NORWAYS POSITION AS A HOLIDAY DESTINATION - 2017

INNOVASJON NORGE


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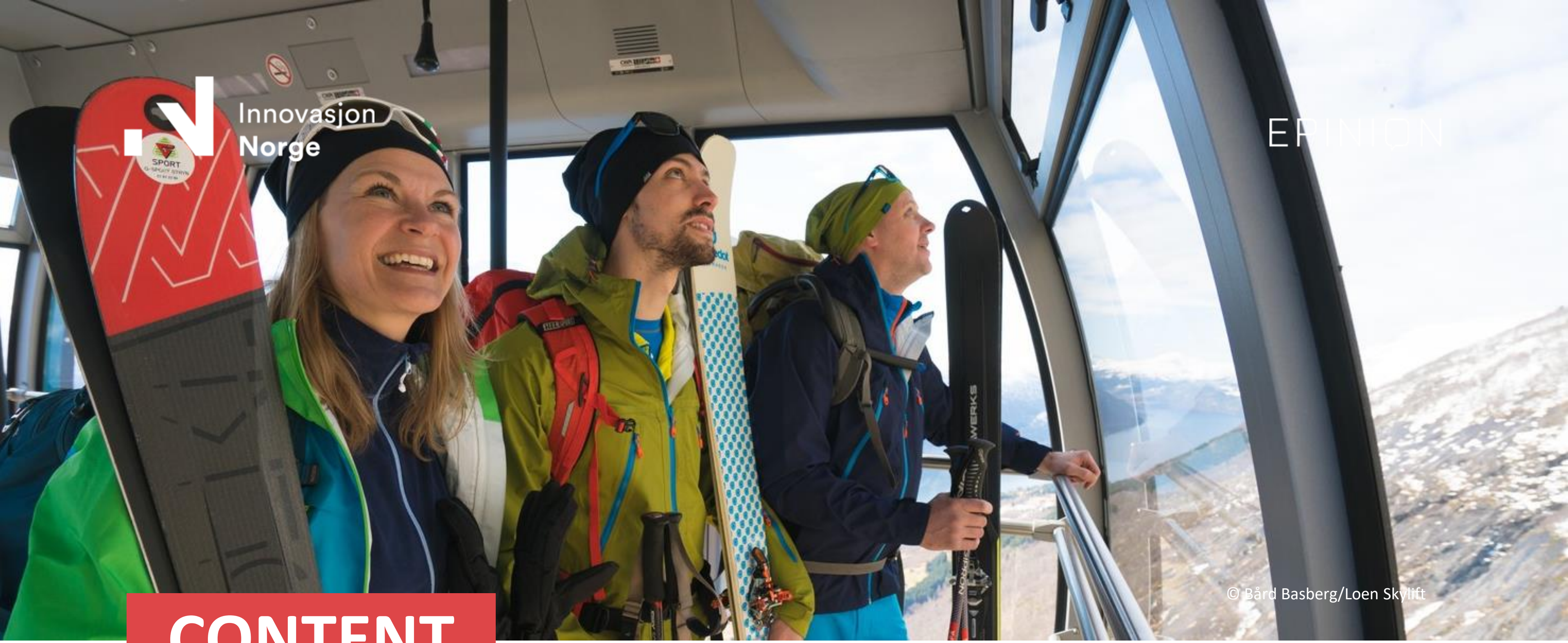

CONTENT

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 2017 collected from the ongoing Innovasjon Norge tracking in seven European countries (Norway, Sweden, Denmark, UK, Germany, France and Netherlands). The only exception to this is the charts that display the development since October 2012 for five select brand targets.

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. This means that Norway is compared to an average for the six foreign markets. And each of the six foreign markets are compared to an average of the six foreign markets as well.

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 67% (France) and 74% (UK) outside of Norway. The northern lights target group is the second largest with a share varying from around 50% in UK and France to less than one in four in Denmark.. In all the alpine target group is the smallest of the three target groups.

NORWAY

Nature: 83%
Northern light : 45%
Alpine: 32%

UK

Nature: 74%
Northern light: 56%
Alpine: 32%

FRANCE

Nature: 67%
Northern light : 52%
Alpine: 35%

SWEDEN

Nature: 68%
Northern light : 32%
Alpine: 21%

DENMARK

Nature: 66%
Northern light : 23%
Alpine: 15%

NETHERLAND

Nature: 67%
Northern light : 34%
Alpine: 21%

GERMANY

Nature: 70%
Northern light : 39%
Alpine: 26%

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EPINION

MAIN FINDINGS – UK, DENMARK, NETHERLANDS AND FRANCE

		UK	DENMARK	NETHERLANDS	FRANCE
TARGET GROUP		Over 40% are **between 36 and 55 years old**. More than half has **no children**. Interested in **wild unspoiled nature, big cities** and **local art, culture and lifestyles**. Seven out of ten says they are interested in **outdoor activities**.	Over 40% of Danes are **over 56 years old**. 74% have **no children**. Interested in **local art, culture and lifestyles** and **big cities and**. Overall **Less interested in outdoor activities** compared to average across all markets.	The Dutch are close to the average on most background characteristics, except they are a little bit **younger and more educated.** They are interested in **big cities, unspoiled nature and local art, culture and lifestyle**. 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 **wild and beautiful scenery, and clean and unspoiled nature**. They are more interested in **Outdoor activities** compared to the average.
NORWAYS BRAND	**TOP OF MIND**	Fjords, the norther lights, snow, beautiful scenery, cold	Nature, snow, mountains, ski, beautiful	Nature, fjords the northern lights, snow, cold	Beautiful nature and scenery, fjords, snow and being cold
	BRAND VALUES	+ Spectacular natural scenery + Natural phenomena + Spectacular mountains + New and interesting experiences ÷ Wide variety of ski in ski out ÷ Good angling ÷ Less crowded skiing destinations ÷ Good cycling	+ Spectacular natural scenery + Spectacular mountains + Hiking + Spectacular fjords ÷ Sustainable alternatives ÷ Wide variety of ski in ski out ÷ Cuisine and local specialties ÷ Less crowded skiing destinations	+ Spectacular natural scenery + Hiking + Spectacular fjords + Natural phenomena ÷ Attractive offers for a holiday ÷ Less crowded skiing destinations ÷ Family friendly skiing ÷ Wide variety of ski in ski out	+ Spectacular natural scenery + Natural phenomena + Spectacular fjords + Best place to experience northern lights ÷ Cuisine and local specialties ÷ Attractive offers for a holiday ÷ Less crowded skiing destinations ÷ Good cycling
INSIDERS AND OUTSIDERS		The visitors are especially likely to say that it is easy to plan a trip to Norway and that there are less crowded skiing destinations, welcoming locals and attractive offer for a holiday compared to non-visitors.	Danes that have visited Norway are more likely to say that the country has welcoming locals and that it is easy to plan a trip to Norway compared to Danes that have not visited Norway.	The Dutch tourists that have visited Norway and the potential Dutch tourists that have not visited Norway mostly disagree on Norway having attractive offers and if they have good cuisine.	French visitors are especially more likely to say that Norway have attractive offers for a holiday and is a good place for cycling compared to non-visitors.
SOV		Norway's SoV is 6% - 9% over 2017, and is a little higher in the winter than other times of the year. Norway's SoV is the highest among the Nordic countries	Norway's SoV is between 9% and 13% in 2017. It is especially high in the winter and months. In the winter Norway's SoV falls below that of more traditional summer holiday destinations.	Norway's SoV is fairly steady throughout the year being 9% - 10% in most months. Norway thus has the 5th largest SoV in the Netherlands but is well ahead of the other Nordic countries.	Norway's SoV averages 8% over the year. It does not vary much over the year but is slightly higher in the beginning of the year. Than in the end of the year.

MAIN FINDINGS – GERMANY, NORWAY AND SWEDEN

		GERMANY	NORWAY	SWEDEN
TARGET GROUP		Almost half in the German target group is between 36-55 yrs. **They travel slightly less often than the average, but are more likely than average to visit Norway**. Interested in **clean and unspoiled nature** and **local art, culture and lifestyle**. More motivated by **hiking** and **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 experiencing **big cities, local art, culture and lifestyle.** They are more motivated by **hiking** and **cross country skiing** compared to average.	On average a little **older** and less likely to have children. **Travels more often than average** and 1/3 **remembers to have seen an ad** for Norway. Interested in **big cities, local art, culture and lifestyles and wild and beautiful scenery.**
NORWAYS BRAND	**TOP OF MIND**	Beautiful nature, fjords, untouched nature and landscape	Nature, mountains, Lofoten, expensive, beautiful,	Nature, fjords, Hurtigruten, beautiful, expensive, mountains
	BRAND VALUES	+ Spectacular natural scenery + Spectacular fjords + Natural phenomena + Good hiking ÷ Wide selection of slopes ÷ Family friendly skiing ÷ Less crowded skiing destinations ÷ Wide variety of ski in ski out	+ Spectacular natural scenery + Spectacular fjords + Good hiking + Spectacular mountains ÷ Snow guarantee ÷ Attractive offers for a holiday ÷ Wide variety of ski in ski out ÷ Less crowded skiing destinations	+ Spectacular fjords + Spectacular natural scenery + Spectacular mountains + Good hiking ÷ Great cuisine and local specialties ÷ Best place to experience the Northern Lights ÷ Wide variety of ski in ski out ÷ Less crowded skiing destinations
INSIDERS AND OUTSIDERS		The two groups especially disagree that it is easy to plan a trip to Norway and that Norway is easy to get to.	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 primarily disagree on whether it is easy to plan a trip to Norway, if the locals are welcoming and if there is a wide selection of slopes.
SOV		Norway is ranking 4th in the German SoV with an average of 9% that fluctuates between 7% and 11% throughout the year. Both Germany, Austria and Italy reach higher average SoV in Germany.	Norway's SoV is the second highest in Norway. Denmark's SoV is higher throughout most of 2016. While Norway's SoV is 17%-19% throughout the year Denmark's SoV peaks at 26% in the summer months.	Norway's SoV in Sweden is placed 4th and fluctuates between 9% and 12% throughout the year. Norway is outranked by both Sweden, Denmark and Italy.

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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 younger, slightly more likely to have children and more likely to visit Norway within the next 12 months. But they are less likely to remember having seen an add for Norway. The UK target group mainly associate Norway with the fjords, the norther lights, snow and having beautiful scenery but being cold place to visit.

DEMOGRAPHIC CHARACTERISTICS

52% / 51%
Women

40% / 37%
1-2 travels abroad in the past 3 years

60% / 63%
3 or more travels abroad in the past 3 years

55% / 66%
No children

21% / 16%
1 child

24% / 18%
2 or more children

37% / 29%
18-35 years old

42% / 39%
36-55 years

21% / 32%
56 years or older

15,0 / 14,5
Average years of education

45.000 - 57.000 EUR
Median income

- UK target group
- Average (foreign markets)

ASSOCIATIONS TO NORWAY

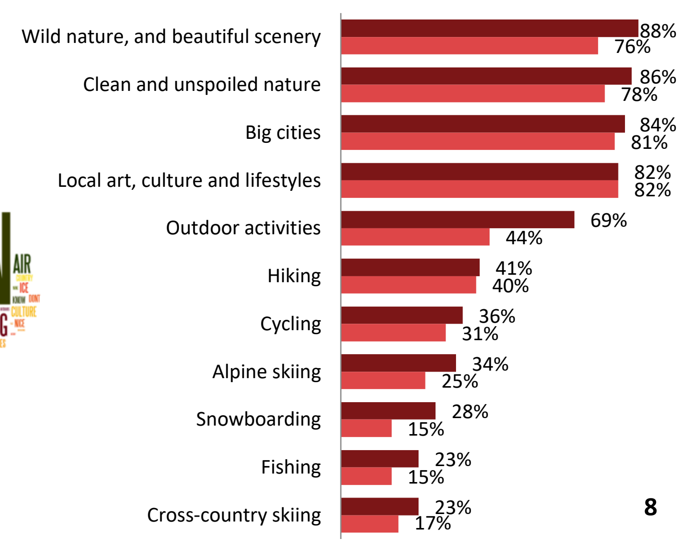
N=5327

PROBABILITY FOR VISIT AND RECALL

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

15% / 22%
Remember seeing an add for Norway

MOTIVATION FOR TRAVEL ON HOLIDAY ABROAD



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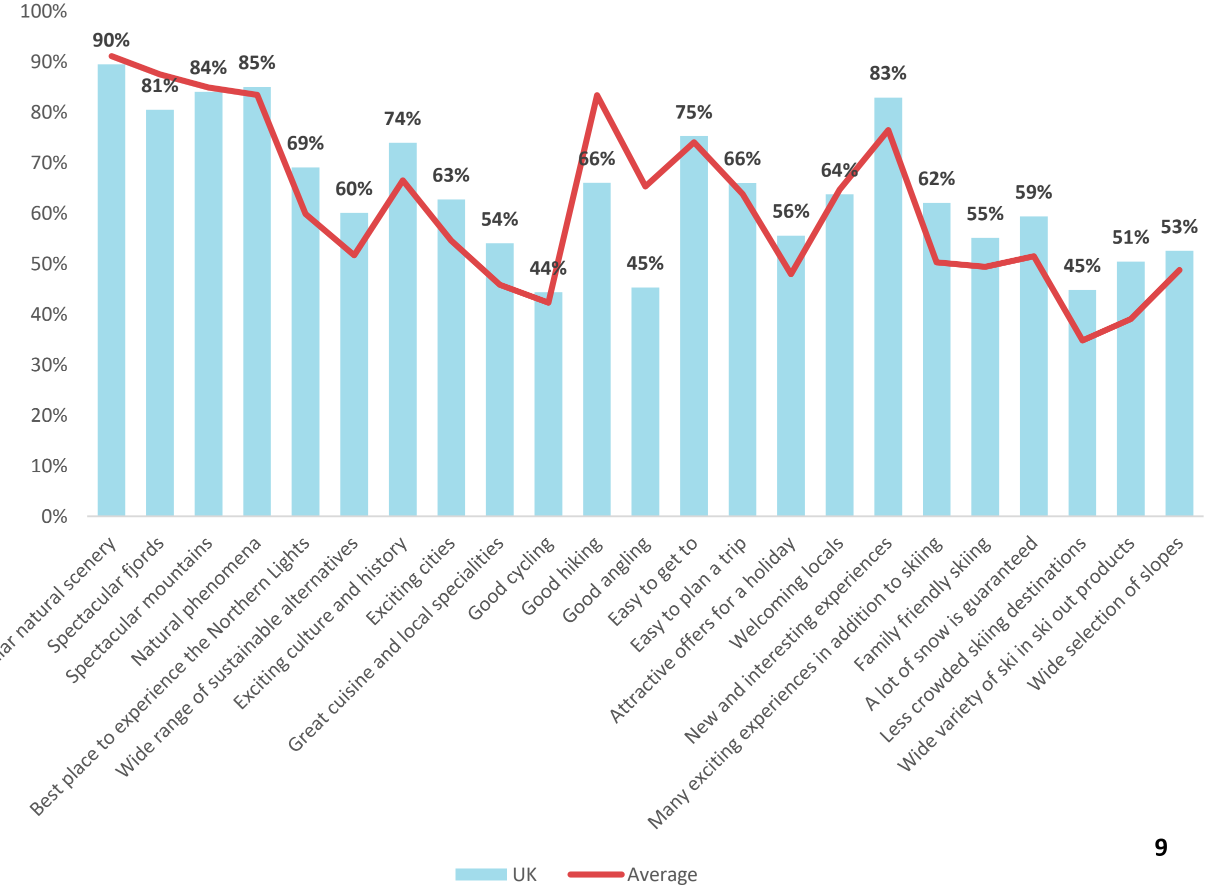
EPINION

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 offers new and interesting experiences, has an exciting culture and history and that a lot of snow is guaranteed. The UK target group is below average when looking at their perception of Norways as a good place for angling and cycling as well as a place that has spectacular fjords.



N= 5327

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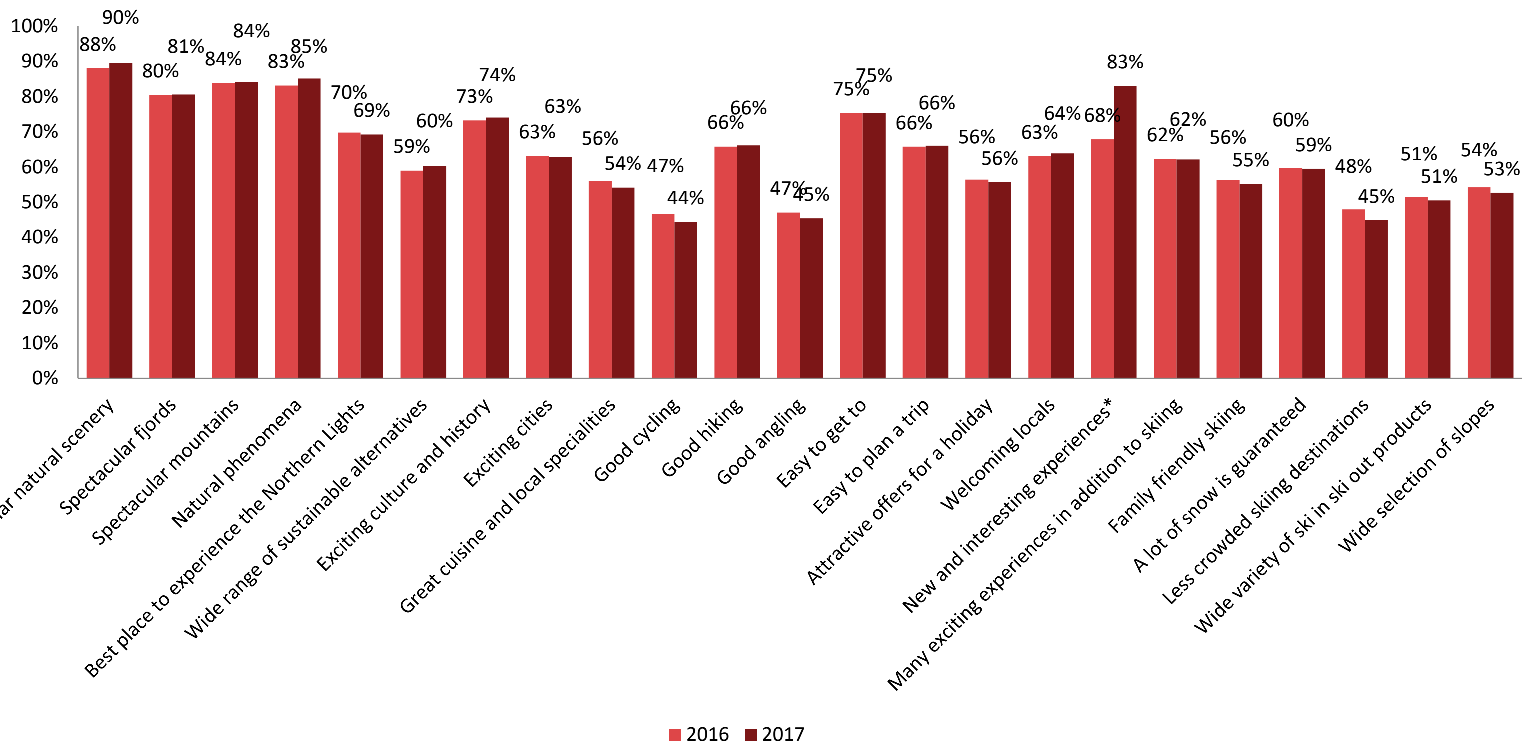
EPINION

DEVELOPMENT IN BRAND TARGETS 2016 TO 2017

The chart below shows how the share that agrees with the brand statements about Norway has developed from 2016 to 2017. As can be seen there is very little change from 2016 to 2017. This indicates a lot of consistency in the british target groups view of Norway as a holiday destination.

DEVELOPMENT I BRAND TARGETS FROM 2016 TO 2017



*Question wording until the end of 2016 was :"It offers experiences that you cannot find anywhere else in the world"

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EPINION

VISITORS AND NON-VISITORS

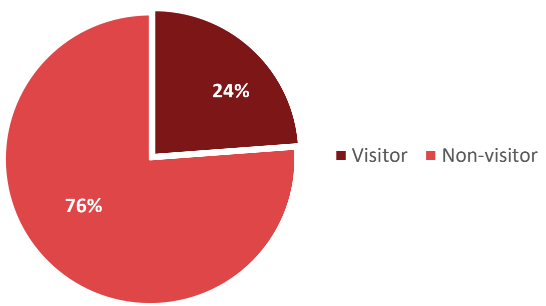
The circle below illustrates that almost a quarter of the tourists in the UK target group have visited Norway before.

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.

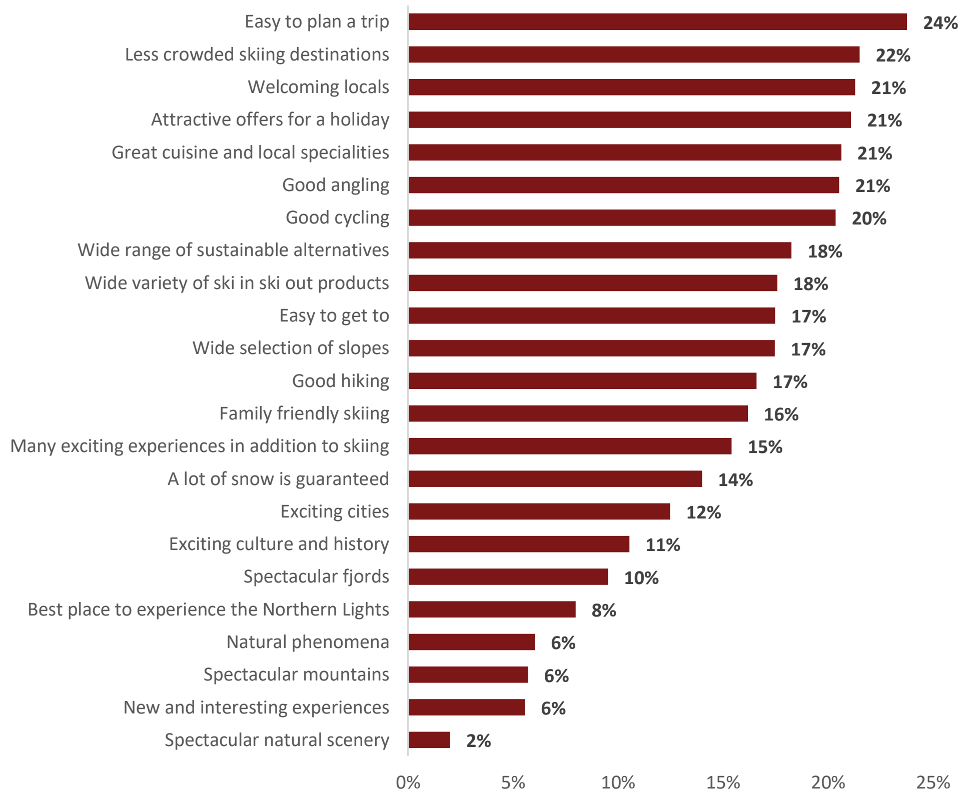
The two groups have almost similar views on Norway's nature. They differ most on their view of how easy it is to plan a trip to Norway, that Norway have less crowded skiing destinations and that there are welcoming locals.

UK TARGET GROUP WHO HAVE VISITED NORWAY



N= 5327

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



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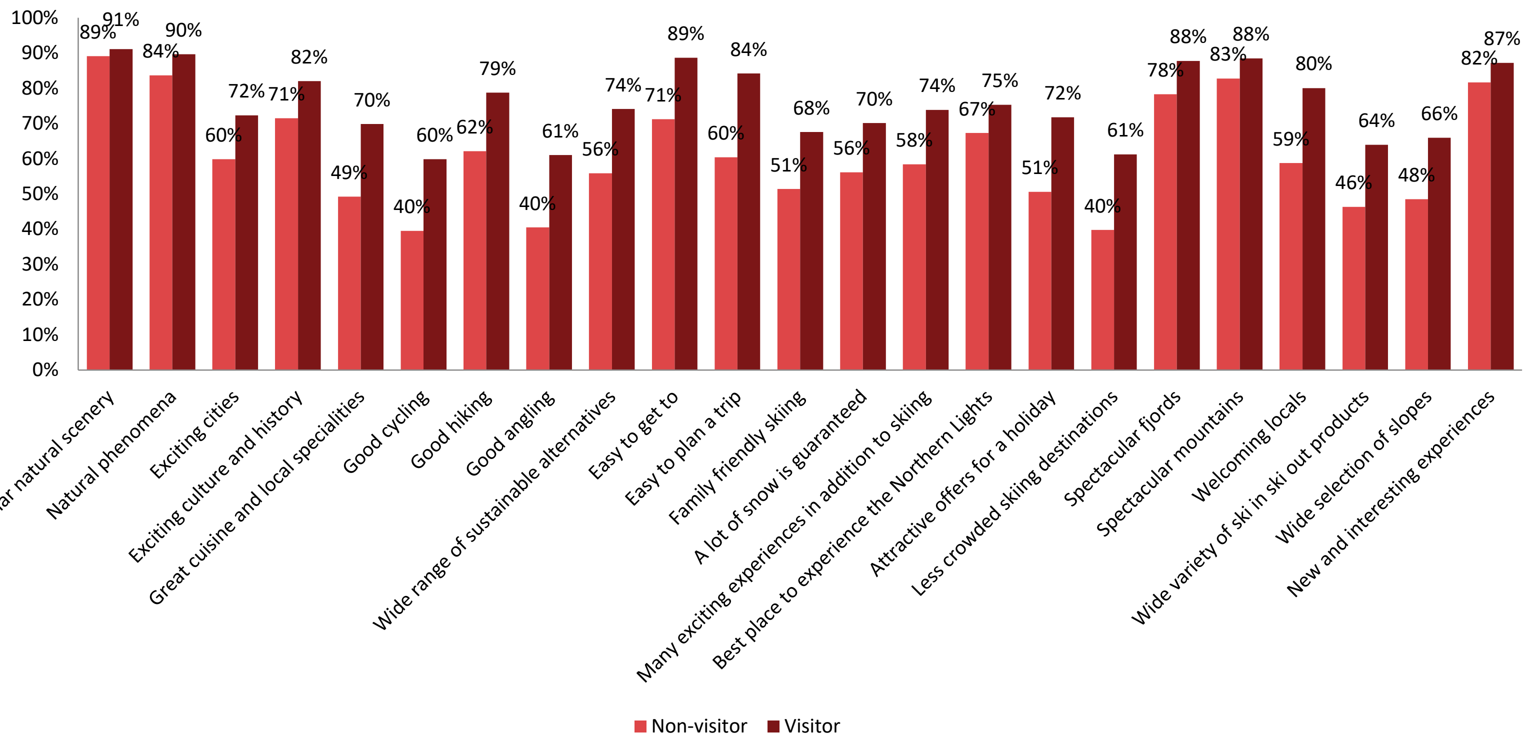
EPINION

SHARE OF VISITORS AGREEING WITH BRAND STATEMENTS

The chart below shows the percentage that agrees with the brand statements split by visitors and non-visitors. The previous page showed the difference between visitors and non-visitors to display what set them apart. On this page is the absolute share that agrees with the brand targets. This illustrates how many in each group that agrees with the brand targets.

