markets that are included in the ongoing Innovasjon Norge tracking. The report will give an overview of the Innovasjon Norge target group in the different countries, who they are, their travel habits, how they perceive Norway as a holiday destination and what Norway can do to try and convince them to go on a holiday in Norway.

The aim of the report is thus to give insights on how to appeal to the Innovasjon Norge target groups in the seven important markets. This knowledge is essential to maintain and improve Norway's position as an attractive holiday destination that tourists are aware of and perceive as an exciting place to go for their next holiday.

DATA AND READING GUIDELINES

The report is based on data for the whole year 2016 collected from the ongoing Innovasjon Norge tracking in seven European countries (Norway, Sweden, Denmark, UK, Germany, France and Netherlands). There are two exceptions two this:

1. To add some perspective to their development over time the time series for selected brand targets covers the period from 2012 to September 2017.
2. The pages showing the difference in the perception of Norway between visitors and non-visitors are for the year 2017 (January to September). This is included to show the opportunity with this new question, that is added for the year 2017.

On some pages the countries are compared to an average. This is the average for all countries except Norway. Average thus refers to the average in the six foreign markets.

MARKED SHARE

The map shows the share of the three target groups in the seven countries that Innovasjon Norge is tracking. The nature based target group is the largest in all countries with a share between 65% (France) and 72% (UK) outside of Norway. The northern lights target group is the second largest with a share of 25%-50% in the countries and the alpine target group is the smallest of the three target groups.

NORWAY

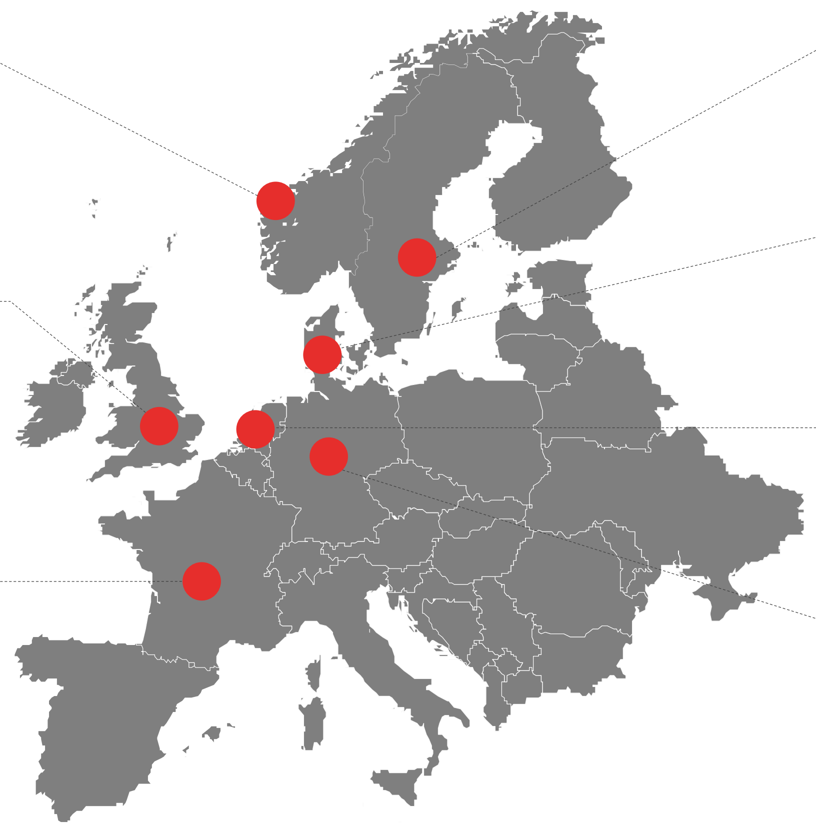
Nature: 85%
Northern light : 48%
Alpine: 35%

UK

Nature: 72%
Northern light: 53%
Alpine: 29%

FRANCE

Nature: 65%
Northern light : 50%
Alpine: 34%



SWEDEN

Nature: 67%
Northern light : 32%
Alpine: 21%

DENMARK

Nature: 66%
Northern light : 24%
Alpine: 16%

NETHERLAND

Nature: 69%
Northern light : 34%
Alpine: 21%

GERMANY

Nature: 69%
Northern light : 37%
Alpine: 25%

MAIN FINDINGS – UK, DENMARK, NETHERLANDS AND FRANCE

		UK	DENMARK	NETHERLANDS	FRANCE
TARGET GROUP		Primarily between **18 and 55 years** old. More than half has **no children**. Interested in **wild unspoiled nature, big cities** and **local art, culture and lifestyles**. Two out of three says they are interested in **outdoor activities**.	Over 40% of Danes are **over 56 years old**. 77% have **no children**. Interested in **big cities and local art, culture and lifestyles**. Overall **Less interested in outdoor activities** compared to average across all markets.	The Dutch are very close to the average on all background measures, except they are a little bit **younger and more educated.** They are interested in **big cities, local art, culture and lifestyle and the unspoiled nature**. They are also more interested in **cycling** than average.	The French group travel less often. They are **younger and they have more children.** They are interested in **dramatic nature and clean unspoiled nature**. But also in **big cities and local art, culture and lifestyles.**
NORWAYS BRAND	**TOP OF MIND**	The Northern Lights, snow, cold, fjords, beautiful scenery	Nature, skiing, mountains, snow, beautiful, expensive	Nature, the northern lights, snow, cold, fjords	Fjord, beautiful scenery, nature, snow and cold
	BRAND VALUES	+ Spectacular nature + Spectacular mountains + Natural phenomena + Spectacular fjords ÷ Less crowded skiing ÷ Wide variety of ski in and out ÷ Good angling ÷ Good cycling	+ Spectacular nature + Spectacular mountains + Hiking + Excellent snowboard and skiing ÷ Less crowded destination ÷ Cuisine and local specialties ÷ Sustainable alternatives ÷ Good cycling	+ Hiking + Spectacular nature + Beautiful lights + Spectacular phenomenon ÷ Family friendly skiing ÷ Less crowded destination ÷ Wide variety of ski in and out ÷ Good cycling	+ Spectacular nature + Interesting places + Natural phenomena + Best place to experience northern lights ÷ Good cycling ÷ Good angling ÷ Attractive offers ÷ Less crowded skiing
INSIDERS AND OUTSIDERS		The visitors are especially likely to say that it is easy to get to Norway and that there are attractive offer for a holiday compared to non-visitors.	Even though most Danes have already visited Norway, are there still potential in explaining that easy to get to Norway and that the population are welcoming.	The visitors and non-visitors of the Netherlands mostly disagree on Norway having attractive offers and if they have good cuisine.	The French know Norway by its nature regardless of an actual visit or not. The two groups differ in their view of Norway having attractive offers for a holiday.
SOV		UK is the country where Norway has the smallest SoV. But Norway's SoV is the highest among the Nordic countries	Norway has the highest SoV of the markets in Denmark. Especially during the winter months. In the summer Denmark and Italy have higher SoV.	Norway ranks as 5th on SoV in the Netherlands. France, Italy, Austria and Germany all holds bigger part of the SoV.	SoV for Norway in France is ranking 4th, but is rising. France, Canada and Italy is all ranking above, but Italy's SoV is falling so Norway's SoV is above in the end of the year.

MAIN FINDINGS – GERMANY, NORWAY AND SWEDEN

		GERMANY	NORWAY	SWEDEN
TARGET GROUP		Almost half between 36-55 yrs. **They travel less often, but are more likely than average to visit Norway**. Interested in clean and unspoiled nature and local art, culture and lifestyle. **More motivated by cycling than the average.**	89% of the Norwegians have had holiday in Norway or abroad **more than 3 times** in the past 3 years. They are interested in **big cities, local art, culture and lifestyle.** They are more motivated **by hiking** compared to average.	On average a little **older** and with less children. **Travels a bit more than average** and almost 1/3 **remembers to have seen an ad** for Norway. Interested in **big cities, local art, culture and lifestyles and dramatic nature.**
NORWAYS BRAND	**TOP OF MIND**	Nature, fjords, untouched landscape, snow	Nature, Lofoten, expensive, beautiful, mountainsides	Nature, fjords, Hurtigruten, beautiful, expensive, mountains
	BRAND VALUES	+ Spectacular nature + Good hiking + Natural phenomena + Spectacular fjords ÷ Wide variety of ski in and out ÷ Family friendly skiing ÷ Less crowded skiing ÷ Wide selection of slopes	+ Spectacular fjords + Good hiking + Spectacular natural scenery + Spectacular mountains ÷ Attractive offer for holidays ÷ Wide variety of ski in and out ÷ Less crowded skiing ÷ Snow guarantee	+ Spectacular fjords + Good hiking + Spectacular natural scenery + Spectacular mountains ÷ Best place to see northern lights ÷ Wide variety of ski in and out ÷ Less crowded skiing ÷ Great cuisine and local specialties
INSIDERS AND OUTSIDERS		The two groups agree on Norway's nature, good hiking and interesting experience. They differ on their view on attractive offers as well as the practical matters of planning and getting there.	Almost all Norwegians have been on vacation in there home country and there are only a couple of percent that say they have never been on a holiday in Norway.	The visitors and non-visitors disagree on whether it is easy to plan a trip to Norway and if there many different slopes for skiing as well as Norway being a country with welcoming locals.
SOV		Norway ranks 4th in the German SoV with an average (and steady) 9%. Both Germany, Austria and Italy reach higher average SoV in Germany.	Norway’s SoV is the second highest in Norway. Denmark's SoV is slightly higher throughout most of 2016.	Norway's SoV in Sweden is placed 4th outranked by both Sweden, Denmark and Italy. Norway's SoV is rather steady throughout the year.

UK

UK

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EPINION

CHARACTERISTICS OF THE BRITISH TARGET GROUP

The chart below describes the characteristics of the British target group. Compared to the average of the six non-Norwegian markets the British target group is slightly younger, more likely to have children and slightly more likely to visit Norway within the next 12 months. But they are less likely to remember having seen an add for Norway recently. The group associate Norway with the fjords, the norther lights, snow and beautiful scenery.

DEMOGRAPHIC CHARACTERISTICS

51% / 51%
Women

40% / 38%
1-2 travels abroad in the past 3 years

60% / 62%
3 or more travels abroad in the past 3 years

58% / 66%
No children

20% / 16%
1 child

22% / 17%
2 or more children

37% / 31%
18-35 years old

42% / 42%
36-55 years

21% / 27%
56 years or older

15,4 / 14,7
Average years of education

45.000 - 56.000 EUR
Median income

- UK target group
- Average (foreign markets)

N=4.673

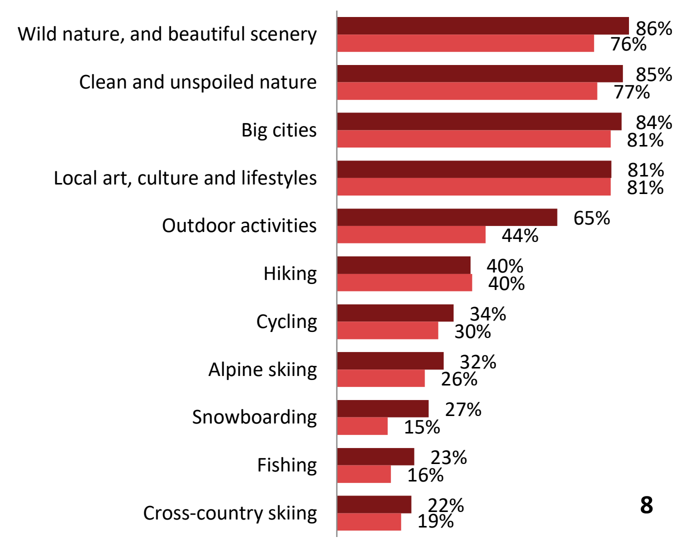
ASSOCIATIONS TO NORWAY

PROBABILITY FOR VISIT AND RECALL

4,5 / 3,9
Likely to visit Norway within 12 months

15% / 21%
Remember seeing an add for Norway

MOTIVATION FOR TRAVEL ON HOLIDAY ABROAD



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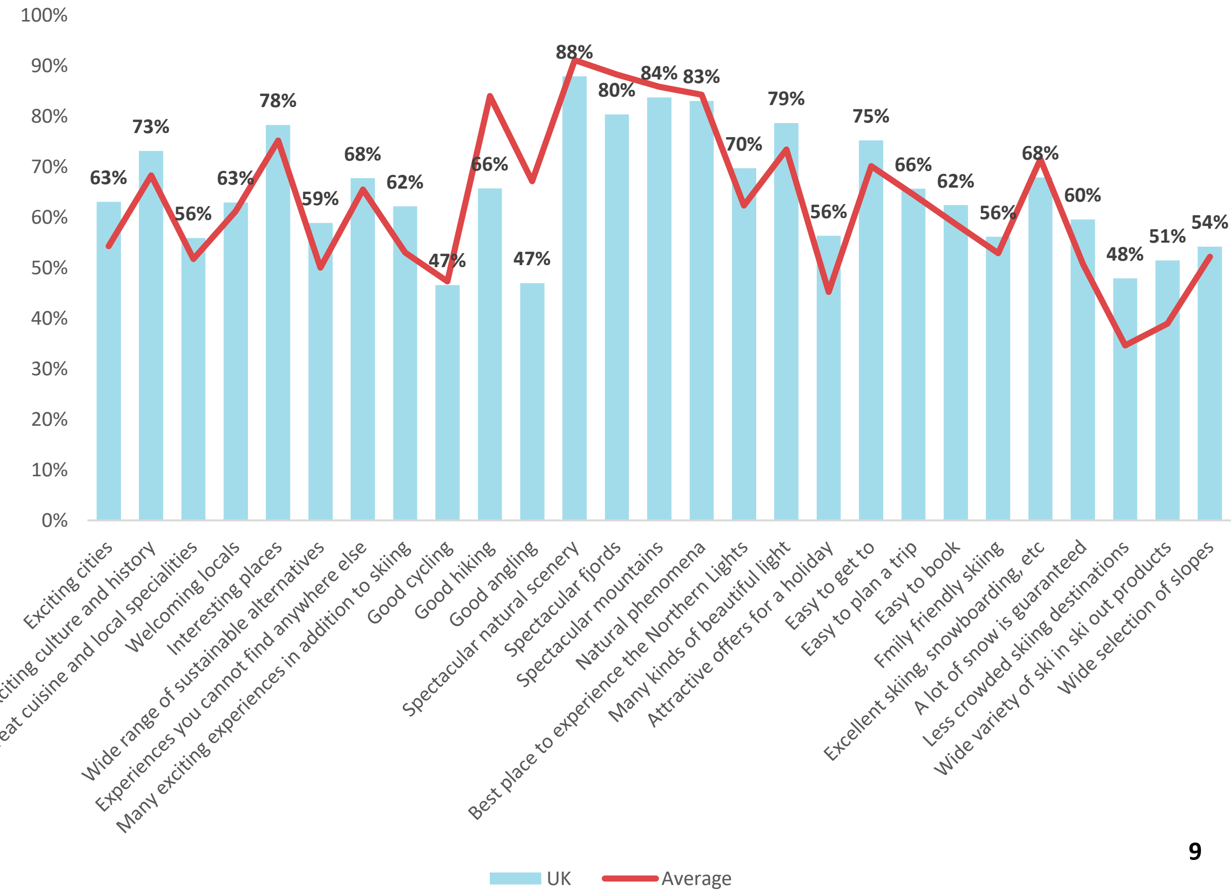
EPINION

HOW THE BRITISH TARGET GROUP SEES NORWAY

BRAND TARGETS

The chart on the right shows the precentage that agrees that the brand targets characterize Norway. The blue bars display the percentage in the UK target group that agrees and the red line show the average across the six markets (Norway excluded).

A higher percentage in the UK than on average agrees that Norway has exciting culture and history, interesting places, has beautiful lights and less crowded skiing destinations. The UK target group is below average when looking at their perception of Norways a good place for angling and cycling.



N=4.673

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EPINION

VISITORS AND NON-VISITORS (data from 2017)

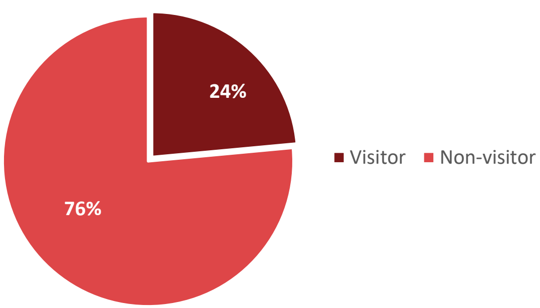
The circle below illustrates that almost a quarter of the tourists in the UK target group have visited Norway before.

The chart to the right shows the percentage that agrees with the branding targets for the people in the target group that have visited Norway before and the people in the target group who have not visited Norway before.

For all brand targets the group that have visited Norway is more positive towards Norway than the group that have not visited Norway.

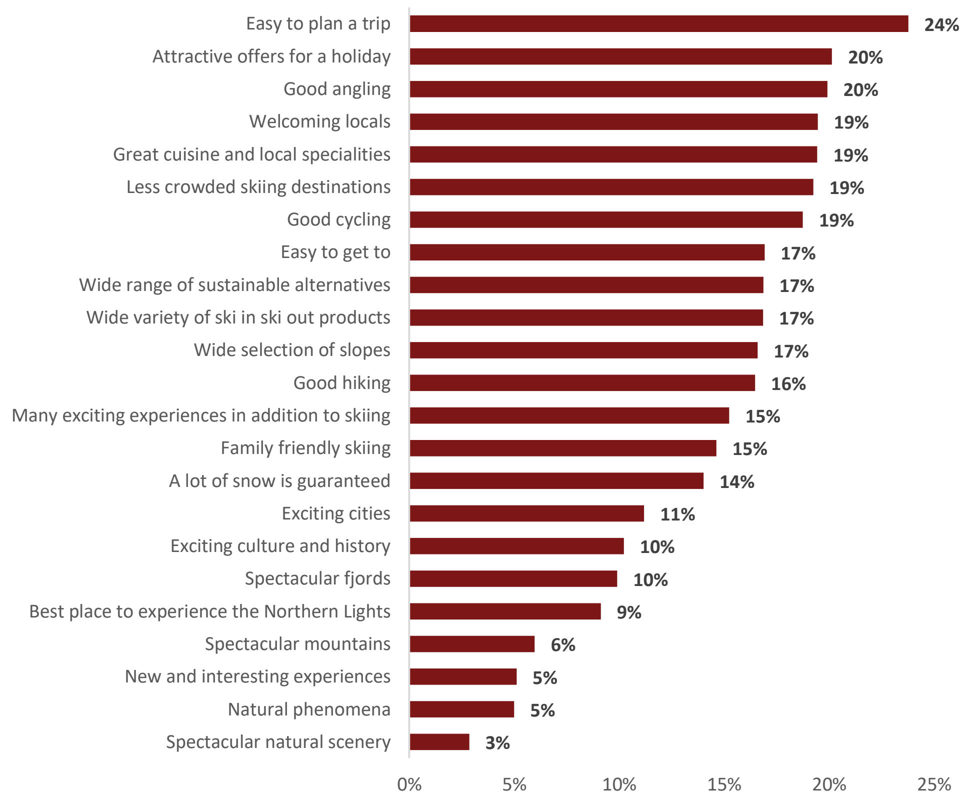
The two groups have almost similar views on Norway's nature. They differ most on their view of how easy it is to plan a trip to Norway, that there are attractive offers for a holiday in Norway and that there are welcoming locals.

UK TARGET GROUP WHO HAVE VISITED NORWAY



N=3998

DIFFERENCE BETWEEN PERCENTAGE VISITORS THAT AGREE AND PERCENTAGE NON-VISITORS THAT AGREE



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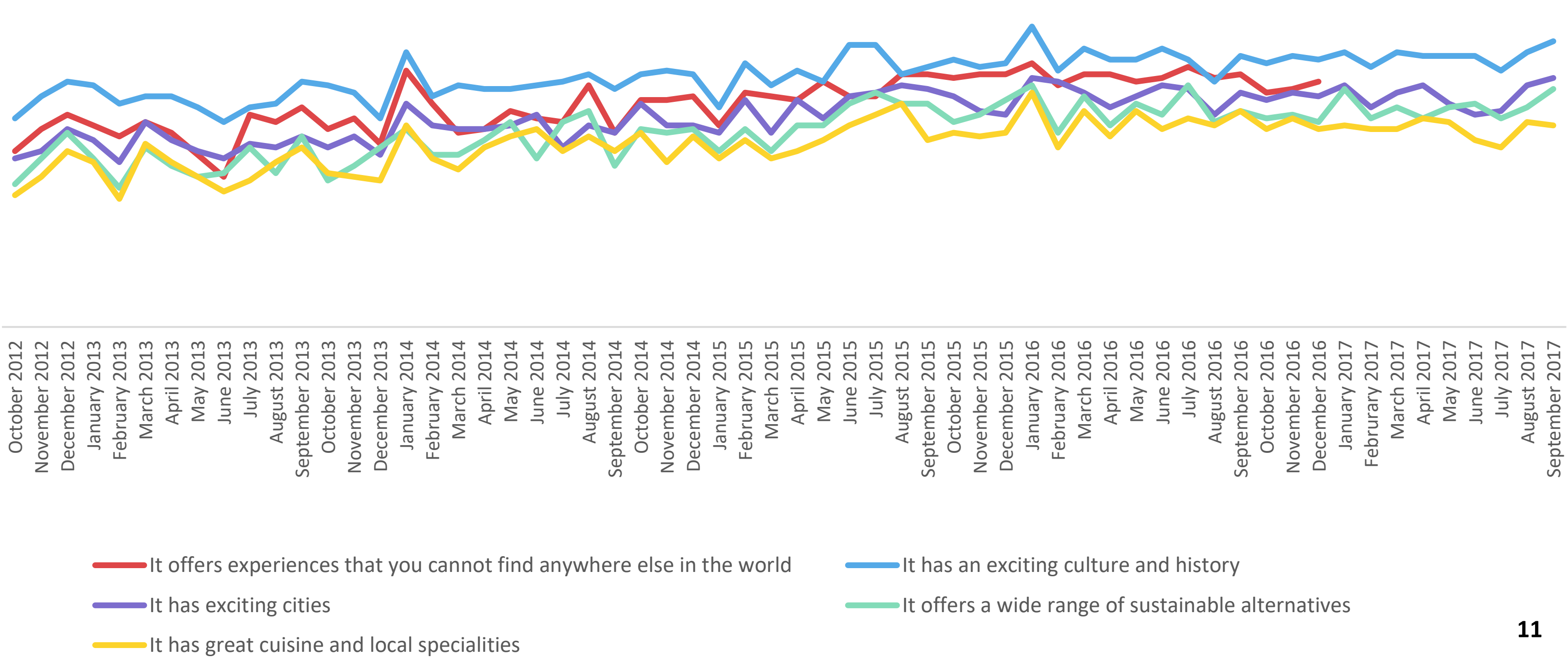
EPINION

DEVELOPMENT IN KEY BRAND TARGETS SINCE 2012

The chart below shows the development in the perception of Norway on selected brand targets. For all five brand targets displayed here there is a slowly but steady increase in the perception of Norway having good offers on these parameters. So even though the view of Norway is fluctuating there seems to be a small positive trend in the view of Norway on the five brand targets below.

