

# NORWAYS POSITION AS A HOLIDAY DESTINATION

Brand tracking results  
August 2016

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## INTRODUCTION AND BACKGROUND

- Epinion carries out weekly brand tracking for Innovasjon Norge in the following 8 markets;
  - Denmark
  - Norway
  - Sweden
  - UK
  - Germany
  - The Netherlands
  - Russia
  - France
- The tracking contains questions about ad awareness, interest in travelling to Norway and a range of branding questions.
- The tracking has been done in most of the markets since 2012.
- This report presents an analysis of the accumulated data in the period of August 2015-July 2016 to get insight into Norway's position as a holiday destination in the 8 markets.
- The figures in this report are comparable to the figures in the report from 2015 since they both cover a full year prior to the report.
- The analysis includes descriptive and more advanced statistical analysis of the data. It also includes qualitative analysis of the question about what comes to mind when thinking about Norway.





# MAIN FINDINGS

# Main findings – UK, Denmark, Netherlands and France

	UK	Denmark	Netherlands	France	
<b>Target group</b>	Primarily between <b>18 and 55 years</b> old. More than half has <b>no children</b> . Interested in <b>wild unspoiled nature, big cities</b> and <b>local art, culture and lifestyles</b> . Two out of three says they are interested in <b>outdoor activities</b> .	Has the largest share of old people ( <b>56 years or older</b> ) and people who <b>don't have children in the household</b> . Especially interested in <b>big cities</b> and <b>local art, culture and lifestyles</b> .	Most people in the middle aged group ( <b>35-55 years old</b> ). Two out of three says they have <b>no children in the household</b> . Especially interested in <b>big cities</b> and <b>local art, culture and lifestyles</b> and <b>clean, unspoiled nature</b> .	Primarily between <b>18 and 55 years</b> old. More than half has <b>no children</b> . Interested in <b>wild unspoiled nature</b> as well as <b>big cities</b> and <b>local art, culture and lifestyles</b> . Also relatively interested in <b>outdoor activities</b> and <b>hiking</b> .	
<b>Norways brand</b>	<b>Top of Mind</b>	The Northern Lights, snow, cold, fjords, beautiful scenery	Beautiful nature, skiing, snow, mountains, expensive	Unspoiled beautiful nature, fjords, the Northern Lights, snow, mountains	Nature, cold, snow, fjords, the landscape, the Northern Lights
	<b>Brand values</b>	<ul style="list-style-type: none"> <li>+ Spectacular nature</li> <li>+ Spectacular mountains</li> <li>+ Natural phenomena</li> <li>+ Spectacular fjords</li> <li>- Skiing</li> <li>- Cuisine and local specialities</li> <li>- Good angling</li> <li>- Good cycling</li> </ul>	<ul style="list-style-type: none"> <li>+ Spectacular nature</li> <li>+ Spectacular mountains</li> <li>+ Spectacular fjords</li> <li>+ Good hiking</li> <li>- Attractive offers for a holiday</li> <li>- Sustainable alternatives</li> <li>- Good cycling</li> <li>- Cuisine and local specialities</li> </ul>	<ul style="list-style-type: none"> <li>+ Spectacular nature</li> <li>+ Good hiking</li> <li>+ Spectacular fjords</li> <li>+ Natural phenomena</li> <li>- Exciting experiences</li> <li>- Skiing</li> <li>- Good cycling</li> <li>- Attractive offers for a holiday</li> </ul>	<ul style="list-style-type: none"> <li>+ Spectacular nature</li> <li>+ New and interesting places</li> <li>+ Northern lights</li> <li>+ Natural phenomena</li> <li>- Skiing</li> <li>- Attractive offers for a holiday</li> <li>- Good angling</li> <li>- Good cycling</li> </ul>
<b>Drivers for going to Norway</b>	There is potential in telling and convincing the Brits that Norway offers a lot of <b>cultural experiences</b> and that it is <b>easy to travel to Norway</b> .	The Danes are well aware that Norway has <b>impressive nature</b> and this is a significant driver. But Danes don't think that Norway offers any <b>cultural experiences</b> which seems to be the most important factor.	The view of Norway as a country with a lot of <b>cultural experiences</b> seems to be most important driver among the Dutch tourists.	French tourists seems to be more likely to visit Norway if they think there are a lot of <b>cultural experiences</b> and that it is <b>easy to travel to Norway</b> .	
<b>SOV</b>	UK is the country where Norway has the smallest SOV. The destinations with the most voice are New Zealand and France	The largest SOV outside of Norway. Among the Danish tourists Norway and Denmark has the highest SOV.	Norway has fairly good SOV in the Netherlands and highest of the Nordic Countries. Though it is slightly behind France.	Norway has the third highest SOV behind France and Canada. Norways SOV is larger than Sweden and Denmark's.	