PERCENTAGE THAT AGREES WITH THE STATEMENT SPLIT BY VISITOR AND NON-VISITOR



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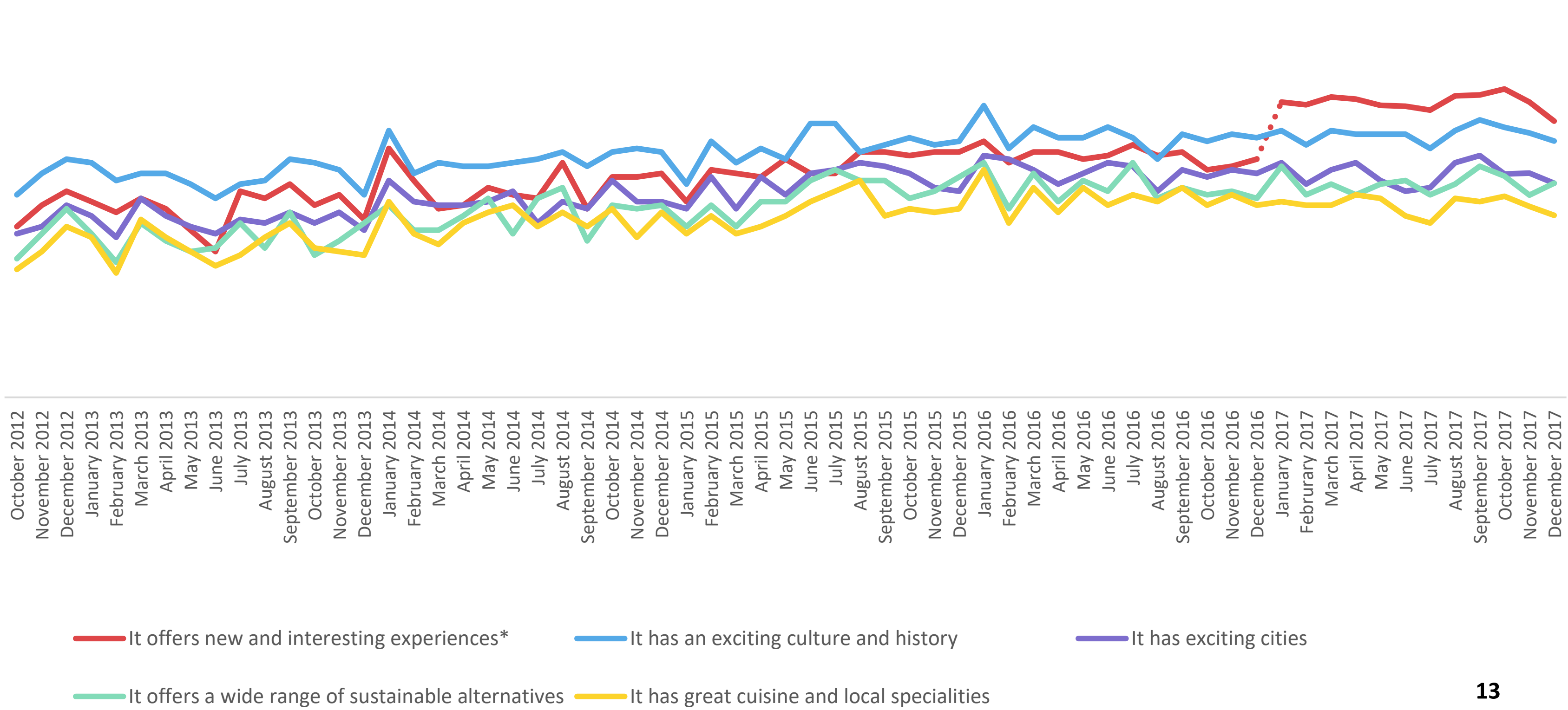
EPINION

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 there is a slowly but steady increase in the perception of Norway having good offers on all brand targets. 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



*Question wording until the end of 2016 was :"It offers experiences that you cannot find anywhere else in the world"

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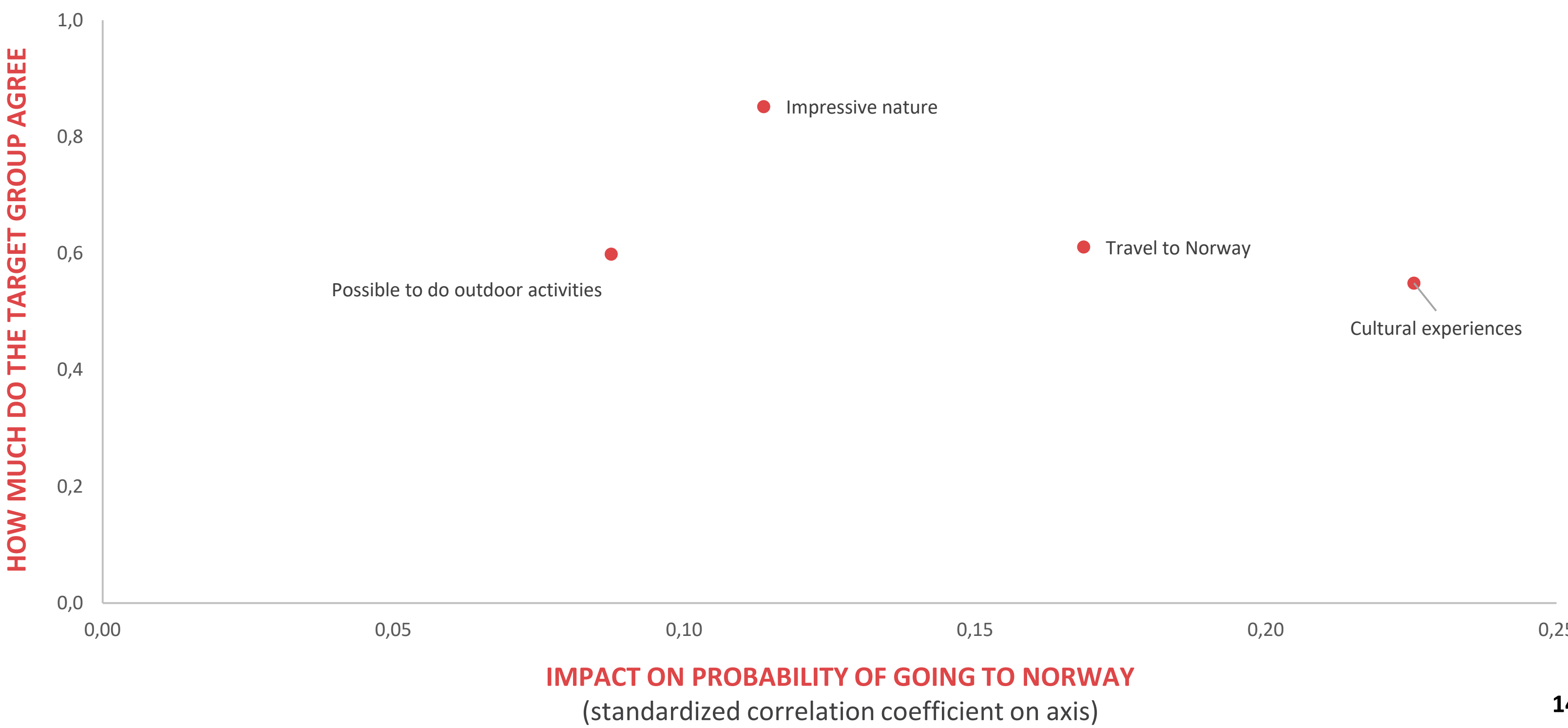
EPINION

DRIVERS FOR THE PROBABILITY TO VISIT NORWAY

The branding targets have been reduced to five dimensions (see page 56). 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 a place with interesting cultural experiences have the highest impact on the probability of going to Norway. And the relatively low share that agrees with this view of Norway suggests that Norway should try to improve the UK target groups perception of Norway as a place with interesting cultural experiences.



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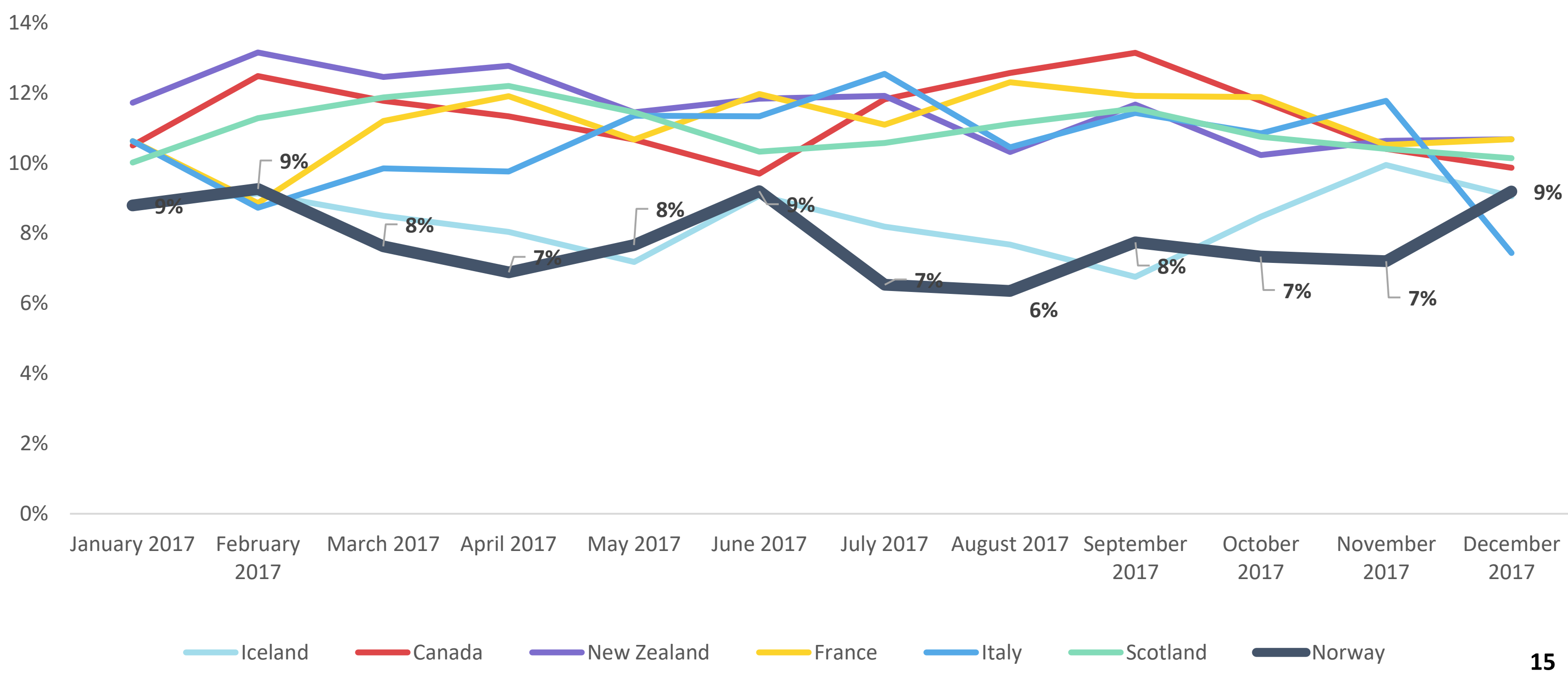
EPINION

SHARE OF VOICE IN THE UK

Below is an illustration of the development of Norways Share of Voice across 2017 in the UK compared with the Share of Voice for other markets. On average Norway is ranking 7th when looking at the Share of Voice in the UK. Norways SoV seems stable across most of the year but slightly higher in the first half of the year than in the latter half. Canada and Naw Zealand have the higest SoV in the UK but Norways SoV is better than both Denmark and Sweden who both average 3-4% across the year.

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



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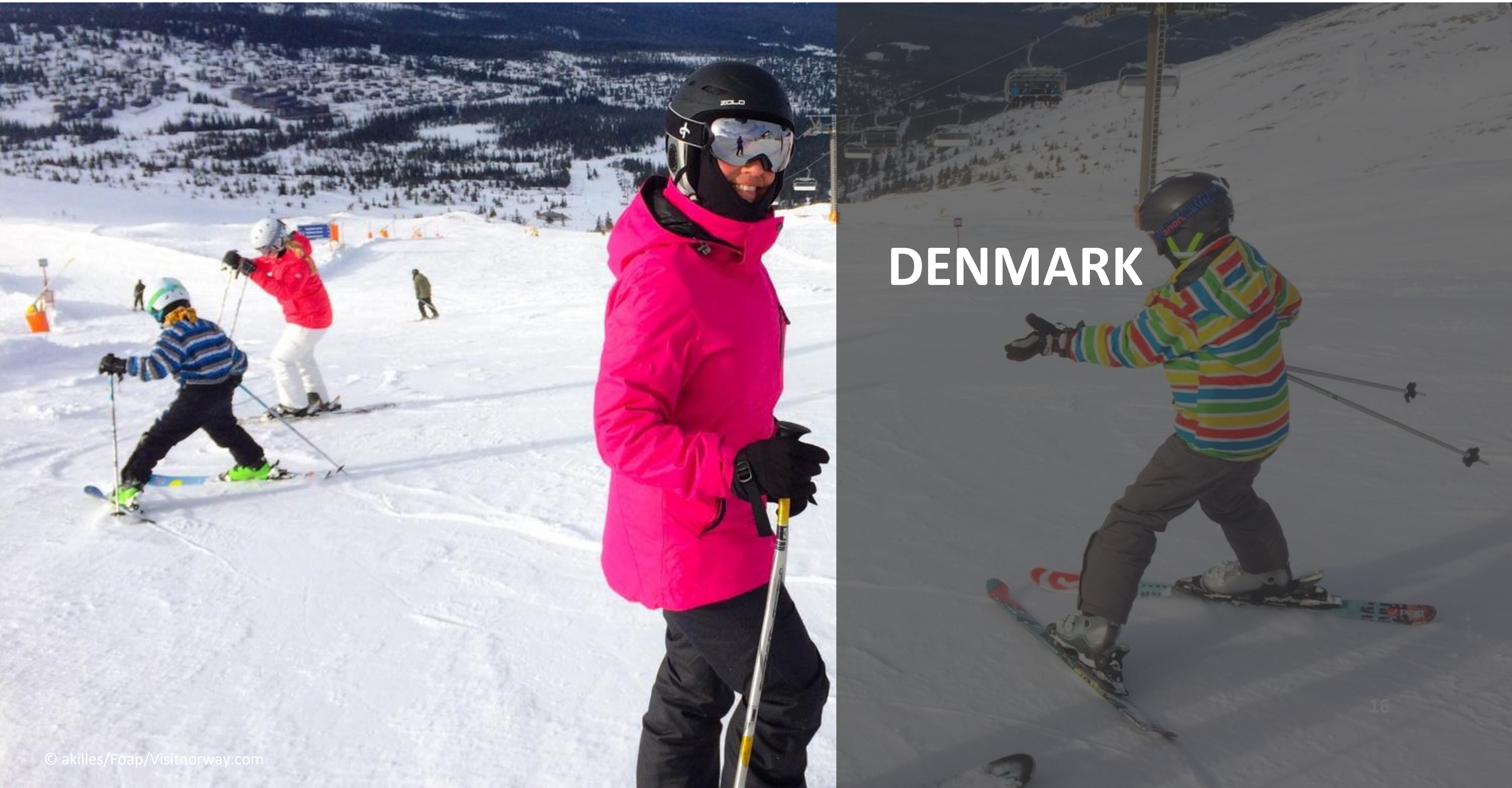

DENMARK

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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 say they will visit Norway within the next 12 months but a higher share remembers having seen an add for Norway. 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 being a beautiful country.

DEMOGRAPHIC CHARACTERISTICS

49% / 51%
Women

31% / 37%
1-2 travels abroad in the past 3 years

69% / 63%
3 or more travels abroad in the past 3 years

80% / 66%
No children

11% / 16%
1 child

9% / 18%
2 or more children

25% / 29%
18-35 years old

23% / 39%
36-55 years

52% / 32%
56 years or older

14,1 / 14,5
Average years of education

54.000 - 67.000 EUR
Median income

- Danish target group
- Average (foreign markets)

N=5266

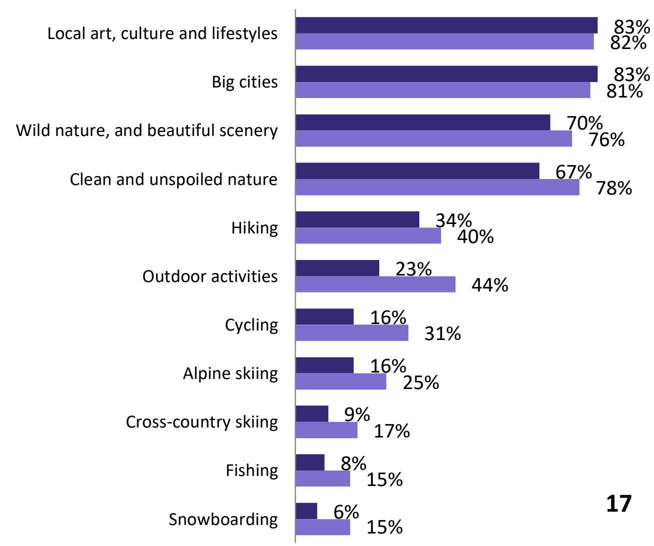
ASSOCIATIONS TO NORWAY

PROBABILITY FOR VISIT AND RECALL

3,0 / 3,9
Likely to visit Norway within 12 months

28% / 22%
Remember seeing an add for Norway

MOTIVATION FOR TRAVEL ON HOLIDAY ABROAD



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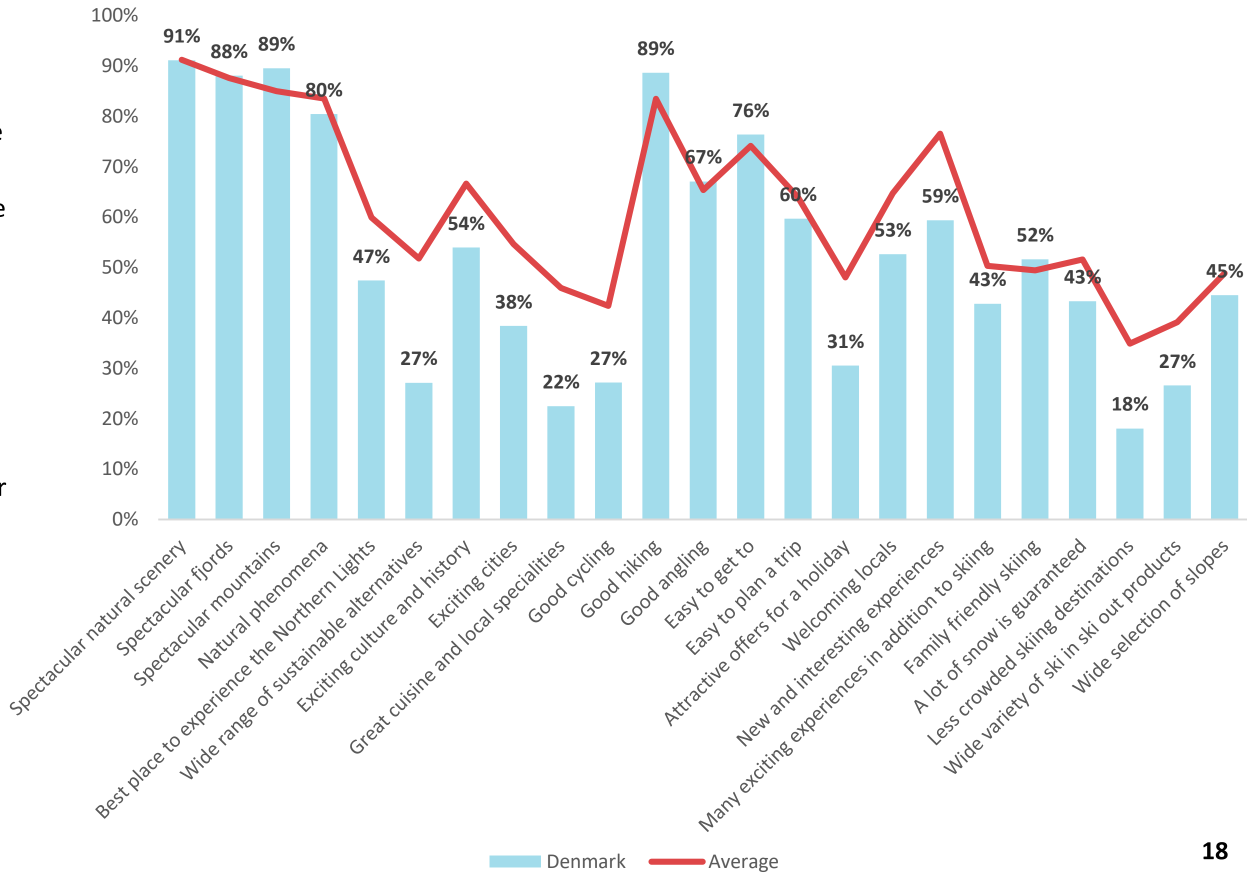
EPINION

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 is a good place for hiking, and that Norway have spectacular mountains. The danish target group is way below average on several branding targets and thus seems to not have as positive a view as most other countries that are tracked.



N= 5266

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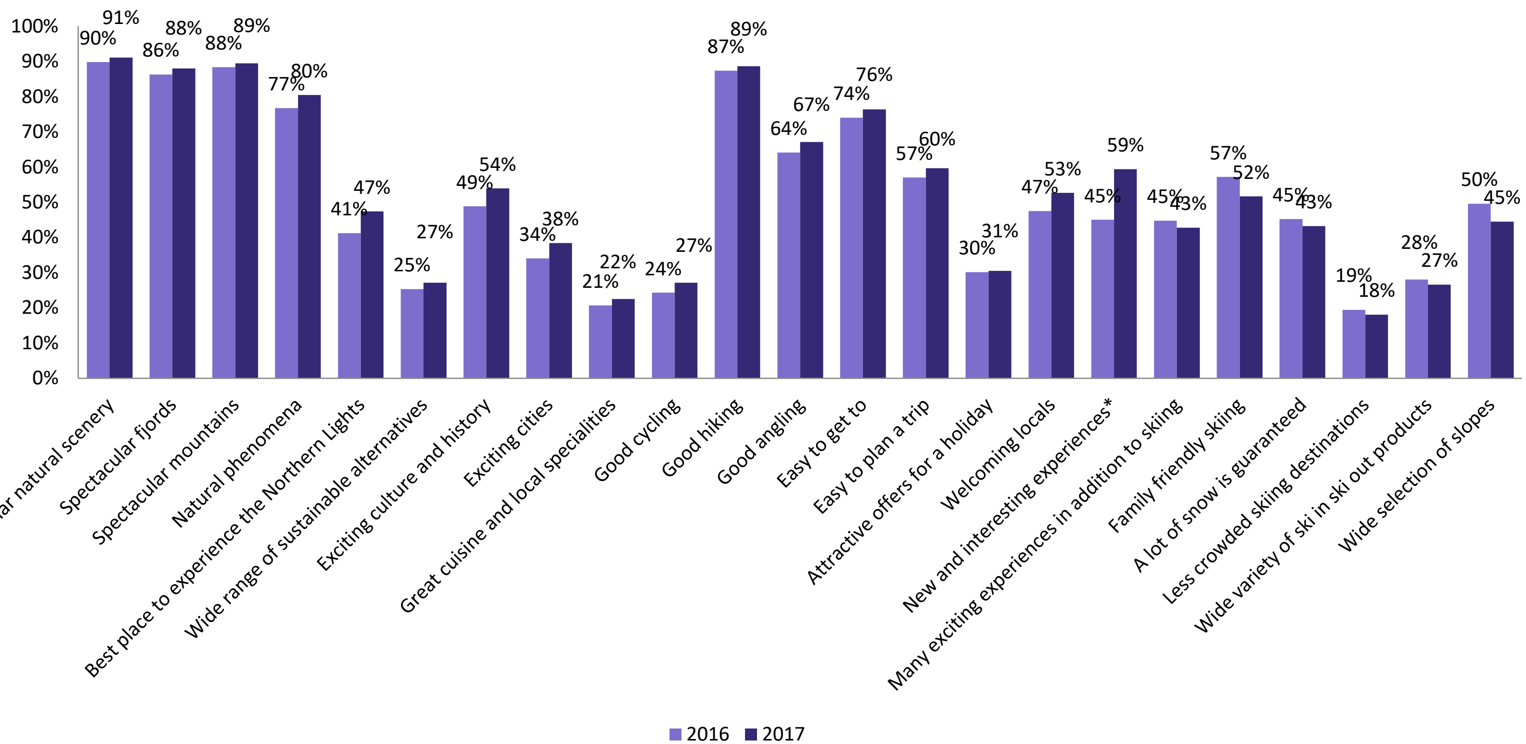
EPINION

DEVELOPMENT IN BRAND TARGETS 2016 TO 2017

The chart below shows how the share that agrees with the brand statements about Norway has developed from 2016 to 2017. As can be seen the danish target group is generally slightly more positive towards Norway in 2017 than in 2016. Although when looking at the questions regarding skiing the share that agrees is slightly lower in 2017 compared to 2016.

DEVELOPMENT I BRAND TARGETS FROM 2016 TO 2017



*Question wording until the end of 2016 was :"It offers experiences that you cannot find anywhere else in the world"

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EPINION

VISITORS AND NON-VISITORS

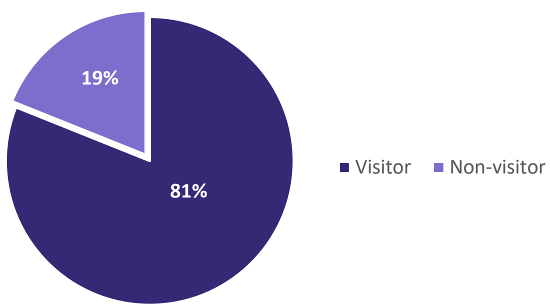
The circle below illustrates that 81% of the tourists in the Danish target group have visited Norway before.

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.

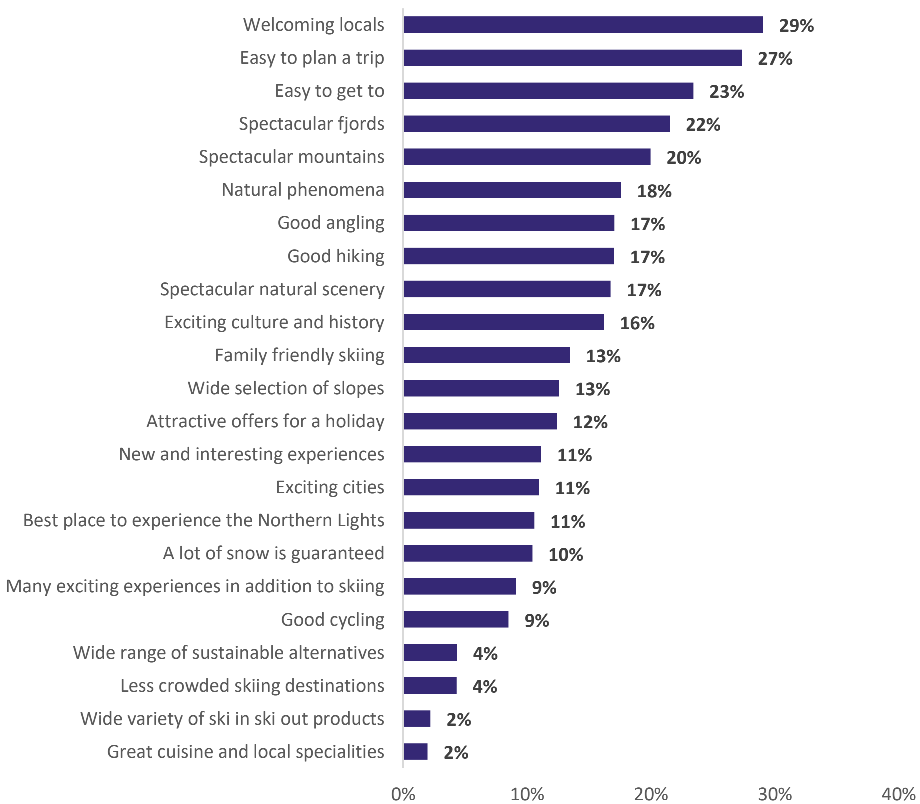
The group that have visited Norway before are more likely to agree that Norway have welcoming locals and that it is easy to plan a trip to Norway compared to the Danish non-visitors.