DEVELOPMENT IN KEY INDICATORS



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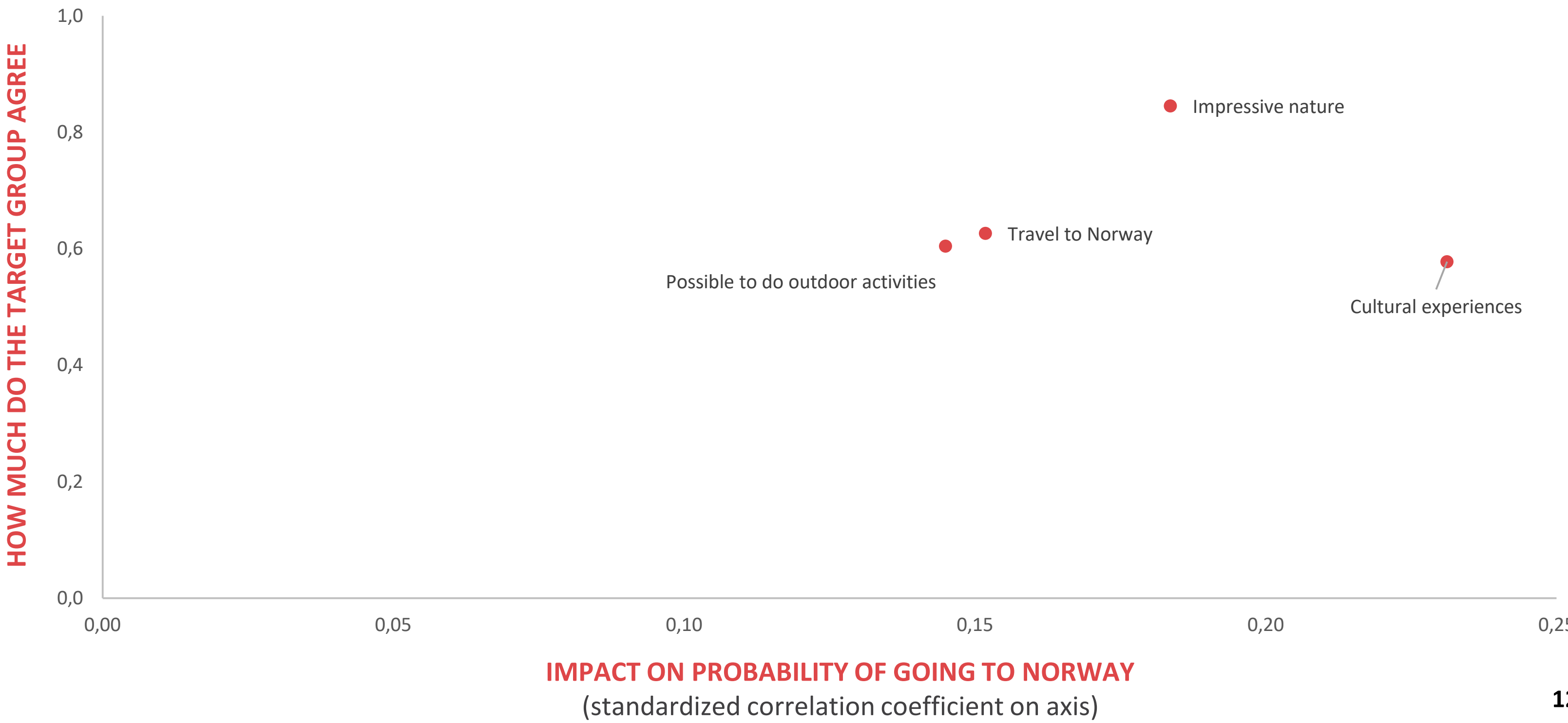
EPINION

DRIVERS FOR THE PROBABILITY TO VISIT NORWAY

The branding targets have been reduced to five dimensions (see page 57). In the chart below are the four dimensions that appears to have a statistically significant impact on the probability of visiting Norway displayed. The chart shows that a large share of the target group agrees that Norway has impressive nature. But the perception of Norway as having a lot of interesting cultural experiences have the highest impact on the probability of going to Norway. And the relatively low share that agrees with this suggests that Norway should try to improve the target groups perception of Norway as a place with interesting cultural experiences.



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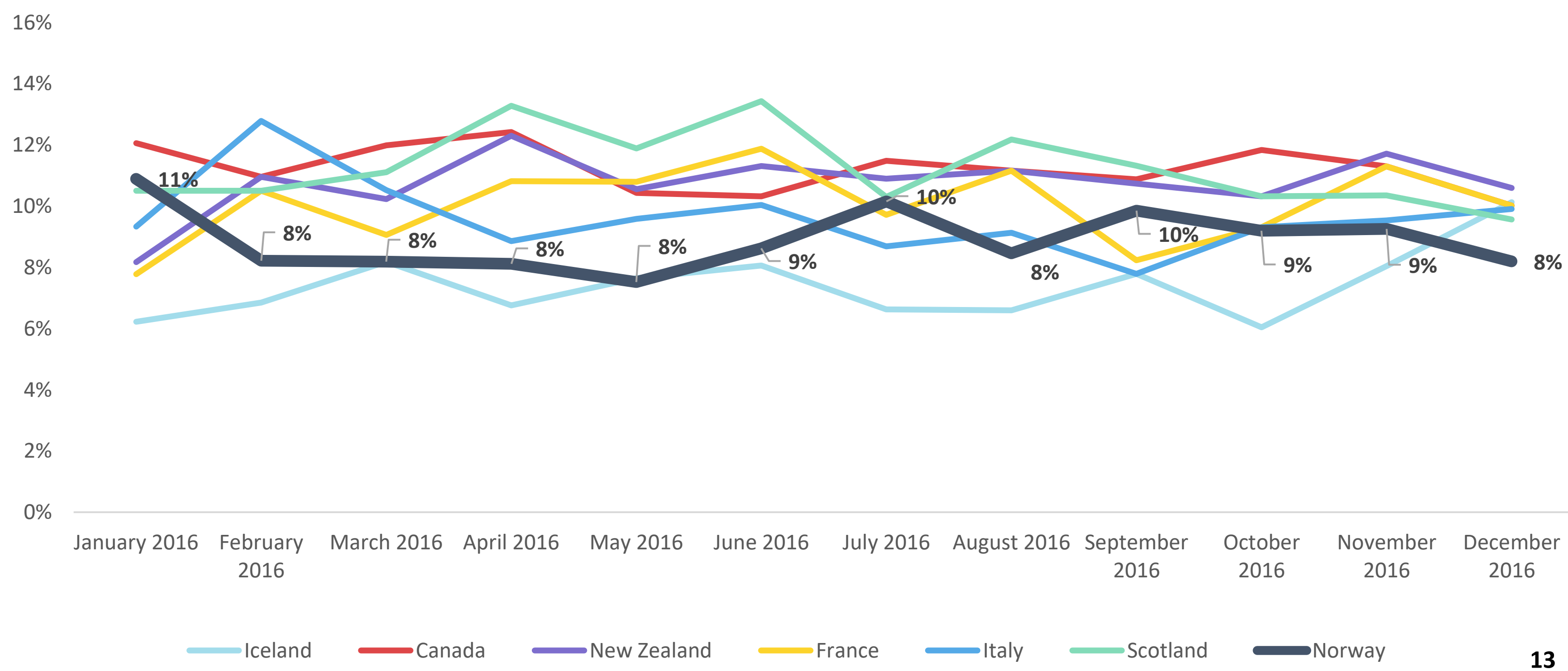
EPINION

SHARE OF VOICE IN THE UK

Below is an illustration of the development of Norways Share of Voice across 2016 in the UK compared with the Share of Voice for other markets. On average Norway is ranking 6th when looking at the Share of Voice in the UK. Norways SoV seems stable across most of the year but spikes at around 10% in the summer months after being around 8% in the spring. Canada and Scotland have the higest SoV in the UK but Norways SoV is better than both Denmark and Sweden who both average 4% across the year.

DEVELOPMENT IN SHARE OF VOICE IN THE UK COMPARED TO OTHER COUNTRIES



DENMARK

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EPINION

CHARACTERISTICS OF THE DANISH TARGET GROUP

The chart below describes the characteristics of the Danish target group. Compared to the average of the markets the Danes travel slightly more often. They are less likely to have children and they are slightly older than average. They are less likely to say they will visit Norway within the next 12 months. Their motivation for traveling abroad is primarily to visit big cities and experience local art, culture and lifestyles. However, the Danes mostly associate Norway with nature, skiing and as beautiful country.

DEMOGRAPHIC CHARACTERISTICS

50% / 51%
Women

31% / 38%
1-2 travels abroad in the past 3 years

69% / 62%
3 or more travels abroad in the past 3 years

77% / 66%
No children

12% / 16%
1 child

12% / 17%
2 or more children

31% / 31%
18-35 years old

27% / 42%
36-55 years

42% / 27%
56 years or older

13,9 / 14,7
Average years of education

54.000 - 67.000 EUR
Median income

- Danish target group
- Average (foreign markets)

N=2.664

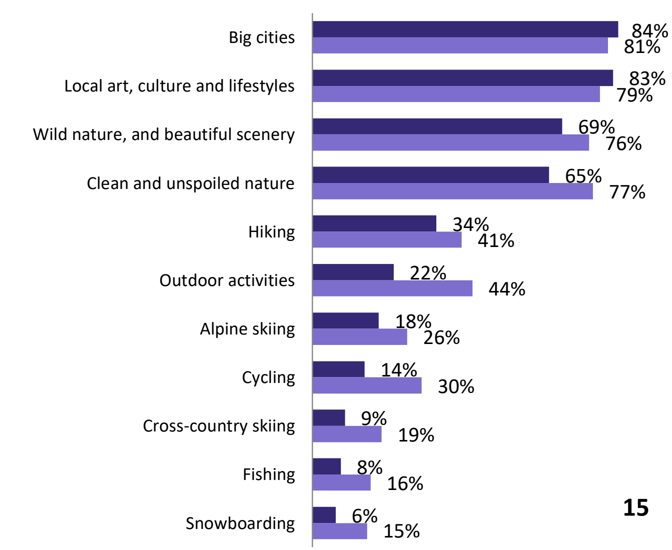
ASSOCIATIONS TO NORWAY

PROBABILITY FOR VISIT AND RECALL

2,8 / 3,9
Likely to visit Norway within 12 months

28% / 21%
Remember seeing an add for Norway

MOTIVATION FOR TRAVEL ON HOLIDAY ABROAD



Innovasjon Norge

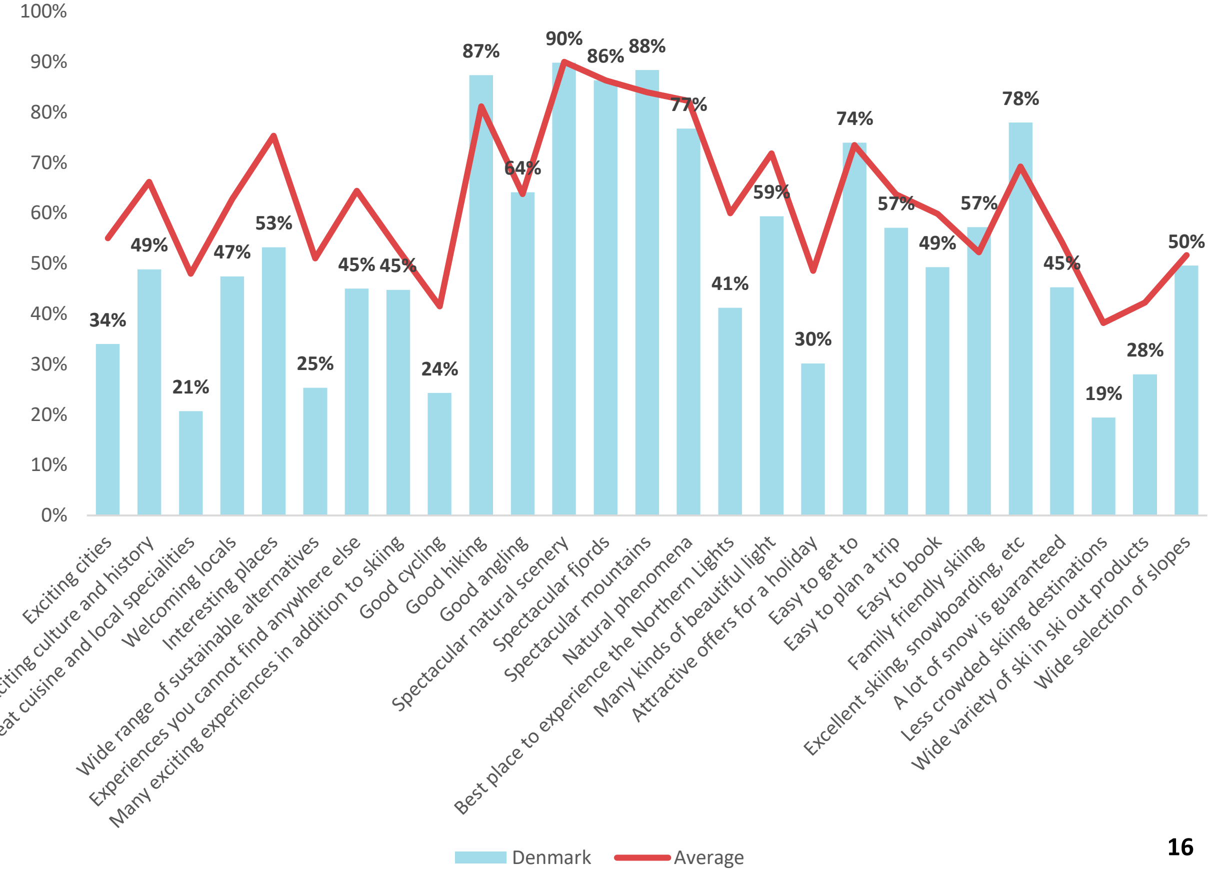
EPINION

HOW THE DANISH TARGET GROUP SEES NORWAY

BRAND TARGETS

The chart on the right shows the precentage that agrees that the brand targets characterize Norway. The blue bars display the percentage in the Danish target group that agrees and the red line show the average across the six markets (Norway excluded).

A higher percentage in Denmark than on average agrees that Norway has has good hiking, and exellent skiing and snowboarding conditions. The danish target group is below average on most branding targets and thus seems to not have as positive a view as most other countries that are tracked.



N=2.664

Innovasjon Norge

EPINION

VISITORS AND NON-VISITORS (data from 2017)

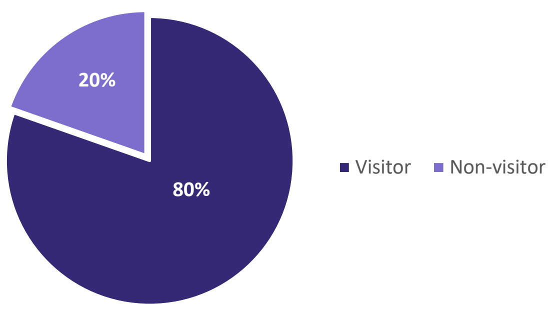
The circle below illustrates that 80% of the tourists in the Danish target group have visited Norway before.

The chart to the right shows the percentage that agrees with the branding targets for the people in the target group that have visited Norway before and the people in the target group who have not visited Norway before.

For all brand targets the group that have visited Norway is more positive towards Norway than the group that have not visited Norway.

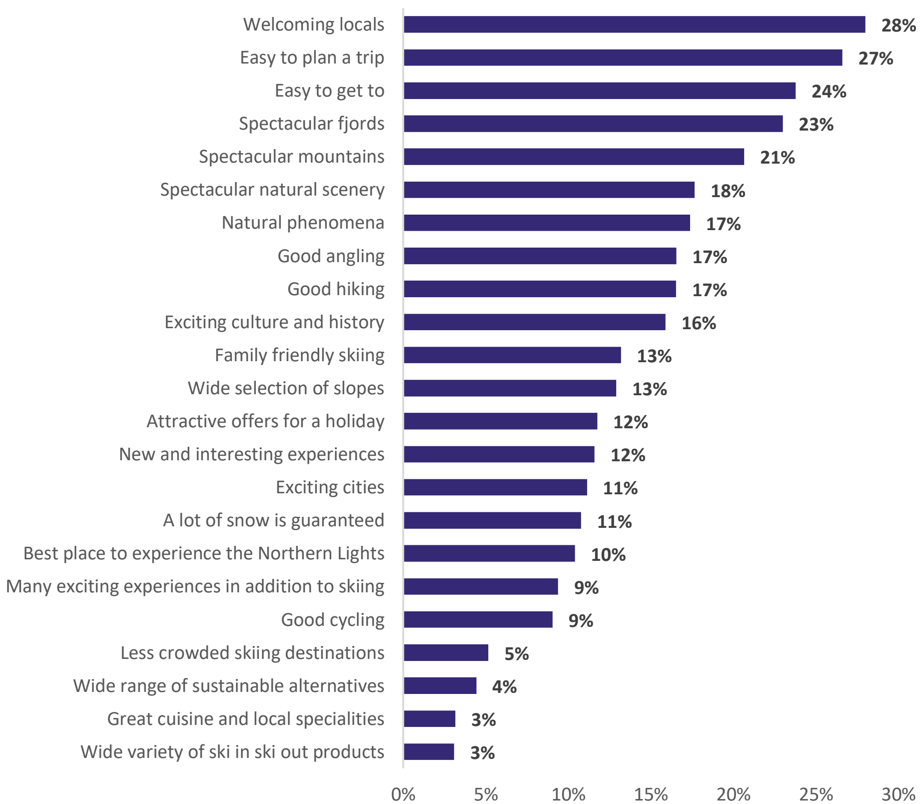
The group that have visited Norway before are more likely to agree that Norway have welcoming locals and that it is easy to plan a trip to Norway compared to the Danish non-visitors.

DANISH TARGET GROUP WHO HAVE VISITED NORWAY



N=3960

DIFFERENCE BETWEEN PERCENTAGE VISITORS THAT AGREE AND PERCENTAGE NON-VISITORS THAT AGREE



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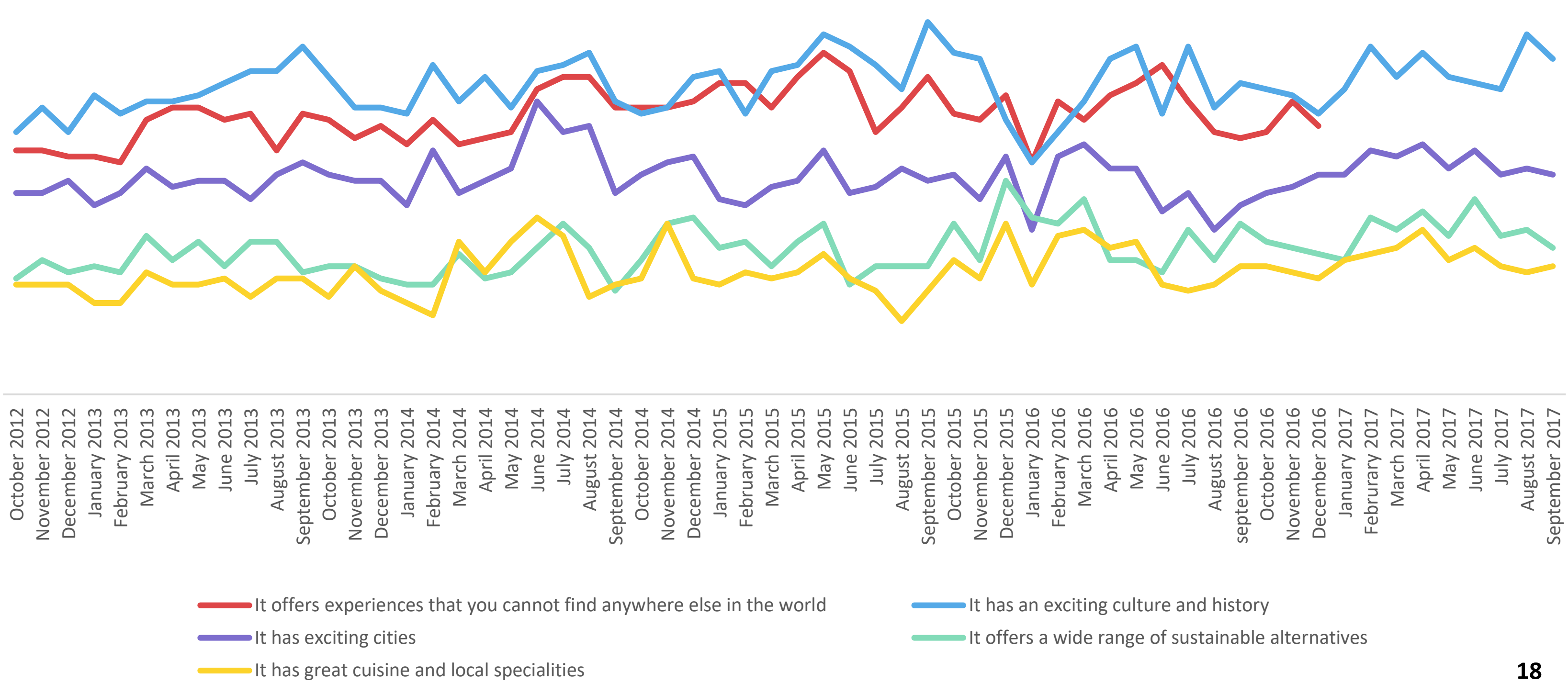
EPINION

DEVELOPMENT IN KEY BRAND TARGETS SINCE 2012

The chart below shows the development in the perception of Norway on selected brand targets. All five brand targets displayed here continues to be more or less on the same steady level as previously. As apparent the percentage that agrees with the branding targets fluctuate throughout the year, but on average there seems to be little development over the years.