# Main findings – Germany, Norway, Russia, Sweden

	Germany	Norway	Russia	Sweden
<b>Target group</b>	<p>Almost half is between <b>35 and 55 years</b> old. Two out of three have <b>no children</b> in the house hold. Primarily interested in <b>clean, unspoiled nature and local art, culture and lifestyles</b>. But also interested in <b>wild nature, big cities</b> and to some extent <b>Hiking</b>.</p>	<p>Almost half is between <b>35 and 55 years</b> old. Two out of three have <b>no children</b> in the house hold. 73% says that they have been on <b>more than four holidays (in Norway or abroad)</b> the last three years. Primarily interested in <b>big cities</b>, but also interested in <b>local art, culture and lifestyles and nature</b>.</p>	<p>The target group seems <b>relatively young</b> compared to other markets. Half of the respondents says, that they have <b>at least one child</b> in the house hold. Many are interested in <b>local art, culture and lifestyles</b>, but the target group is also interested in <b>big cities and nature</b>.</p>	<p>More females than males in the target group. Four out of ten is between <b>35 and 55 years</b> old. Two out of three have <b>no children</b> in the house hold. Primarily interested in <b>local art, culture and lifestyles and big cities</b>. But also in <b>nature</b> to some extent.</p>
<b>Norways brand</b>	<b>Top of Mind</b>	Beautiful unspoiled nature, fjords, the landscape, snow, Oslo	Beautiful nature, mountains, fjords, Lofoten, expensive, the Northern Lights	Fjords, beautiful nature, Hurtigruten, skiing, mountains, expensive
	<b>Brand values</b>	<ul style="list-style-type: none"> <li>+ Spectacular nature</li> <li>+ Spectacular fjords</li> <li>+ Good hiking</li> <li>+ Natural phenomena</li> <li>- Sustainable alternatives</li> <li>- Cycling</li> <li>- Exciting experiences</li> <li>- Skiing</li> </ul>	<ul style="list-style-type: none"> <li>+ Good hiking</li> <li>+ Spectacular nature</li> <li>+ Spectacular fjords</li> <li>+ Natural phenomena</li> <li>- Easy to book all elements</li> <li>- Exciting cities</li> <li>- Sustainable alternatives</li> <li>- Attractive offers</li> </ul>	<ul style="list-style-type: none"> <li>+ New and interesting places</li> <li>+ Spectacular nature</li> <li>+ Spectacular fjords</li> <li>+ Spectacular mountains</li> <li>- Attractive offers for a holiday</li> <li>- Welcoming locals</li> <li>- Exciting cities</li> <li>- Good cycling</li> </ul>
<b>Drivers for going to Norway</b>	<p>It seems that the perception of how <b>easy it is to travel to Norway</b> and the <b>cultural experiences</b> that Norway offers are the most important factors for German tourists.</p>	<p>In Norway the fact that it is <b>easy to plan and travel</b> in Norway and that there are <b>cultural experiences</b> are the drivers with most potential. And these are the factors where Norway is rated lowest by the Norwegians.</p>	<p>Russian tourists are estimated to put especially high emphasis on how <b>easy it is to travel to Norway</b>.</p>	<p>Swedish tourists are expected to be more likely to visit Norway if they perceive the country as a place that offers <b>cultural experiences</b>. Less than half has that impression of Norway currently.</p>
<b>SOV</b>	<p>Norway has the highest SOV among the Nordic Countries. But Norway is behind Germany and Austria.</p>	<p>Denmark has the highest SOV among Norwegian tourists with 21%. Norway is second with 17%. But the home marked is where Norway has the largest SOV.</p>	<p>Norway has a relatively high SOV but is still behind Finland and Italy.</p>	<p>Norway have the fourth highest SOV among Swedish tourists. Sweden has the highest SOV then Denmark and Italy follows.</p>



# TARGET GROUP

## The size of the target groups in each market

Based on questions regarding number of holidays within last three years and holiday interests

Nature-based target group	UK	DENMARK	NETHERLANDS	FRANCE	GERMANY	NORWAY	RUSSIA	SWEDEN
August 2015-July 2016	74%	66%	73%	69%	71%	84%	69%	65%
August 2014-July 2015	69%	74%	67%	64%	65%	86%	68%	67%