DANISH TARGET GROUP WHO HAVE VISITED NORWAY



N= 5266

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



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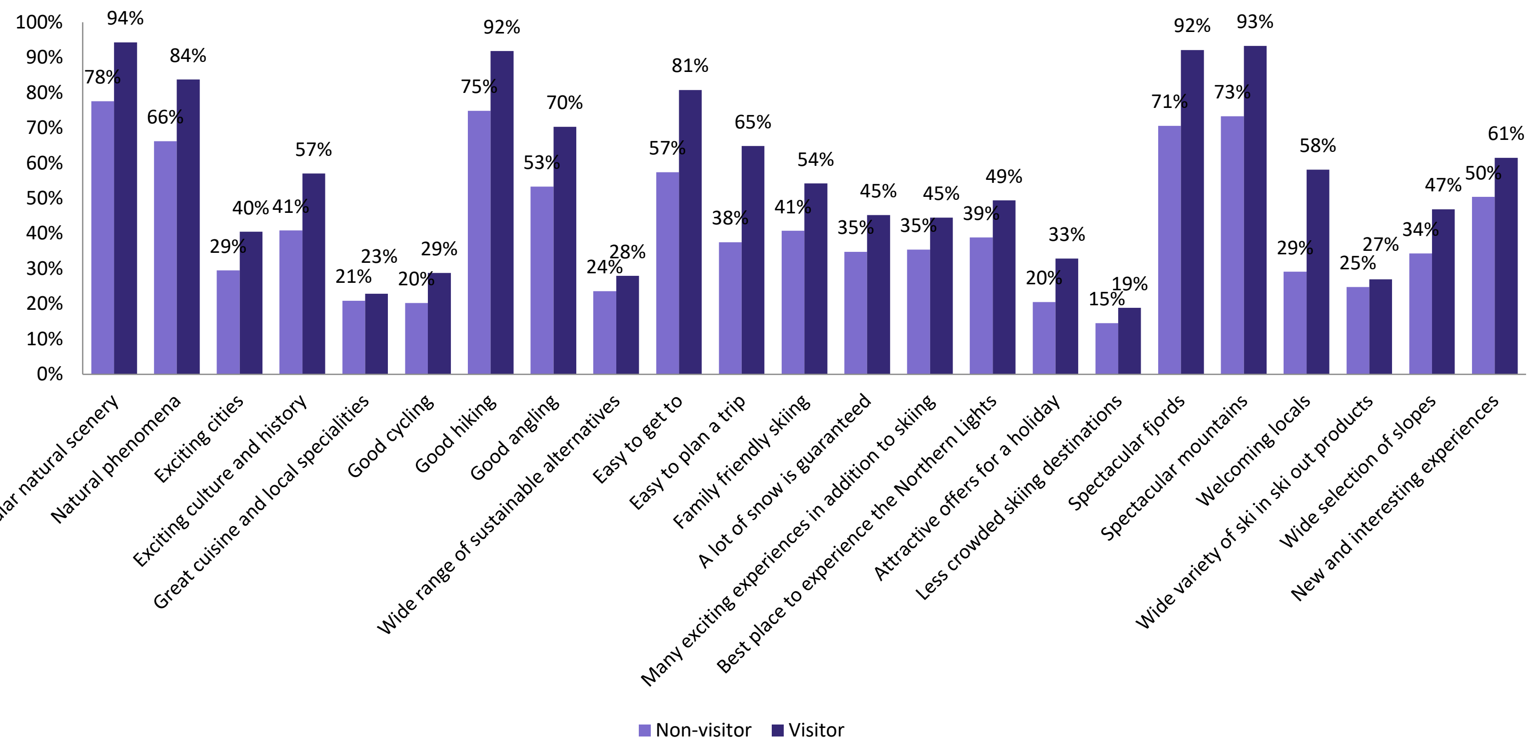
EPINION

SHARE OF VISITORS AGREEING WITH BRAND STATEMENTS

The chart below shows the percentage that agrees with the brand statements split by visitors and non-visitors. The previous page showed the difference between visitors and non-visitors to display what set them apart. On this page is the absolute share that agrees with the brand targets. This illustrates how many in each group that agrees with the brand targets.

PERCENTAGE THAT AGREES WITH THE STATEMENT SPLIT BY VISITOR AND NON-VISITOR



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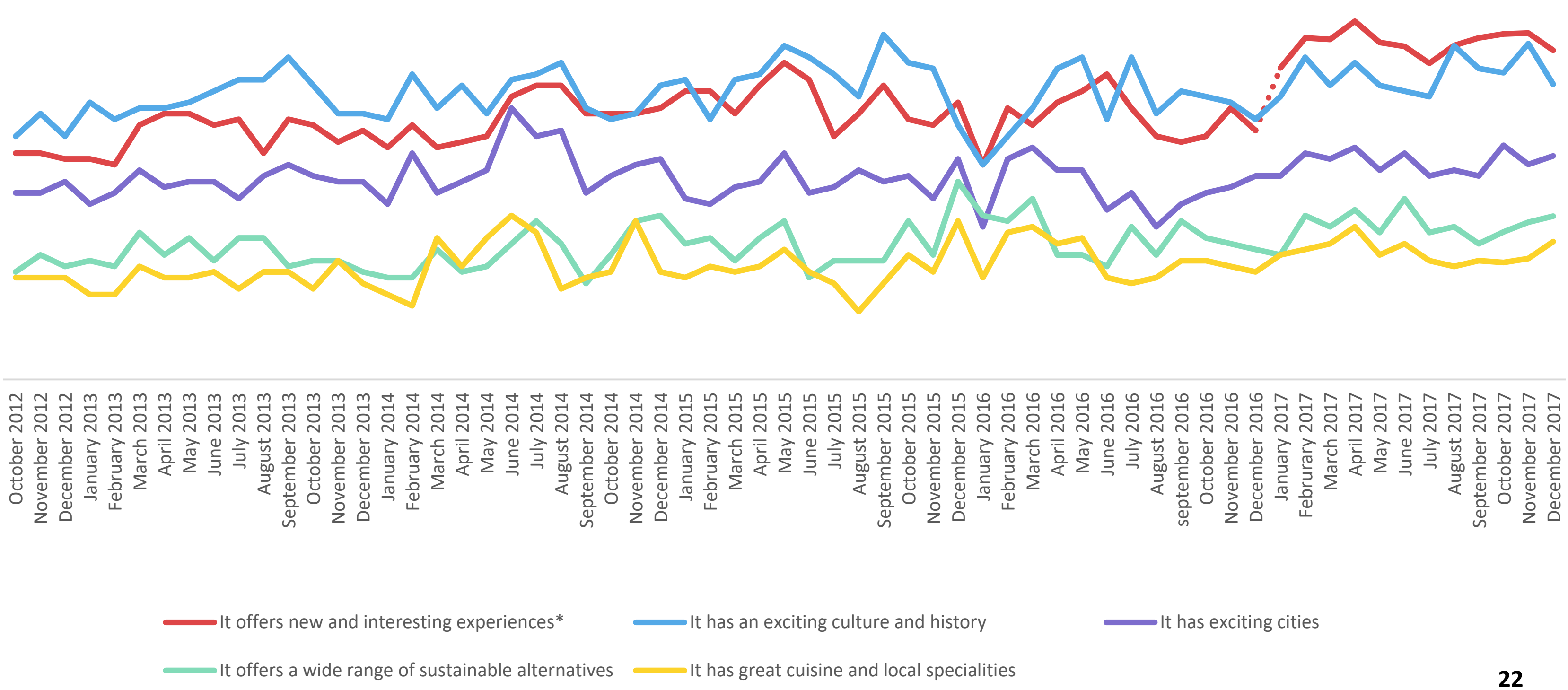
EPINION

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 fluctuate throughout the year, but on average there seems to be little development over the years. The jump in the percentage that agrees with the question «It offers new and interresting experiences» is caused by a change in the question wording.

DEVELOPMENT IN KEY INDICATORS



*Question wording until the end of 2016 was :"It offers experiences that you cannot find anywhere else in the world"

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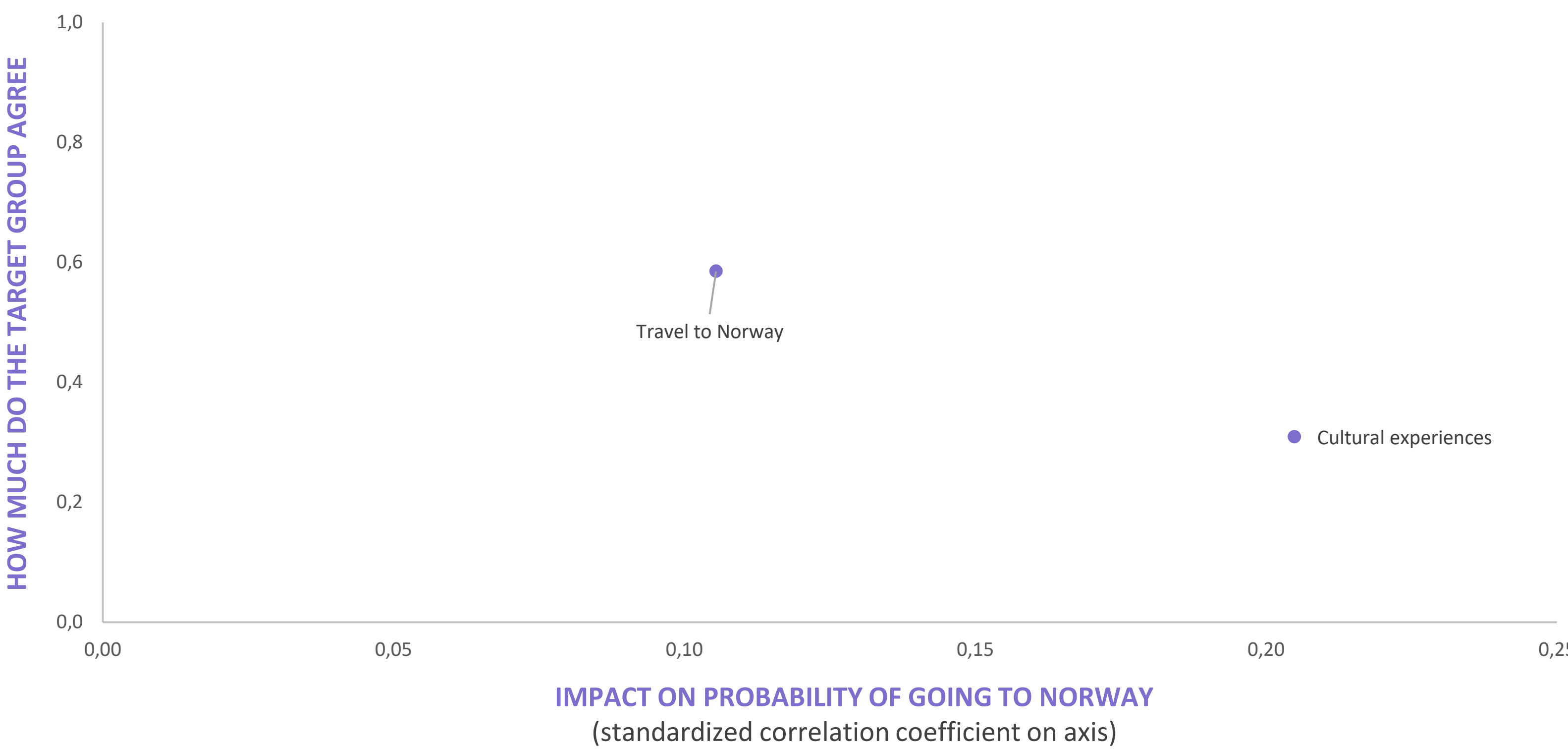
EPINION

DRIVERS FOR THE PROBABILITY TO VISIT NORWAY

The branding targets have been reduced to five dimensions (see page 56). 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. This indicate that Norway should work on improving the danish target groups perception of Norway as a place with many cultural experiences since it is expected that this will increase the probability that this group will visit Norway.



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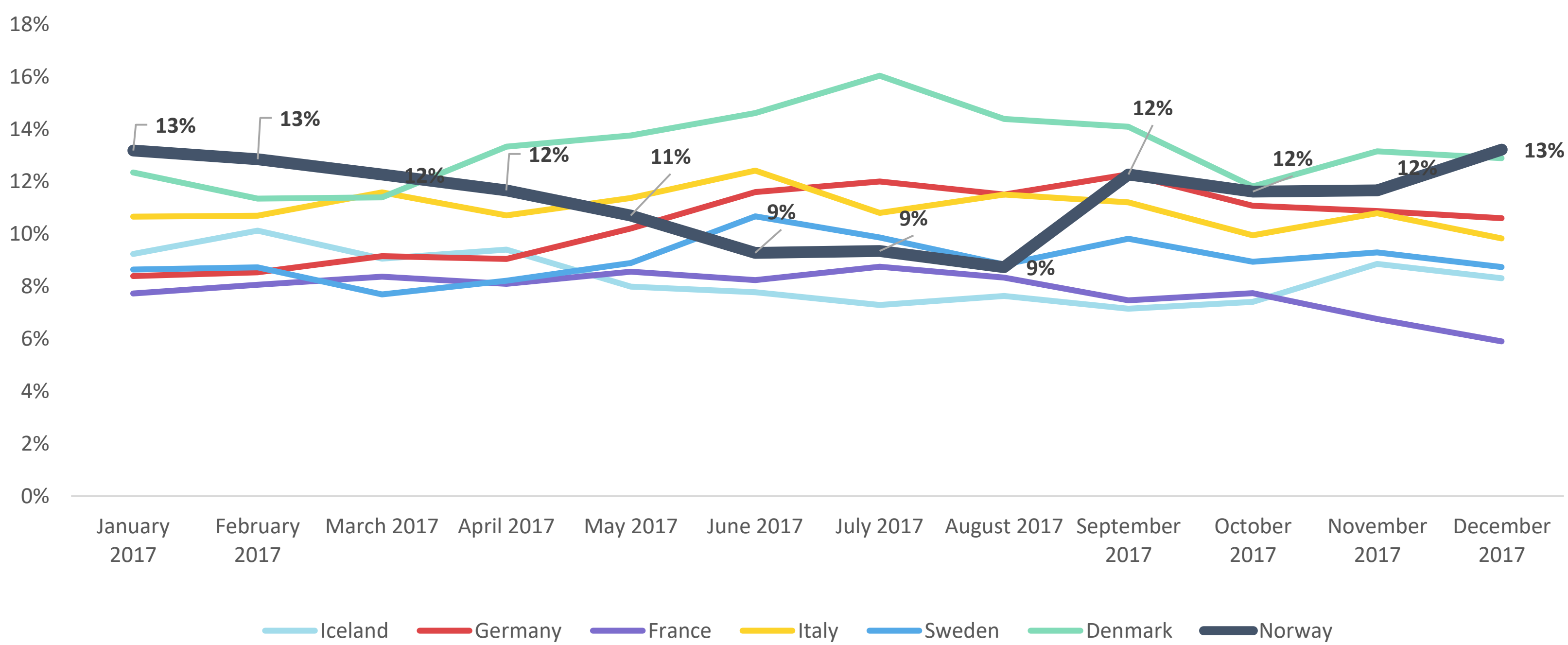
EPINION

SHARE OF VOICE IN DENMARK

Below is an illustration of the development of Norways Share of Voice across 2017 in Denmark compared with the Share of Voice for other markets. On average Norway is ranking 2nd, just behind Denmark itself. 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 a couple of other countries.

DEVELOPMENT IN SHARE OF VOICE IN DENMARK COMPARED TO OTHER COUNTRIES



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 when looking at their demographics or their probability for visit or recall. Their main reasons for this group to travel abroad is to visit big cities, to experience unspoiled nature or to experience local culture. The Dutch target group mainly associate Norway with nature, fjords and the northern lights.

DEMOGRAPHIC CHARACTERISTICS

50% / 51%
Women

38% / 37%
1-2 travels abroad in the past 3 years

62% / 63%
3 or more travels abroad in the past 3 years

65% / 66%
No children

16% / 16%
1 child

19% / 18%
2 or more children

33% / 29%
18-35 years old

42% / 39%
36-55 years

24% / 32%
56 years or older

15,3 / 14,5
Average years of education

40.000 - 50.000 EUR
Median income

- Dutch target group
- Average (foreign markets)

N=5318

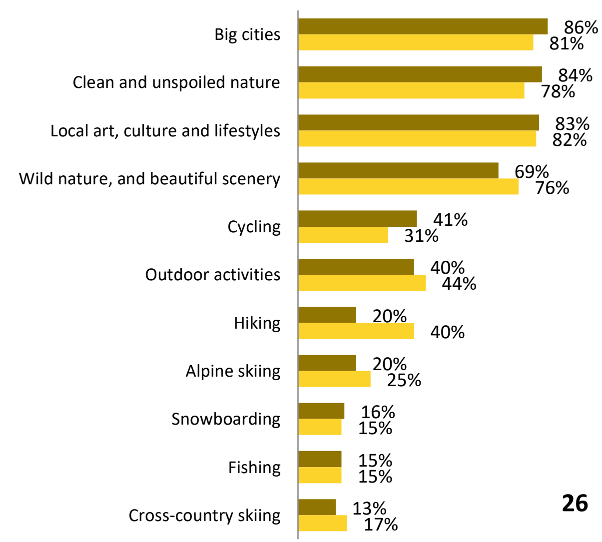
ASSOCIATIONS TO NORWAY

PROBABILITY FOR VISIT AND RECALL

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

18% / 22%
Remember seeing an add for Norway

MOTIVATION FOR TRAVEL ON HOLIDAY ABROAD



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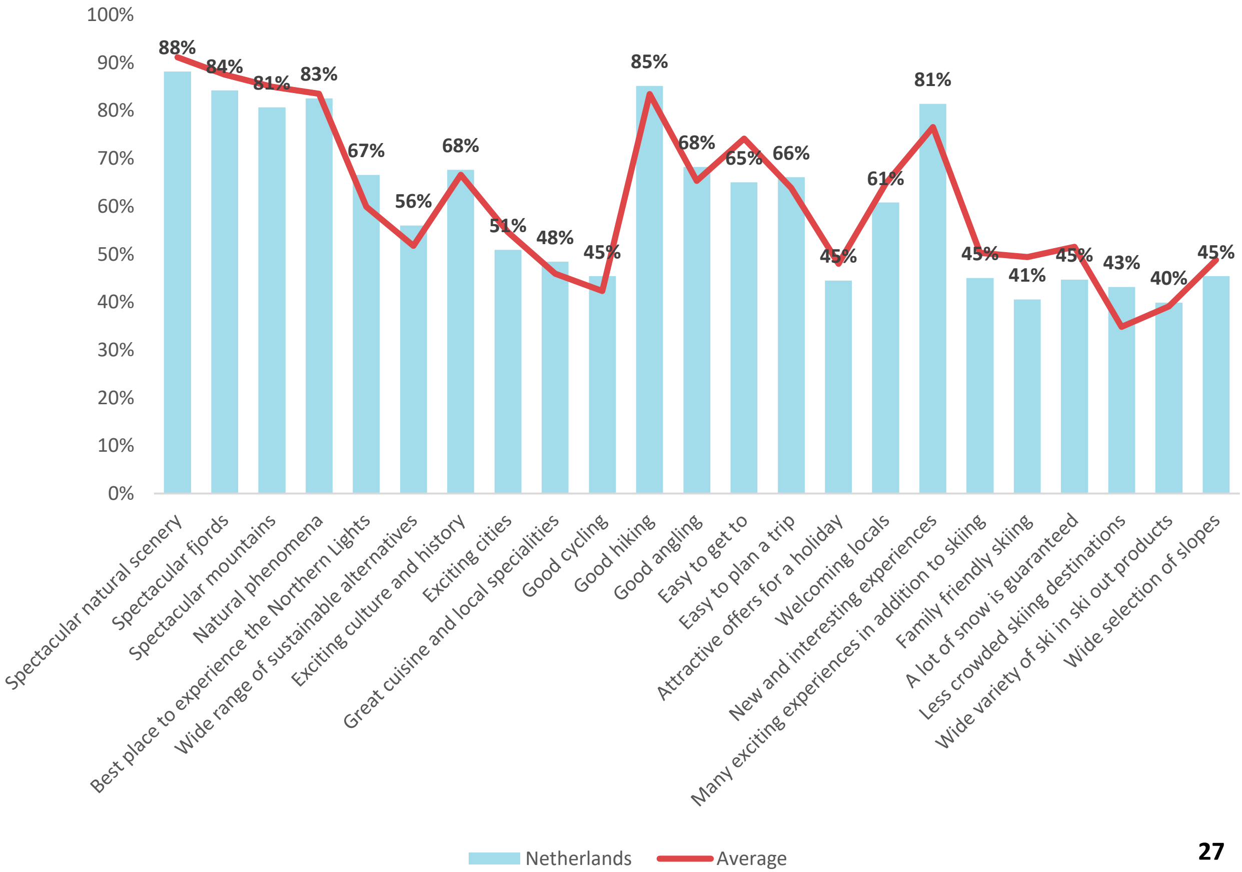
EPINION

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 offersnew and interesting experiences. 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= 5318

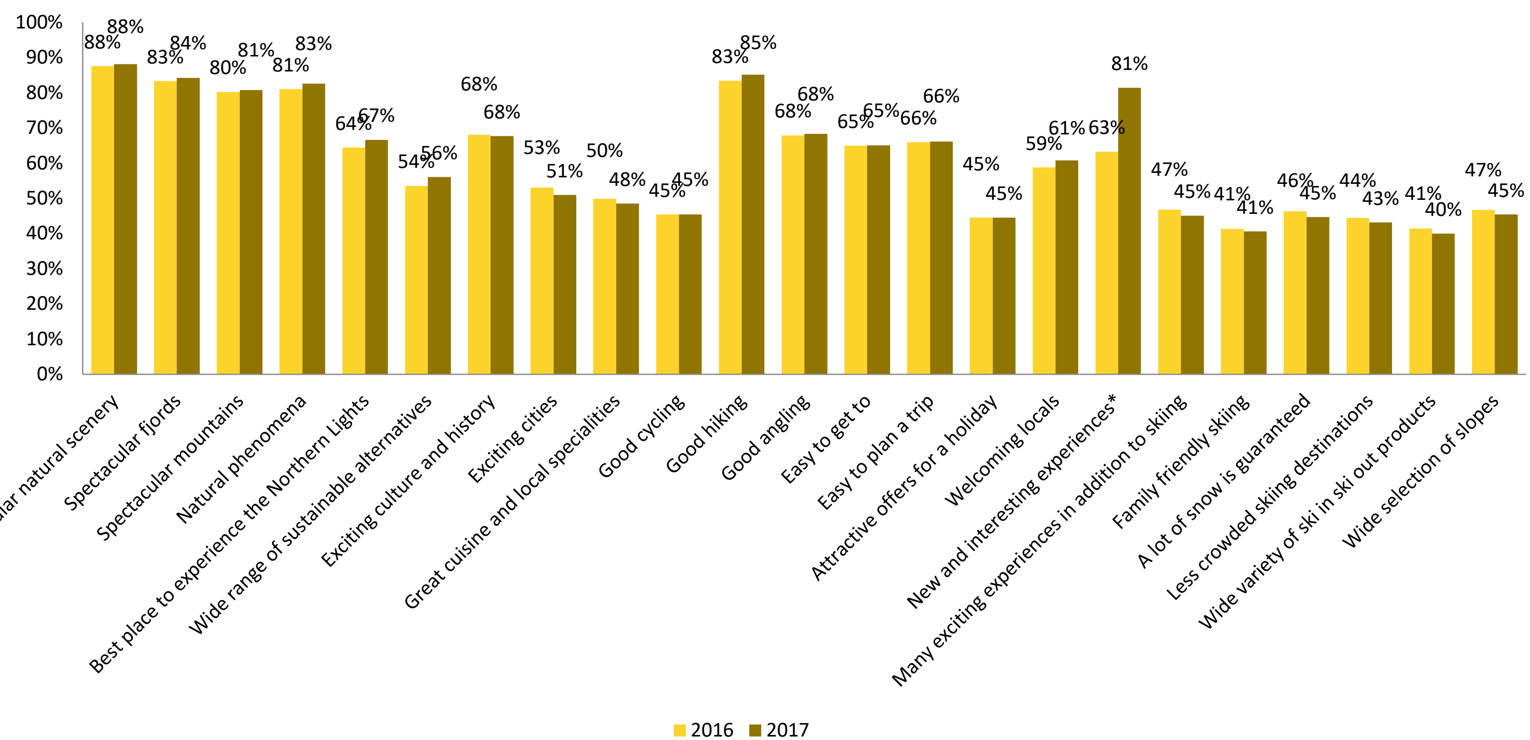
Innovasjon Norge

EPINION

DEVELOPMENT IN BRAND TARGETS 2016 TO 2017

The chart below shows how the share that agrees with the brand statements about Norway has developed from 2016 to 2017. As can be seen the dutch target groups view of Norway has not changed much fro 2016 to 2017.

DEVELOPMENT I BRAND TARGETS FROM 2016 TO 2017



*Question wording until the end of 2016 was :"It offers experiences that you cannot find anywhere else in the world"

Innovasjon Norge

EPINION

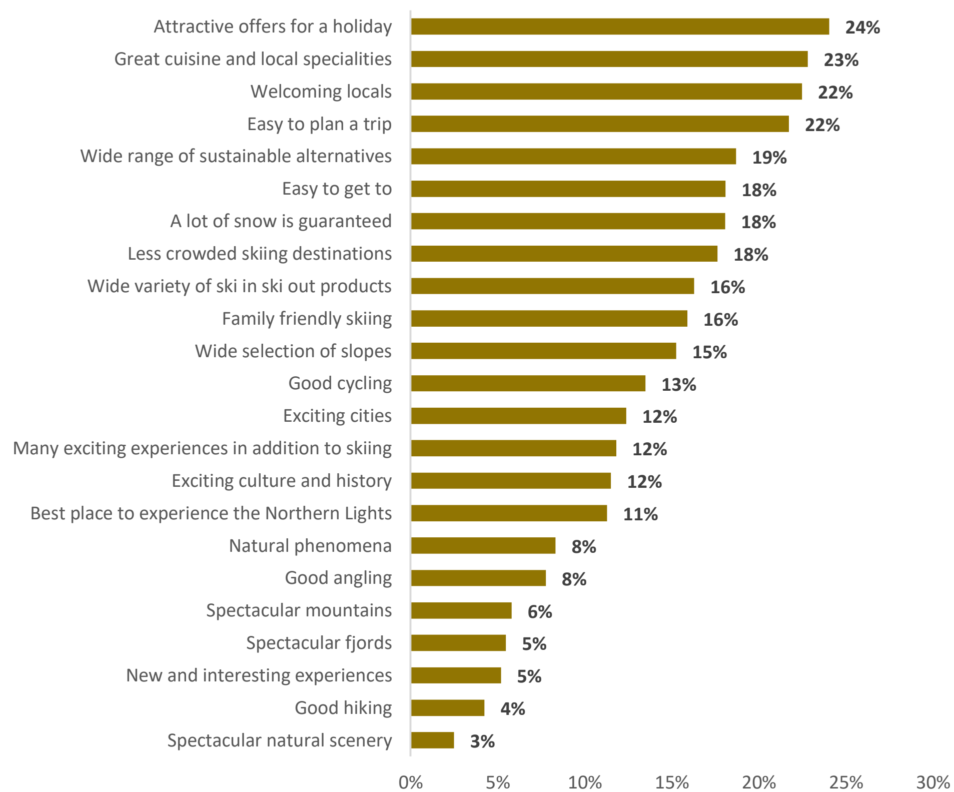
VISITORS AND NON-VISITORs

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

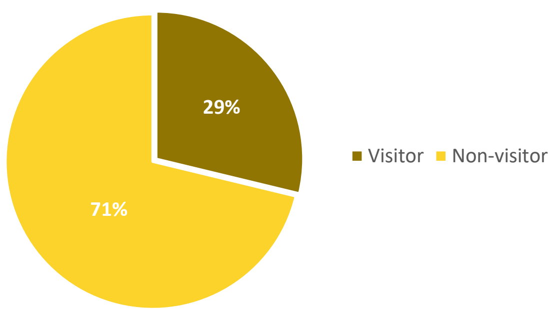
The chart to the right shows the percentage that agrees with the branding targets for the people in the target group that have visited Norway before and the people in the target group who have not visited Norway before.