DEVELOPMENT IN KEY INDICATORS



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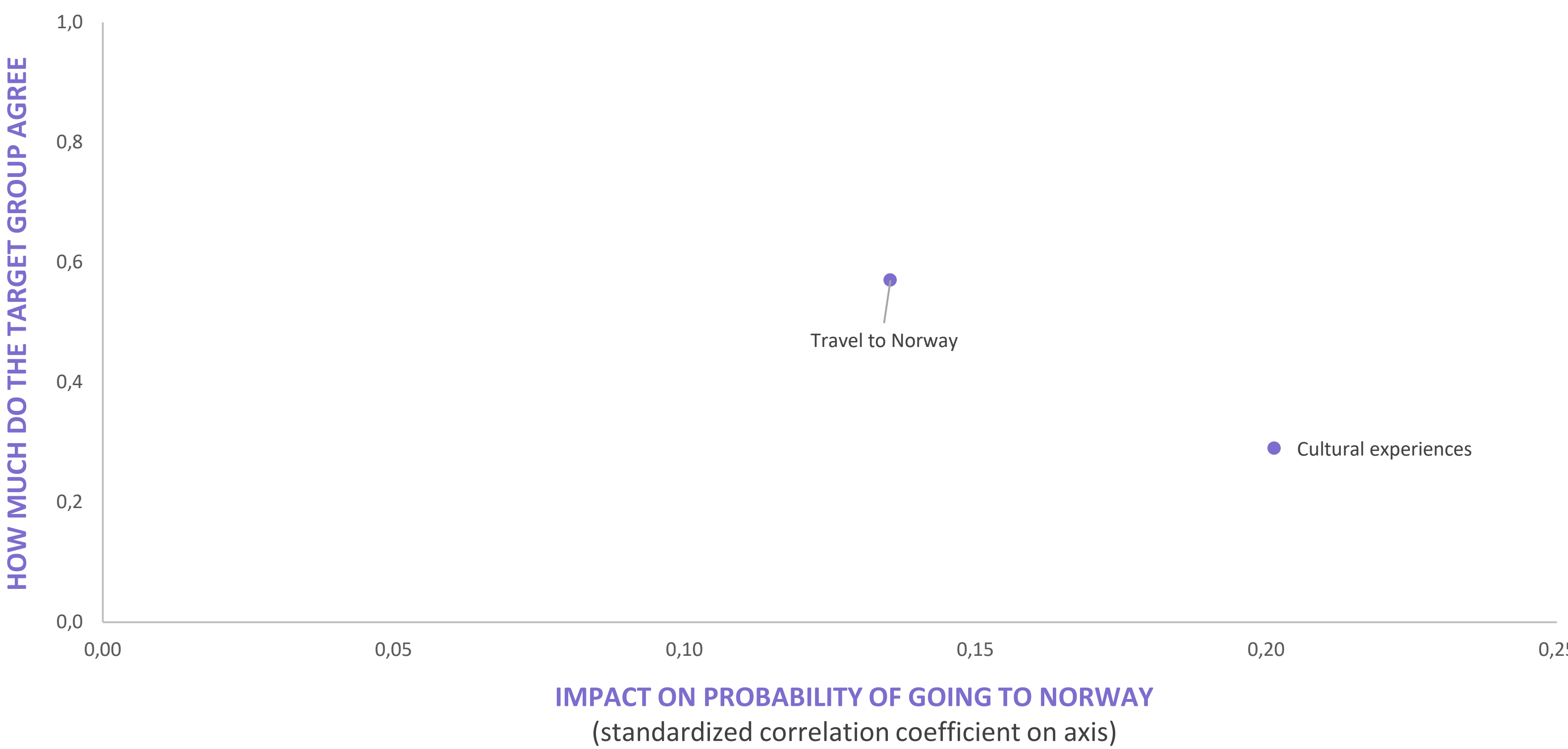
EPINION

DRIVERS FOR THE PROBABILITY TO VISIT NORWAY

The branding targets have been reduced to five dimensions (see page 57). In the chart below are the two dimensions that appears to have a statistically significant impact on the probability of visiting Norway displayed. Of these it is the perception of the cultural experiences that Norway has to offer that has the greats impact on the probability of visitng Norway. This is also the dimension that fewest agree with which suggests that Norway should work on improving the danish target groups perception of Norway as a place with many cultural experiences.



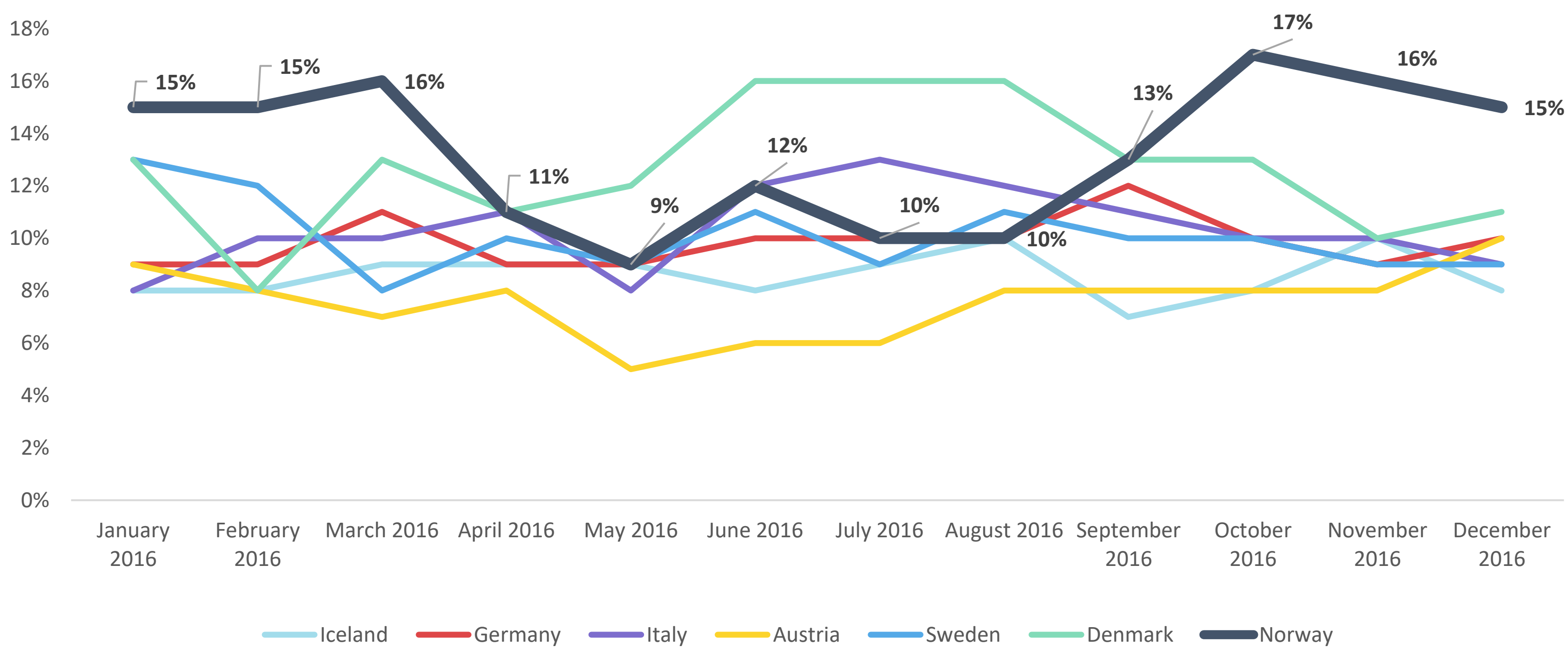
Innovasjon Norge

EPINION

SHARE OF VOICE IN DENMARK

Below is an illustration of the development of Norways Share of Voice across 2016 in Denmark compared with the Share of Voice for other markets. On average Norway is ranking 1th when looking at the Share of Voice in Denmark. Norways SoV is the highest in the winter months, most likely because Norway is a prefered ski destination for danes this time of the year. During the summer the norwegian SoV is surpassed by Denmark and Italy.

DEVELOPMENT IN SHARE OF VOICE IN DENMARK COMPARED TO OTHER COUNTRIES



Innovasjon Norge

NETHERLAND

Innovasjon Norge

EPINION

CHARACTERISTICS OF THE DUTCH TARGET GROUP

The chart below describes the characteristics of the Dutch target group. The Dutch target group does not differ much from the average although this group is slightly younger. Their main reasons for traveling abroad is to visit big cities or to experience local culture. They primarily associate Norway with nature, fjords and the northern lights.

DEMOGRAPHIC CHARACTERISTICS

50% / 51%
Women

39% / 38%
1-2 travels abroad in the past 3 years

61% / 62%
3 or more travels abroad in the past 3 years

66% / 66%
No children

15% / 16%
1 child

19% / 17%
2 or more children

34% / 31%
18-35 years old

44% / 42%
36-55 years

22% / 27%
56 years or older

15,3 / 14,7
Average years of education

25.000 - 40.000 EUR
Median income

- Dutch target group
- Average (foreign markets)

N=4600

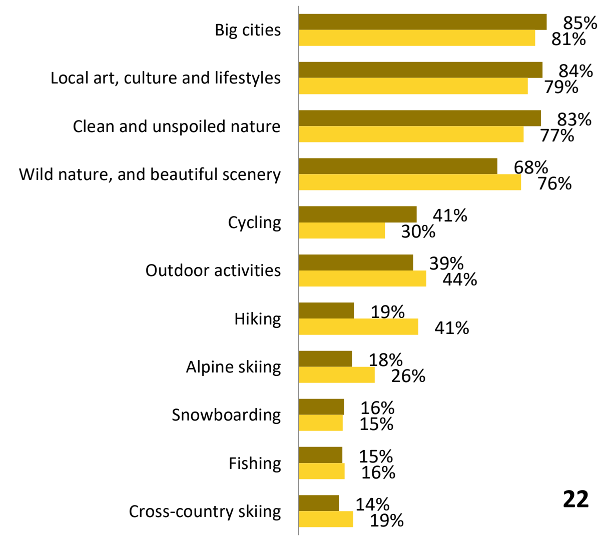
ASSOCIATIONS TO NORWAY

PROBABILITY FOR VISIT AND RECALL

3,8 / 3,9
Likely to visit Norway within 12 months

18% / 21%
Remember seeing an add for Norway

MOTIVATION FOR TRAVEL ON HOLIDAY ABROAD



Innovasjon Norge

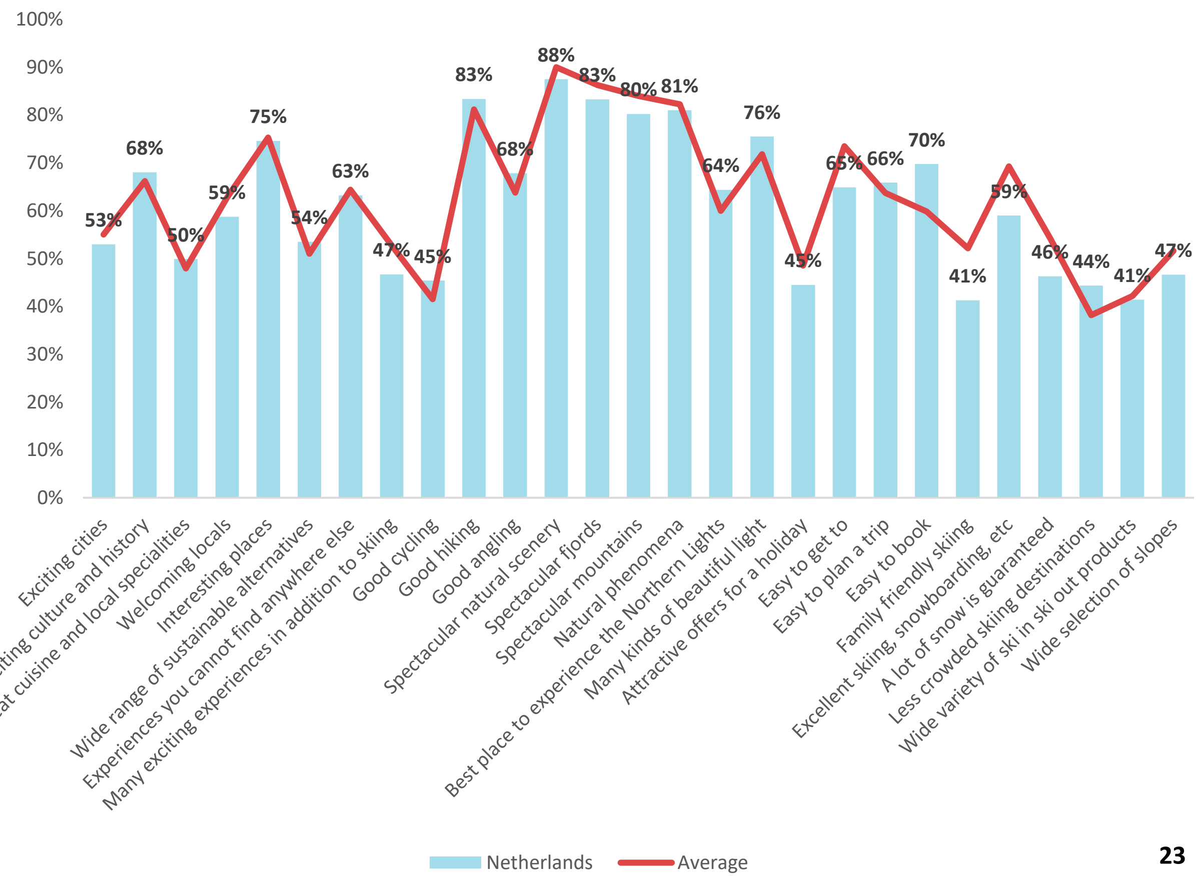
EPINION

HOW THE DUTCH TARGET GROUP SEES NORWAY

BRAND TARGETS

The chart on the right shows the precentage that agrees that the brand targets characterize Norway. The blue bars display the percentage in the Dutch target group that agrees and the red line show the average across the six markets (Norway excluded).

A higher percentage compared to the average agrees that Norway has good hicking that it is easy to book a trip to Norway. The dutch target group is below average when looking at their perception of Norways as a family friendly place to ski and as a place that has attractive offers for a holiday.



N=4600

Innovasjon Norge

EPINION

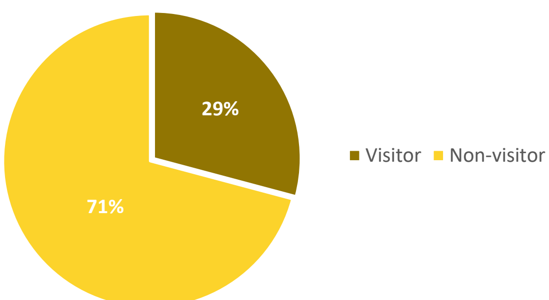
VISITORS AND NON-VISITORS (data from 2017)

The circle below illustrates that almost three out of ten in the Dutch target group have visited Norway before.

The chart to the right shows the percentage that agrees with the branding targets for the people in the target group that have visited Norway before and the people in the target group who have not visited Norway before.

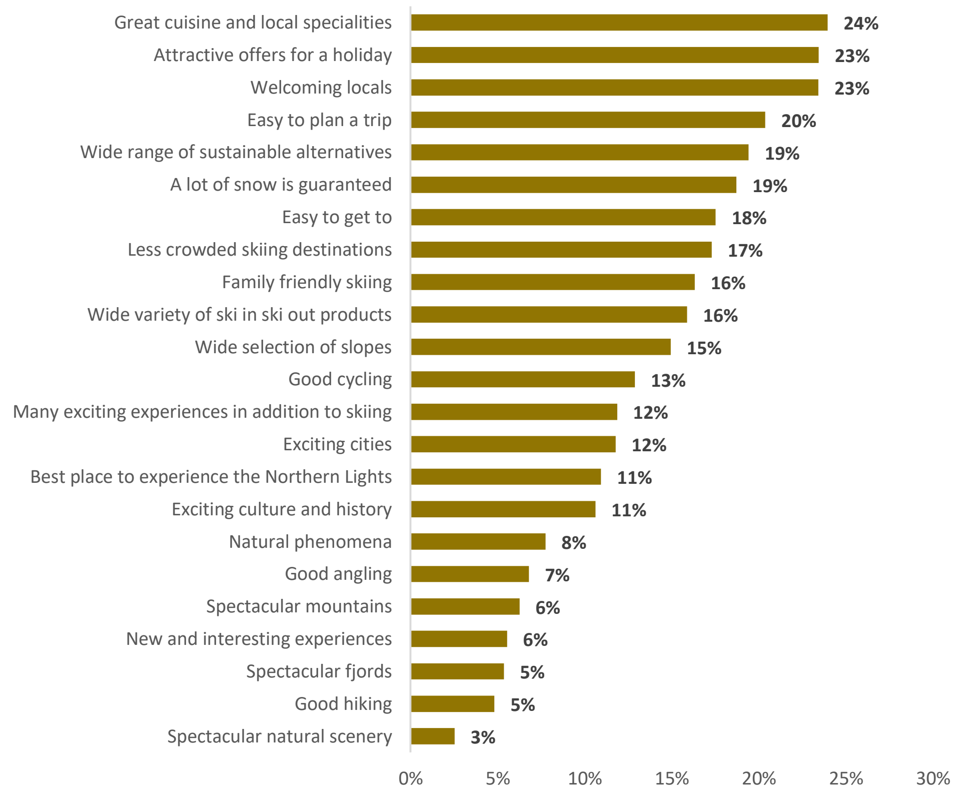
For all brand targets the group that have visited Norway is more positive towards Norway than the group that have not visited Norway. The two groups do not differ much in their view of the Norwegian nature but tourists that have visited Norway before are more likely to agree that Norway has great cuisine, attractive offers and welcoming locals.

DUTCH TARGET GROUP WHO HAVE VISITED NORWAY



N=4006

DIFFERENCE BETWEEN PERCENTAGE VISITORS THAT AGREE AND PERCENTAGE NON-VISITORS THAT AGREE



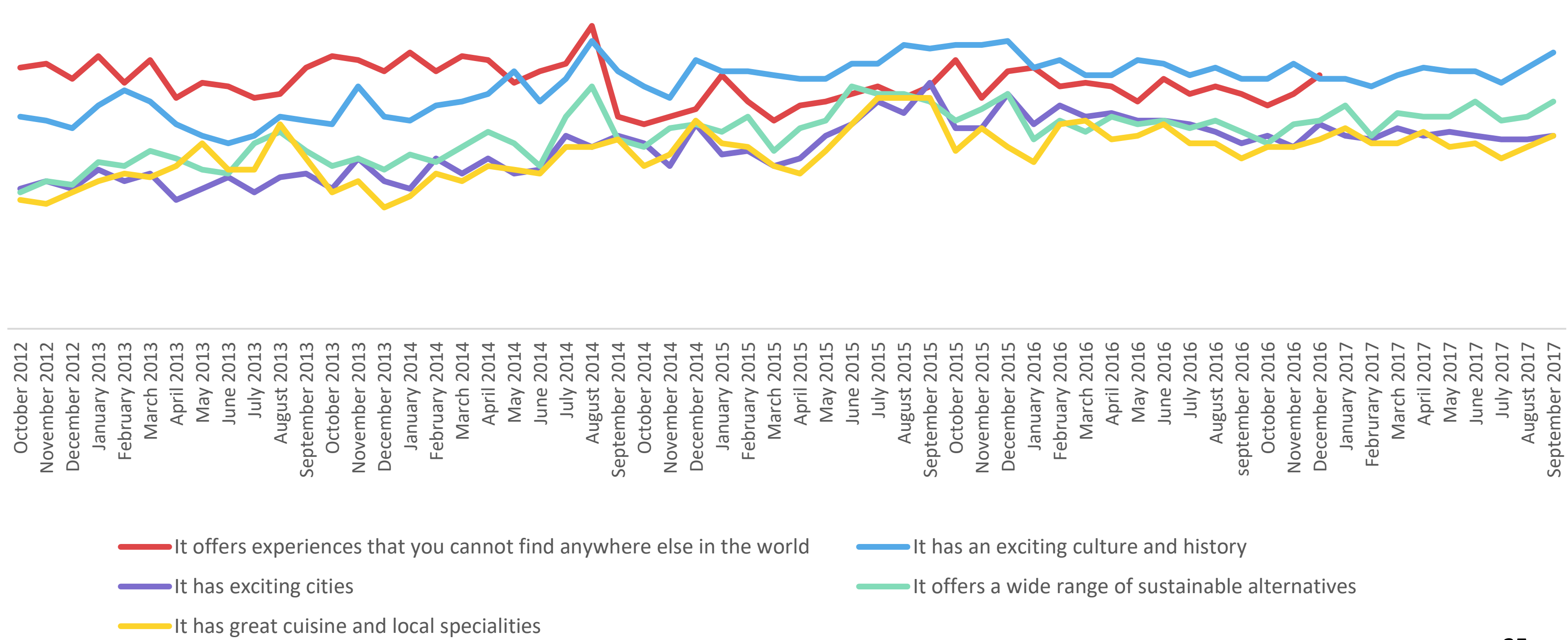
Innovasjon Norge

EPINION

DEVELOPMENT IN KEY BRAND TARGETS SINCE 2012

The chart below shows the development in the perception of Norway on selected brand targets. There seems to be a slight positive development in the target groups perception of Norway as being a place that offes great cuisine and local specialities, has exciting cities and offers a wide range of sustainable alternatives. Altso, there seems to have been a slight positive development in the perception of Norway as a place with exciting culture and history.