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 attractive offers, great cuisine and welcoming locals.

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



DUTCH TARGET GROUP WHO HAVE VISITED NORWAY



N= 5318

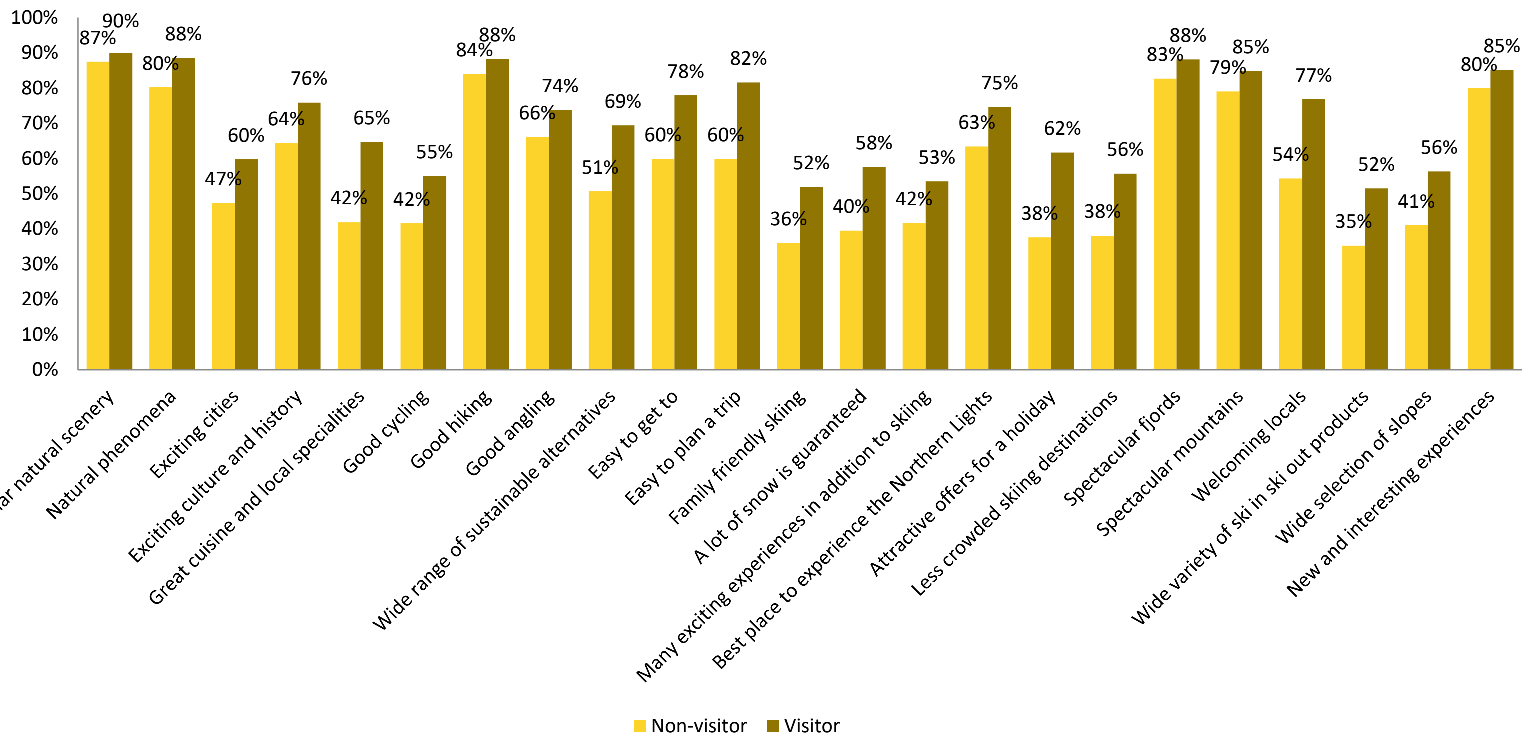
Innovasjon Norge

EPINION

SHARE OF VISITORS AGREEING WITH BRAND STATEMENTS

The chart below shows the percentage that agrees with the brand statements split by visitors and non-visitors. The previous page showed the difference between visitors and non-visitors to display what set them apart. On this page is the absolute share that agrees with the brand targets. This illustrates how many in each group that agrees with the brand targets.

PERCENTAGE THAT AGREES WITH THE STATEMENT SPLIT BY VISITOR AND NON-VISITOR



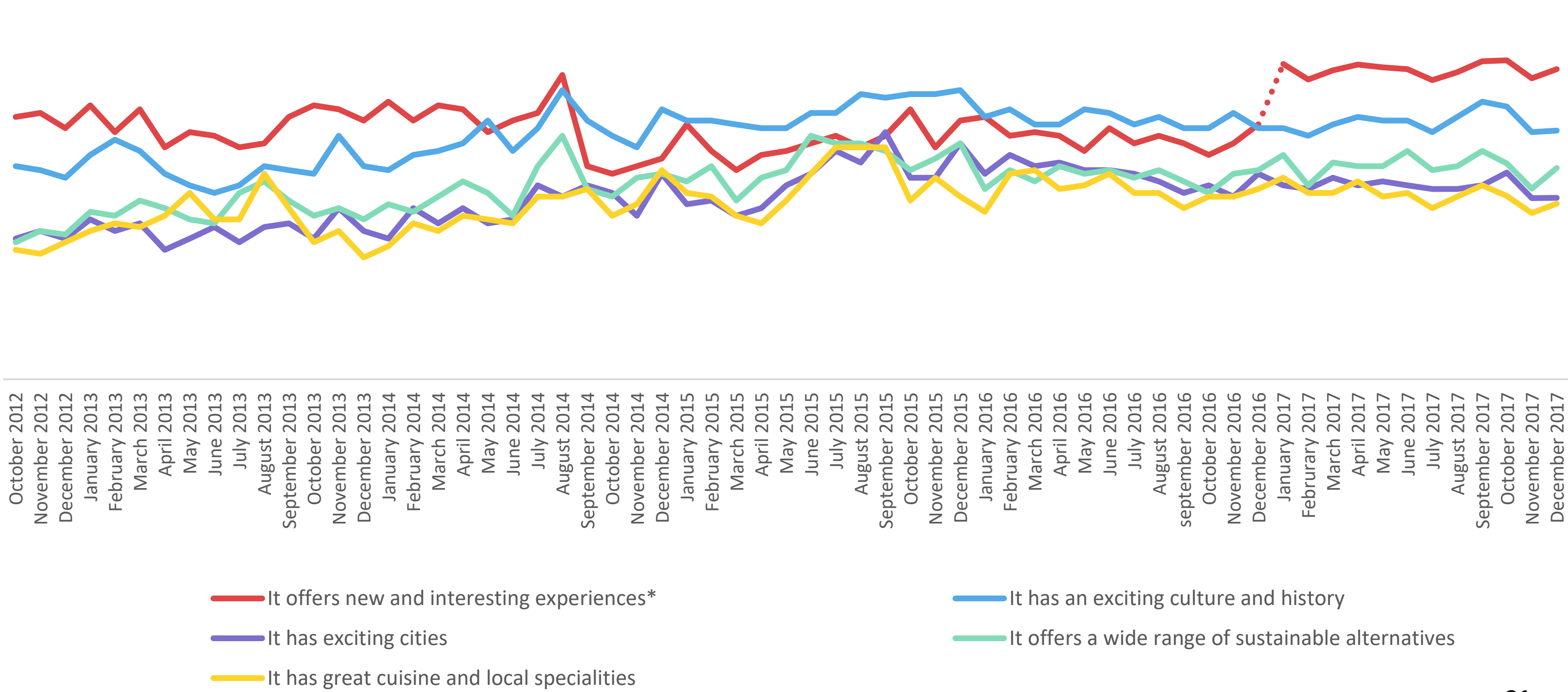
Innovasjon Norge

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 with exciting culture and history. Untill the middle of 2015 there also seems to be a positive trend regarding «great cuisine and local specialities», «exciting cities» and «wide range of sustainable alternatives». But since then the positive trend has stopped.

DEVELOPMENT IN KEY INDICATORS



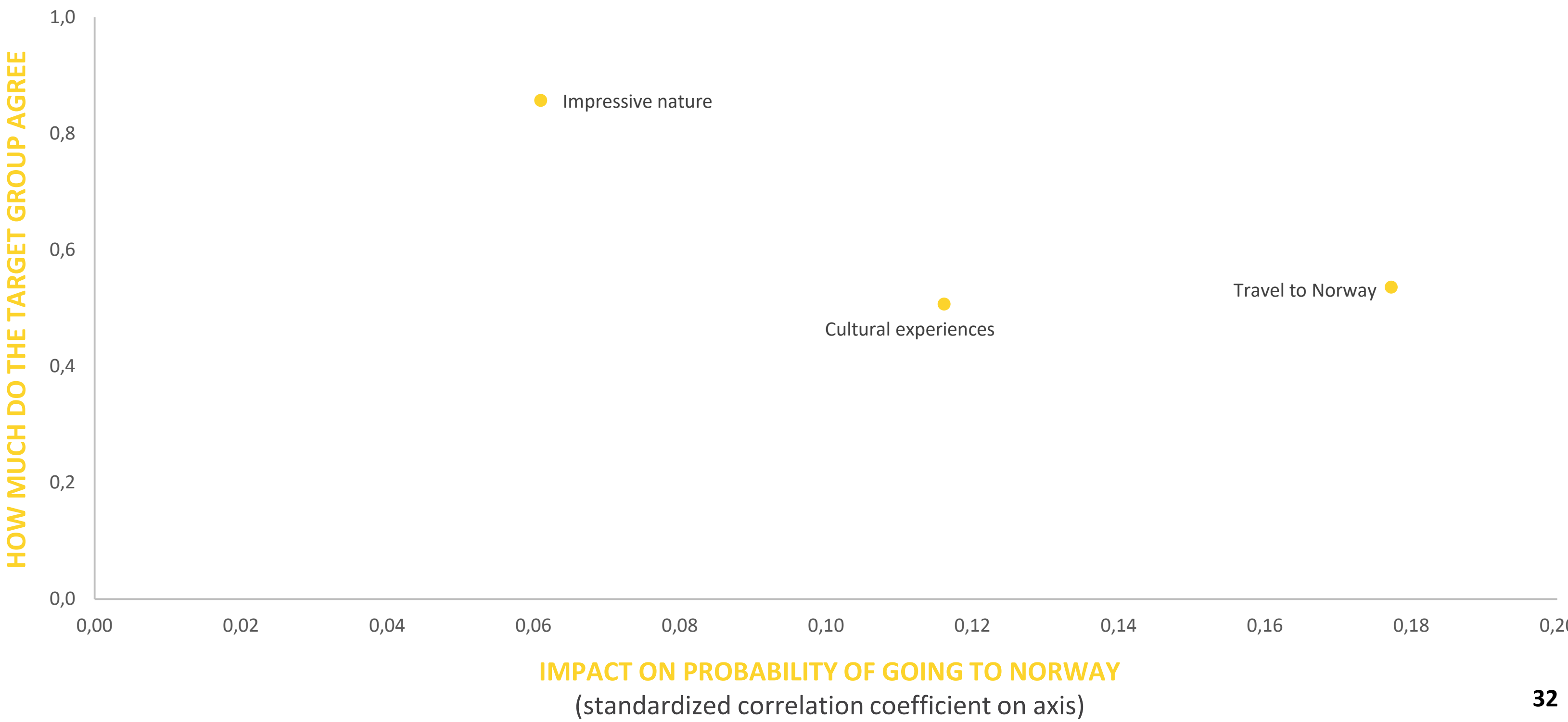
*Question wording until the end of 2016 was :"It offers experiences that you cannot find anywhere else in the world"

Innovasjon Norge

EPINION

DRIVERS FOR THE PROBABILITY TO VISIT NORWAY

The branding targets have been reduced to five dimensions (see page 56). 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 but 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 and to a lesser extent the perception of the cultural experiences that Norway has to offer 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.



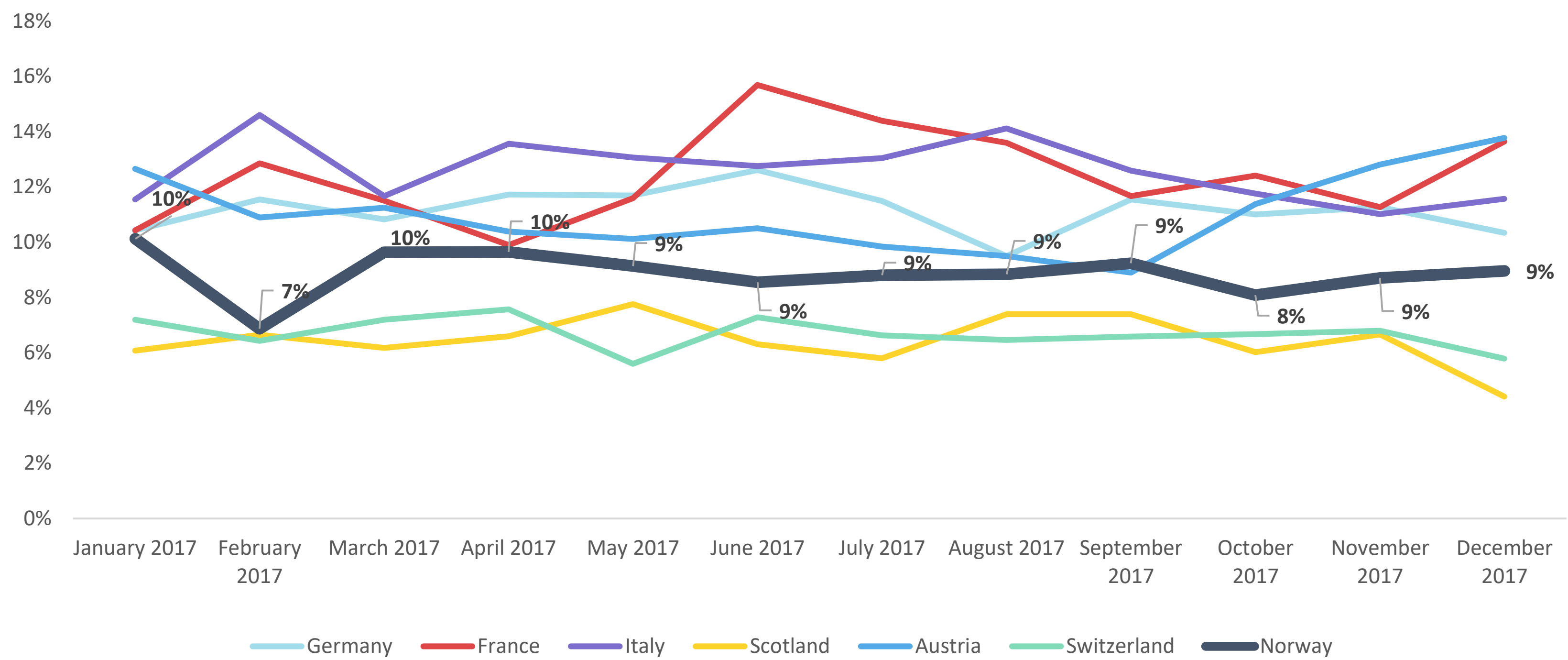
Innovasjon Norge

EPINION

SHARE OF VOICE IN NETHERLANDS

Below is an illustration of the development of Norways Share of Voice across 2017 in the Netherlands compared with the Share of Voice for other markets. Norways SoV has been fairly steady throughout the year. France and Italy have the highest SoV with an average of respectively 12% and 13%. Germany and Austria are also ranking higher than Norway on SoV in the Netherlands, but with an average of 9% Norway is well ahead of Denmark and Sweden who both had a SoV of 5%.

DEVELOPMENT IN SHARE OF VOICE IN NETHERLANDS COMPARED TO OTHER COUNTRIES



FRANCE

Innovasjon Norge

EPINION

CHARACTERISTICS OF THE FRENCH TARGET GROUP

The chart below describes the characteristics of the French target group. The French group does not travel as much as the average, but they say they are more likely to visit Norway within the next 12 months. They are slightly younger and a higher share have children compared to the average for the six foreign markets. Their main motivation for travelling abroad is to wild and unspoiled nature. The French target group associates Norway with beautiful nature and scenery, fjords, snow and being cold.

DEMOGRAPHIC CHARACTERISTICS

50% / 51%
Women

45% / 37%
1-2 travels abroad in the past 3 years

55% / 63%
3 or more travels abroad in the past 3 years

54% / 66%
No children

23% / 16%
1 child

23% / 18%
2 or more children

35% / 29%
18-35 years old

42% / 39%
36-55 years

23% / 32%
56 years or older

15,1 / 14,5
Average years of education

26.000 - 39.999 EUR
Median income

- French target group
- Average (foreign markets)

N=2696

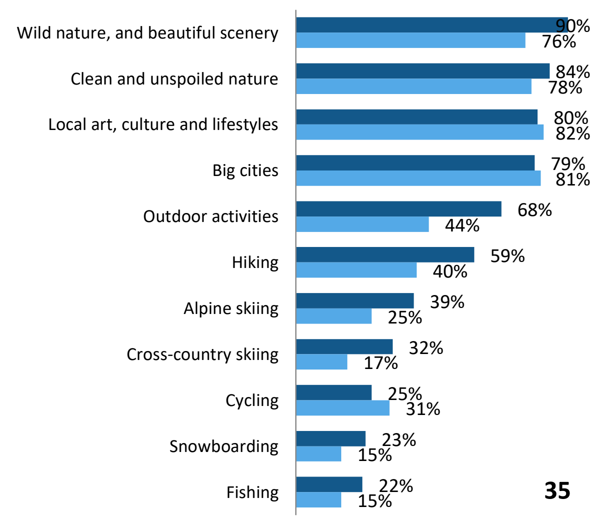
ASSOCIATIONS TO NORWAY

PROBABILITY FOR VISIT AND RECALL

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

19% / 22%
Remember seeing an add for Norway

MOTIVATION FOR TRAVEL ON HOLIDAY ABROAD



Innovasjon Norge

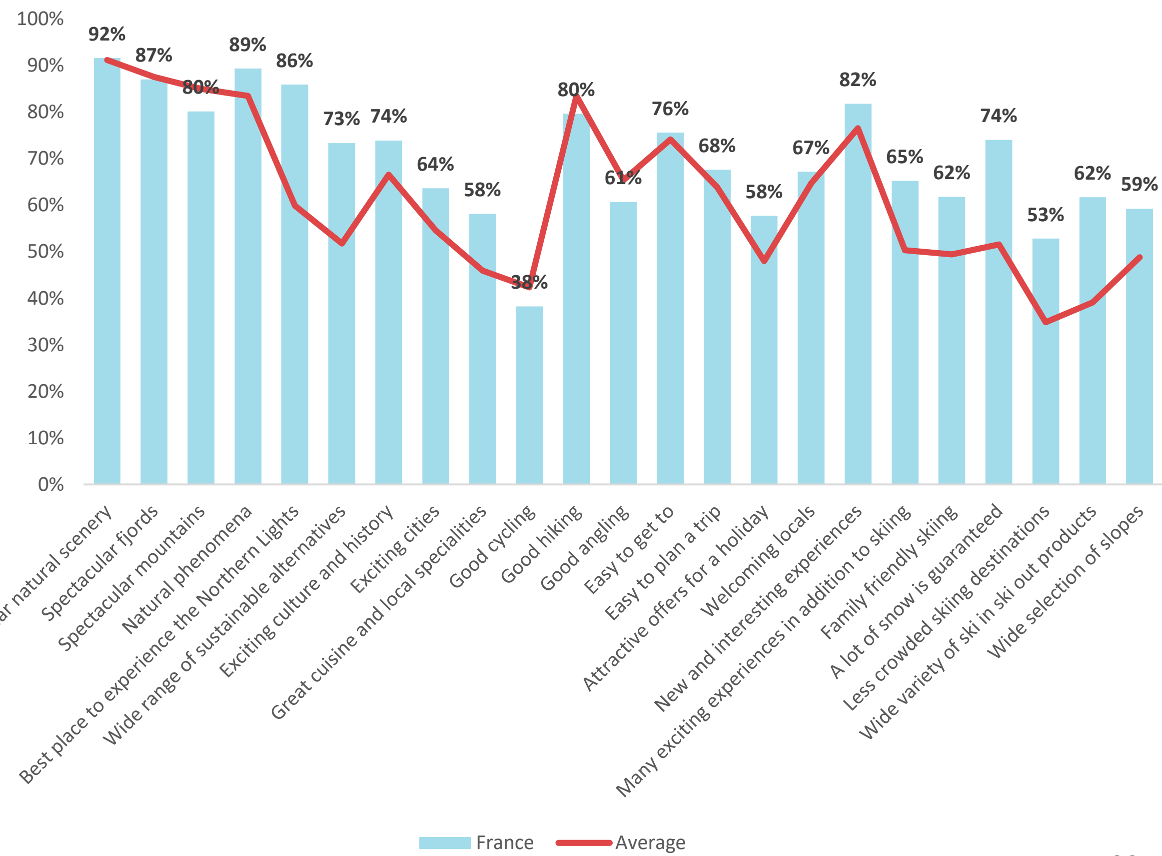
EPINION

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 is more likely to see Norway as a great place to experience the northern light and a place with new and interesting experiences compared to the average. But the french are less likely to see Norway as a great place for cycling.



N= 2696

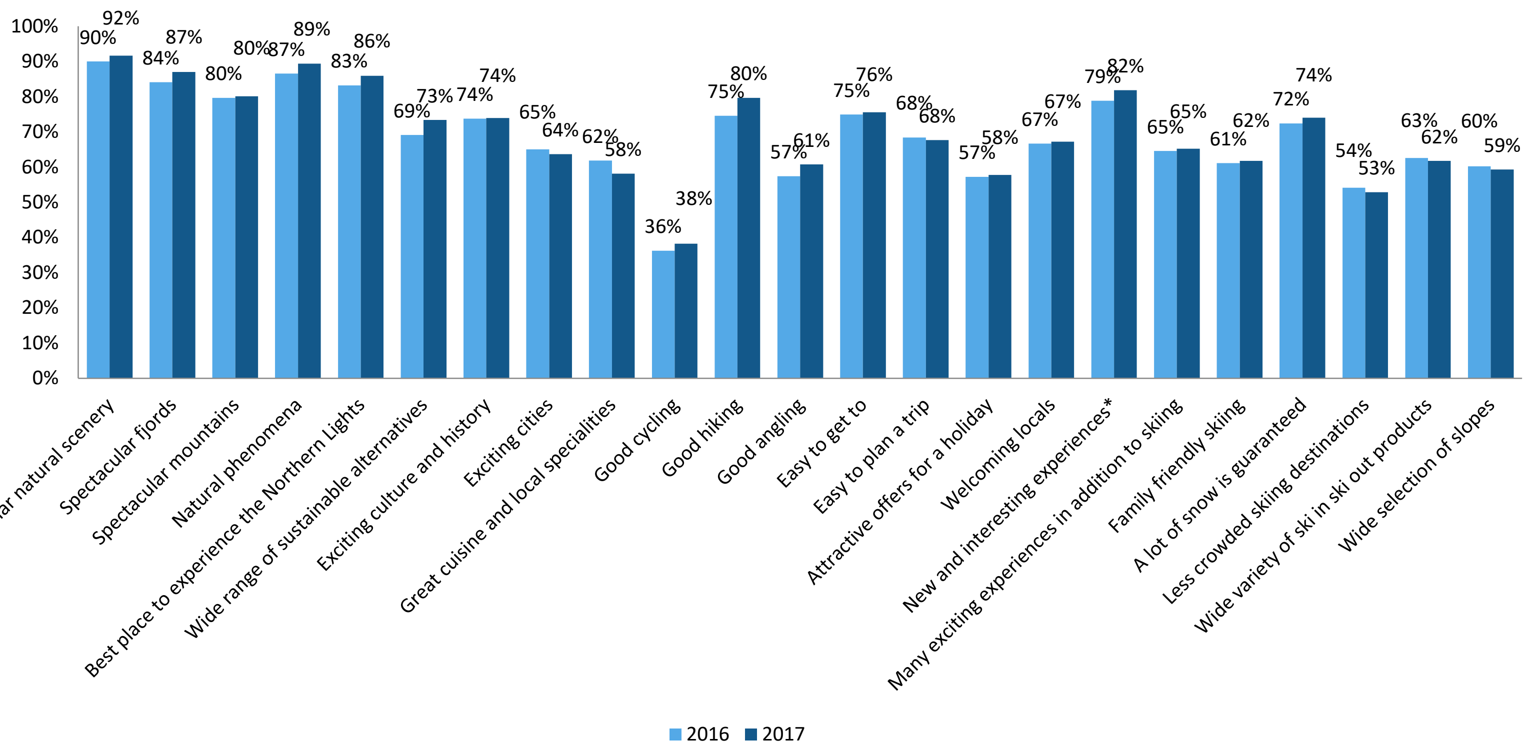
Innovasjon Norge

EPINION

DEVELOPMENT IN BRAND TARGETS 2016 TO 2017

The chart below shows how the share that agrees with the brand statements about Norway has developed from 2016 to 2017. As can be seen the French target group seems to have a slighly more positive view of Norway as a country with good angling, hiking and a wise range of sustainable alternatives.

DEVELOPMENT I BRAND TARGETS FROM 2016 TO 2017



*Question wording until the end of 2016 was :"It offers experiences that you cannot find anywhere else in the world"

Innovasjon Norge

EPINION

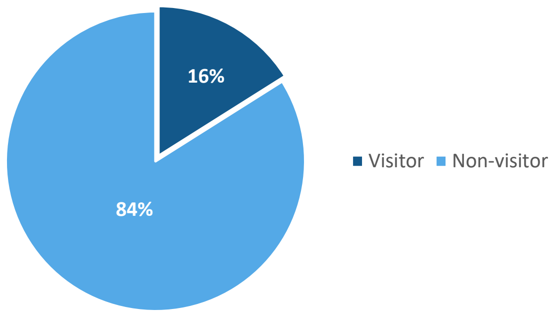
VISITORS AND NON-VISITORS

The circle below illustrates that about 16% 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.

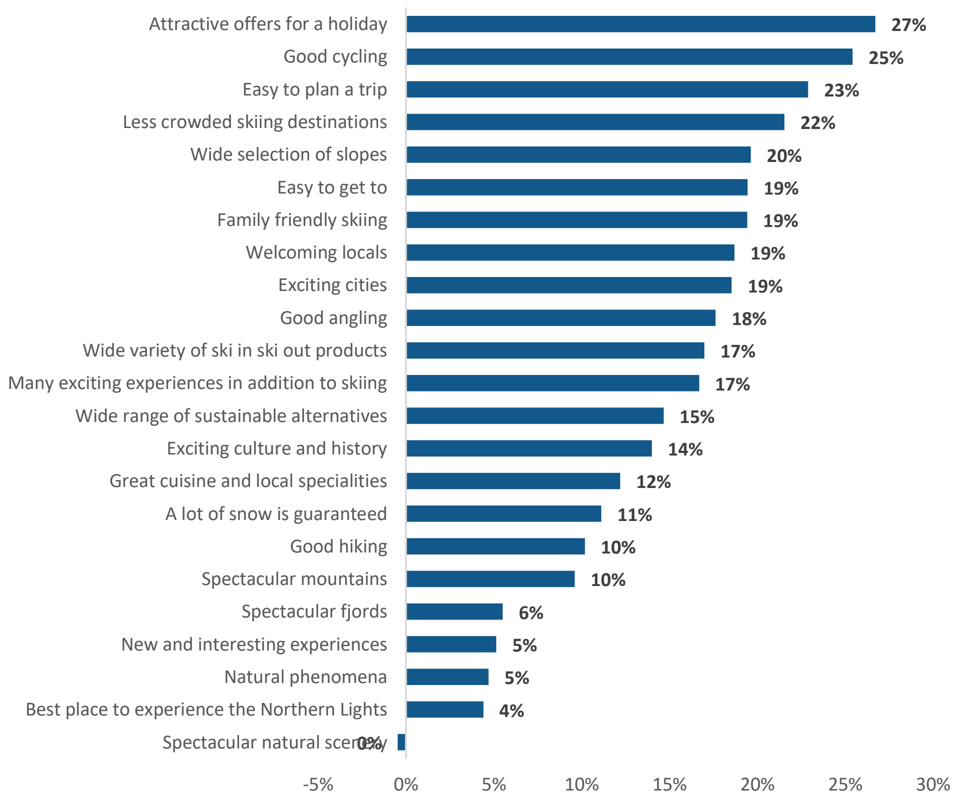
For all brand targets except the statement "spectacular natural scenery" the group that have visited Norway is more positive towards Norway than the group that have not visited Norway. The two groups agree in their view on the Norwegian nature and the possibilities to experience the northern lights, but tourists that have visited Norway are more likely to say there are attractive offers for holidays in Norway and that the country is a good place for cycling.

FRENCH TARGET GROUP WHO HAVE VISITED NORWAY



N= 2696

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



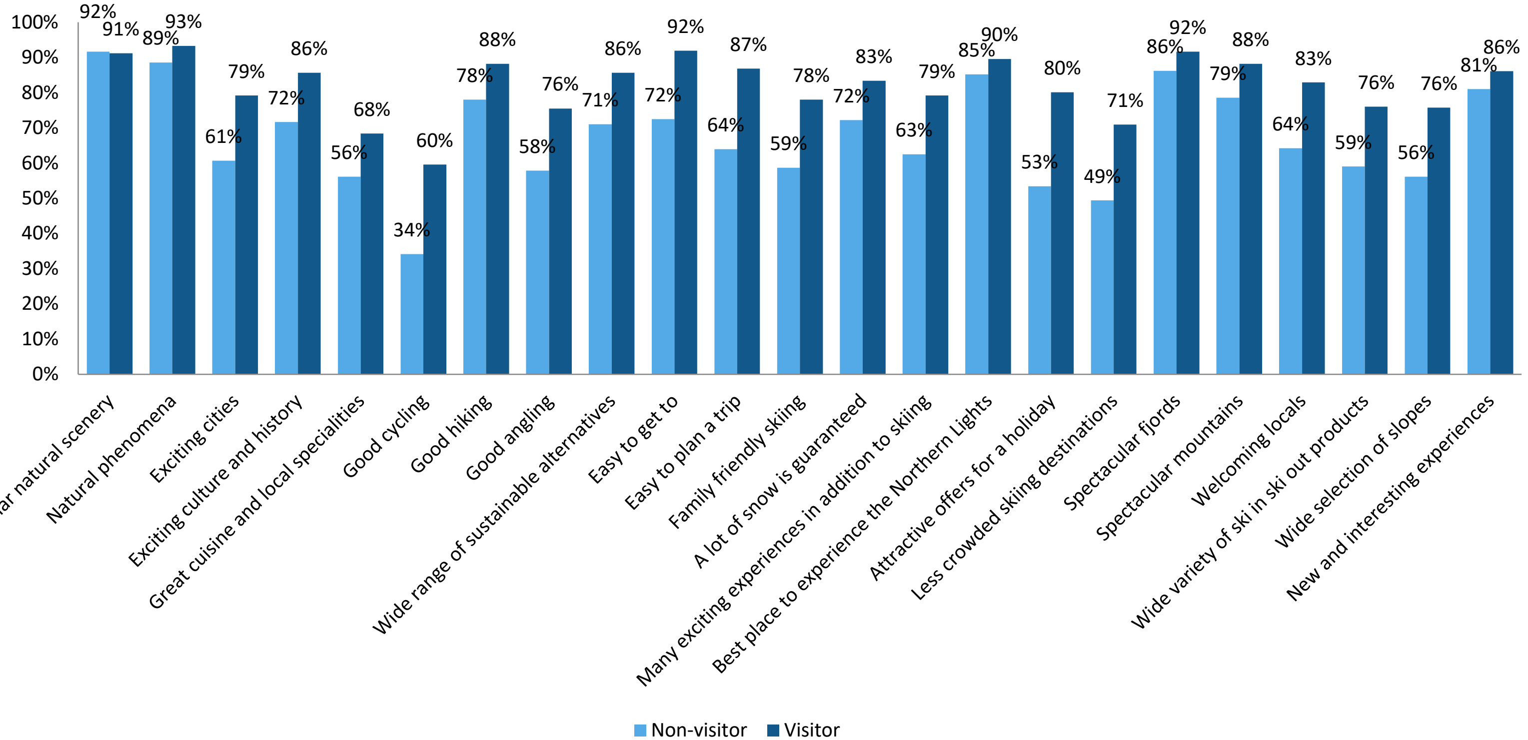
Innovasjon Norge

EPINION

SHARE OF VISITORS AGREEING WITH BRAND STATEMENTS

The chart below shows the percentage that agrees with the brand statements split by visitors and non-visitors. The previous page showed the difference between visitors and non-visitors to display what set them apart. On this page is the absolute share that agrees with the brand targets. This illustrates how many in each group that agrees with the brand targets.

PERCENTAGE THAT AGREES WITH THE STATEMENT SPLIT BY VISITOR AND NON-VISITOR



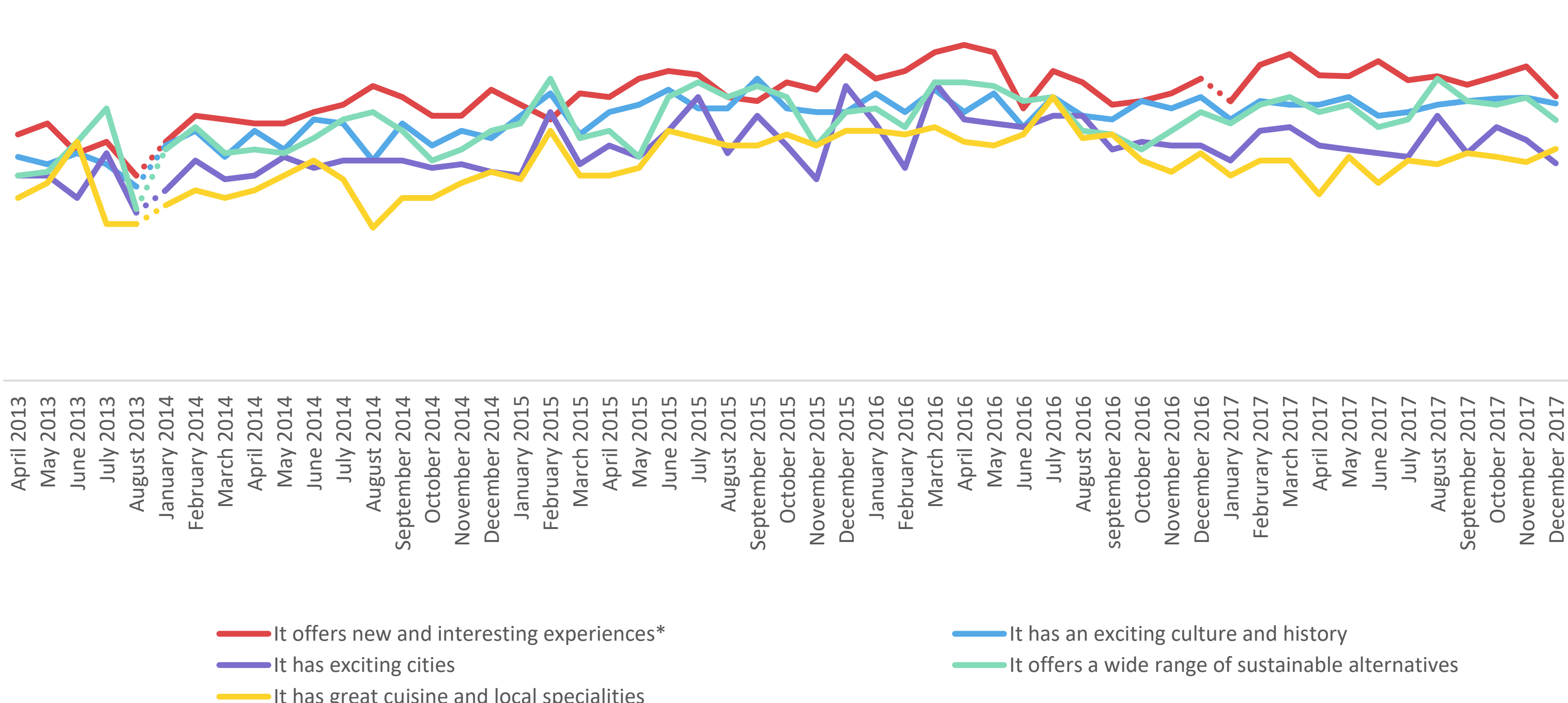
Innovasjon Norge

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 from 2012 untill around the middle of 2016. Since then there seems to be either no develpment i the share that agrees with the brand targets and for «great cuisine and local specialities» there could be a slightly negative development.

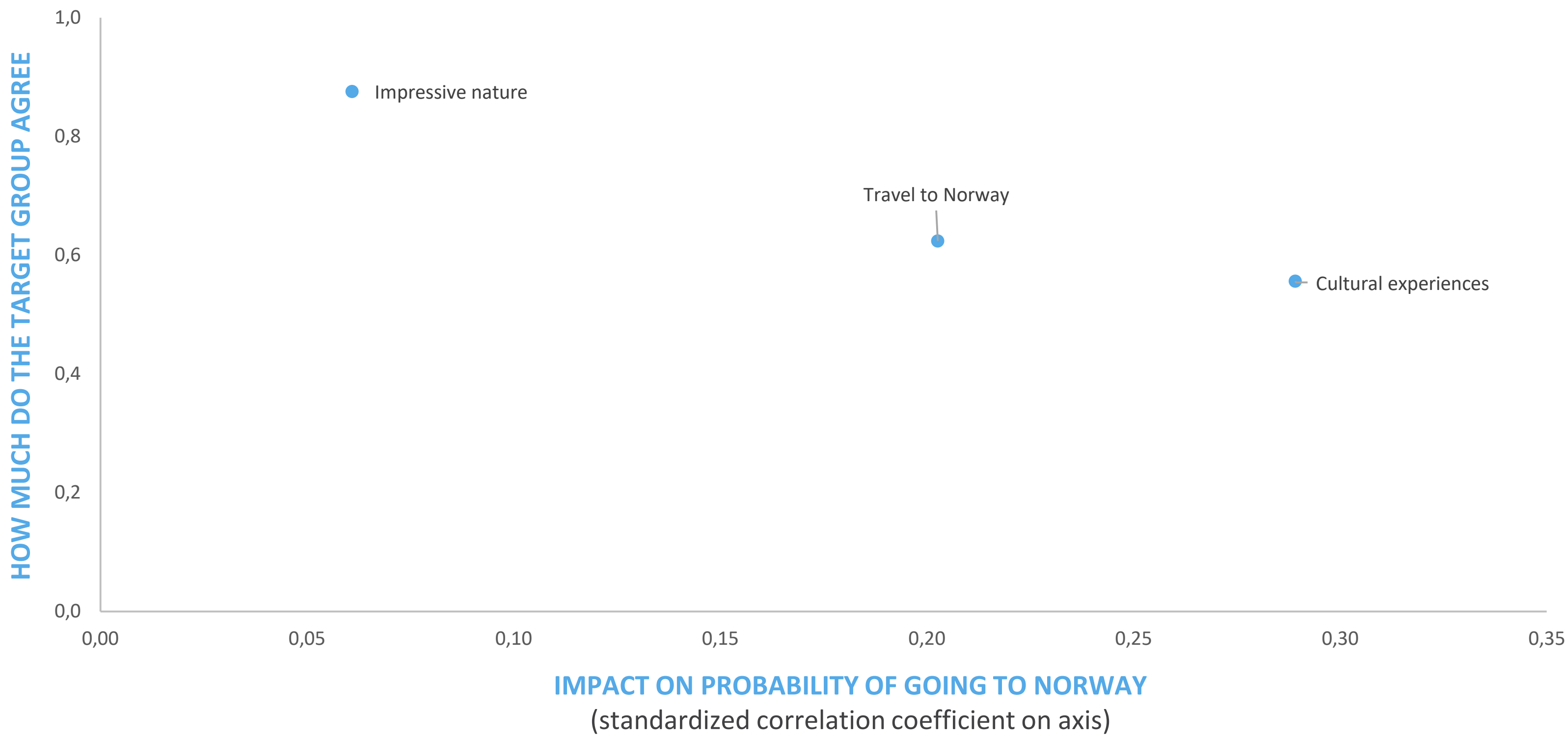
DEVELOPMENT IN KEY INDICATORS



*Question wording until the end of 2016 was :"It offers experiences that you cannot find anywhere else in the world"

DRIVERS FOR THE PROBABILITY TO VISIT NORWAY

The branding targets have been reduced to five dimensions (see page 56). In the chart below are the three dimensions that appears to have a statistically significant impact on the probability of visiting Norway displayed. The perception of whether Norway has great cultural experiences seems to have the highest impact on the probability of going to Norway. This is also the dimension that least potential tourists agrees with. So Innovasjon Norge could consider branding Norway as a place with a lot of cultural experiences in order to raise the probability that french tourists will chose Norway as their next holiday destination.



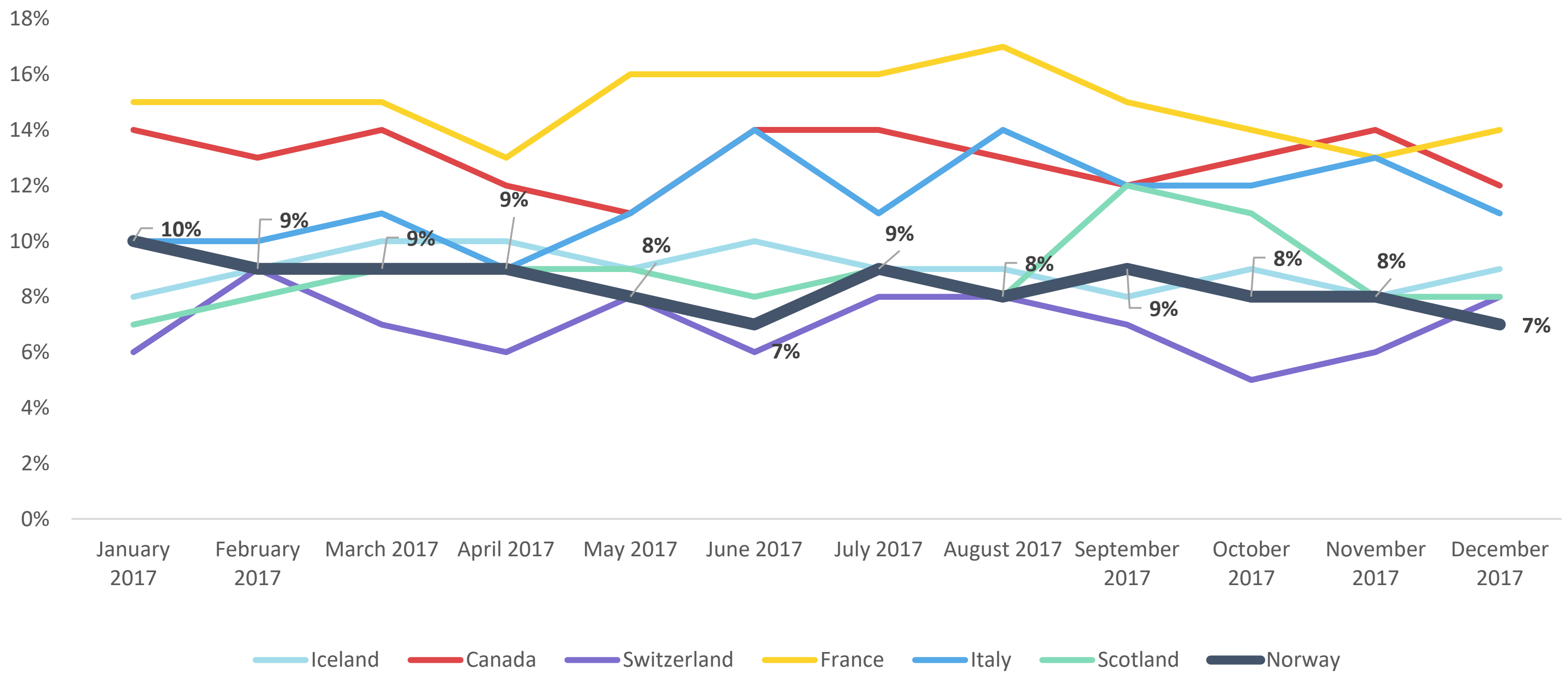
Innovasjon Norge

EPINION

SHARE OF VOICE IN FRANCE

Below is an illustration of the development of Norways Share of Voice across 2017 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%, followed by Canada with an average SoV of 13%. Norways Sov does not vary much over the year but is sligtly higher in the beginning of the year. With an average SoV of 8% Norways SoV is the higher than the SoV of Denmark (3%) and Sweden (4%).

DEVELOPMENT IN SHARE OF VOICE IN FRANCE COMPARED TO OTHER COUNTRIES



GERMANY

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Innovasjon Norge

EPINION

CHARACTERISTICS OF THE GERMAN TARGET GROUP

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

DEMOGRAPHIC CHARACTERISTICS

50% / 51%
Women

43% / 37%
1-2 travels abroad in the past 3 years

57% / 63%
3 or more travels abroad in the past 3 years

67% / 66%
No children

18% / 16%
1 child

15% / 18%
2 or more children

30% / 29%
18-35 years old

47% / 39%
36-55 years

23% / 32%
56 years or older

14,1 / 14,5
Average years of education

40.000 – 52.999 EUR
Median income

- German target group
- Average (foreign markets)

N=5467

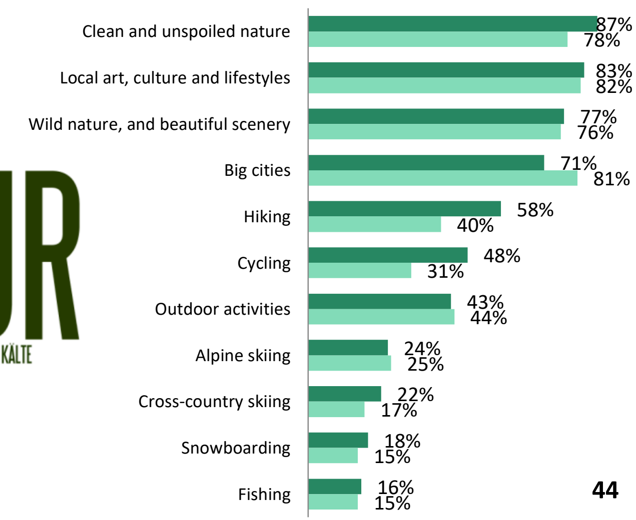
ASSOCIATIONS TO NORWAY

PROBABILITY FOR VISIT AND RECALL

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

21% / 22%
Remember seeing an add for Norway

MOTIVATION FOR TRAVEL ON HOLIDAY ABROAD



Innovasjon Norge

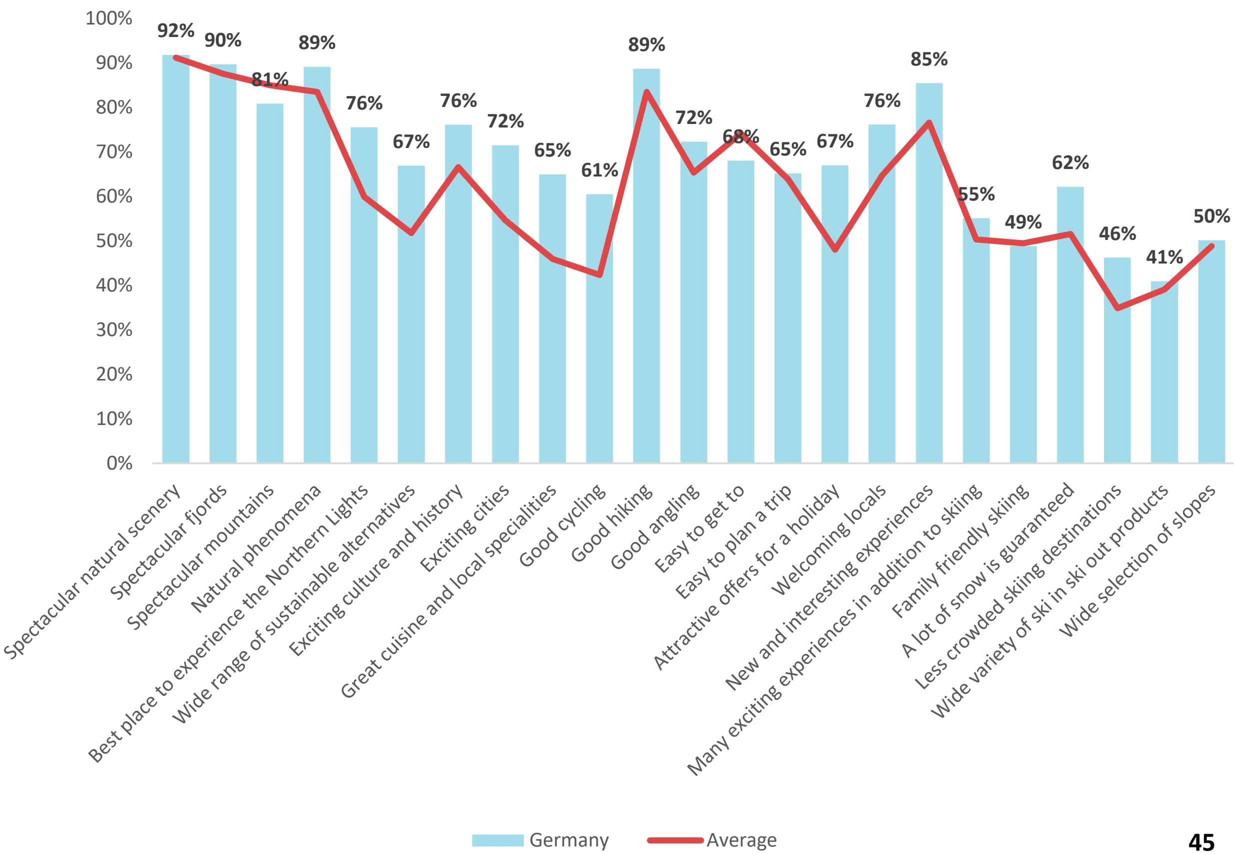
EPINION

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 on a lot of the branding targets. But compared to the average they are especially more likely to see Norway as a place that offers new and interesting experiences, have exciting cities and have great cuisine and local specialities.



N= 5467

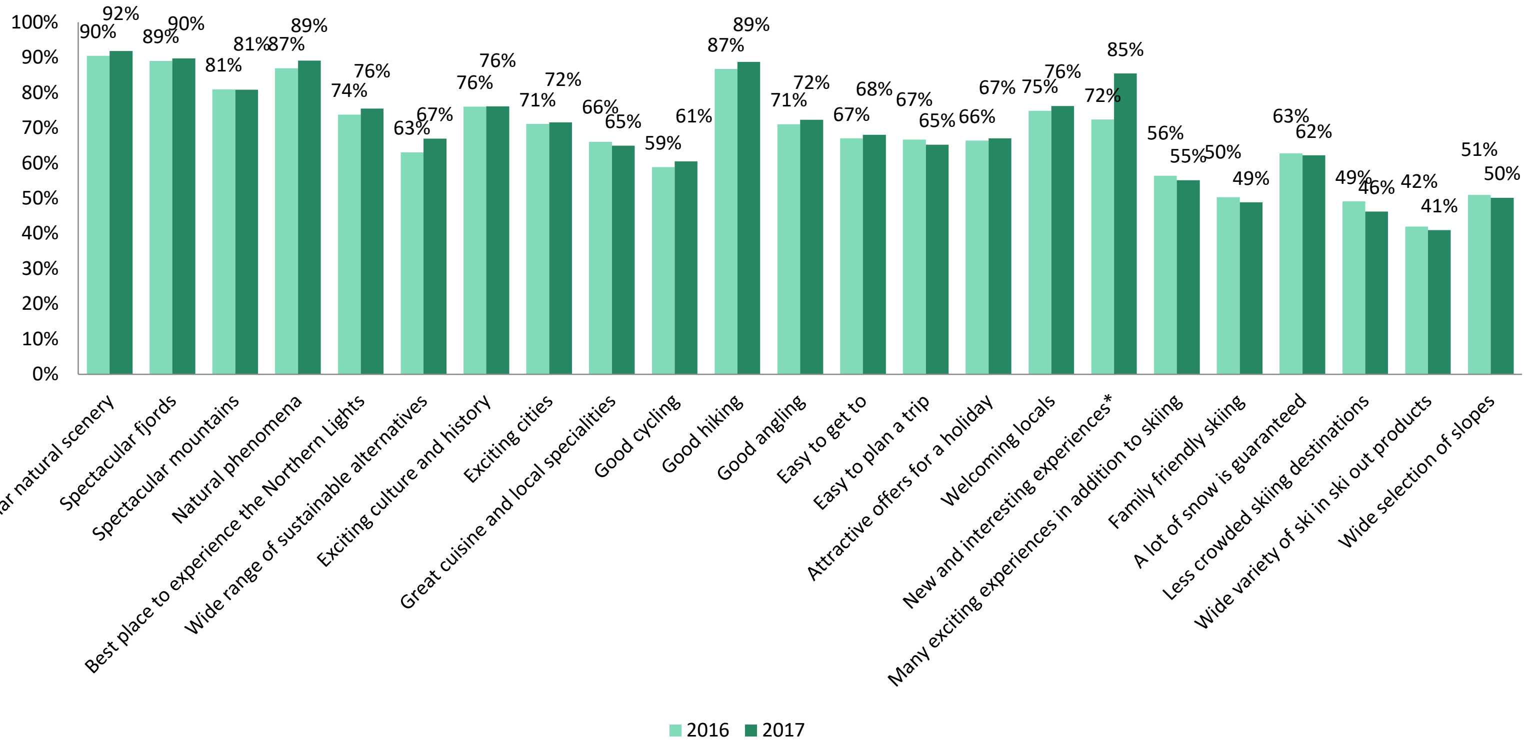
Innovasjon Norge

EPINION

DEVELOPMENT IN BRAND TARGETS 2016 TO 2017

The chart below shows how the share that agrees with the brand statements about Norway has developed from 2016 to 2017. As can be seen the German target groups oppinion of Norway has not changed much since 2016. But it seems as slightly more view Norway a place with a wide range of sustainable alternatives.