DEVELOPMENT IN KEY INDICATORS

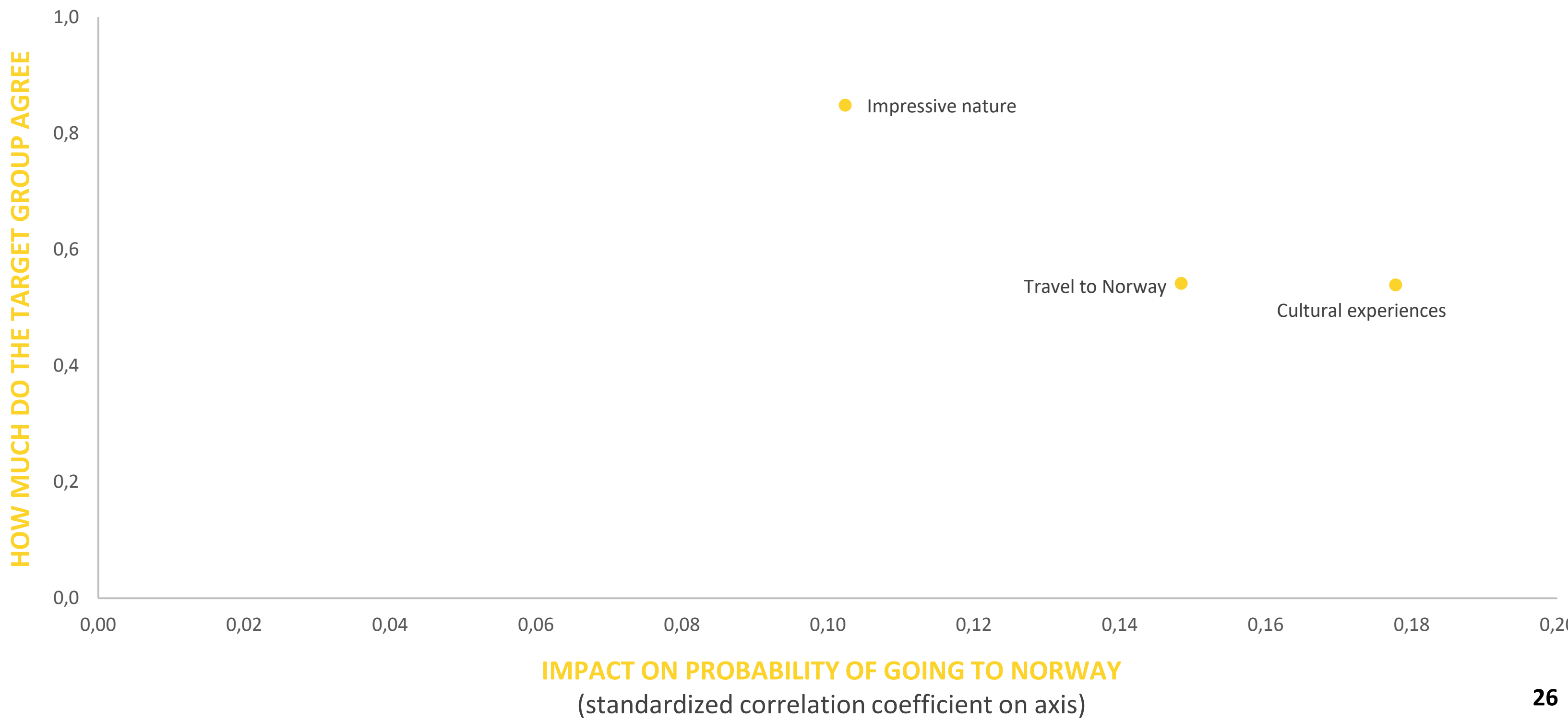


Innovasjon Norge

EPINION

DRIVERS FOR THE PROBABILITY TO VISIT NORWAY

The branding targets have been reduced to five dimensions (see page 57). In the chart below are the three dimensions that appears to have a statistically significant impact on the probability of visiting Norway displayed. Most in the Dutch target group agrees that Norway has impressive nature and this does not seem to be a great driver for the probability of visiting Norway. The perception of how easy it is to get to Norway and Norway as a place with cultural experiences seems to affect the probability of visiting Norway the most. Thus Innovasjon Norge should try to increase the perception of Norway as a place that is easy to get to and having a lot of cultural experiences in order to increase the likelihood that Dutch tourists will visit Norway.



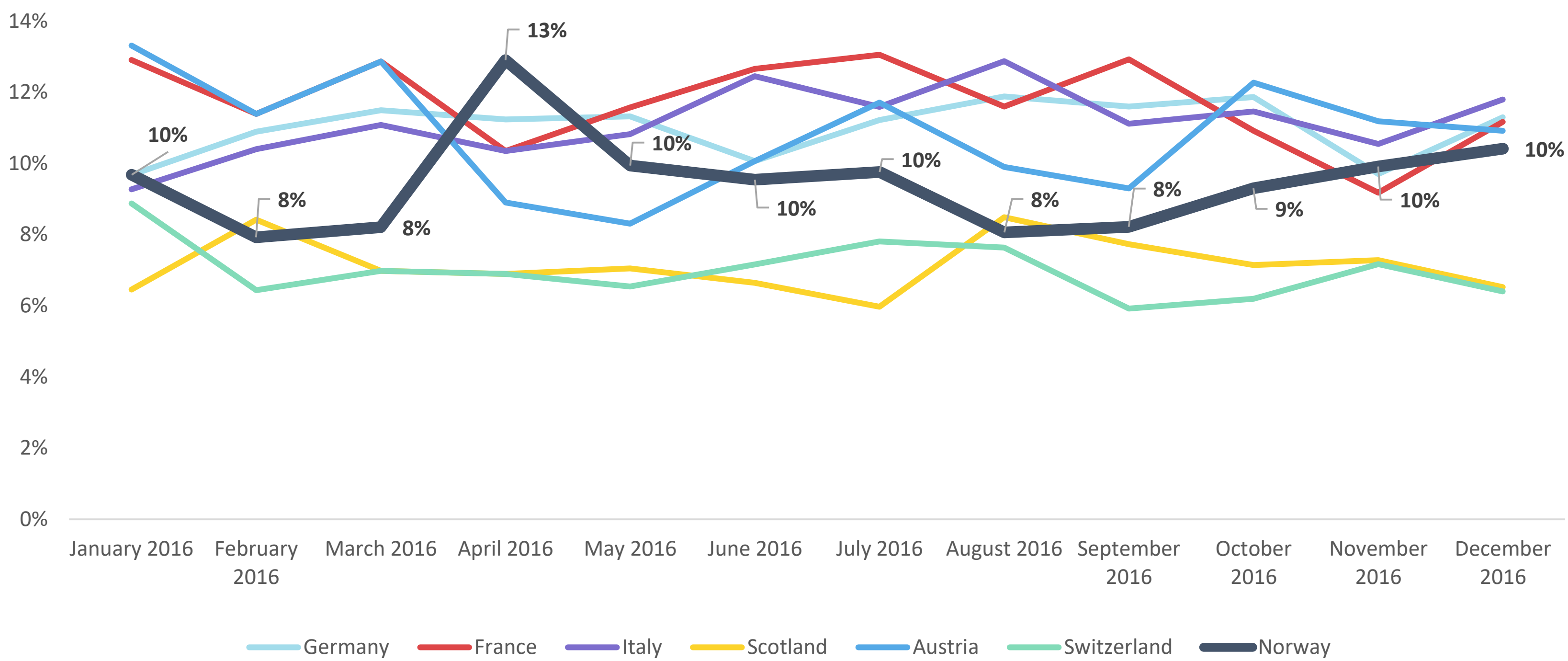
Innovasjon Norge

EPINION

SHARE OF VOICE IN NETHERLANDS

Below is an illustration of the development of Norways Share of Voice across 2016 in the Netherlands compared with the Share of Voice for other markets. Norways SoV spikes in April 2016, and have since been rather steady. France and Italy have the highest SoV with an average of respectively 12% and 11%. Germany and Austria are also ranking higher than Norway on SoV in the Netherlands. But Norway has the highest SoV in the Netherlands among the nordic countries.

DEVELOPMENT IN SHARE OF VOICE IN NETHERLANDS COMPARED TO OTHER COUNTRIES



Innovasjon Norge

FRANCE

Innovasjon Norge

EPINION

CHARACTERISTICS OF THE FRENCH TARGET GROUP

The chart below describes the characteristics of the French target group. The French group travels less often compared to average, but they are more likely to have children. They are slightly younger but more likely to visit Norway within the next 12 months. Their main motivation for travelling abroad are big cities, local art and culture, as well as dramatic and wild nature which is higher than average. The French group associate Norway with beautiful scenery, fjords snow and that it is cold and snowy.

DEMOGRAPHIC CHARACTERISTICS

50% / 51%
Women

49% / 38%
1-2 travels abroad in the past 3 years

51% / 62%
3 or more travels abroad in the past 3 years

52% / 66%
No children

23% / 16%
1 child

24% / 17%
2 or more children

36% / 31%
18-35 years old

43% / 42%
36-55 years

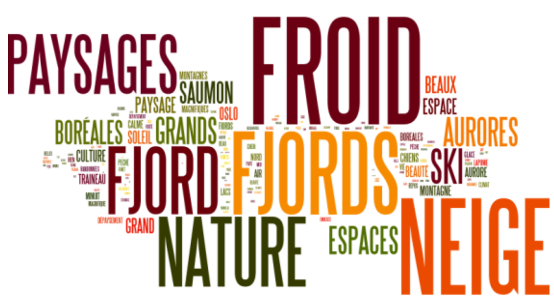
21% / 27%
56 years or older

15,1 / 14,7
Average years of education

26.000 - 39.999 EUR
Median income

- French target group
- Average (foreign markets)

N=1160



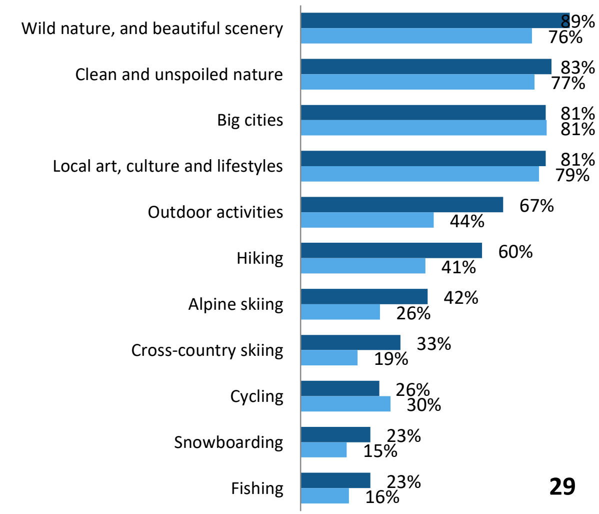
ASSOCIATIONS TO NORWAY

PROBABILITY FOR VISIT AND RECALL

4,4 / 3,9
Likely to visit Norway within 12 months

20% / 21%
Remember seeing an add for Norway

MOTIVATION FOR TRAVEL ON HOLIDAY ABROAD



Innovasjon Norge

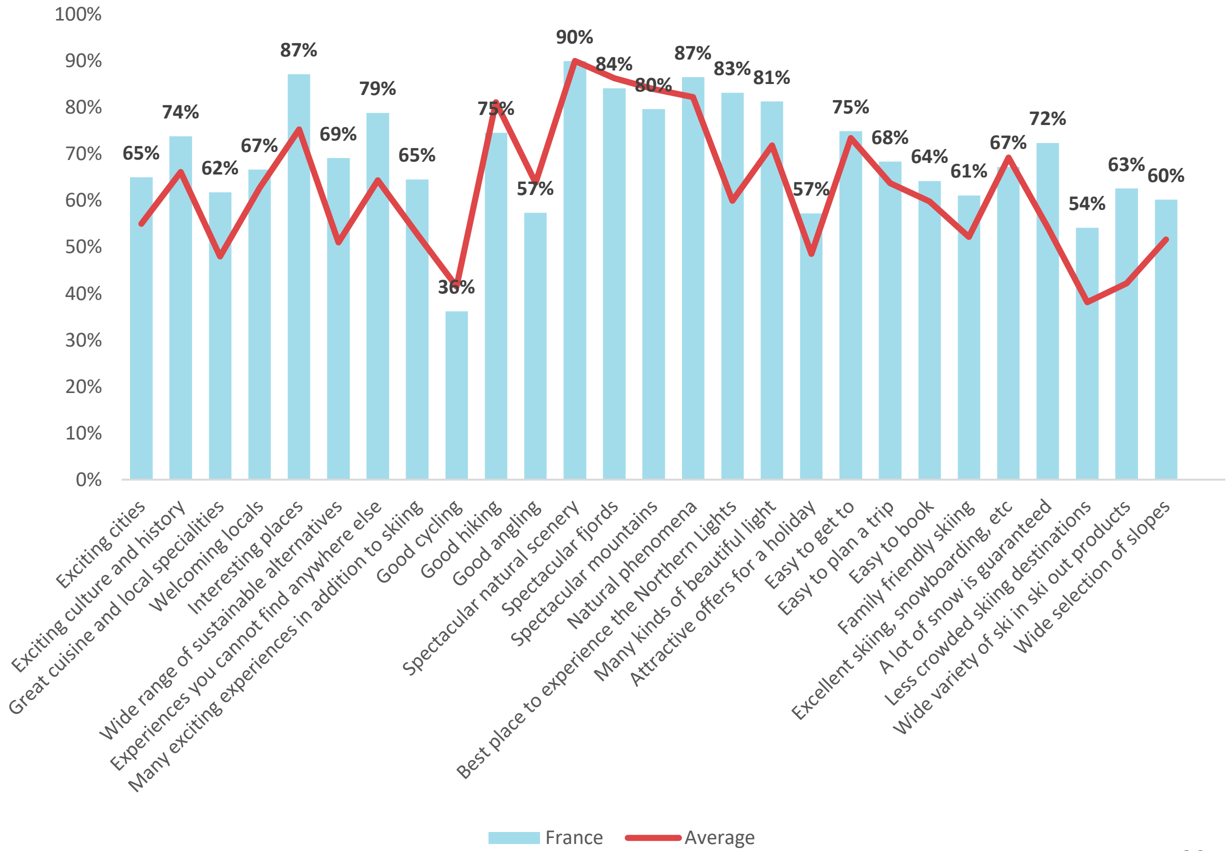
EPINION

HOW THE FRENCH TARGET GROUP SEES NORWAY

BRAND TARGETS

The chart on the right shows the precentage that agrees that the brand targets characterize Norway. The blue bars display the percentage in the French target group that agrees and the red line show the average across the six markets (Norway excluded).

The french target group see Norway as an interesting place where you can find unique experiences. They also see Norway as the best place to see the northern lights and snow is guarenteed. The french group are below average when i comes to seeing Norway as a good place for cycling and angling.



N=1160

Innovasjon Norge

EPINION

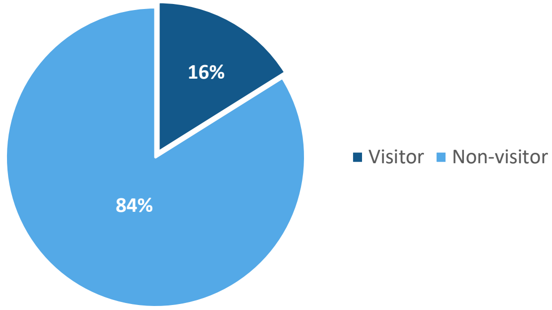
VISITORS AND NON-VISITORS (data from 2017)

The circle below illustrates that about 15% of the tourists in the French target group have visited Norway before.

The chart to the right shows the percentage that agrees with the branding targets for the people in the target group that have visited Norway before and the people in the target group who have not visited Norway before.

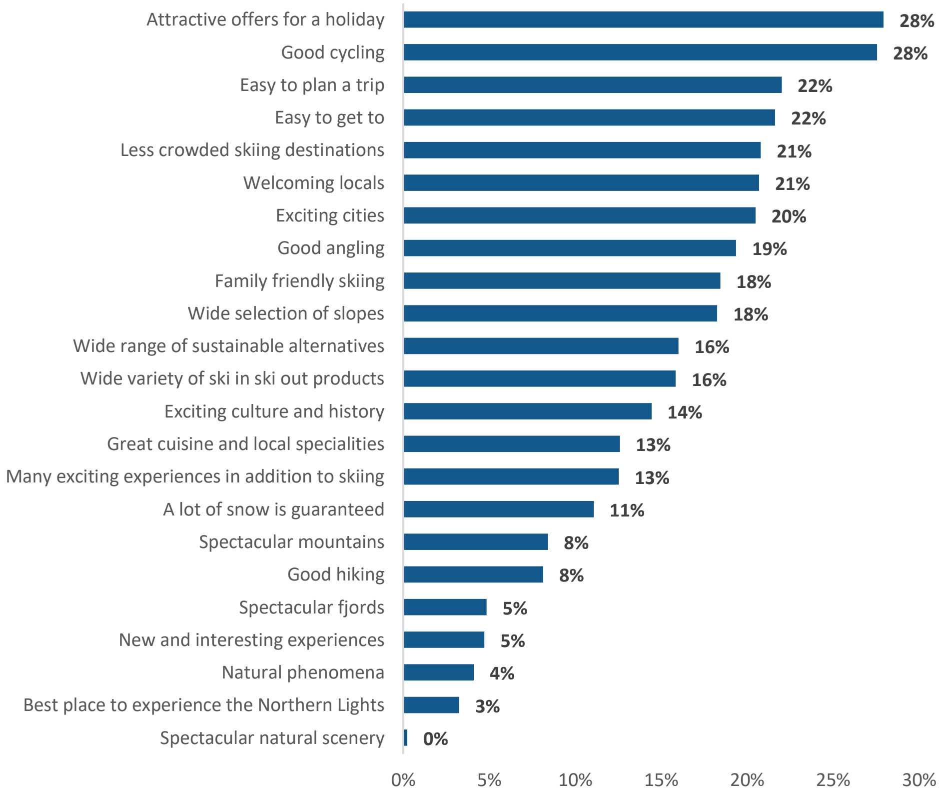
For all brand targets the group that have visited Norway is more positive towards Norway than the group that have not visited Norway. The two groups agree in their view on the Norwegian nature but tourists that have visited Norway are more likely to agree that there are attractive offers for holidays in Norway and that it is easy to plan a trip to Norway and get there.

FRENCH TARGET GROUP WHO HAVE VISITED NORWAY



N=2037

DIFFERENCE BETWEEN PERCENTAGE VISITORS THAT AGREE AND PERCENTAGE NON-VISITORS THAT AGREE



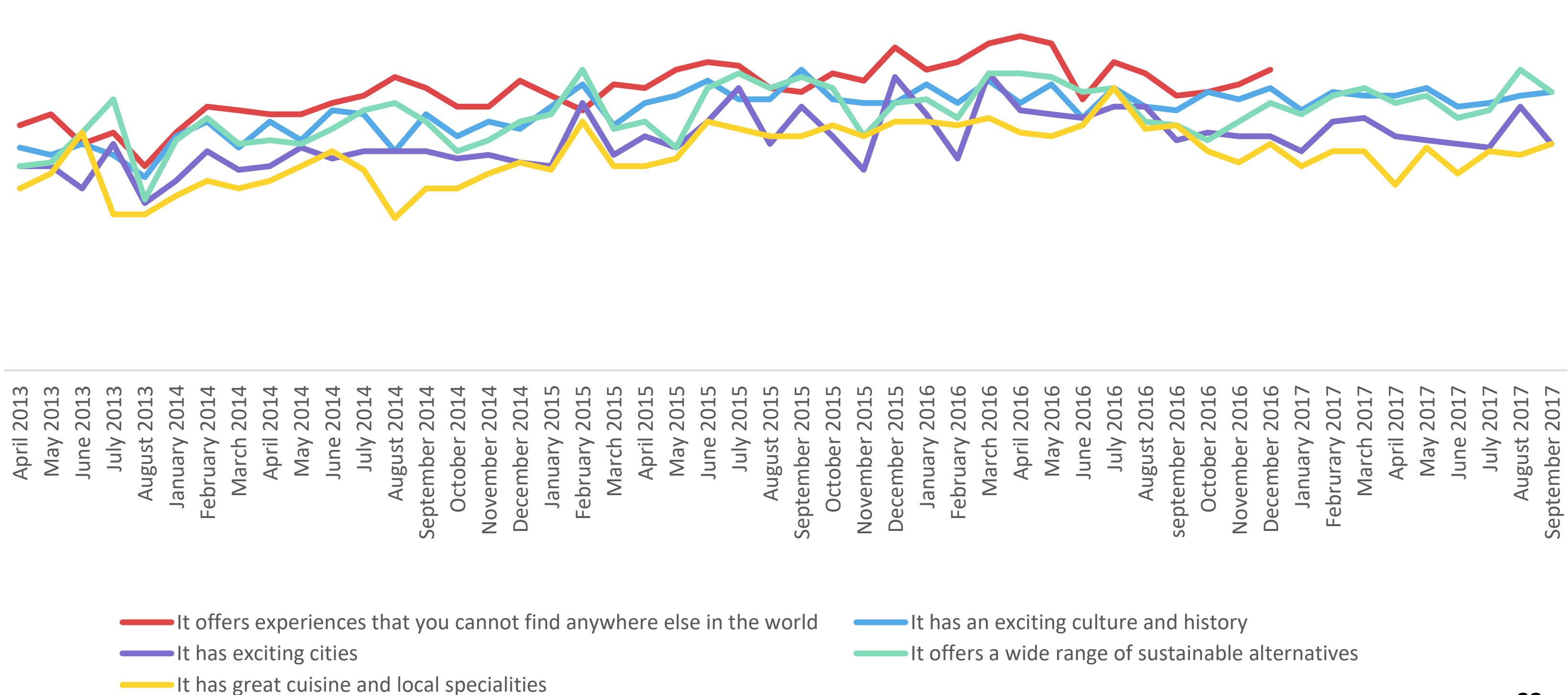
Innovasjon Norge

EPINION

DEVELOPMENT IN KEY BRAND TARGETS SINCE 2012

The chart below shows the development in the perception of Norway on selected brand targets. The development in perception of the brand targets in France have been fluctuating, but overall there seems to be a slightly positive trend since 2012.. There is indications though, that there could be a small negative development since the start of 2016 for the brand targets «exciting cities» and «greta cuisine and local specialities».