DEVELOPMENT I BRAND TARGETS FROM 2016 TO 2017



*Question wording until the end of 2016 was :"It offers experiences that you cannot find anywhere else in the world"

Innovasjon Norge

EPINION

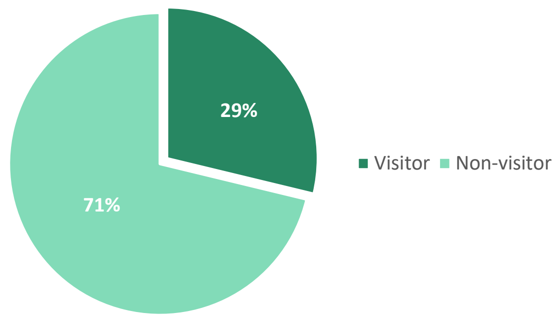
VISITORS AND NON-VISITORS

The circle below illustrates that 29% 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.

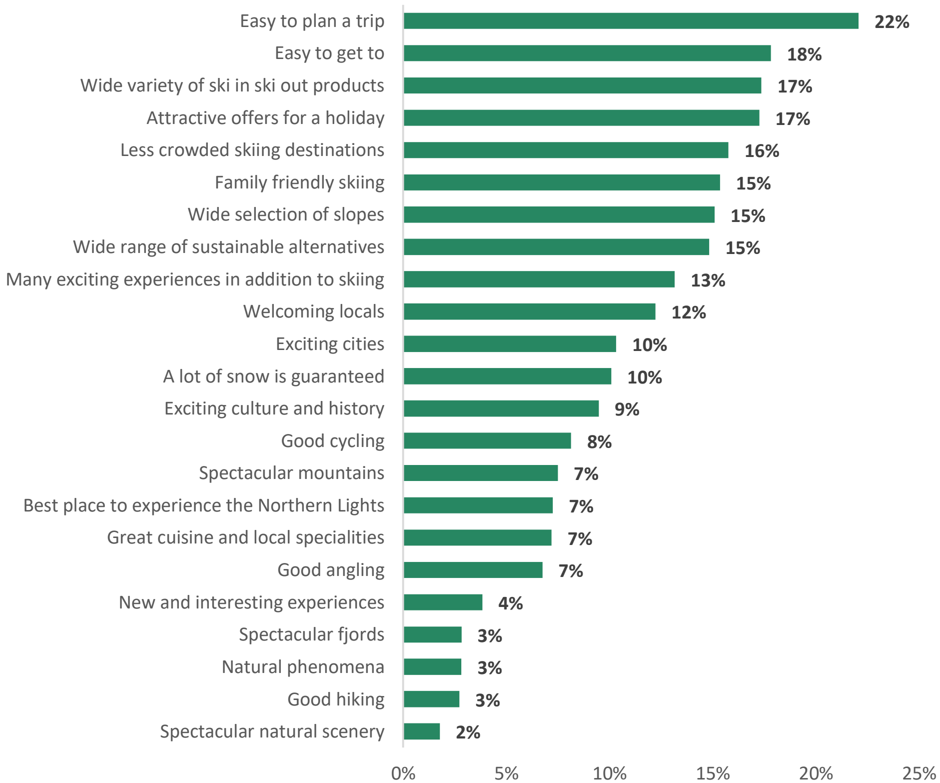
For all brand targets the group that have visited Norway is more positive towards Norway than the group that have not visited Norway. The two groups agree that Norway has beautiful nature but tourists that have visited Norway are more likely to say that it is easy to plan a trip to Norway, that it is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

GERMAN TARGET GROUP WHO HAVE VISITED NORWAY



N= 5467

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



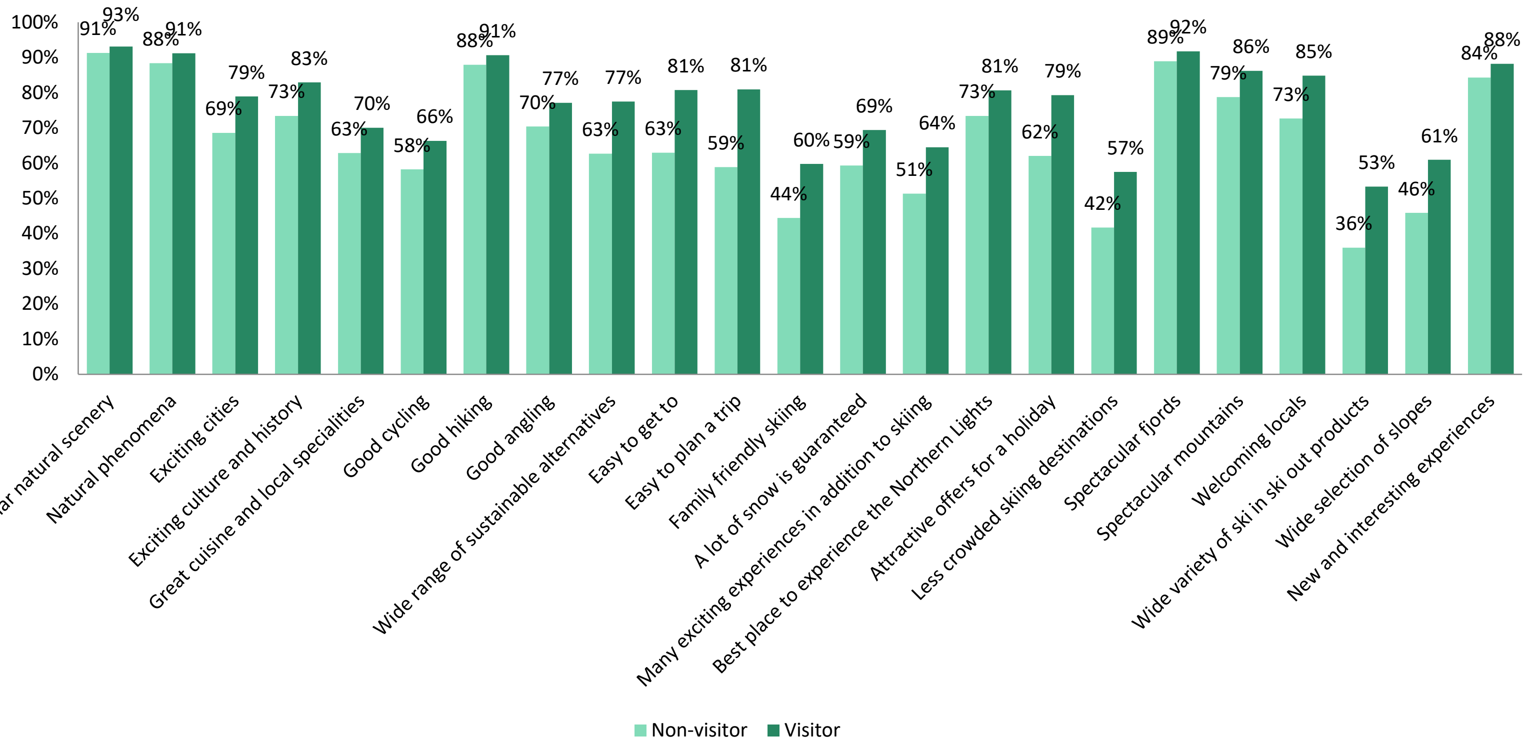
Innovasjon Norge

EPINION

SHARE OF VISITORS AGREEING WITH BRAND STATEMENTS

The chart below shows the percentage that agrees with the brand statements split by visitors and non-visitors. The previous page showed the difference between visitors and non-visitors to display what set them apart. On this page is the absolute share that agrees with the brand targets. This illustrates how many in each group that agrees with the brand targets.

PERCENTAGE THAT AGREES WITH THE STATEMENT SPLIT BY VISITOR AND NON-VISITOR



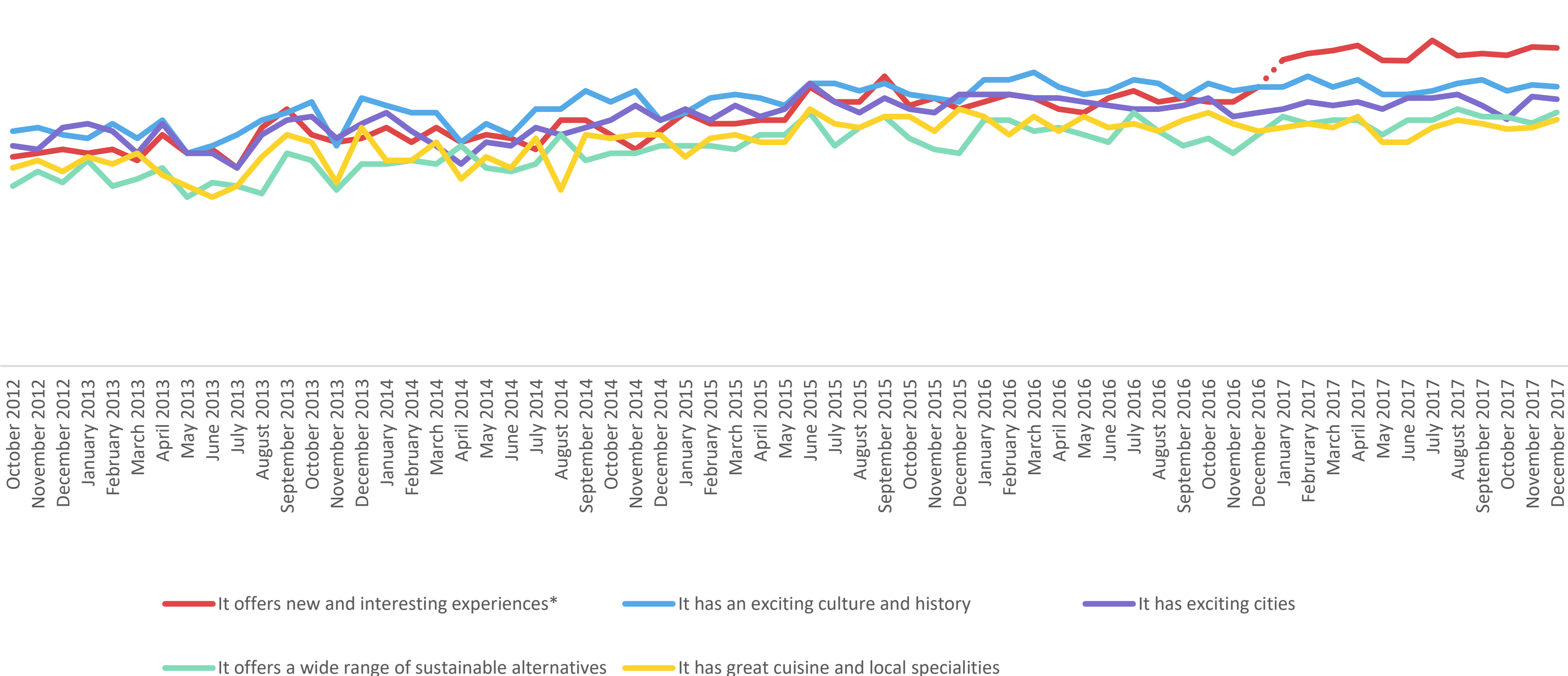
Innovasjon Norge

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 that is tracked here show a slow but steady increase over the time period from 2012 to around 2016. But in 2016 and 2017 the positive trend seems to have disappeared and the brand targets remain at almost the same level.

DEVELOPMENT IN KEY INDICATORS



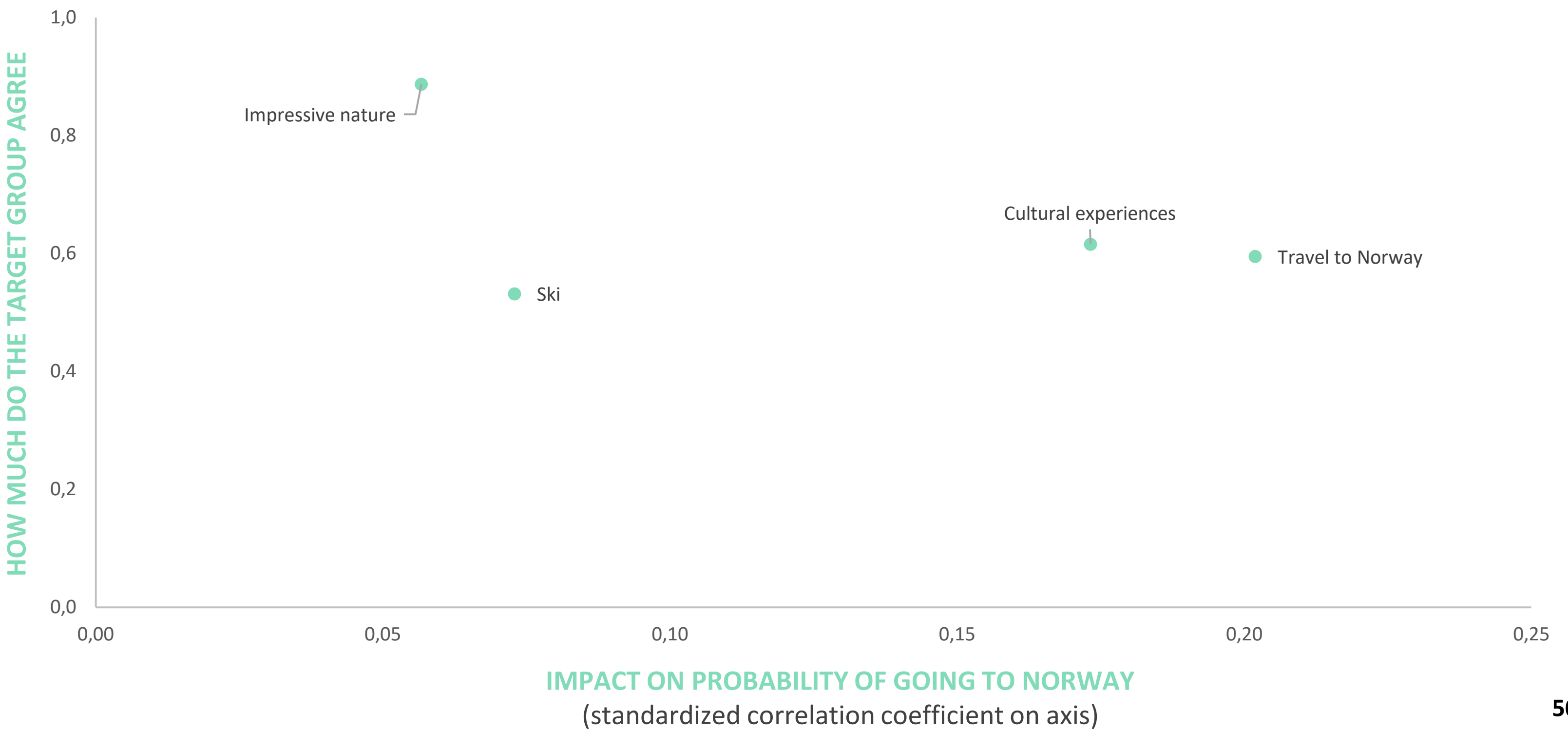
*Question wording until the end of 2016 was :"It offers experiences that you cannot find anywhere else in the world"

Innovasjon Norge

EPINION

DRIVERS FOR THE PROBABILITY TO VISIT NORWAY

The branding targets have been reduced to five dimensions (see page 56). In the chart below are the four 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 the perception 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 regarding accesability and a place that offers a lot of cultural experiences. This is predicted to have the most effect on raising the probability of visiting Norway in the future.



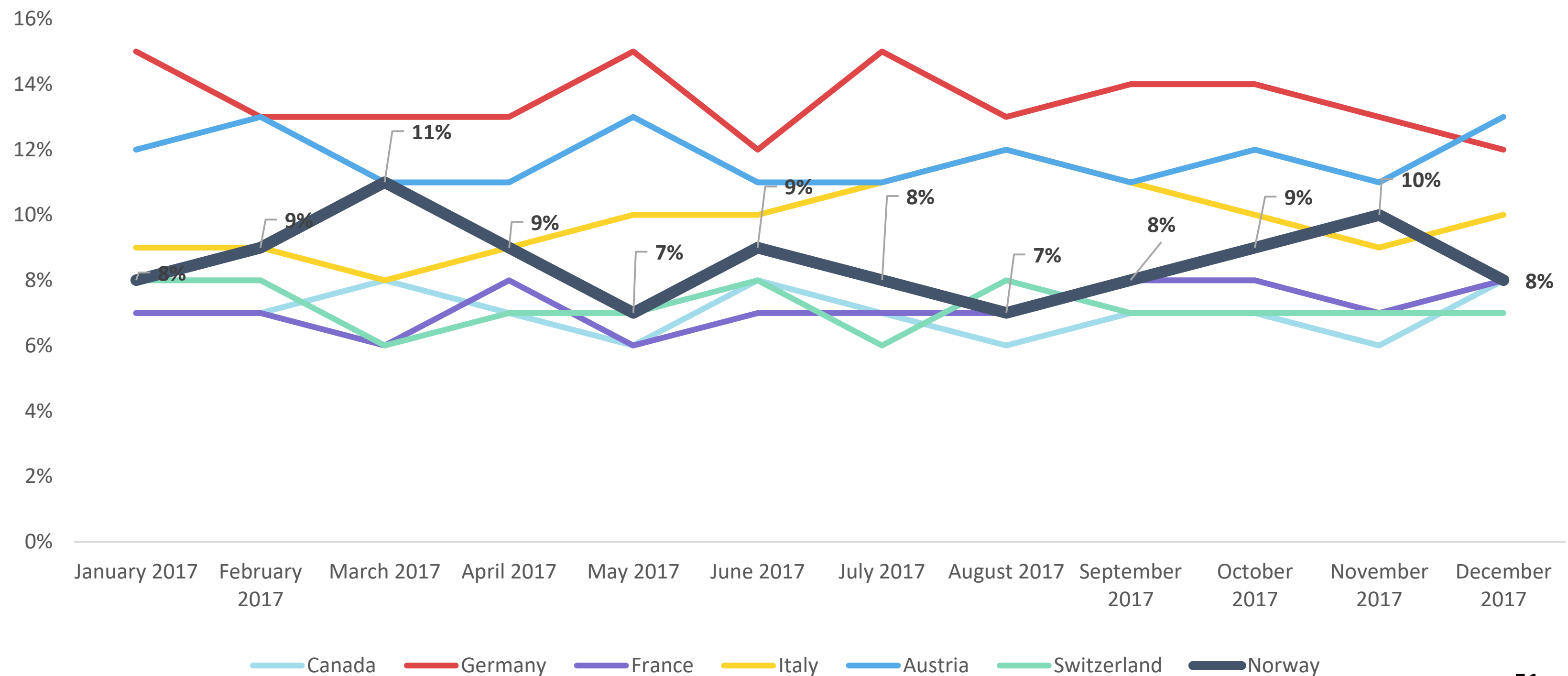
Innovasjon Norge

EPINION

SHARE OF VOICE IN GERMANY

Below is an illustration of the development of Norways Share of Voice across 2017 in Germany compared with the Share of Voice for other markets. Norway is ranking as 4th in the German SoV with an average of 9%. Norway seems to have a slightly higher SoV in the winter months than in the summer. The country with the highest Share of Voice in Germany is Germany itself with an average of 14% followed by Austria with 12%.

DEVELOPMENT IN SHARE OF VOICE IN GERMANY COMPARED TO OTHER COUNTRIES



Innovasjon Norge

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 and they have a much higher recall as well. They primarily travel abroad to experience big cities and local art, culture and lifestyle. The Norwegians primarily associate Norway with the nature, the mountains and Lofoten but also that the country is expensive.

DEMOGRAPHIC CHARACTERISTICS

53% / 51%
Women

11% / 37%
1-2 travels in Norway or abroad in the past 3 years

89% / 63%
3 or more travels in Norway or abroad in the past 3 years

68% / 66%
No children

14% / 16%
1 child

18% / 18%
2 or more children

20% / 29%
18-35 years old

43% / 39%
36-55 years

37% / 32%
56 years or older

13,5 / 14,5
Average years of education

73.000 - 83.000 EUR
Median income

- Norwegian target group
- Average (foreign markets)

ASSOCIATIONS TO NORWAY

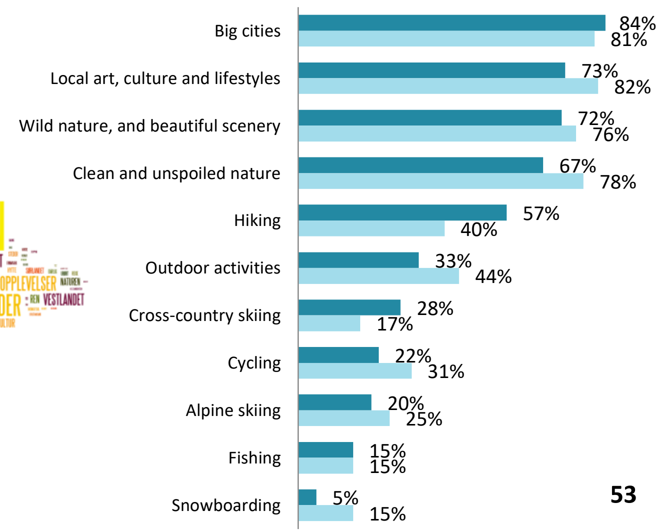
N=5769

PROBABILITY FOR VISIT AND RECALL

7,4 / 3,9
Likely to take a holiday in Norway within 12 months

41% / 22%
Remember seeing an add for Norway

MOTIVATION FOR TRAVEL ON HOLIDAY



Innovasjon Norge

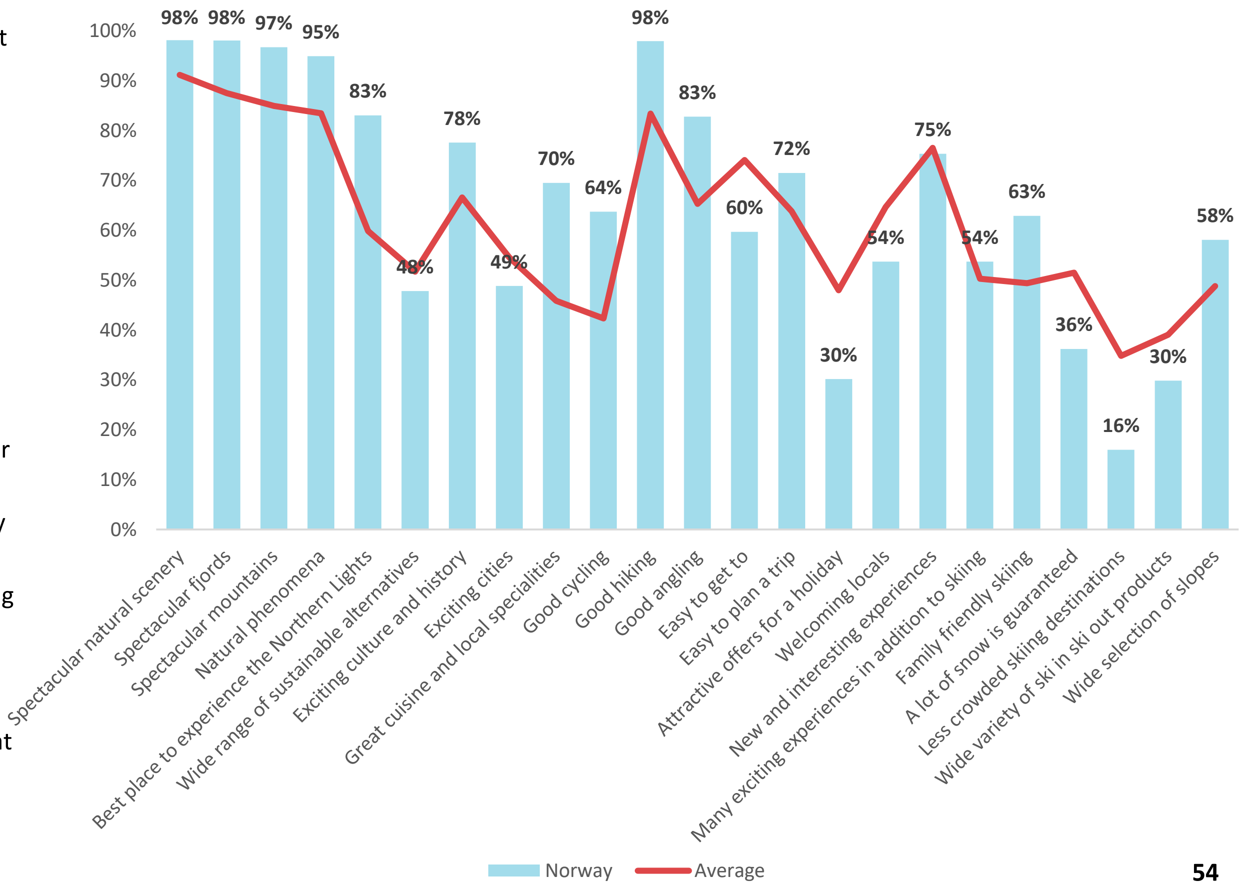
EPINION

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 more likely than foreigners to see Norway as a place that offers family friendly skiing and having a lot of different slopes. Norwegians are less likely than foreigners to say that there are attractive offers for holidays and that ski destinations are less crowded.