DEVELOPMENT IN KEY INDICATORS

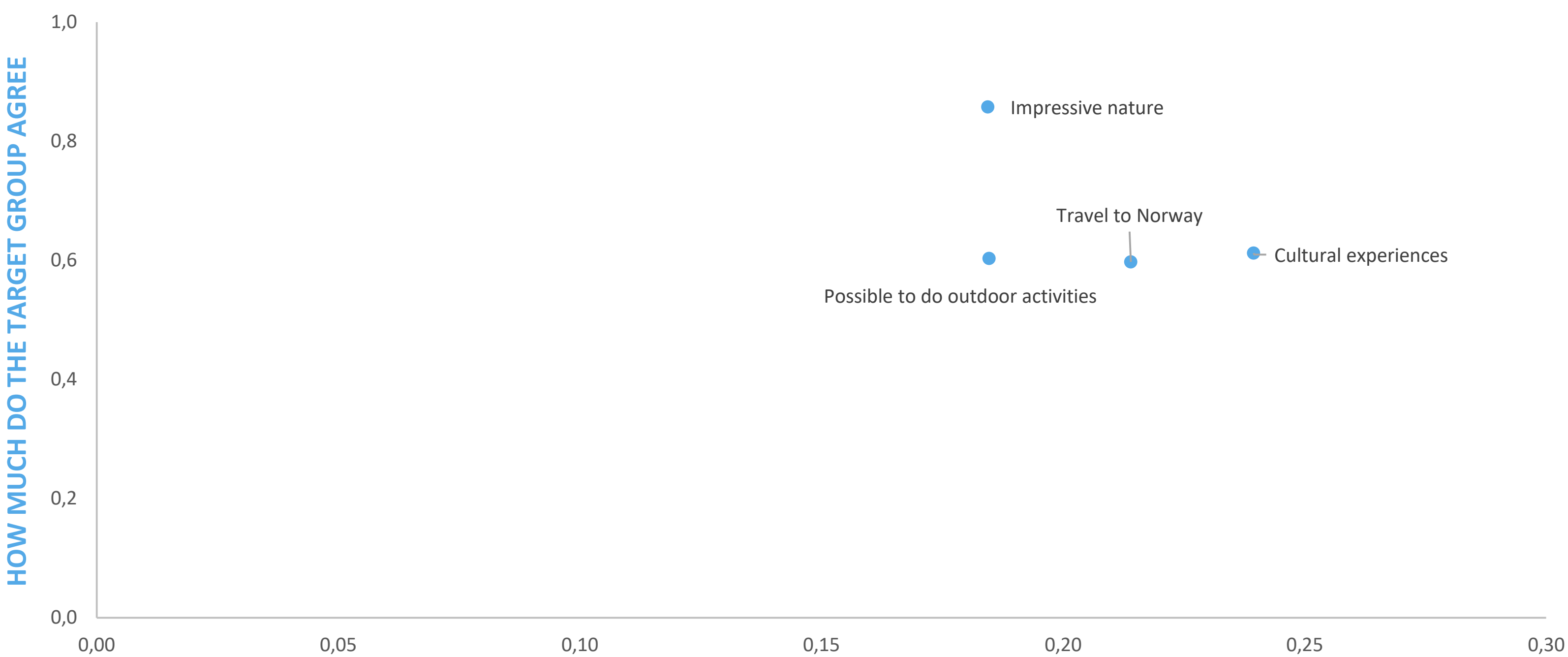


Innovasjon Norge

EPINION

DRIVERS FOR THE PROBABILITY TO VISIT NORWAY

The branding targets have been reduced to five dimensions (see page 57). In the chart below are the four dimensions that appears to have a statistically significant impact on the probability of visiting Norway displayed. The perception of how easy it is to get to Norway and whether Norway has great cultural experiences seems to have the highest impact on the probability of going to Norway. Norway could thus work on inproving the target groups perception of Norway on these parameters in order to raise the probability that tourists in the target group will have their holiday in Norway.



IMPACT ON PROBABILITY OF GOING TO NORWAY
(standardized correlation coefficient on axis)

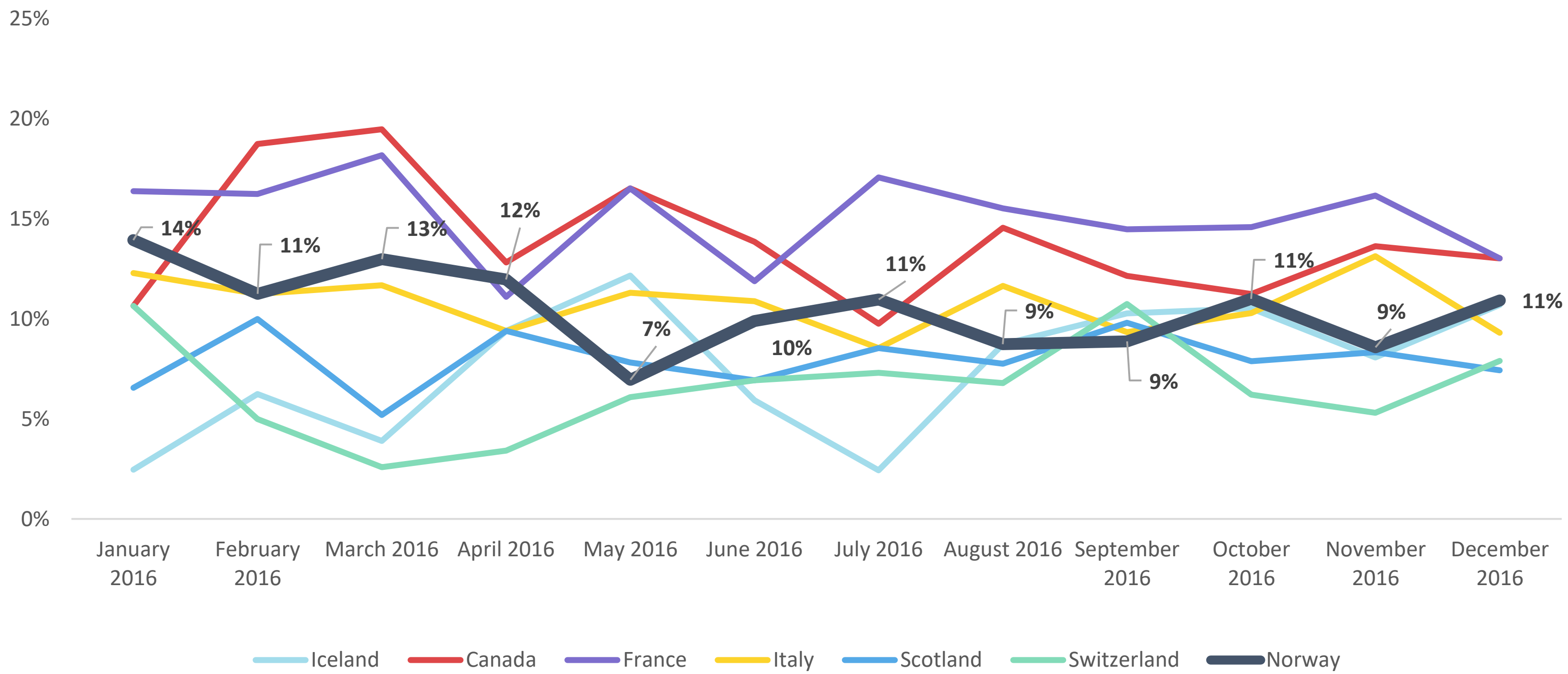
Innovasjon Norge

EPINION

SHARE OF VOICE IN FRANCE

Below is an illustration of the development of Norways Share of Voice across 2016 in France compared with the Share of Voice for other markets. The country with the highest Share of Voice in France is France itself with an average of 15%, closely followed by Canada with an average SoV of 14%. Norway ranking 4th with an average SoV of 11% and Norway have the highest SoV in the winter.

DEVELOPMENT IN SHARE OF VOICE IN FRANCE COMPARED TO OTHER COUNTRIES



Innovasjon Norge

GERMANY

Innovasjon Norge

EPINION

CHARACTERISTICS OF THE GERMAN TARGET GROUP

The chart below describes the characteristics of the German target group. They are more likely to visit Norway within the next 12 months, but they travel less often abroad overall. Their motivation for travelling abroad are to a large extent to experience the clean and unspoiled nature and local art, culture and lifestyles. The Germans are more motivated to hike and cycle than average. They mainly associate Norway with nature and the fjords, but many also mentions untouched nature and landscape.

DEMOGRAPHIC CHARACTERISTICS

50% / 51%
Women

46% / 38%
1-2 travels abroad in the past 3 years

54% / 62%
3 or more travels abroad in the past 3 years

68% / 66%
No children

17% / 16%
1 child

15% / 17%
2 or more children

31% / 31%
18-35 years old

47% / 42%
36-55 years

22% / 27%
56 years or older

14,3 / 14,7
Average years of education

40.000 – 52.999 EUR
Median income

- German target group
- Average (foreign markets)

N=4693

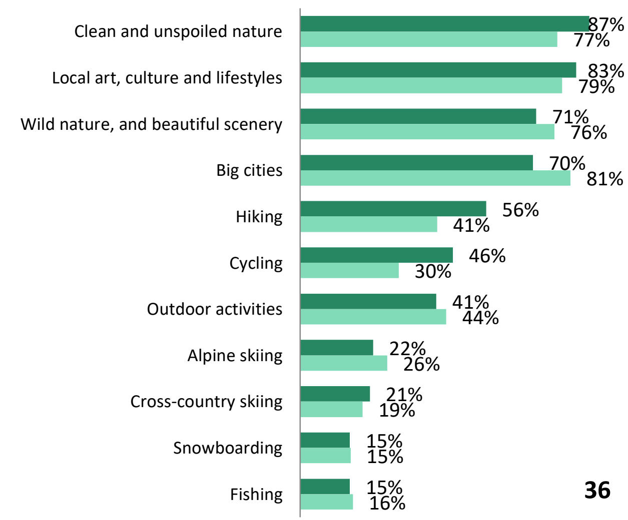
ASSOCIATIONS TO NORWAY

PROBABILITY FOR VISIT AND RECALL

4,4 / 3,9
Likely to visit Norway within 12 months

20% / 21%
Remember seeing an add for Norway

MOTIVATION FOR TRAVEL ON HOLIDAY ABROAD



Innovasjon Norge

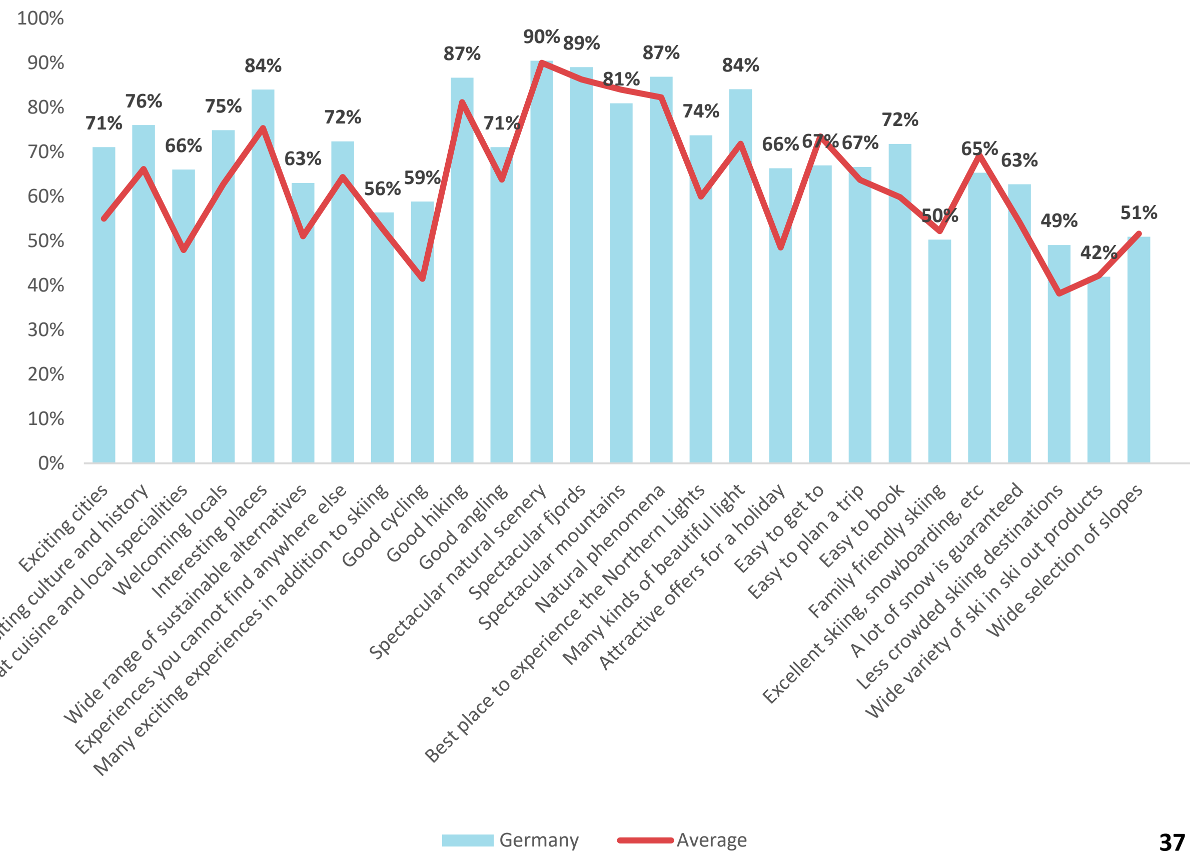
EPINION

HOW THE GERMAN TARGET GROUP SEES NORWAY

BRAND TARGETS

The chart on the right shows the precentage that agrees that the brand targets characterize Norway. The blue bars display the percentage in the German target group that agrees and the red line show the average across the six markets (Norway excluded).

The German target group are above average in almost every brand target, and especially regarding Norway as an interesting place and a country with many kinds of beautiful lights. The German group are only below average when it comes to Norway as a family friendly skiing place and as having a wide variety of slopes.



N=4693

Innovasjon Norge

EPINION

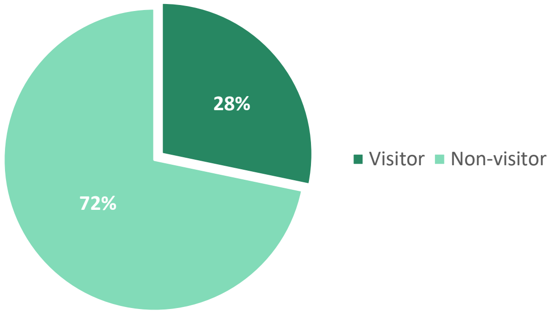
VISITORS AND NON-VISITORS (data from 2017)

The circle below illustrates that almost a quarter of the tourists in the German target group have visited Norway before.

The chart to the right shows the percentage that agrees with the branding targets for the people in the target group that have visited Norway before and the people in the target group who have not visited Norway before.

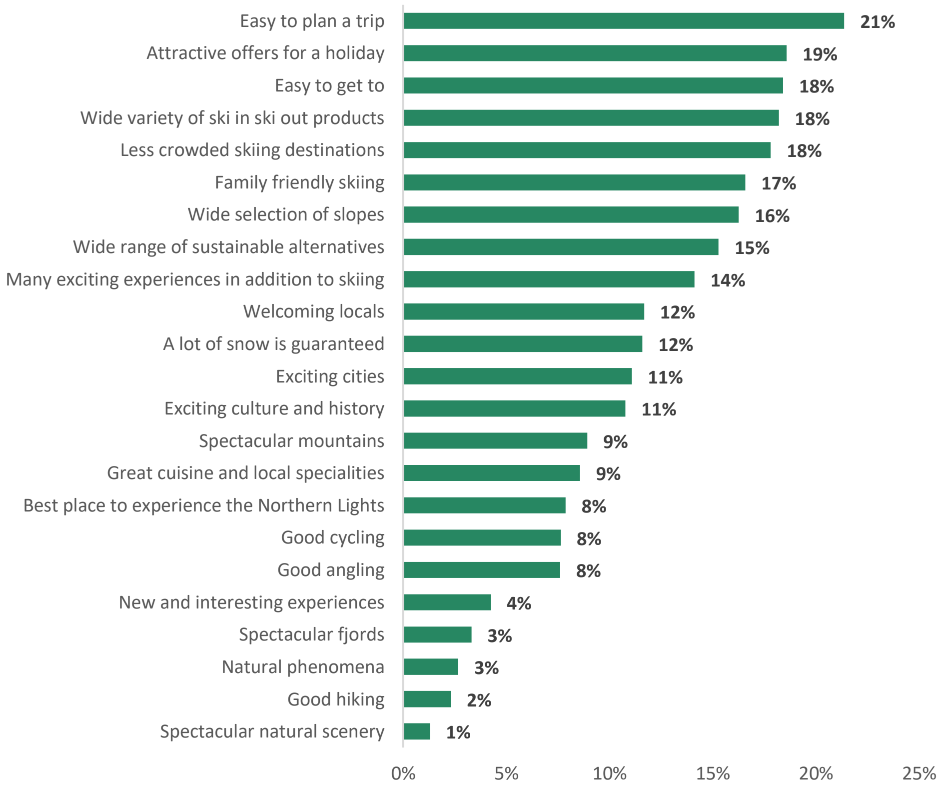
For all brand targets the group that have visited Norway is more positive towards Norway than the group that have not visited Norway. The two groups agree that Norway has beautiful nature but tourists that have visited Norway are more likely to say that it is easy to plan a trip to Norway, that it is easy to get there and that there are attractive offers compared to non-visitors in the German target group.

GERMAN TARGET GROUP WHO HAVE VISITED NORWAY



N=4111

DIFFERENCE BETWEEN PERCENTAGE VISITORS THAT AGREE AND PERCENTAGE NON-VISITORS THAT AGREE



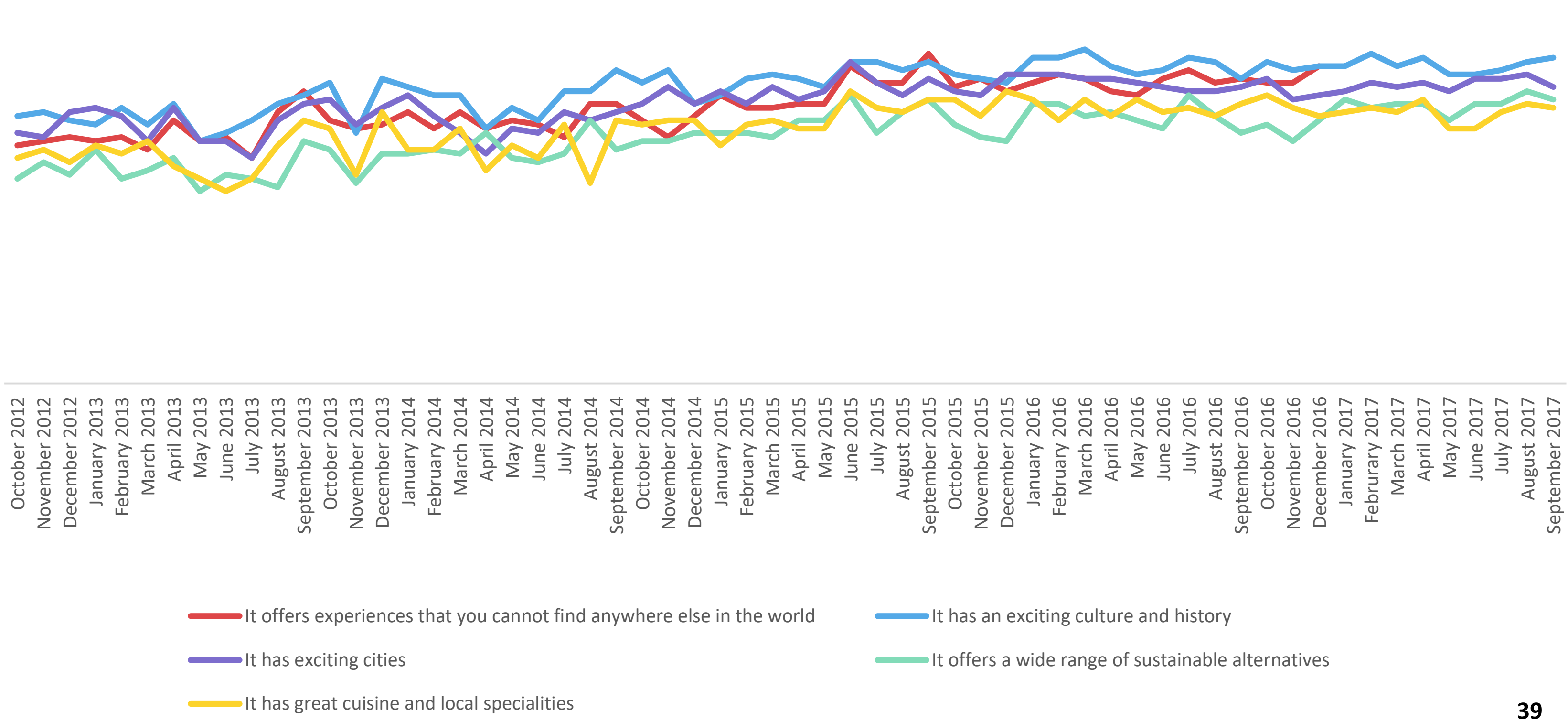
Innovasjon Norge

EPINION

DEVELOPMENT IN KEY BRAND TARGETS SINCE 2012

The chart below shows the development in the perception of Norway on selected brand targets. All five brand targets displayed here show a slow but steady rather steady increase compared to the level i 2012. But there seems to be less of an increase in 2016 and 2017 where the curve seems to be more flat and without much fluctuation.

DEVELOPMENT IN KEY INDICATORS

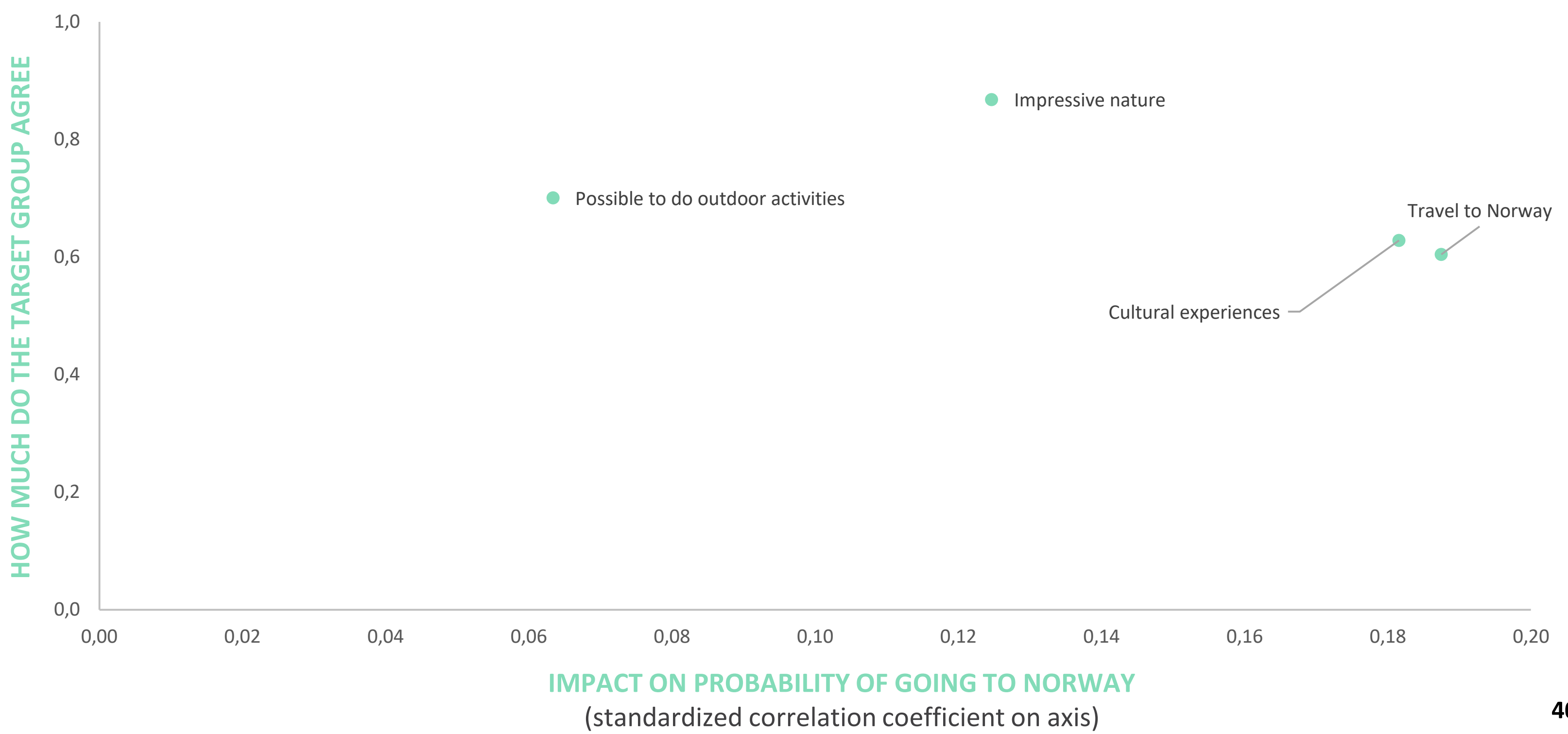


Innovasjon Norge

EPINION

DRIVERS FOR THE PROBABILITY TO VISIT NORWAY

The branding targets have been reduced to five dimensions (see page 57). In the chart below are the three dimensions that appears to have a statistically significant impact on the probability of visiting Norway displayed. The Germans are very aware that Norway can offer impressive nature. However factors such as cultural experiences and that it is easy to get to Norway have a larger impact on the probability of going to Norway. Innovasjon Norge should thus work on increasing the perception of Norway in these regards in order to raise the amount in the target group who agrees with this. This is predicted to have the most effect on raising the probability of visiting Norway in the future.



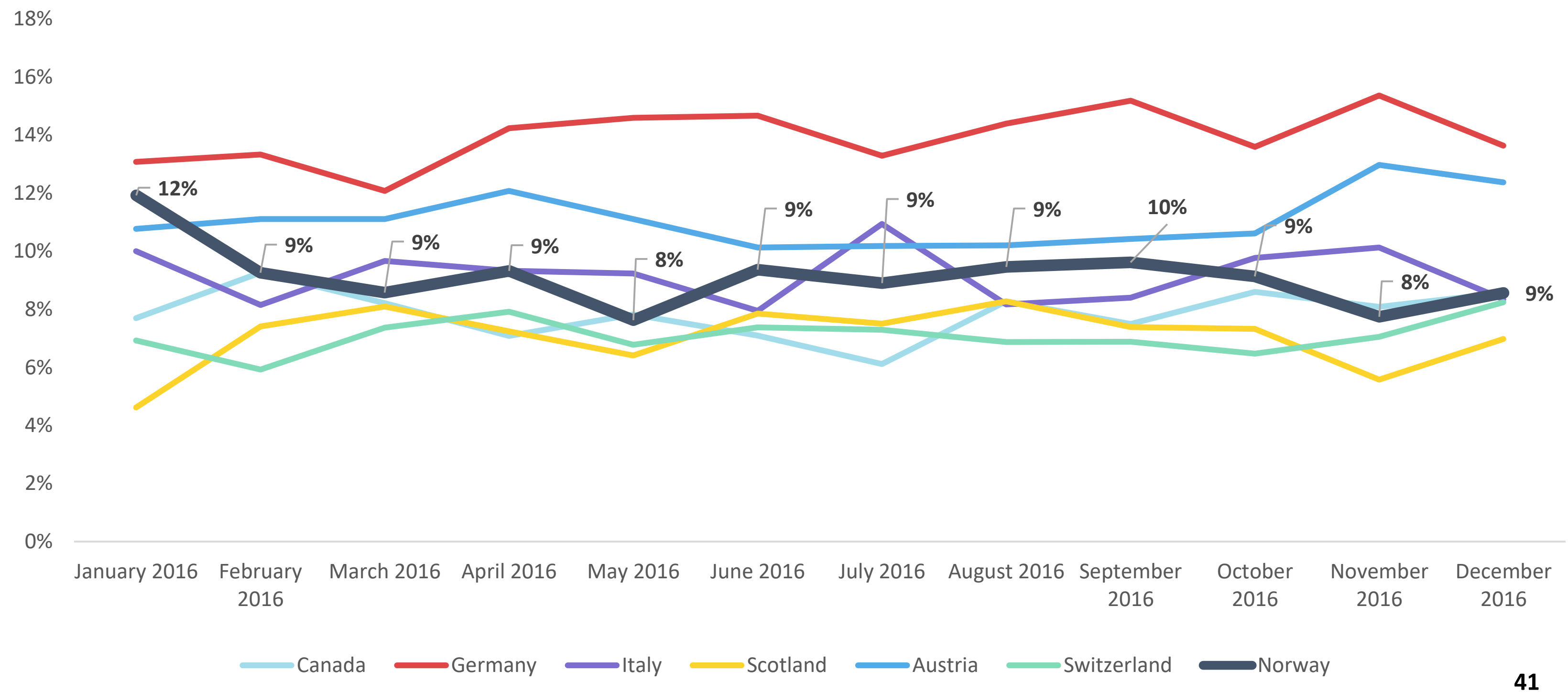
Innovasjon Norge

EPINION

SHARE OF VOICE IN GERMANY

Below is an illustration of the development of Norways Share of Voice across 2016 in Germany compared with the Share of Voice for other markets. Norway is ranking as 4th in the German SoV with a rather steady 9%. Norways SoV was biggest at the start of 2016 but did not raise to the same level in the winter months at the end of 2016. The country with the highest Share of Voice in Germany is by far Germany itself with an average of 14%.

DEVELOPMENT IN SHARE OF VOICE IN GERMANY COMPARED TO OTHER COUNTRIES



NORWAY

Innovasjon Norge

EPINION

CHARACTERISTICS OF THE NORWEGIAN TARGET GROUP

The chart below describes the characteristics of the Norwegian target group compared to the average for the six foreign countries. The Norwegian target group is naturally more likely to go on a holiday in Norway than the target group in other countries. The Norwegians primarily associate Norway with the nature and the mountains but also that the country is expensive. They primarily travel to experience big cities, local culture and wild nature.

DEMOGRAPHIC CHARACTERISTICS

54% / 51%
Women

11% / 38%
1-2 travels in Norway or abroad in the past 3 years

89% / 62%
3 or more travels in Norway or abroad in the past 3 years

68% / 66%
No children

14% / 16%
1 child

18% / 17%
2 or more children

26% / 31%
18-35 years old

43% / 42%
36-55 years

31% / 27%
56 years or older

13,9 / 14,7
Average years of education

75.000 - 86.000 EUR
Median income

- Norwegian target group
- Average (foreign markets)

N=4465

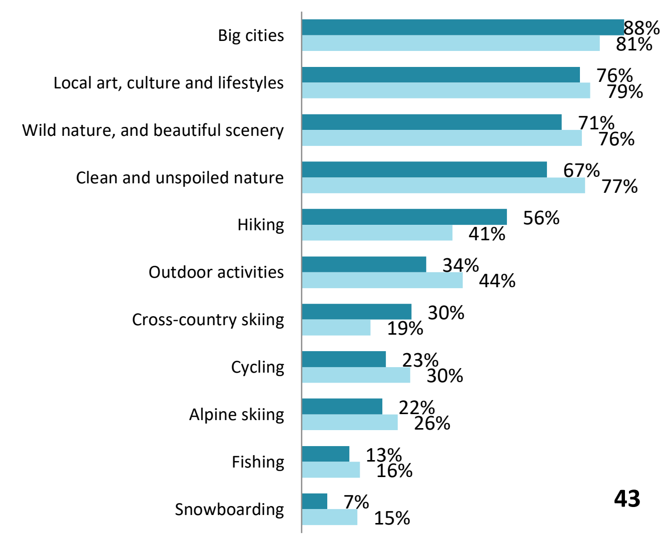
ASSOCIATIONS TO NORWAY

PROBABILITY FOR VISIT AND RECALL

7,2 / 3,9
Likely to take a holiday in Norway within 12 months

32% / 21%
Remember seeing an add for Norway

MOTIVATION FOR TRAVEL ON HOLIDAY



Innovasjon Norge

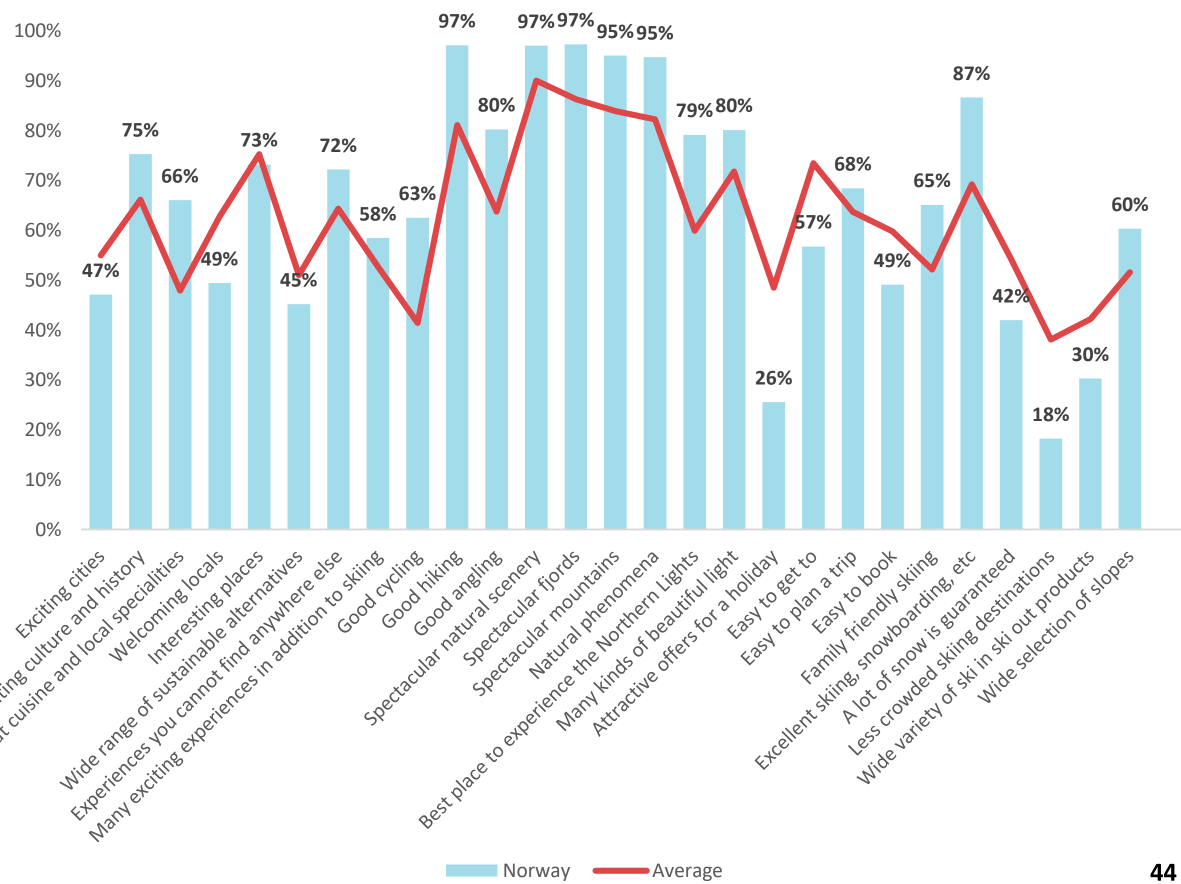
EPINION

HOW THE NORWEGIAN TARGET GROUP SEES NORWAY

BRAND TARGETS

The chart shows the precentage that agrees that the brand targets characterize Norway. The blue bars display the percentage in the Norwegian target group that agrees and the red line show the average across the six markets (Norway excluded).

Almost the entire Norwegian target group percieve Norway as a place that offers good hiking in spectacular natural scenery, fjords and mountains. They are also above average when it comes to excellent snowboarding. The Norwegian group is below average on factors such as attractive offers for a holiday and less crowded skiing destinations.



N=4465

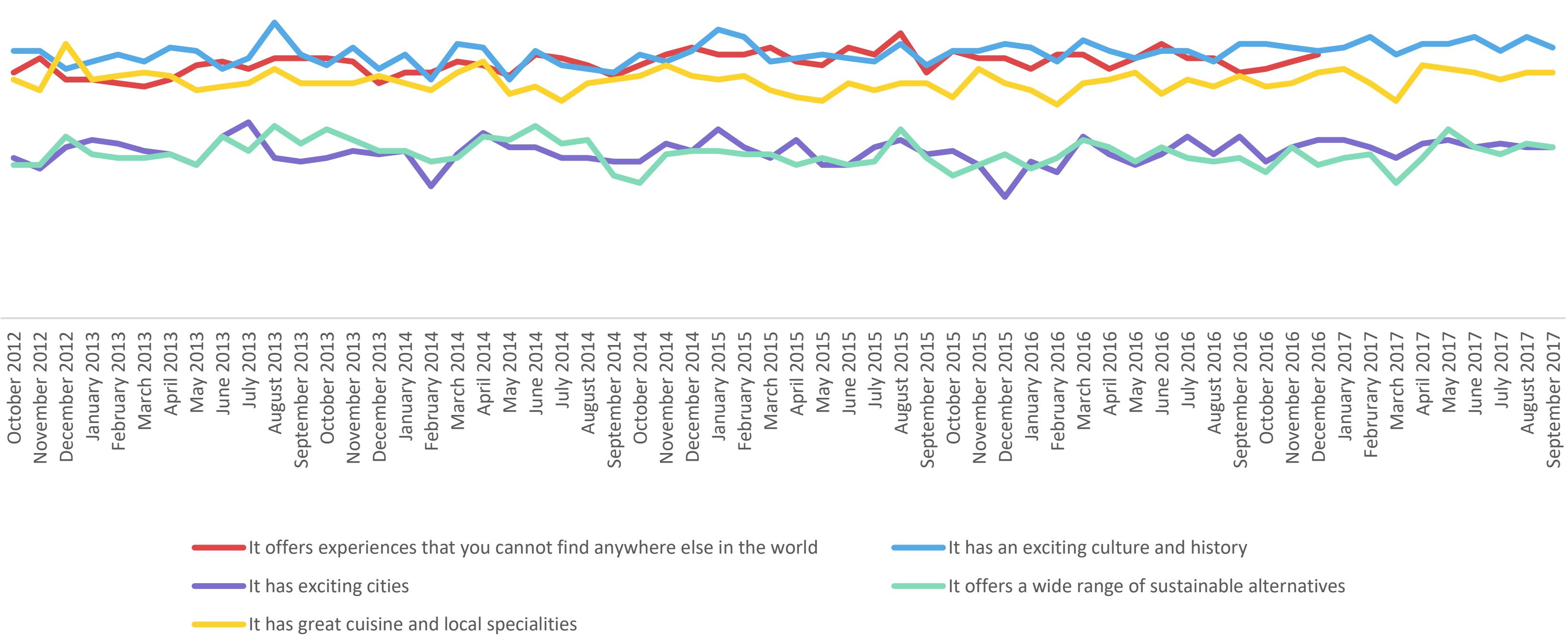
Innovasjon Norge

EPINION

DEVELOPMENT IN KEY BRAND TARGETS SINCE 2012

The chart below shows the development in the perception of Norway on selected brand targets. All five brand targets displayed here show a steady level since 2012. It seems that the Norwegian target group has a fairly consistent view of their country that does not change easily. The graph shows some fluctuation but the trend seems to horizontal over the long run.

DEVELOPMENT IN KEY INDICATORS

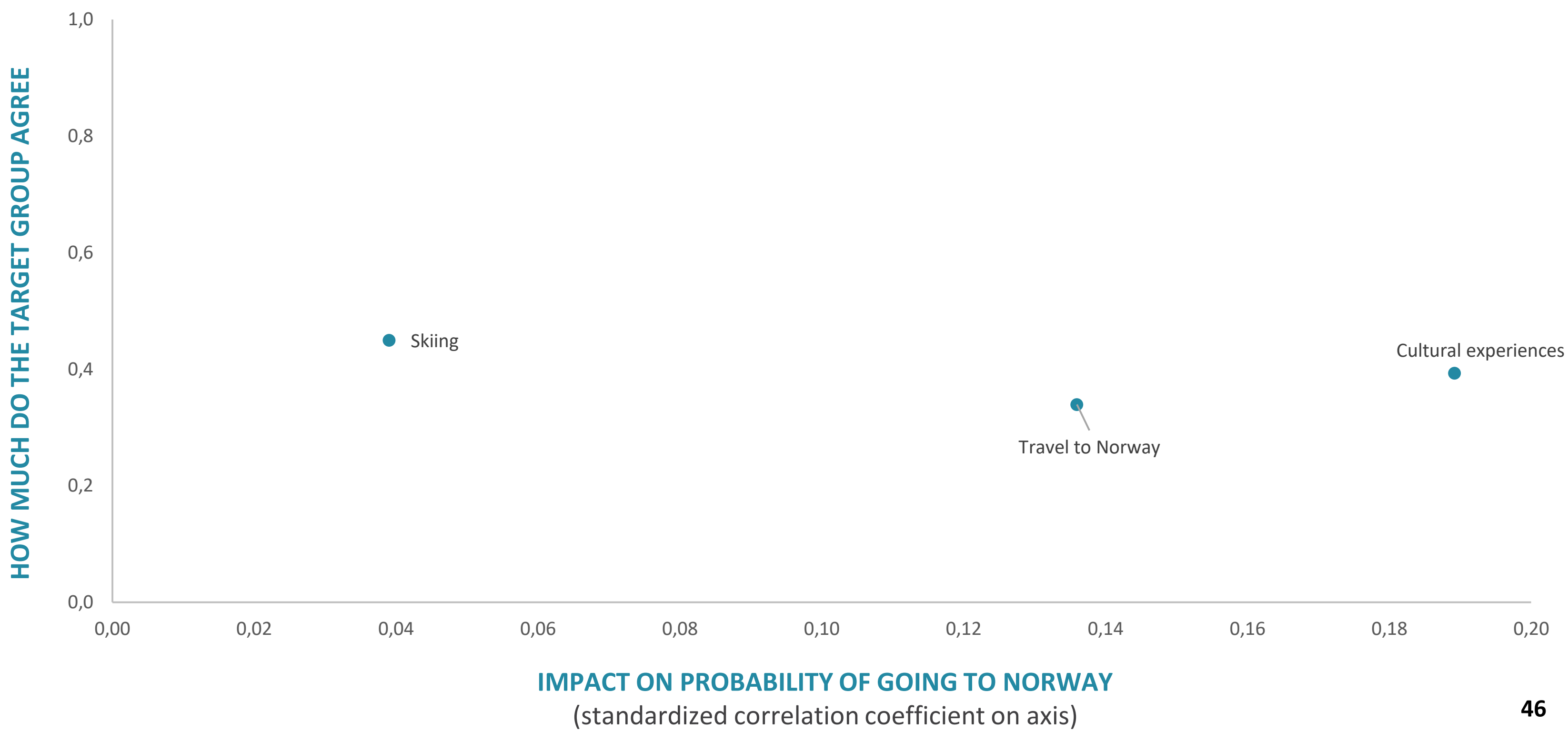


Innovasjon Norge

EPINION

DRIVERS FOR THE PROBABILITY TO VISIT NORWAY

The branding targets have been reduced to five dimensions (see page 57). In the chart below are the two dimensions that appears to have a statistically significant impact on the probability of visiting Norway displayed. Similar to the foreign countries it also seems that the greates driver for Norwegians to go on a holiday in Norway is their perception of the cultural experiences that the area offers. So just like foreign tourists the Norwegians themselves are also most affected by their perception of the cultural experiences when choosing their holiday destination.