N= 5769

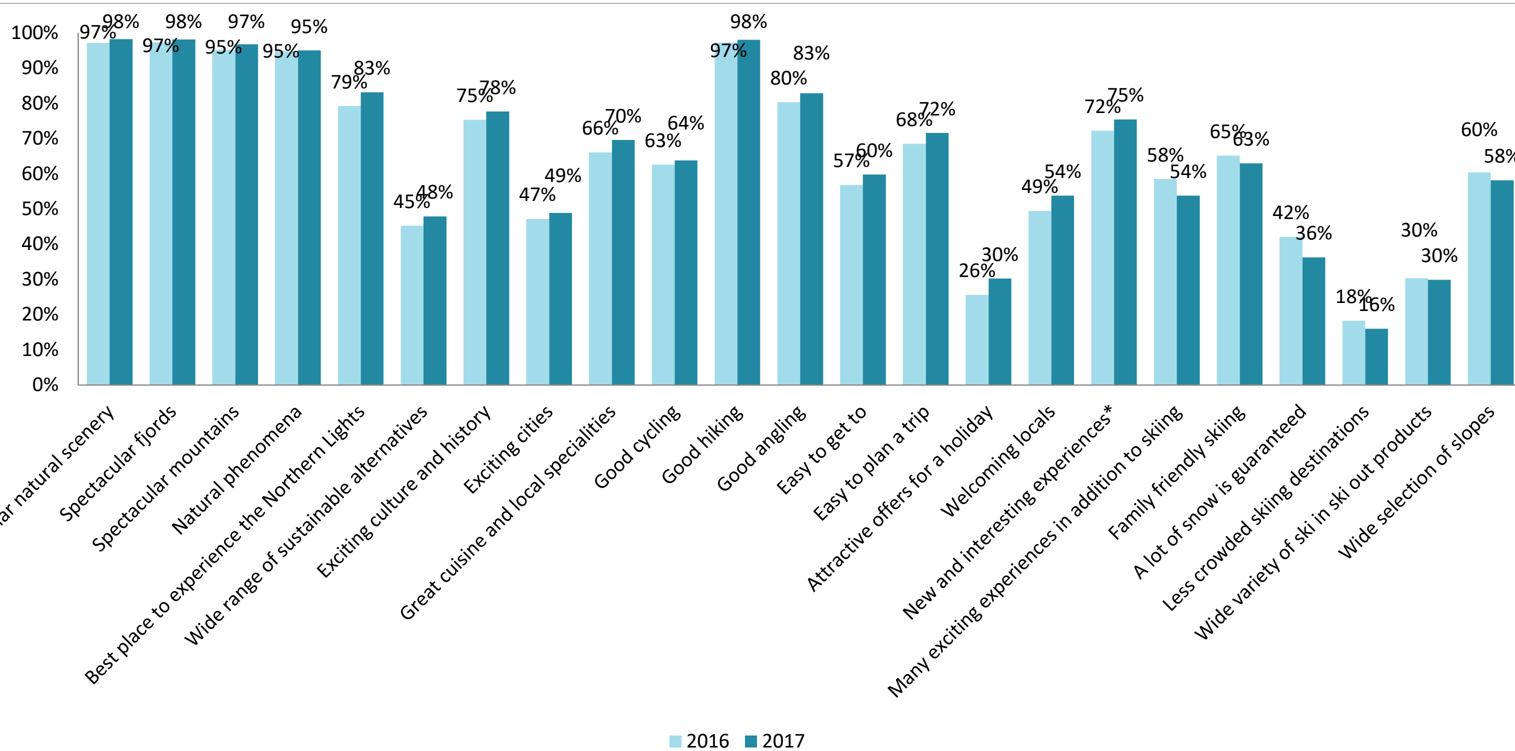
Innovasjon Norge

EPINION

DEVELOPMENT IN BRAND TARGETS 2016 TO 2017

The chart below shows how the share that agrees with the brand statements about Norway has developed from 2016 to 2017. As can be seen the Norwegians have a slightly more positive view of their country regarding the possibilities attractive offers for a holiday, that it is easy to plan a trip and that there are welcoming locals. But it also seems like their view of skiing in Norway is slightly more negative in 2017 compared to 2016.

DEVELOPMENT I BRAND TARGETS FROM 2016 TO 2017

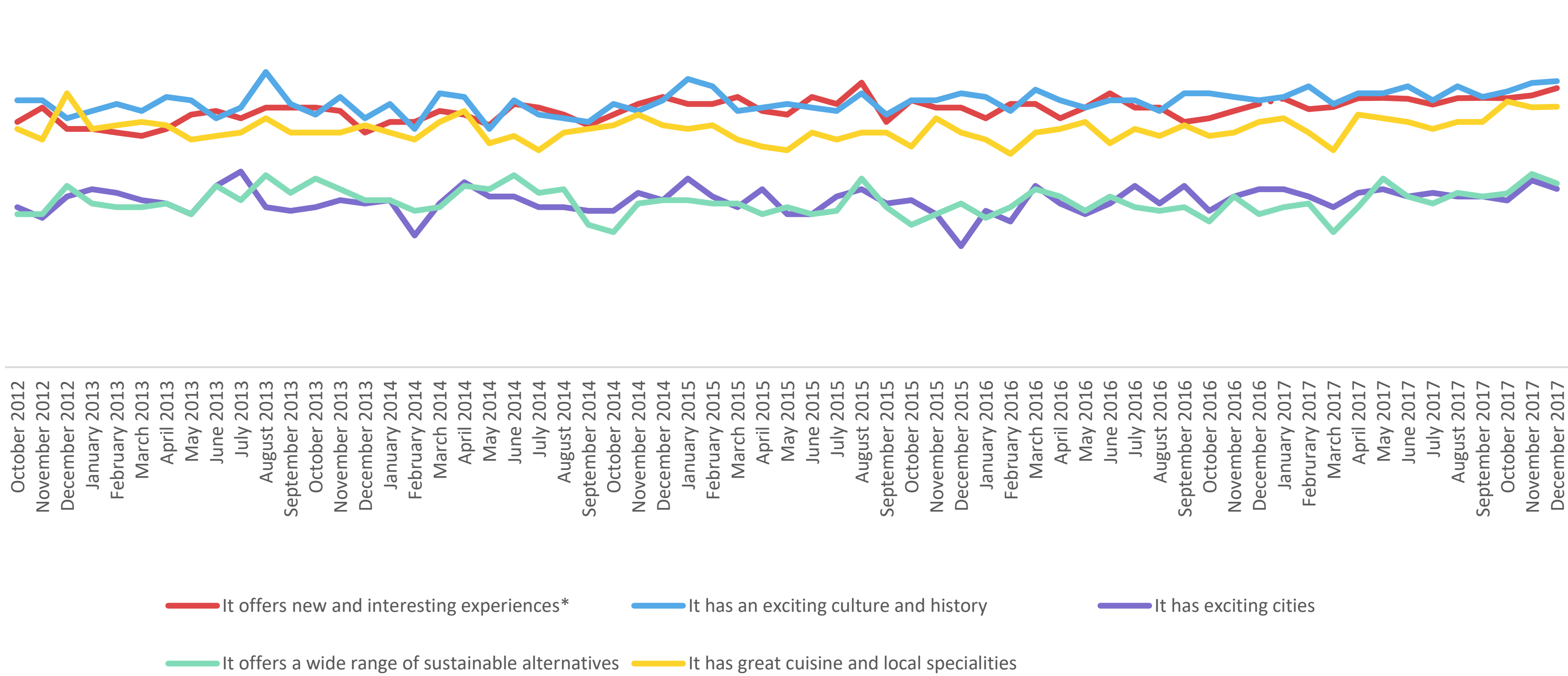


*Question wording until the end of 2016 was :"It offers experiences that you cannot find anywhere else in the world"

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 remarkable 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 does not seem to be neither positive nor negative in the period from 2012 to 2017.

DEVELOPMENT IN KEY INDICATORS



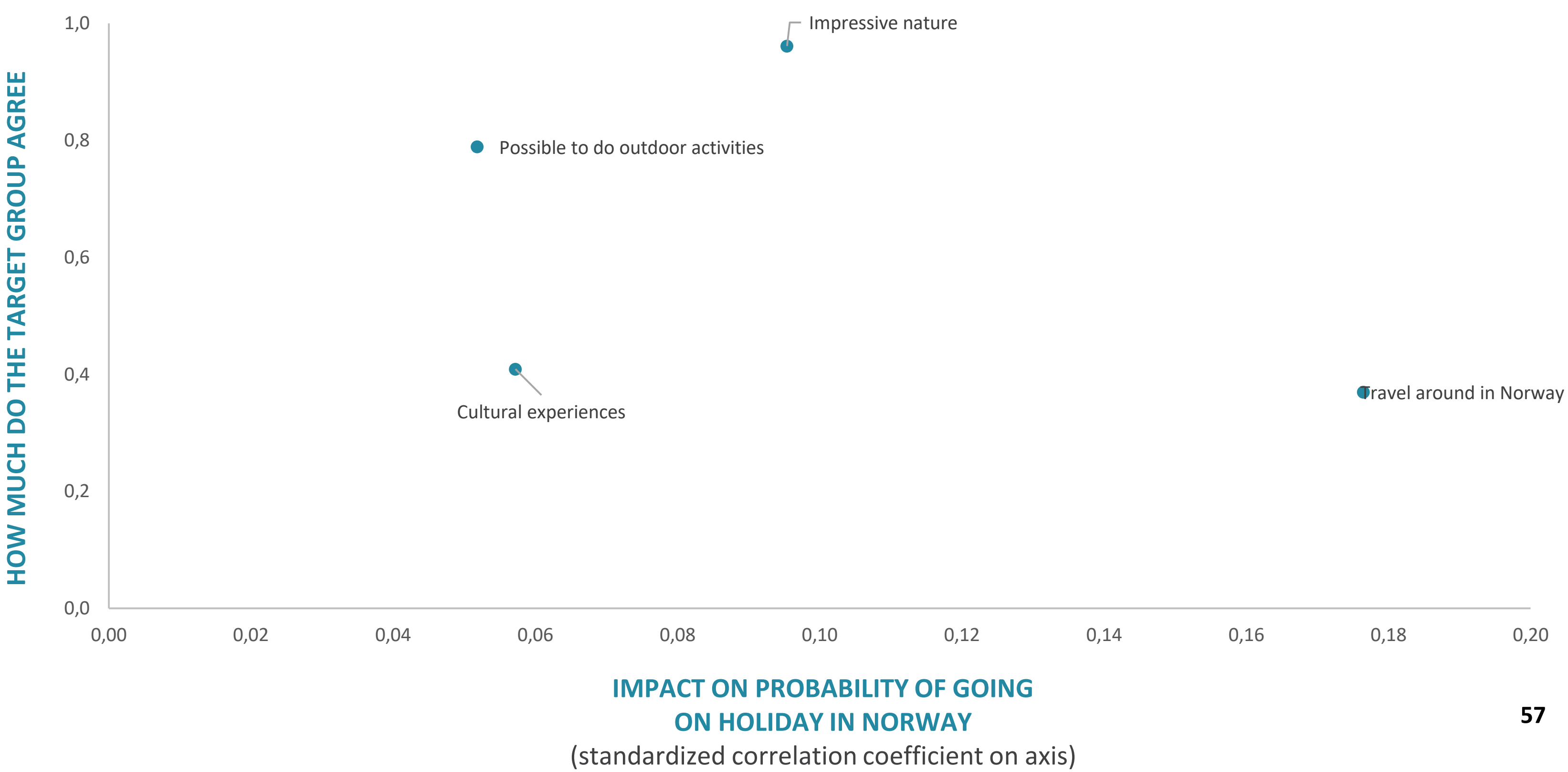
Question wording until the end of 2016 was :"It offers experiences that you cannot find anywhere else in the world"

Innovasjon Norge

EPINION

DRIVERS FOR THE PROBABILITY TO VISIT NORWAY

The branding targets have been reduced to five dimensions (see page 56). In the chart below are the four dimensions that appears to have a statistically significant impact on the probability of visiting Norway displayed. The dimension that seems to have the highest impact on the probability of going on a holiday in Norway in the next 12 months seems to be the perception of how easy it is to travel around in Norway including the view that there are good offers for a holiday. The other three significant dimensions all seem to have a lower impact on the probability to go on holiday in Norway.



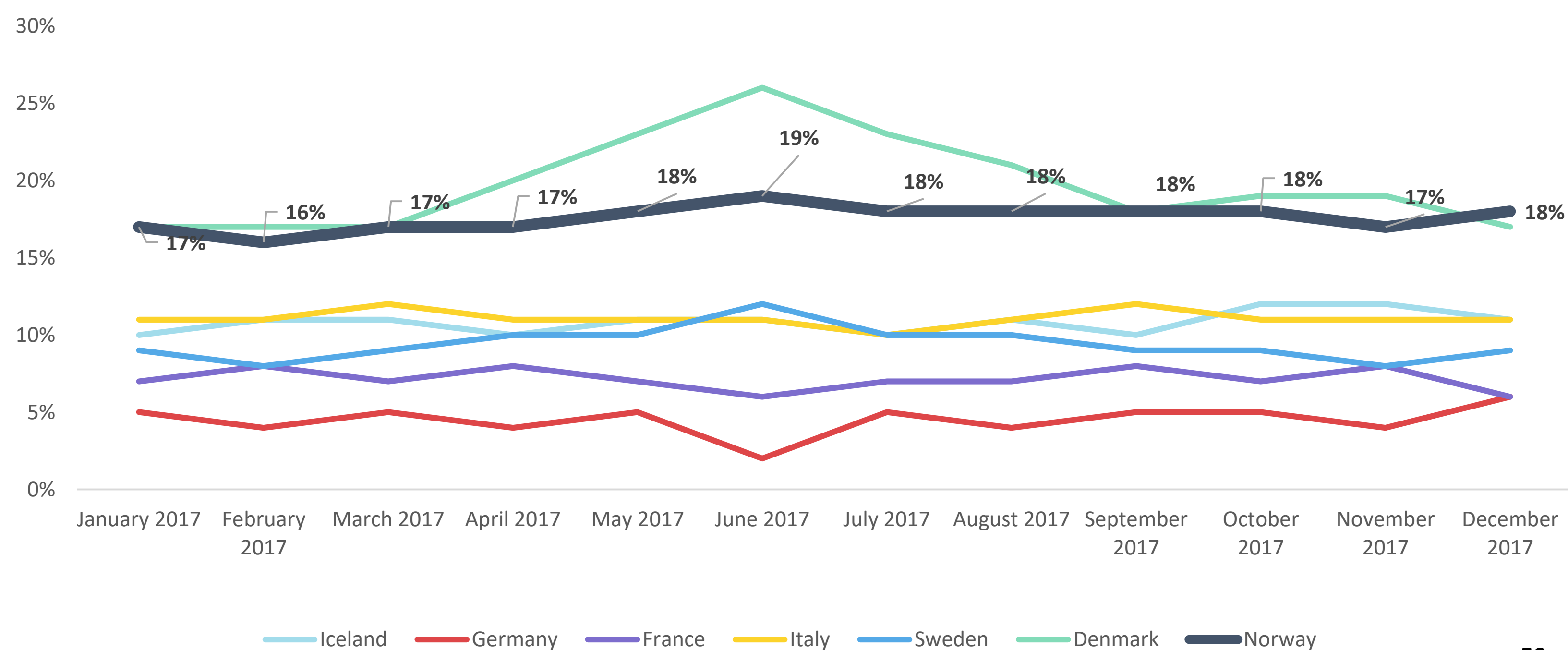
Innovasjon Norge

EPINION

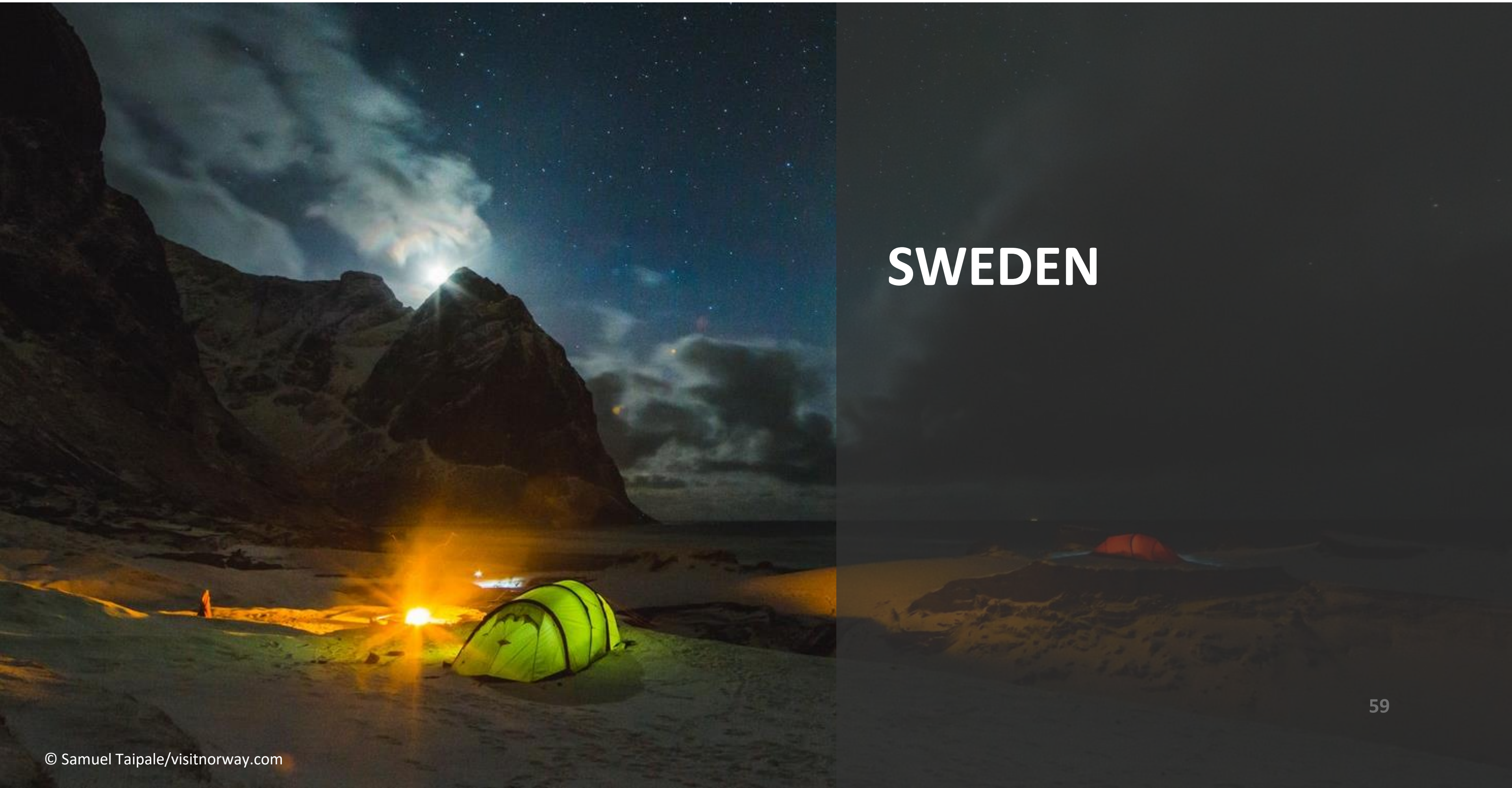
SHARE OF VOICE IN NORWAY

Below is an illustration of the development of Norways Share of Voice across 2017 in Norway compared with the Share of Voice for other markets. On average Norway has a SoV of 18% and is ranked 2nd behind Denmark (20%) when looking at the Share of Voice in Norway. Norways SoV seems to be rather stable over the year while Denmarks Share of Voice peaks in the spring and summer time before fading to the same level as Norway in the fall and winter.

DEVELOPMENT IN SHARE OF VOICE IN NORWAY COMPARED TO OTHER COUNTRIES



Innovasjon Norge



SWEDEN

SWEDEN

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 potential tourists in other foreign countries to visit Norway within the next 12 months. Their motivation to travel abroad are mainly to experience 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 the Swedish target group mentions the beautiful nature and fjords as well as Hurtigruten.

DEMOGRAPHIC CHARACTERISTICS

56% / 51%
Women

29% / 37%
1-2 travels abroad in the past 3 years

71% / 63%
3 or more travels abroad in the past 3 years

72% / 66%
No children

13% / 16%
1 child

15% / 18%
2 or more children

17% / 29%
18-35 years old

41% / 39%
36-55 years

42% / 32%
56 years or older

13,7 / 14,5
Average years of education

51.000 - 61.000 EUR
Median income

- Swedish target group
- Average (foreign markets)

N=5527

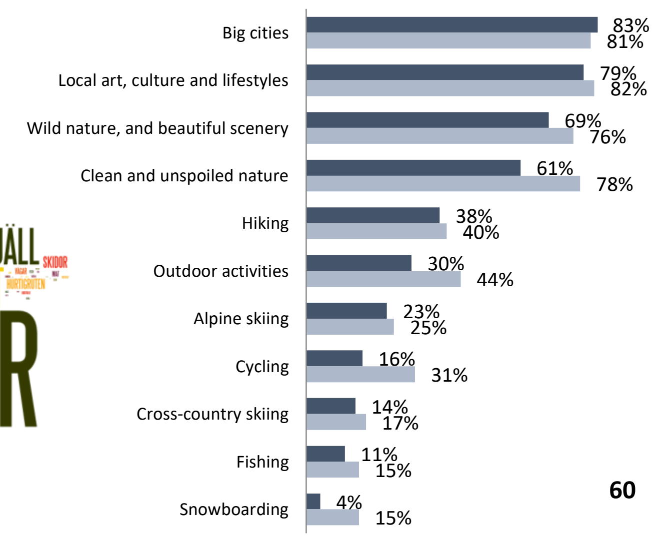
ASSOCIATIONS TO NORWAY

PROBABILITY FOR VISIT AND RECALL

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

33% / 22%
Remember seeing an add for Norway

MOTIVATION FOR TRAVEL ON HOLIDAY ABROAD



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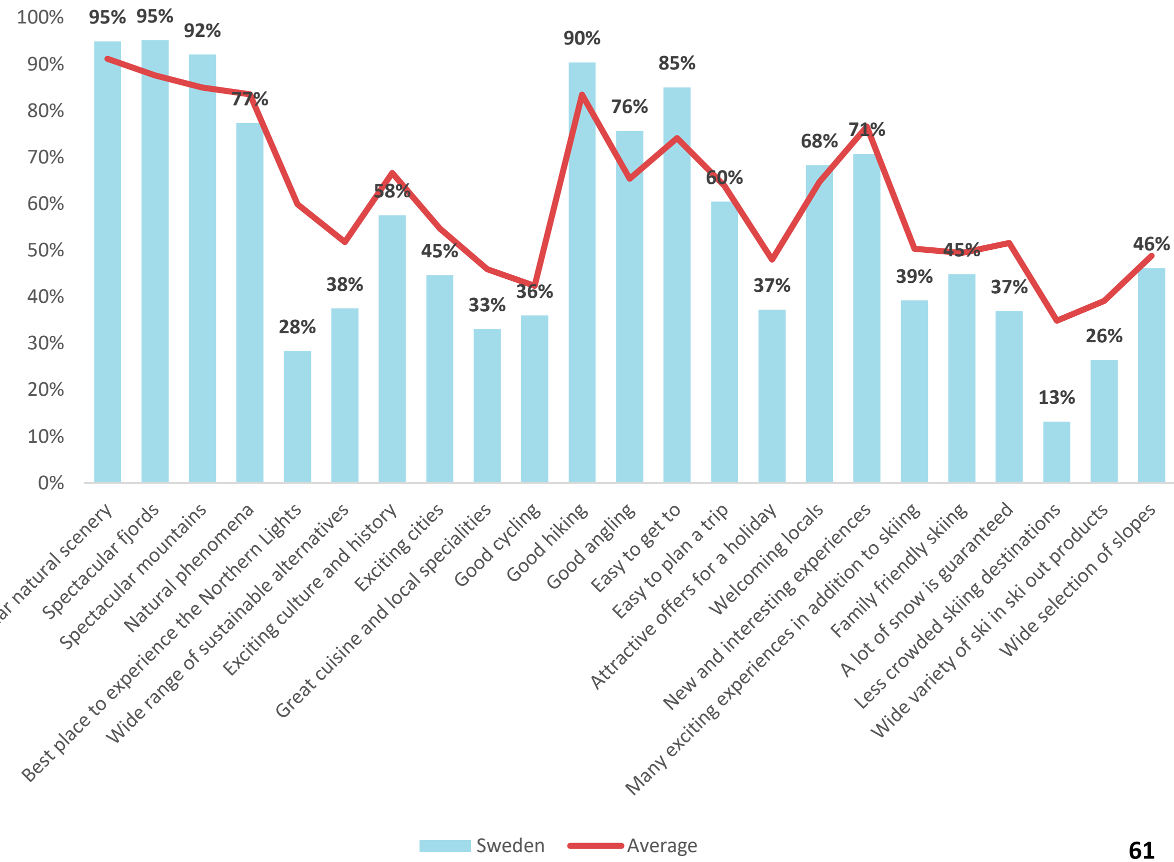
HOW THE SWEDISH TARGET GROUP SEES NORWAY

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 with beautiful nature, that is easy to get to and being a good place for hiking. They score below average when asked about their perception of Norway as being the best place to experience the northern lights, having a wide range of sustainable alternatives and having less crowded skiing destinations.



N= 5527

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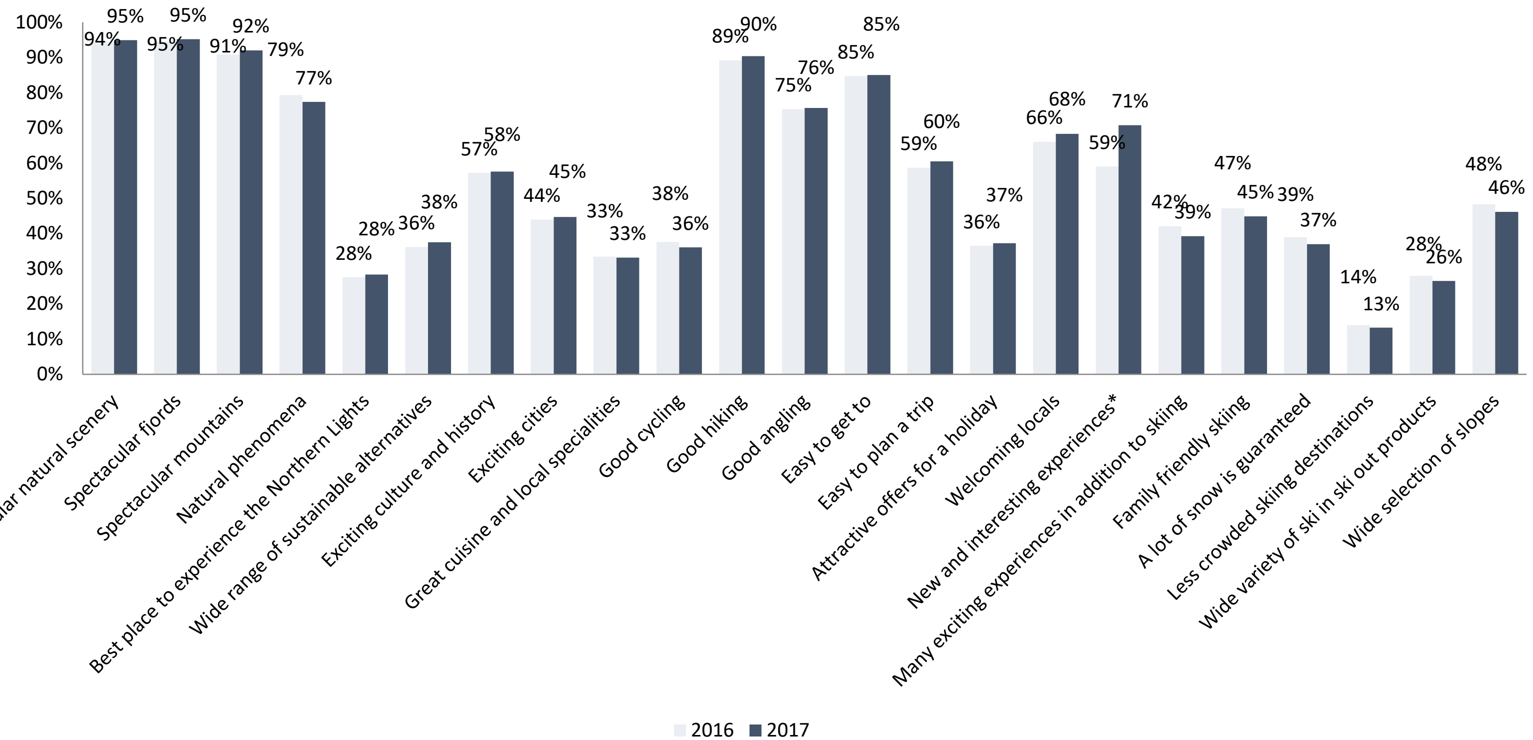
DEVELOPMENT IN BRAND TARGETS 2016 TO 2017

The chart below shows how the share that agrees with the brand statements about Norway has developed from 2016 to 2017. As can be seen the Swedish target groups oppinion of Norway has not changed much from 2016 to 2017.