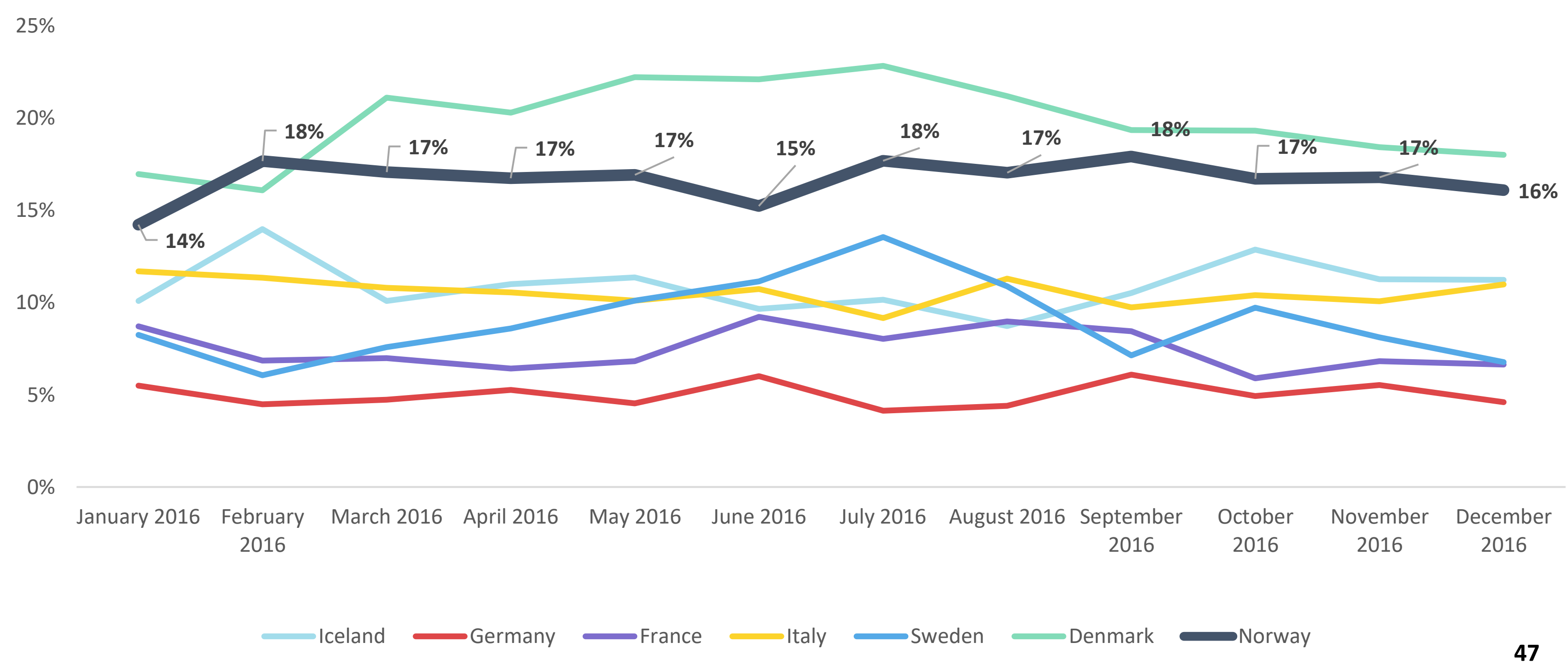
Innovasjon Norge

EPINION

SHARE OF VOICE IN NORWAY

Below is an illustration of the development of Norways Share of Voice across 2016 in Norway compared with the Share of Voice for other markets. On average Norway is ranking 2nd behind Denmark when looking at the Share of Voice in Norway. Norways SoV seems to be rather stable over the year whole Denmarks Share of Voice peaks in the spring and summer.

DEVELOPMENT IN SHARE OF VOICE IN NORWAY COMPARED TO OTHER COUNTRIES



Innovasjon Norge

SWEDEN

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Innovasjon Norge

EPINION

CHARACTERISTICS OF THE SWEDISH TARGET GROUP

The chart below describes the characteristics of the Swedish target group. Compared to the average the Swedish group travel more often, but are less likely than average to visit Norway within the next 12 months. Their motivation to travel abroad are big cities and local art, culture and lifestyles. They are less motivated by nature and outdoor activities compared to the average. When asked what they associate Norway with they mention the beautiful nature and fjords as well as Hurtigruten.

DEMOGRAPHIC CHARACTERISTICS

55% / 51%
Women

30% / 38%
1-2 travels abroad in the past 3 years

70% / 62%
3 or more travels abroad in the past 3 years

71% / 66%
No children

13% / 16%
1 child

16% / 17%
2 or more children

18% / 31%
18-35 years old

41% / 42%
36-55 years

40% / 27%
56 years or older

13,9 / 14,7
Average years of education

52.000 - 63.000 EUR
Median income

- Swedish target group
- Average (foreign markets)

N=4128

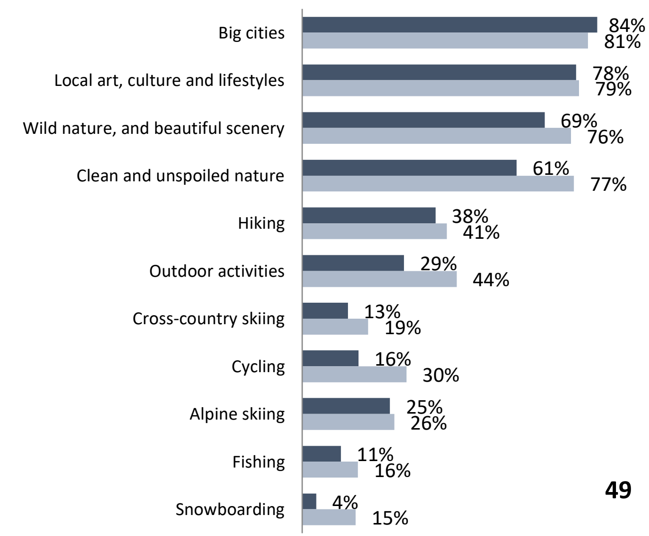
ASSOCIATIONS TO NORWAY

PROBABILITY FOR VISIT AND RECALL

3,4 / 3,9
Likely to visit Norway within 12 months

31% / 21%
Remember seeing an add for Norway

MOTIVATION FOR TRAVEL ON HOLIDAY ABROAD



Innovasjon Norge

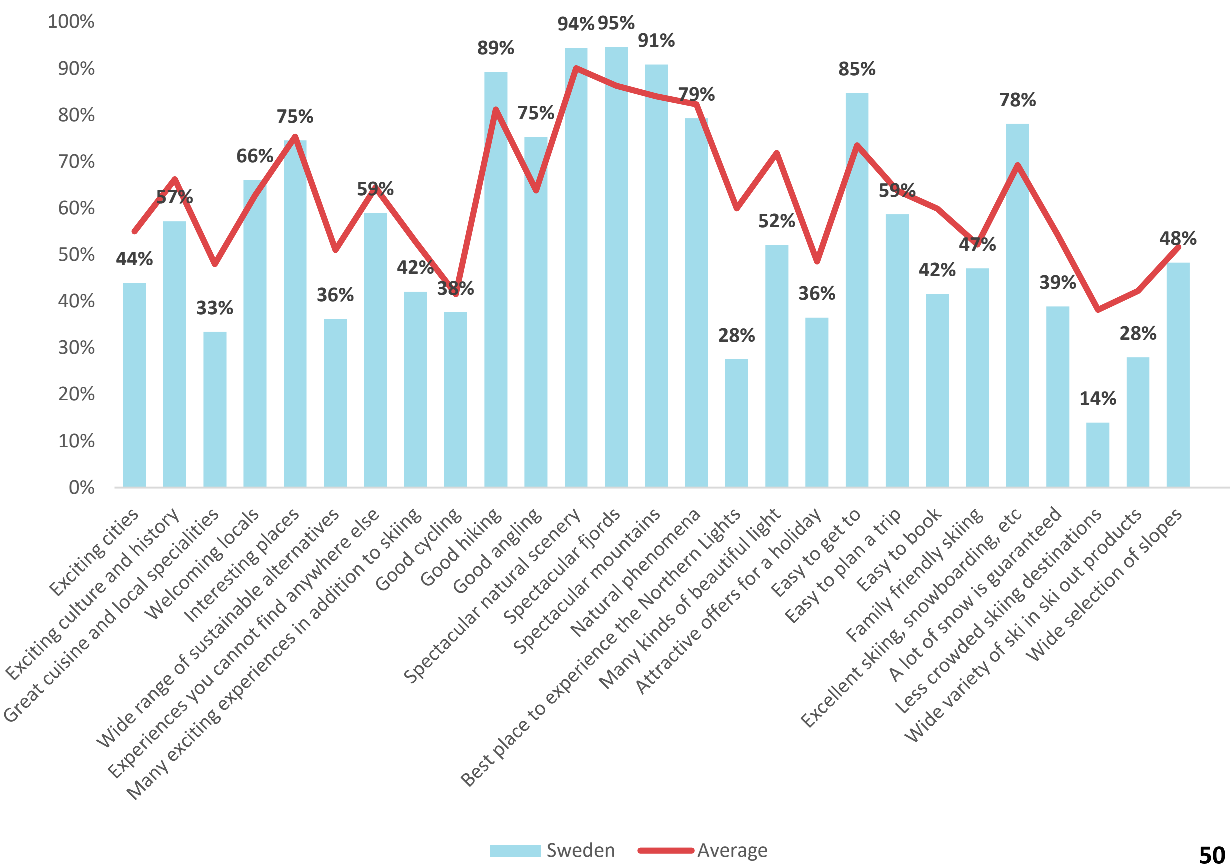
EPINION

HOW THE SWEDISH TARGET GROUP SEES NORWAY

BRAND TARGETS

The chart on the right shows the precentage that agrees that the brand targets characterize Norway. The blue bars display the percentage in the Swedish target group that agrees and the red line show the average across the six markets (Norway excluded).

The Swedish target group is above average when it comes to seeing Norway as a place that is easy to get to and as good for hiking and snowboarding. They score below average on factors such as the best place to see northern lights, as a less crowded skiing destination and as a place that has attractive offers for a holiday.



N=4128

Innovasjon Norge

EPINION

VISITORS AND NON-VISITORS (data from 2017)

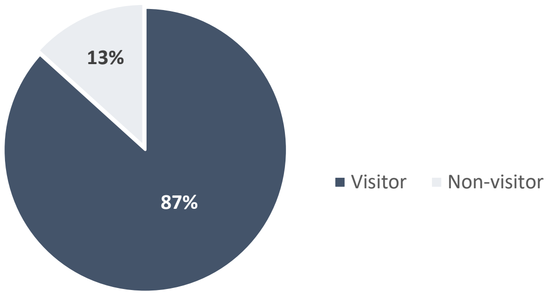
The circle below illustrates that around 86% of the Swedes in the Swedish target group have visited Norway before.

The chart to the right shows the percentage that agrees with the branding targets for the people in the target group that have visited Norway before and the people in the target group who have not visited Norway before.

For all brand targets the group that have visited Norway is more positive towards Norway than the group that have not visited Norway.

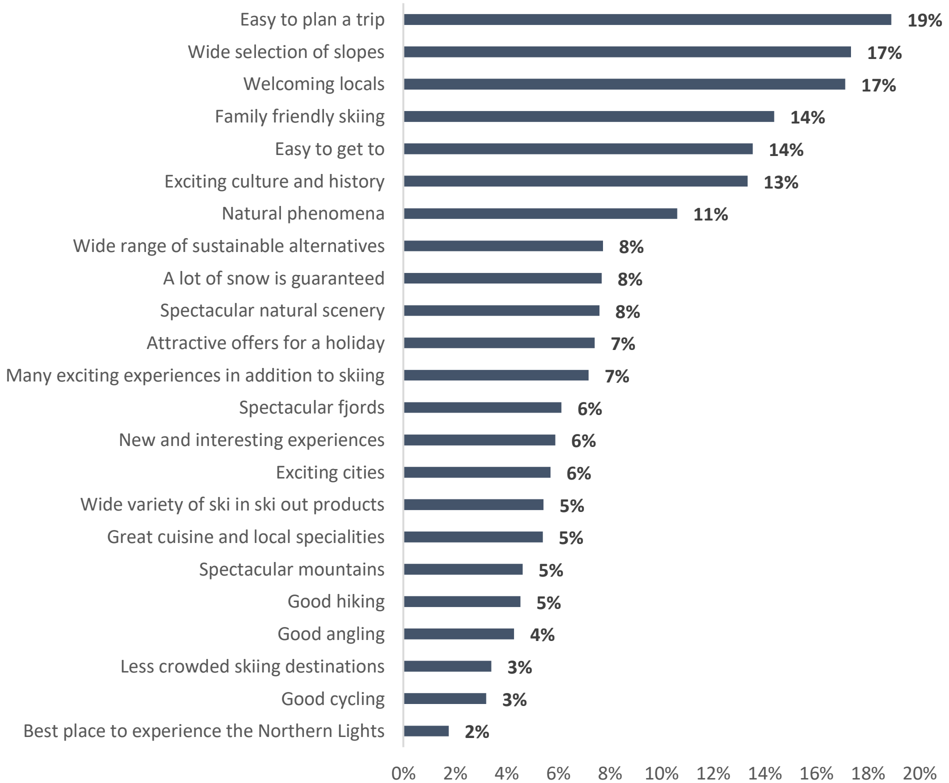
The two groups primarily disagree on how easy it is to plan a trip to Norway, the variety of the slopes for skiing and their view on how welcoming the locals are.

SWEDISH TARGET GROUP WHO HAVE VISITED NORWAY



N=4193

DIFFERENCE BETWEEN PERCENTAGE VISITORS THAT AGREE AND PERCENTAGE NON-VISITORS THAT AGREE



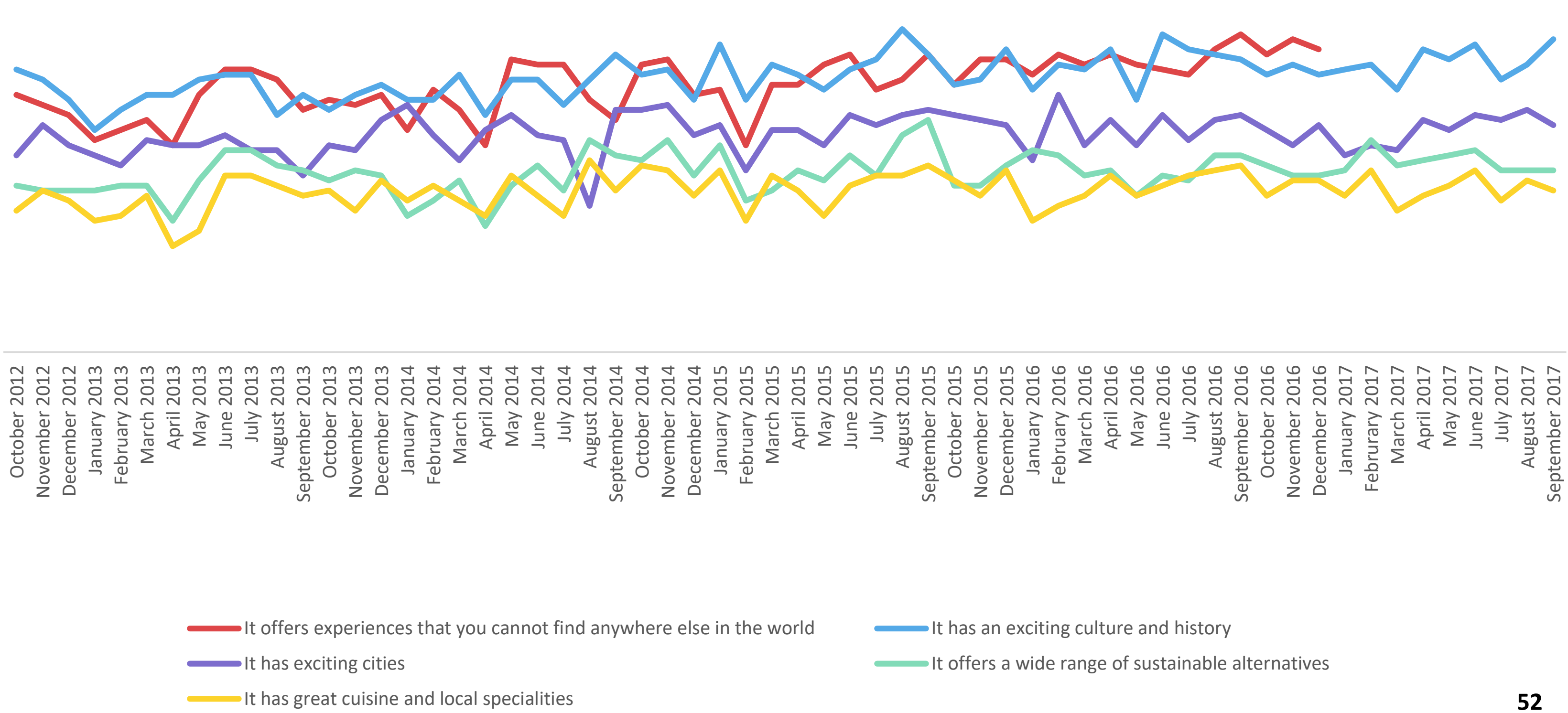
Innovasjon Norge

EPINION

DEVELOPMENT IN KEY BRAND TARGETS SINCE 2012

The chart below shows the development in the perception of Norway on selected brand targets. The swedish target groups perception of Norway on key brand targets seem to fluctuate across the time period but most brand targets does not show either a positive or a negative trend over the long run. There does seem to be a minor positive development in the swedish target groups perception of Norway as having a exciting culture and history though.

DEVELOPMENT IN KEY INDICATORS

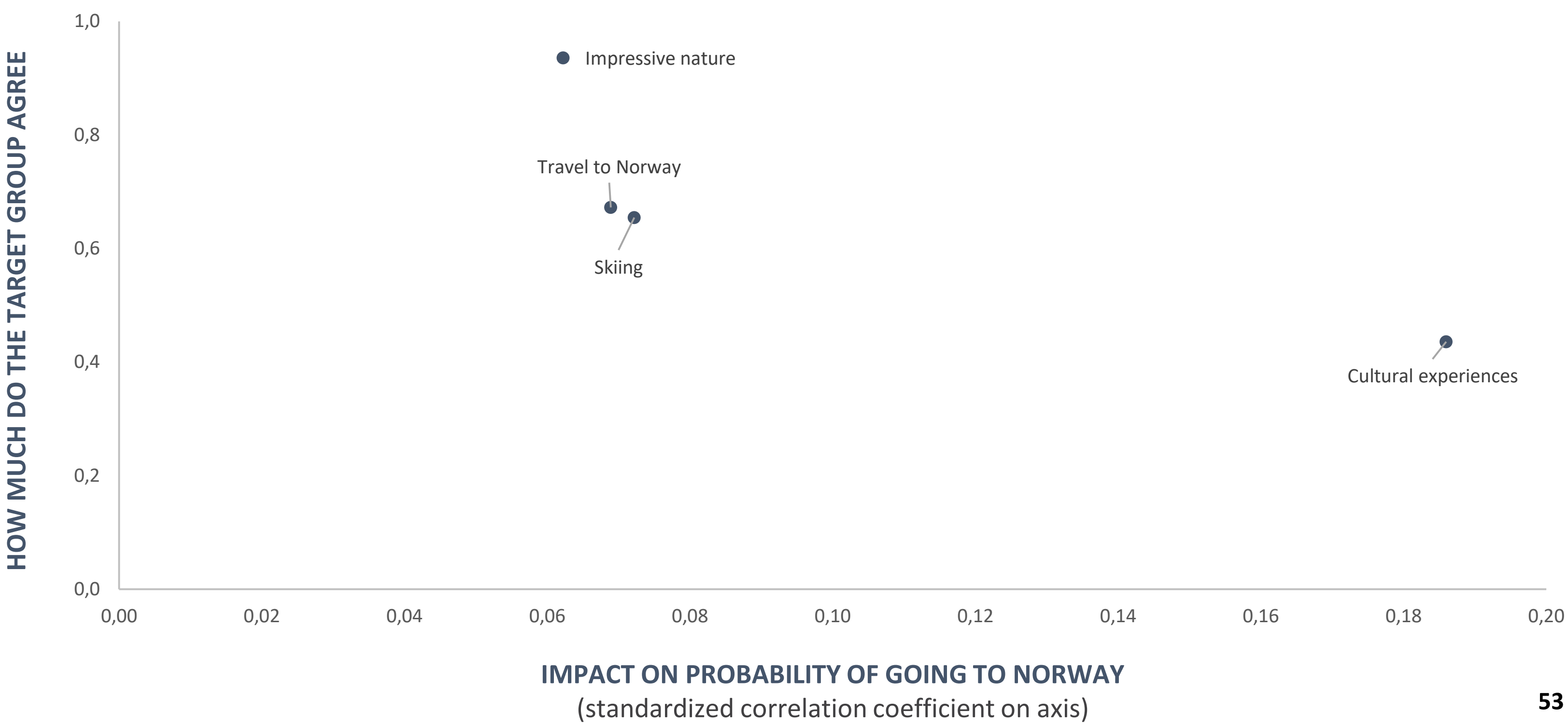


Innovasjon Norge

EPINION

DRIVERS FOR THE PROBABILITY TO VISIT NORWAY

The branding targets have been reduced to five dimensions (see page 57). In the chart below are the four dimensions that appears to have a statistically significant impact on the probability of visiting Norway displayed. The very most important driver for the Swedish target group is also the perception of the cultural experiences that Norway offers. Cultural experiences is also the factor that the least amount in the target group agrees with which indicate room for raising the perception among the target group regarding this.