DEVELOPMENT I BRAND TARGETS FROM 2016 TO 2017



*Question wording until the end of 2016 was :"It offers experiences that you cannot find anywhere else in the world"

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VISITORS AND NON-VISITOR

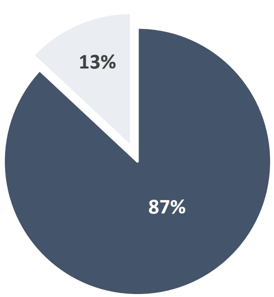
The circle below illustrates that around 87% of the Swedes in the Swedish target group have visited Norway before.

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, their view of how welcoming the locals are and if Norway have a wide selection of slopes.

SWEDISH TARGET GROUP WHO HAVE VISITED NORWAY



N= 5527

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

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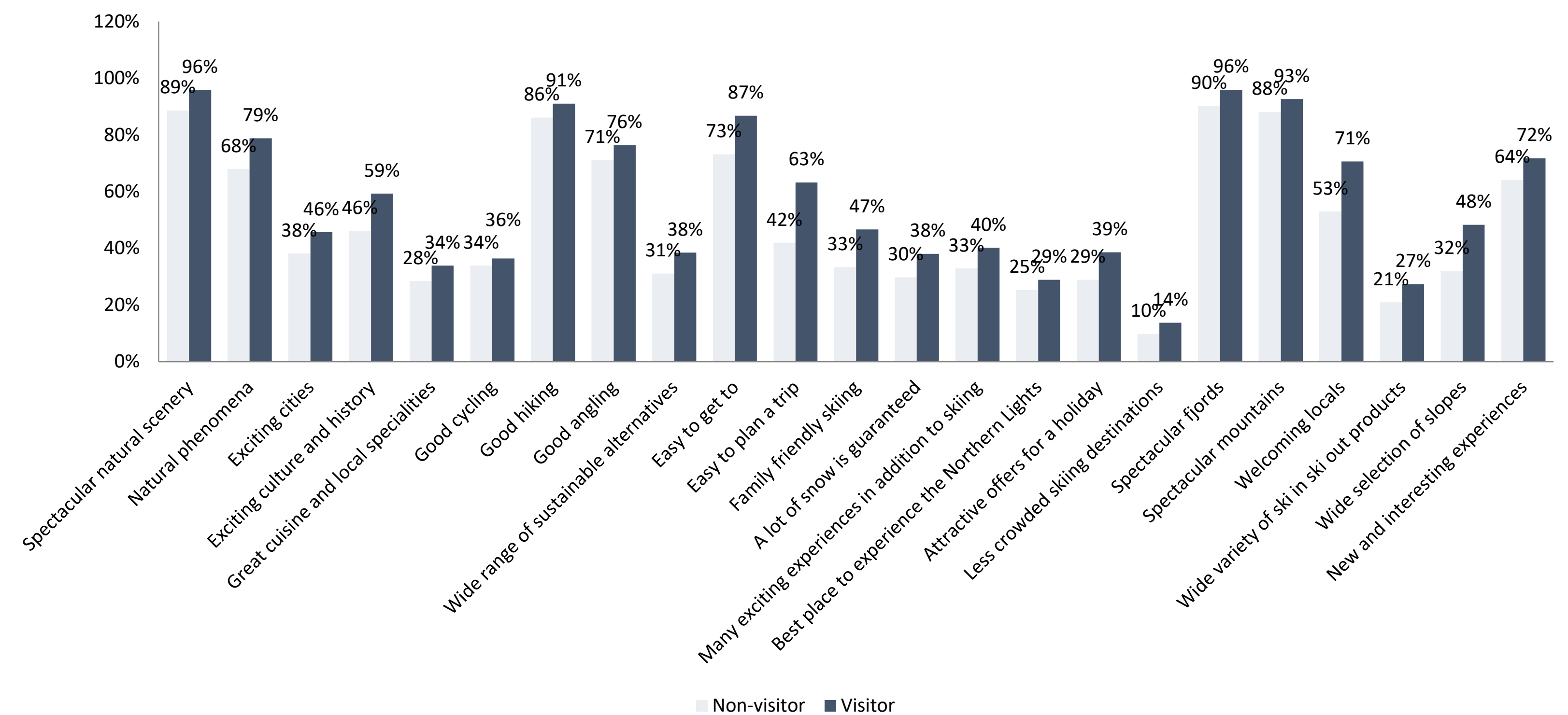
SHARE OF VISITORS AGREEING WITH BRAND STATEMENTS

The chart below shows the percentage that agrees with the brand statements split by visitors and non-visitors. The previous page showed the difference between visitors and non-visitors to display what set them apart. On this page is the absolute share that agrees with the brand targets. This illustrates how many in each group that agrees with the brand targets.

PERCENTAGE THAT AGREES WITH THE STATEMENT SPLIT BY VISITOR AND NON-VISITOR



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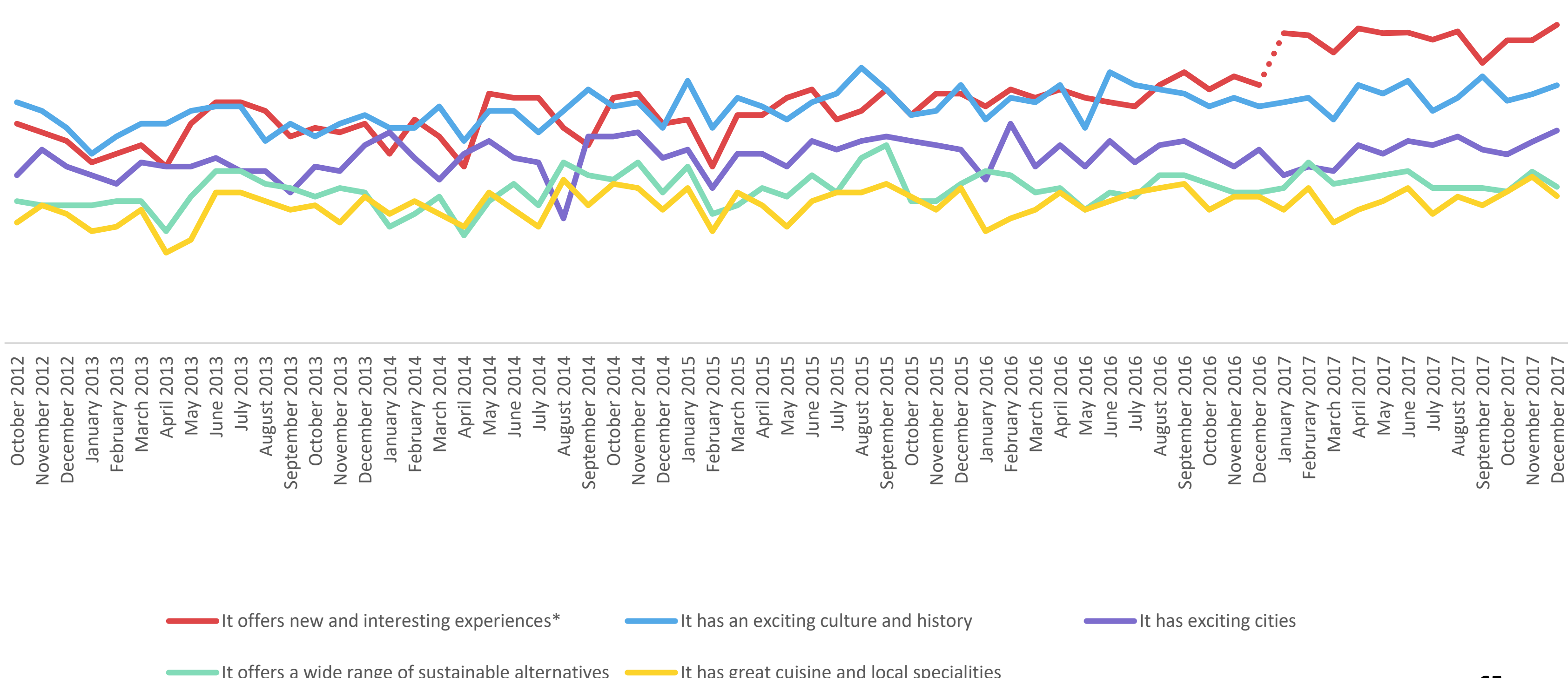
DEVELOPMENT IN KEY BRAND TARGETS SINCE 2012

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 from month to month but most brand targets does not show either a positive or a negative trend over the long run. However there seems to be a minor positive development in the swedish target groups perception of Norway as having a exciting culture and history though when looking across the time period.

DEVELOPMENT IN KEY INDICATORS



*Question wording until the end of 2016 was :"It offers experiences that you cannot find anywhere else in the world"

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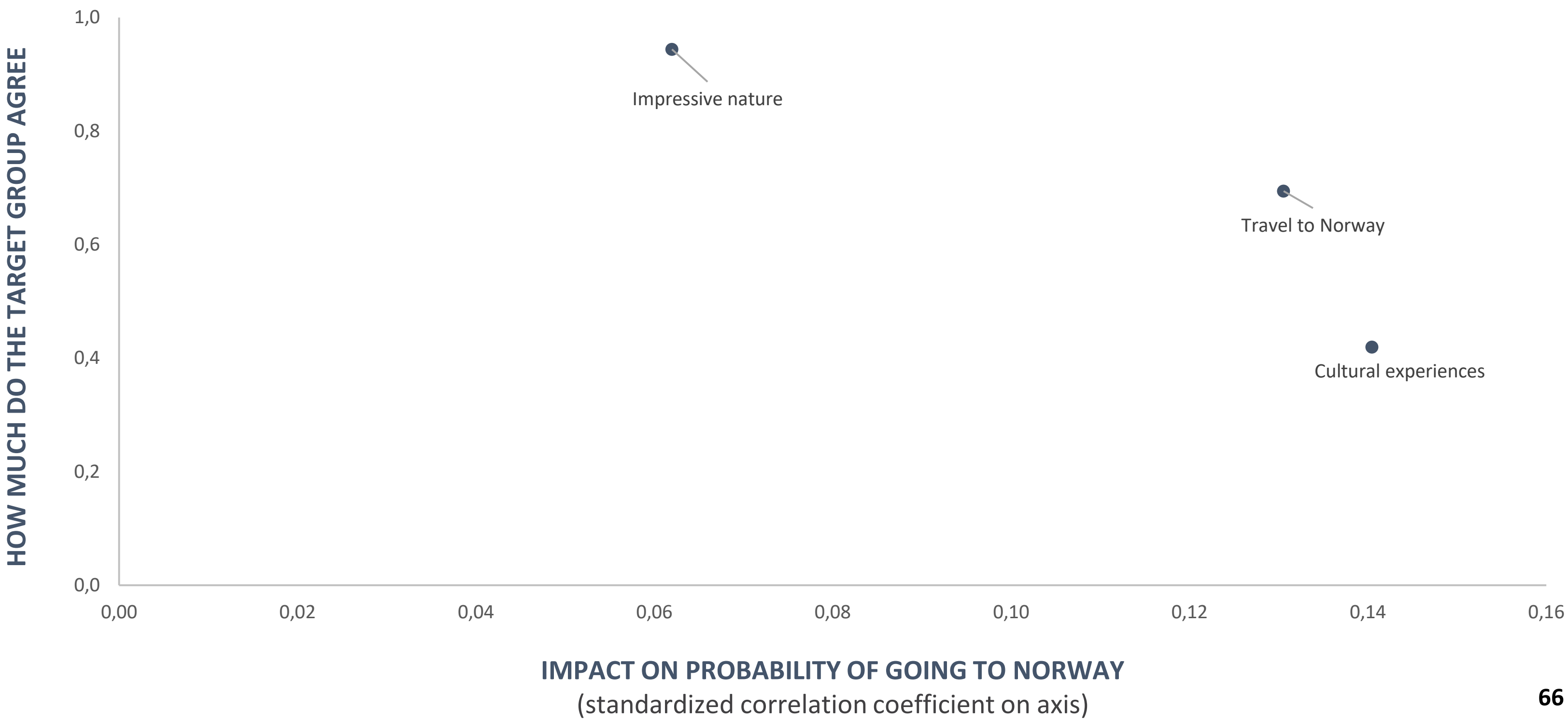
DRIVERS FOR THE PROBABILITY TO VISIT NORWAY

The branding targets have been reduced to five dimensions (see page 56). In the chart below are the three dimensions that appears to have a statistically significant impact on the probability of visiting Norway displayed. The very most important drivers for the Swedish target group is the perception of the cultural experiences that Norway offers and how easy they think it is to travel to Norway. Norway being a country that offers a lot of cultural experiences is also the factor that the least amount in the target group agrees with. This suggests room for raising the perception among the target group regarding this.



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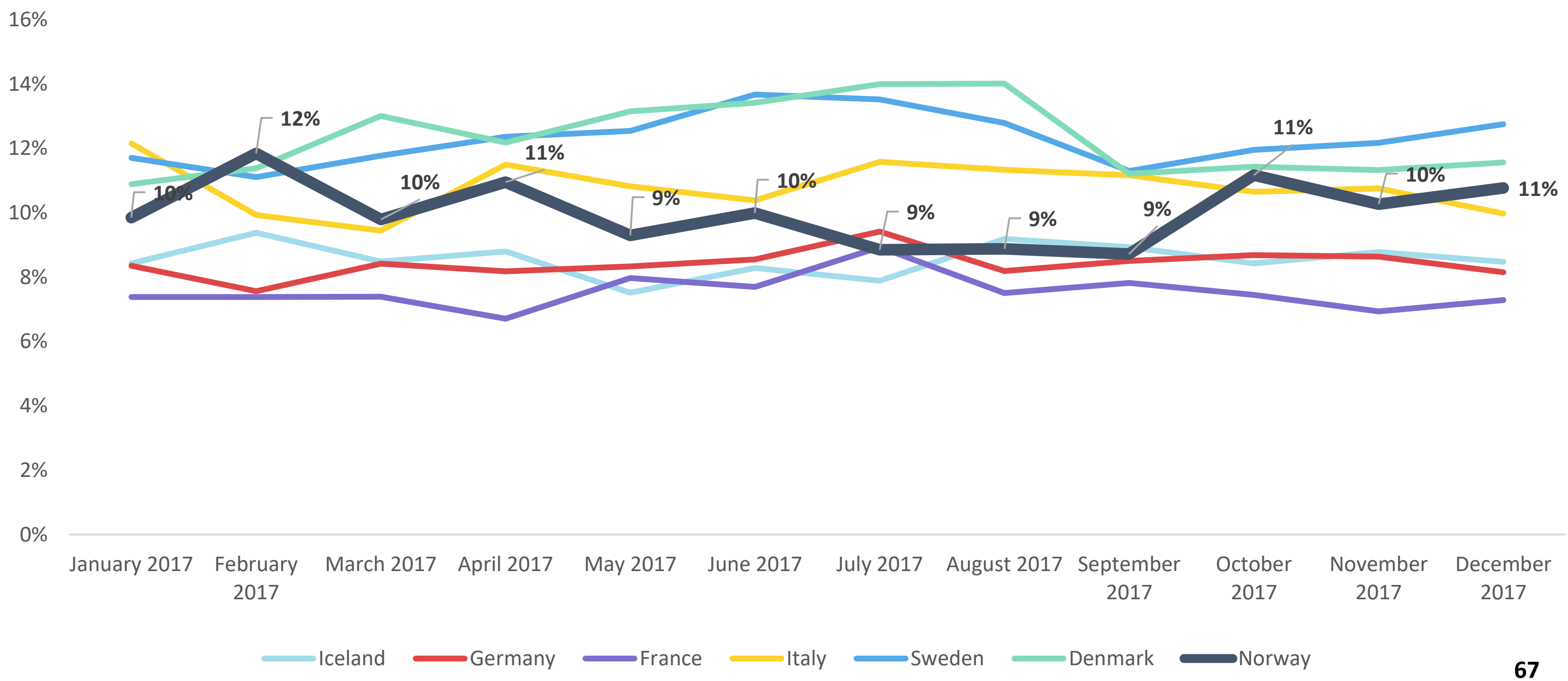
EPINION

SHARE OF VOICE IN SWEDEN

Below is an illustration of the development of Norways Share of Voice across 2017 in Sweden compared with the Share of Voice for other markets. On average Norway is ranking 4th with a SoV that fluctuates between 12% and 9% throughout the year. Norways SoV seems to be slightly higher during the winter and spring than in the summer and fall. Denmark and Sweden itself have the highest SoV wit an average of 12% each.

DEVELOPMENT IN SHARE OF VOICE IN SWEDEN COMPARED TO OTHER COUNTRIES



METHOD

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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 23 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

POSSIBLE TO DO OUTDOOR ACTIVITIES:

- It offers good cycling
- It offers good hiking
- It offers good angling
- It is the best place to experience the Northern Lights

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 offers new and interesting experiences
- It offers a wide range of sustainable alternatives

TRAVEL TO NORWAY:

- It is easy to plan a trip 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
UK	5327
DENMARK	5266
NETHERLANDS	5318
FRANCE	2696
GERMANY	5467
NORWAY	5769
SWEDEN	5527

APPENDIX

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TARGET GROUP COMPARISON

		UK	Denmark	Netherlands	France	Germany	Norway	Sweden
Gender	Male	48%	51%	50%	50%	50%	47%	44%
	Female	52%	49%	50%	50%	50%	53%	56%
Age	18-34	37%	25%	33%	35%	31%	20%	17%
	35-55	42%	23%	42%	42%	47%	43%	41%
	56+	21%	52%	24%	23%	23%	37%	43%
Number of children	None	55%	80%	65%	54%	67%	68%	72%
	1+2	21%	11%	16%	23%	18%	14%	13%
	3 or more	24%	9%	19%	23%	15%	18%	15%
Holidays in last 3 years	1-2	40%	31%	38%	45%	43%	11%	29%
	3-4	30%	28%	35%	30%	32%	19%	28%
	More than 4	30%	41%	27%	25%	25%	69%	43%
Motivation	Dramatic and wild nature, and beautiful scenery	88%	70%	69%	90%	77%	72%	69%
	Alpine skiing	34%	16%	20%	39%	24%	20%	23%
	Snowboarding	28%	6%	16%	23%	18%	5%	4%
	Cross-country skiing	23%	9%	13%	32%	22%	28%	14%
	Outdoor activities such as going dog sledding, staying in an ice hotel or seeing the Northern Lights	69%	23%	40%	68%	43%	33%	30%
	Clean and unspoiled nature	86%	67%	84%	84%	87%	67%	61%
	Local art, culture and lifestyles	82%	83%	83%	80%	83%	73%	79%
	Big cities	84%	83%	86%	79%	71%	84%	83%
	Hiking	41%	34%	20%	59%	58%	57%	38%
	Fishing	23%	8%	15%	22%	16%	15%	11%
	Cycling	36%	16%	41%	25%	48%	22%	16%
Income	Median (EUR)	45.000 – 57.000	54.000 – 67.000	40.000 – 50.000	26.000 – 39.999	40.000 – 52.999	73.000 – 83.000	51.000 – 61.000
Education	Average years	15,0	14,1	15,3	15,1	14,1	13,5	13,7

ATTITUDE TO NORWAY

	UK	Denmark	Netherlands	France	Germany	Norway	Sweden
Spectacular natural scenery	90%	91%	88%	92%	92%	98%	95%
Spectacular fjords	81%	88%	84%	87%	90%	98%	95%
Spectacular mountains	84%	89%	81%	80%	81%	97%	92%
Natural phenomena	85%	80%	83%	89%	89%	95%	77%
Best place to experience the Northern Lights	69%	47%	67%	86%	76%	83%	28%
Wide range of sustainable alternatives	60%	27%	56%	73%	67%	48%	38%
Exciting culture and history	74%	54%	68%	74%	76%	78%	58%
Exciting cities	63%	38%	51%	64%	72%	49%	45%
Great cuisine and local specialities	54%	22%	48%	58%	65%	70%	33%
Good cycling	44%	27%	45%	38%	61%	64%	36%
Good hiking	66%	89%	85%	80%	89%	98%	90%
Good angling	45%	67%	68%	61%	72%	83%	76%
Easy to get to	75%	76%	65%	76%	68%	60%	85%
Easy to plan a trip	66%	60%	66%	68%	65%	72%	60%
Attractive offers for a holiday	56%	31%	45%	58%	67%	30%	37%
Welcoming locals	64%	53%	61%	67%	76%	54%	68%
New and interesting experiences	83%	59%	81%	82%	85%	75%	71%
Many exciting experiences in addition to skiing	62%	43%	45%	65%	55%	54%	39%
Family friendly skiing	55%	52%	41%	62%	49%	63%	45%
A lot of snow is guaranteed	59%	43%	45%	74%	62%	36%	37%
Less crowded skiing destinations	45%	18%	43%	53%	46%	16%	13%
Wide variety of ski in ski out products	51%	27%	40%	62%	41%	30%	26%
Wide selection of slopes	53%	45%	45%	59%	50%	58%	46%

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THE GROUP THAT IS INTERESTED IN GOING TO NORWAY

		UK		Denmark		Netherlands		France		Germany		Norway		Sweden	
		%	Index	%	Index	%	Index	%	Index	%	Index	%	Index	%	Index
Gender	Male	55%	114	52%	101	54%	108	59%	119	53%	107	46%	99	47%	107
	Female	45%	87	48%	99	46%	92	41%	81	47%	93	54%	101	53%	95
Age	18-34	53%	143	22%	89	41%	123	40%	114	31%	101	19%	94	20%	122
	35-55	36%	85	21%	93	43%	101	45%	107	48%	103	43%	100	38%	94
	56+	12%	54	57%	108	16%	67	16%	67	21%	93	38%	104	41%	97
Number of children	None	37%	67	79%	99	52%	80	32%	59	59%	89	67%	99	69%	97
	1+2	51%	247	16%	151	39%	246	57%	253	36%	197	27%	191	26%	204
	3 or more	12%	49	5%	53	10%	51	11%	47	5%	32	6%	34	5%	30
Holidays in last 3 years	1-2	28%	70	22%	73	27%	71	25%	56	32%	75	9%	76	20%	71
	3-4	35%	115	27%	98	37%	107	36%	120	33%	101	17%	90	29%	104
	More than 4	37%	125	50%	121	36%	131	39%	154	36%	142	74%	107	51%	117
Income	Median (EUR)	57.000 – 69.000	▲	67.000 – 81.000	▲	40.000 – 50.000	▶	40.000 – 52.999	▲	40.000 – 52.999	▶	83.000 – 93.000	▲	51.000 – 61.000	▶
Education	Average years	15,4	(+0,4)	14,0	(+0,1)	15,5	(+0,2)	15,3	(+0,2)	13,9	(-0,2)	13,7	(+0,2)	13,9	(+0,2)

Share of tourists interested in going to Norway in the 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

		UK		Denmark		Netherlands		France		Germany		Norway		Sweden	
		%	Index	%	Index	%	Index	%	Index	%	Index	%	Index	%	Index
Motivation	Dramatic and wild nature, and beautiful scenery	91%	103	79%	112	83%	120	95%	105	84%	108	77%	107	77%	112
	Alpine skiing	50%	150	26%	163	38%	192	59%	150	37%	158	21%	104	33%	144
	Snowboarding	49%	174	6%	109	35%	212	45%	195	32%	183	5%	104	6%	155
	Cross-country skiing	47%	207	23%	272	33%	243	55%	170	38%	175	34%	123	23%	170
	Outdoor activities such as going dog sledding, staying in an ice hotel or seeing the Northern Lights	78%	112	32%	138	61%	152	78%	115	59%	136	36%	107	40%	133
	Clean and unspoiled nature	86%	99	77%	115	89%	106	89%	106	90%	104	73%	108	70%	115
	Local art, culture and lifestyles	84%	103	79%	96	86%	103	85%	106	87%	105	73%	100	76%	96
	Big cities	90%	107	80%	96	90%	105	83%	105	74%	105	83%	99	79%	95
	Hiking	58%	144	44%	128	39%	191	82%	137	71%	122	63%	112	50%	131
	Fishing	48%	206	14%	178	31%	206	47%	218	28%	176	18%	121	20%	189
	Cycling	62%	173	19%	122	63%	151	50%	200	64%	135	25%	114	24%	145

Share of tourists interested in going to Norway in the 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
Spectacular natural scenery	93%	103	96%	105	92%	104	94%	103	95%	103	99%	101	99%	104
Spectacular fjords	89%	110	93%	106	88%	105	95%	109	94%	104	99%	101	98%	103
Spectacular mountains	92%	110	95%	107	88%	109	91%	113	88%	109	98%	101	97%	106
Natural phenomena	92%	108	85%	106	89%	107	96%	108	94%	105	95%	100	82%	105
Best place to experience the Northern Lights	86%	124	59%	124	82%	124	93%	108	86%	114	84%	101	39%	136
Wide range of sustainable alternatives	83%	139	42%	153	76%	135	92%	126	83%	124	53%	110	55%	146
Exciting culture and history	89%	121	70%	130	82%	121	92%	124	88%	116	82%	105	73%	128
Exciting cities	85%	136	54%	140	71%	139	86%	135	84%	118	53%	108	57%	128
Great cuisine and local specialities	81%	149	40%	178	70%	144	86%	148	79%	122	73%	106	48%	144
Good cycling	74%	168	40%	147	65%	142	69%	180	75%	125	67%	105	48%	133
Good hiking	83%	125	93%	105	90%	106	93%	117	93%	105	99%	101	95%	105
Good angling	74%	163	71%	106	78%	114	80%	131	81%	112	84%	102	79%	104
Easy to get to	90%	120	87%	114	80%	123	91%	120	83%	122	66%	110	94%	110
Easy to plan a trip	88%	133	81%	135	84%	128	88%	130	83%	127	78%	110	85%	141
Attractive offers for a holiday	84%	151	48%	156	72%	163	91%	157	85%	127	35%	114	57%	152
Welcoming locals	86%	134	76%	144	78%	129	91%	136	88%	116	59%	109	86%	126
New and interesting experiences	92%	111	76%	127	90%	111	95%	116	92%	108	81%	108	87%	123
Many exciting experiences in addition to skiing	84%	136	59%	138	62%	138	87%	134	76%	138	57%	106	52%	132
Family friendly skiing	80%	144	61%	118	61%	152	86%	139	71%	145	66%	105	53%	117
A lot of snow is guaranteed	81%	137	52%	119	62%	139	89%	121	77%	124	38%	106	47%	126
Less crowded skiing destinations	73%	162	29%	163	62%	143	77%	146	67%	144	18%	111	22%	166
Wide variety of ski in ski out products	78%	154	37%	139	62%	156	87%	140	64%	156	32%	106	38%	145
Wide selection of slopes	80%	151	55%	124	65%	143	86%	146	70%	140	60%	104	55%	119

Share of tourists interested in going to Norway in the left column.
Index compared to the target group in the right column.

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