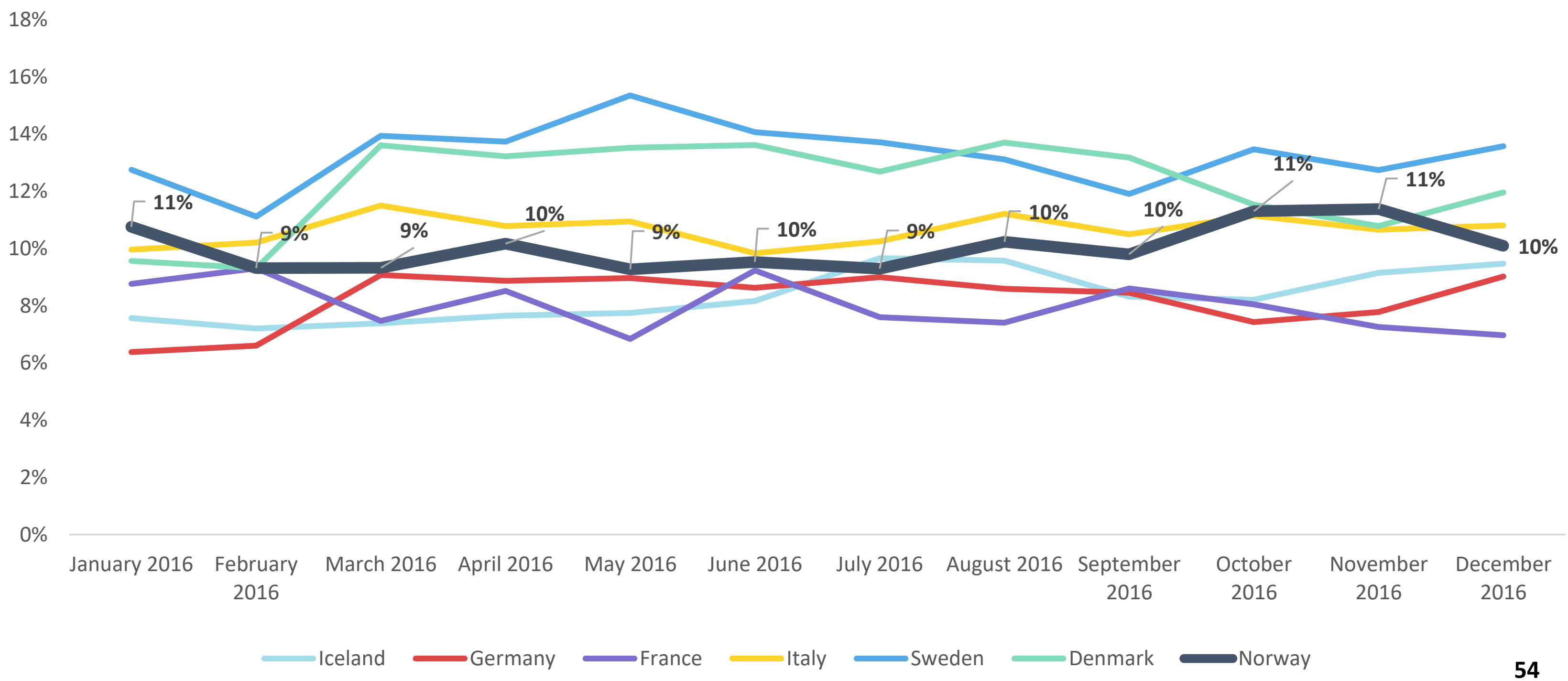
Innovasjon Norge

EPINION

SHARE OF VOICE IN SWEDEN

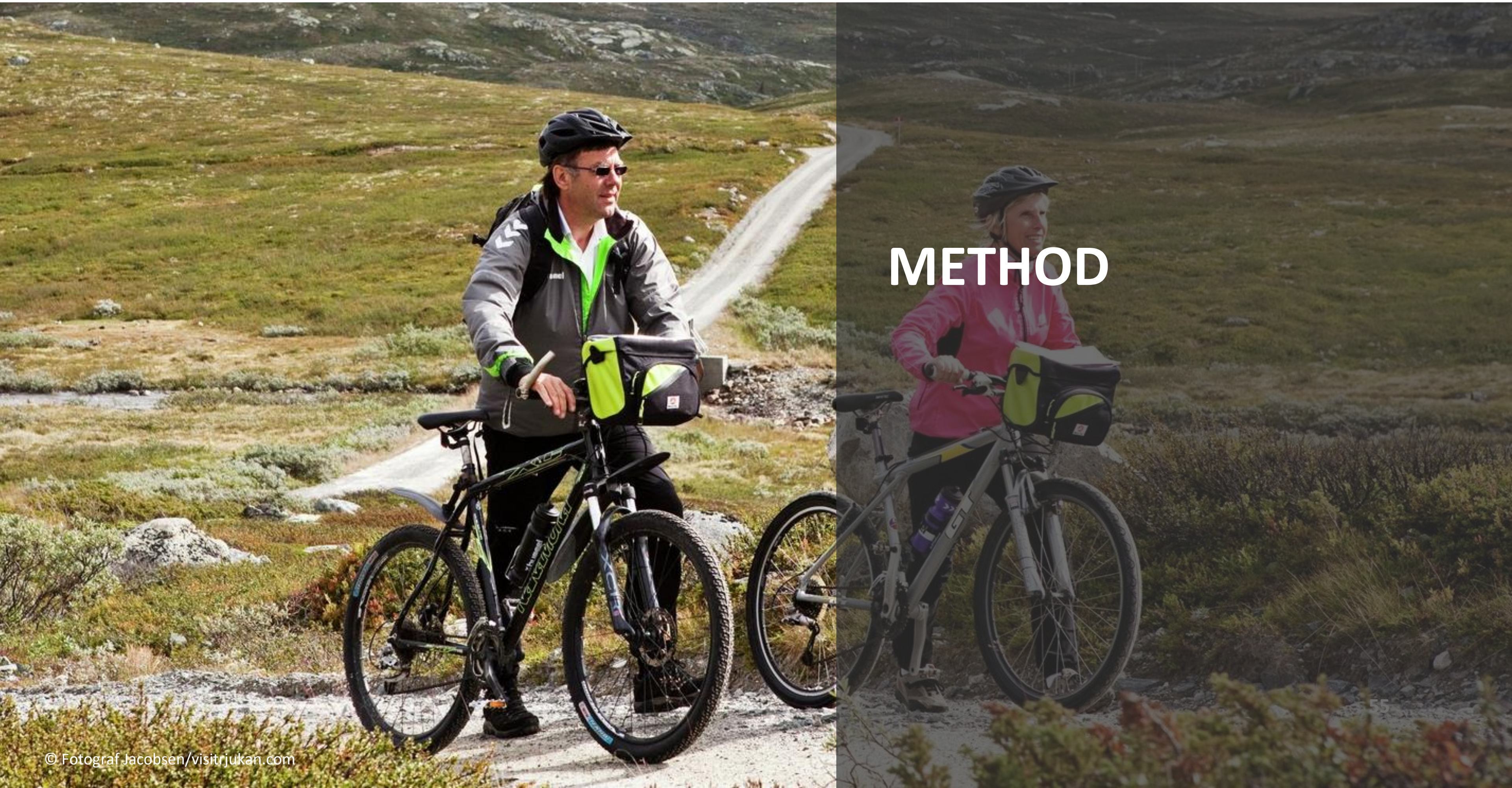
Below is an illustration of the development of Norways Share of Voice across 2016 in Sweden compared with the Share of Voice for other markets. On average Norway is ranking 4th with a steady 9%-11% across the year. Sweden, Denmark and Italy experience higher SoV in Sweden. Both Sweden and Denmark spikes at 15% and 14% in the spring 2016, but end at respectively 12% and 13% on average for all of 2016.

DEVELOPMENT IN SHARE OF VOICE IN SWEDEN COMPARED TO OTHER COUNTRIES



Innovasjon Norge

METHOD



THE IMPACT OF THE BRAND VALUES ON THE PROBABILITY OF GOING TO NORWAY

REDUCING THE BRAND VALUES TO FIVE MAIN DIMENSIONS

The grouping of the brand values on the following slides is based on a factor analysis. This has been necessary to reduce the correlation between the individual brand values and isolate the effects of the most significant factor. The factor analysis has indicated, that the 27 brand values can be reduced to five main dimensions that has an impact on the decision of choosing Norway as a holiday destination. Below is the grouping of the brand values:

SKIING DESTINATIONS:

- It offers a wide selection of slopes with different levels of difficulty
- A lot of snow is guaranteed on a skiing holiday in Norway
- It offers a wide variety of ski in ski out products
- It offers family friendly skiing
- There are many exciting experiences on offer in addition to skiing/snowboarding
- It is less crowded in Norwegian skiing destinations
- It offers excellent skiing, snowboarding, etc.

POSSIBLE TO DO OUTDOOR ACTIVITIES:

- It offers good cycling
- It offers good hiking
- It offers good angling
- It offers many kinds of beautiful light
- It is the best place to experience the Northern Lights
- It offers experiences that you cannot find anywhere else in the world

CULTURAL EXPERIENCES:

- It has exciting cities
- It has great cuisine and local specialties
- It has an exciting culture and history
- It has welcoming locals
- It has new and interesting places
- It offers a wide range of sustainable alternatives

TRAVEL TO NORWAY:

- It is easy to plan a trip to Norway
- It is easy to book all the elements of a holiday to Norway
- Norway is easy to get to
- There are attractive offers for a holiday in Norway

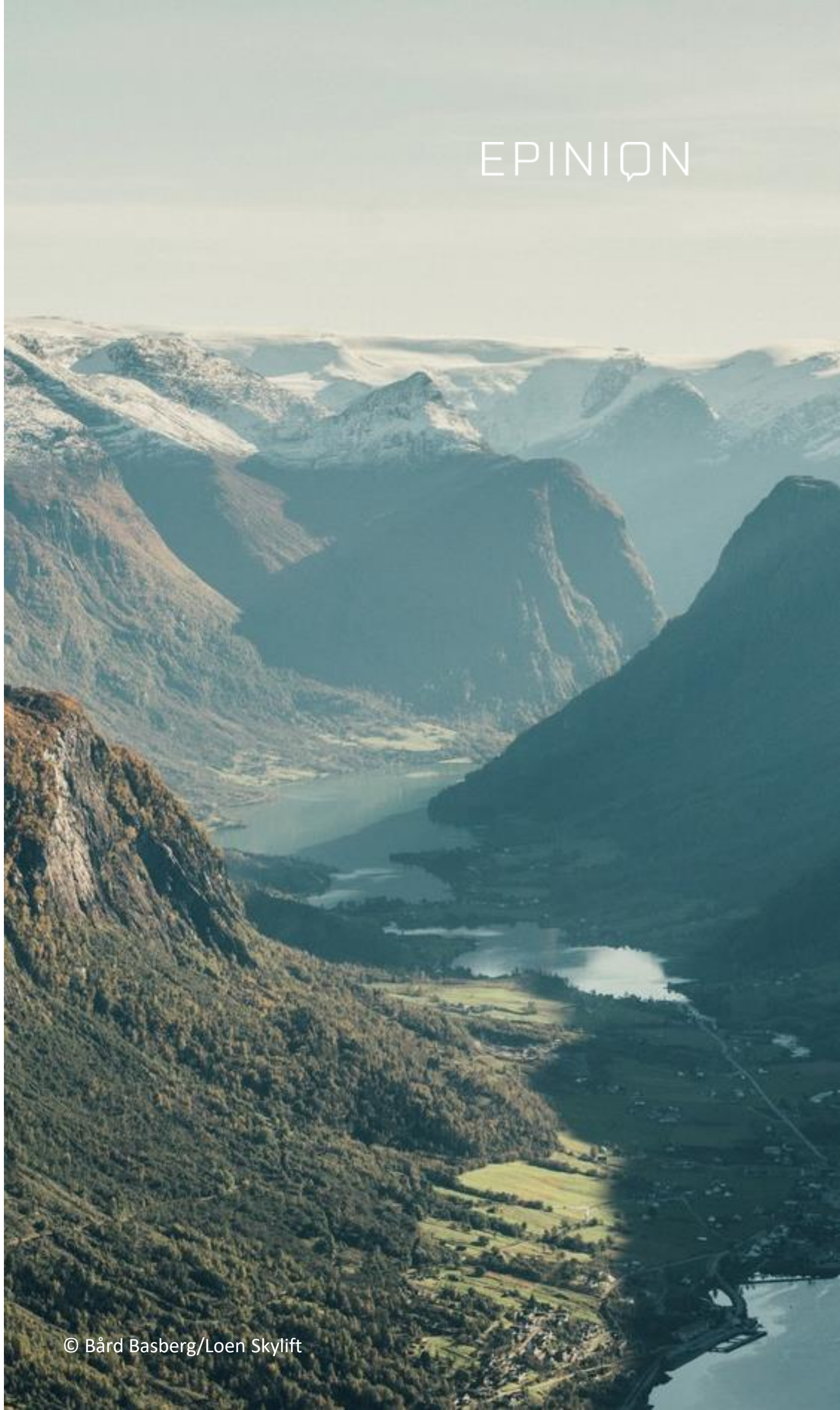
IMPRESSIVE NATURE:

- It has spectacular natural scenery
- It has spectacular fjords
- It has spectacular mountains
- Offers an opportunity to experience natural phenomena such as the midnight sun or the Northern Lights

DATA

THE ANALYSIS IN THE REPORT IS BASED ON THE FOLLOWING NUMBER OF INTERVIEWS:

MARKET	NUMBER OF INTERVIEWS 2016	NUMBER OF INTERVIEWS 2017
UK	4673	3998
DENMARK	2464	3960
NETHERLANDS	4600	4006
FRANCE	1160	2037
GERMANY	4693	4111
NORWAY	4465	4408
SWEDEN	4128	4193



APPENDIX

TARGET GROUP COMPARISON

		UK	Denmark	Netherlands	France	Germany	Norway	Sweden
Gender	Male	49%	50%	50%	50%	50%	46%	45%
	Female	51%	50%	50%	50%	50%	54%	55%
Age	18-34	37%	31%	34%	36%	31%	26%	18%
	35-55	42%	27%	44%	43%	47%	43%	41%
	56+	21%	42%	22%	21%	22%	31%	40%
Number of children	None	58%	77%	66%	52%	68%	68%	71%
	1+2	35%	19%	28%	41%	28%	27%	25%
	3 or more	7%	4%	6%	7%	4%	5%	4%
Holidays in last 3 years	1-2	40%	31%	39%	49%	46%	11%	30%
	3-4	31%	29%	34%	27%	31%	18%	29%
	More than 4	30%	40%	27%	23%	24%	71%	41%
Motivation	Dramatic and wild nature, and beautiful scenery	86%	69%	68%	89%	77%	71%	69%
	Alpine skiing	32%	18%	18%	42%	22%	22%	25%
	Snowboarding	27%	6%	16%	23%	15%	7%	4%
	Cross-country skiing	22%	9%	14%	33%	21%	30%	13%
	Outdoor activities such as going dog sledding, staying in an ice hotel or seeing the Northern Lights	65%	22%	39%	67%	41%	34%	29%
	Clean and unspoiled nature	85%	65%	83%	83%	87%	67%	61%
	Local art, culture and lifestyles	81%	83%	84%	81%	83%	76%	78%
	Big cities	84%	84%	85%	81%	70%	88%	84%
	Hiking	40%	34%	19%	60%	56%	56%	38%
	Fishing	23%	8%	15%	23%	15%	13%	11%
	Cycling	34%	14%	41%	26%	46%	23%	16%
Income	Median (EUR)	45.000 - 56.000	54.000 – 67.000	25.000 - 40.000	26.000 - 39.999	40.000 - 52.999	75.000 – 86.000	52.000 – 63.000
Education	Average years	15,4	13,9	15,3	15,1	14,3	13,9	13,9

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EPINION

ATTITUDE TO NORWAY

	UK	Denmark	Netherlands	France	Germany	Norway	Sweden
Exciting cities	63%	34%	53%	65%	71%	47%	44%
Exciting culture and history	73%	49%	68%	74%	76%	75%	57%
Great cuisine and local specialities	56%	21%	50%	62%	66%	66%	33%
Welcoming locals	63%	47%	59%	67%	75%	49%	66%
New and interesting places	78%	53%	75%	87%	84%	73%	75%
Sustainable alternatives	59%	25%	54%	69%	63%	45%	36%
Experiences that you cannot find anywhere else	68%	45%	63%	79%	72%	72%	59%
Exciting experiences in addition to skiing	62%	45%	47%	65%	56%	58%	42%
Good cycling	47%	24%	45%	36%	59%	63%	38%
Good hiking	66%	87%	83%	75%	87%	97%	89%
Good angling	47%	64%	68%	57%	71%	80%	75%
Spectacular natural scenery	88%	90%	88%	90%	90%	97%	94%
Spectacular fjords	80%	86%	83%	84%	89%	97%	95%
Spectacular mountains	84%	88%	80%	80%	81%	95%	91%
Natural phenomena	83%	77%	81%	87%	87%	95%	79%
Best place to experience the Northern Lights	70%	41%	64%	83%	74%	79%	28%
Beautiful light	79%	59%	76%	81%	84%	80%	52%
Attractive offers	56%	30%	45%	57%	66%	26%	36%
Easy to get to	75%	74%	65%	75%	67%	57%	85%
Easy to plan a trip	66%	57%	66%	68%	67%	68%	59%
Easy to book	62%	49%	70%	64%	72%	49%	42%
Family friendly skiing	56%	57%	41%	61%	50%	65%	47%
Excellent skiing	68%	78%	59%	67%	65%	87%	78%
Snow is guaranteed	60%	45%	46%	72%	63%	42%	39%
Less crowded ski destinations	48%	19%	44%	54%	49%	18%	14%
Variety of ski in ski out	51%	28%	41%	63%	42%	30%	28%
Wide selection of slopes	54%	50%	47%	60%	51%	60%	48%

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EPINION

THE GROUP THAT IS INTERESTED IN GOING TO NORWAY

		England		Denmark		Netherlands		France		Germany		Norway		Sweden	
		%	Index	%	Index	%	Index	%	Index	%	Index	%	Index	%	Index
Gender	Male	53%	108	44%	89	59%	118	57%	115	55%	110	45%	97	45%	102
	Female	47%	92	56%	111	41%	82	43%	86	45%	90	55%	103	55%	99
Age	18 - 35	53%	144	30%	98	37%	109	41%	114	31%	101	24%	93	19%	103
	36 - 55	38%	89	25%	92	47%	107	46%	108	48%	103	43%	101	40%	96
	56 +	9%	42	45%	107	16%	73	13%	60	20%	92	33%	104	41%	103
No. of children	None	58%	100	77%	100	66%	100	52%	100	68%	100	68%	100	71%	100
	1+2	35%	100	19%	100	28%	100	41%	100	28%	100	27%	100	25%	100
	3+	7%	100	4%	100	6%	100	7%	100	4%	100	5%	100	4%	100
Holidays in last 3 years	1 - 2	40%	100	31%	100	39%	100	49%	100	46%	100	11%	100	30%	100
	3 - 4	31%	100	29%	100	34%	100	27%	100	31%	100	18%	100	29%	100
	More than 4	30%	100	40%	100	27%	100	23%	100	24%	100	71%	100	41%	100
Income	Median (EUR)	45.000 - 56.000	▶	81.000 – 94.000	▲	50.000 – 60.000	▲	40.000-52.999	▲	40.000-52.999	▶	86.000 – 96.000	▲	63.000 – 73.000	▲
Education	Average years	15,8	(+0,4)	14,1	(+0,2)	16,2	(+0,9)	15,2	(+0,1)	13,9	(-0,4)	14,1	(+0,2)	14,6	(+0,3)

Share in left column. Index compared to the target group in the right column.

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EPINION

THE GROUP THAT IS INTERESTED IN GOING TO NORWAY

Motives	England		Denmark		Netherlands		France		Germany		Norway		Sweden	
	%	Index	%	Index	%	Index	%	Index	%	Index	%	Index	%	Index
Dramatic and wild nature, and beautiful scenery	89%	103	77%	113	80%	117	93%	104	83%	108	76%	108	78%	112
Hiking	59%	150	46%	135	36%	188	79%	132	70%	125	64%	115	50%	130
Fishing	48%	211	14%	181	36%	240	52%	222	29%	188	16%	121	21%	197
Cycling	61%	178	19%	135	60%	149	56%	216	60%	130	27%	118	24%	148
Alpine skiing	52%	164	29%	161	36%	196	62%	146	35%	158	25%	110	32%	131
Snowboarding	49%	181	9%	148	32%	207	46%	200	30%	201	7%	109	8%	178
Cross-country skiing	49%	222	23%	259	32%	234	62%	186	38%	181	36%	123	23%	168
Outdoor activities such as going dog sledding, staying in an ice hotel or seeing the northern lights	76%	116	33%	146	61%	154	81%	121	56%	138	38%	111	38%	129
Clean and unspoiled nature	84%	99	71%	109	87%	105	89%	107	90%	103	73%	109	70%	115
Local art, culture and lifestyles	81%	100	81%	98	87%	103	87%	107	88%	106	77%	102	75%	96
Big cities	88%	104	81%	96	85%	99	87%	108	75%	106	87%	99	80%	96

Share in left column. Index compared to the target group in the right column.

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EPINION

THE GROUP THAT IS INTERESTED IN GOING TO NORWAY

	England		Denmark		Netherlands		France		Germany		Norway		Sweden	
	%	Index	%	Index	%	Index	%	Index	%	Index	%	Index	%	Index
Exciting cities	86%	137	55%	160	73%	138	90%	138	84%	118	53%	113	58%	132
Exciting culture and history	91%	124	69%	141	82%	121	94%	128	88%	116	81%	107	70%	122
Great cuisine and local specialities	83%	149	37%	178	75%	151	85%	137	81%	123	72%	110	44%	133
Welcoming locals	85%	135	70%	148	80%	136	91%	136	89%	118	55%	111	81%	123
New and interesting places	92%	117	74%	139	85%	114	97%	111	92%	109	81%	110	88%	118
Sustainable alternatives	84%	143	44%	172	73%	136	89%	129	83%	131	50%	111	52%	145
Experiences that you cannot find anywhere else	86%	127	62%	139	82%	130	94%	119	87%	120	77%	106	71%	121
Exciting experiences in addition to skiing	85%	136	65%	145	72%	154	87%	135	76%	135	63%	108	53%	127
Good cycling	78%	166	40%	163	67%	147	71%	195	76%	129	66%	105	46%	123
Good hiking	86%	131	94%	108	89%	107	92%	124	92%	106	98%	101	93%	104
Good angling	77%	163	71%	111	80%	118	82%	142	82%	115	83%	103	78%	104
Spectacular natural scenery	94%	107	96%	107	90%	103	95%	106	94%	104	98%	101	98%	104
Spectacular fjords	90%	112	94%	109	89%	107	92%	109	94%	106	98%	101	97%	103
Spectacular mountains	94%	112	95%	107	89%	111	94%	118	90%	111	96%	101	96%	106
Natural phenomena	92%	111	85%	111	89%	110	94%	109	94%	108	96%	101	84%	106
Best place to experience the Northern Lights	87%	125	54%	130	81%	126	97%	116	87%	118	80%	101	38%	140
Beautiful light	92%	117	71%	120	87%	115	93%	115	92%	109	84%	105	65%	126
Attractive offers	87%	153	51%	169	75%	169	87%	152	85%	128	31%	120	55%	151
Easy to get to	91%	121	91%	124	83%	129	91%	122	83%	124	63%	111	94%	111
Easy to plan a trip	88%	134	87%	153	85%	128	89%	131	85%	127	76%	111	83%	141
Easy to book	88%	141	71%	145	86%	124	88%	138	87%	121	55%	111	57%	137
Family friendly skiing	82%	146	74%	130	67%	161	84%	138	71%	141	68%	105	57%	120
Excellent skiing	86%	126	84%	108	76%	128	86%	128	79%	120	88%	101	80%	103
Snow is guaranteed	85%	142	64%	142	70%	150	86%	119	78%	124	44%	105	51%	130
Less crowded ski destinations	76%	159	32%	164	66%	149	83%	153	71%	144	21%	115	20%	146
Variety of ski in ski out	81%	157	43%	153	67%	162	89%	142	67%	159	33%	108	38%	135
Wide selection of slopes	80%	148	65%	132	71%	152	86%	143	73%	143	63%	105	58%	121

Share in left column. Index compared to the target group in the right column.

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