Northern Lights target group	UK	DENMARK	NETHERLANDS	FRANCE	GERMANY	NORWAY	RUSSIA	SWEDEN
August 2015-July 2016	53%	24%	38%	55%	38%	48%	33%	31%
August 2014-July 2015	49%	28%	33%	47%	32%	50%	30%	33%

Alpine target group	UK	DENMARK	NETHERLANDS	FRANCE	GERMANY	NORWAY	RUSSIA	SWEDEN
August 2015-July 2016	31%	17%	24%	37%	25%	35%	29%	20%
August 2014-July 2015	26%	19%	21%	30%	20%	38%	24%	22%



# Target group comparison

A comparison between the countries target groups in regards to demography and holiday frequency and motives

		UK	Denmark	Netherlands	France	Germany	Norway	Russia	Sweden
Gender	Male	48%	52%	50%	50%	50%	47%	48%	44%
	Female	52%	48%	50%	50%	50%	53%	52%	56%
Age	18-34	38%	29%	34%	39%	32%	27%	51%	19%
	35-55	42%	25%	44%	42%	46%	44%	41%	42%
	56+	20%	47%	22%	19%	22%	29%	7%	39%
Number of children	None	58%	79%	64%	53%	66%	68%	39%	69%
	1+2	35%	18%	29%	40%	30%	27%	56%	26%
	3 or more	6%	3%	7%	7%	4%	5%	5%	4%
Holidays in last 3 years	1-2	38%	31%	38%	51%	46%	10%	44%	31%
	3-4	32%	29%	34%	27%	30%	17%	31%	29%
	More than 4	30%	41%	28%	22%	24%	73%	25%	41%
Motivation	Dramatic and wild nature, and beautiful scenery	86%	69%	70%	88%	77%	71%	82%	68%
	Alpine skiing	33%	18%	20%	41%	23%	22%	32%	24%
	Snowboarding	28%	5%	18%	22%	16%	7%	28%	4%
	Cross-country skiing	23%	10%	15%	38%	22%	30%	17%	13%
	Outdoor activities such as going dog sledding, staying in an ice hotel or seeing the Northern Lights	64%	21%	40%	66%	40%	34%	28%	29%
	Clean and unspoiled nature	84%	68%	83%	83%	87%	70%	83%	60%
	Local art, culture and lifestyles	81%	83%	84%	81%	84%	77%	92%	78%
	Big cities	84%	84%	86%	80%	71%	90%	88%	83%
	Hiking	40%	33%	20%	62%	55%	56%	38%	37%
	Fishing	24%	8%	17%	27%	15%	14%	34%	11%
	Cycling	34%	16%	42%	29%	46%	25%	34%	15%
Education/Income	Median (EUR)	48.000-60.000	81.000-94.000	40.000-50.000	40.000-52.999	40.000-52.999	85.000-96.000	N/A	63.000-74.000
	Average years	15,4	14,1	15,3	15,6	14,3	14,2	15,4	14,0



# THE IMPRESSION OF NORWAY AS A HOLIDAY DESTINATION





## The Netherlands

The Dutch target group associates Norway with beautiful nature and fjords.





## Germany

The Germans primarily associates Norway with the fjords and the nature.



# Norway

The Norwegians associate Norway with the beautiful nature, the mountains and Lofoten.





## Russia

Russians associate Norway with fishing (Рыбалка), fjords (фьорды), nature (природа) and mountains (горы).





# Attitude to Norway – Norways brand in the different markets

Based on question “Please state whether you agree or disagree with each statement” about Norway

	UK	Denmark	Netherlands	France	Germany	Norway	Russia	Sweden
It has spectacular natural scenery	88%	91%	88%	91%	90%	97%	93%	94%
It has exciting cities	84%	79%	81%	87%	87%	95%	80%	78%
It has new and interesting places	63%	35%	56%	68%	71%	46%	59%	44%
It has an exciting culture and history	80%	56%	75%	90%	84%	74%	93%	75%
It has great cuisine and local specialities	74%	52%	70%	74%	76%	75%	75%	58%
It has spectacular fjords	55%	21%	52%	67%	66%	66%	72%	33%
It has spectacular mountains	69%	47%	63%	81%	73%	73%	86%	57%
It has welcoming locals	69%	79%	60%	72%	65%	88%	76%	79%
It offers an opportunity to experience natural phenomena such as the midnight sun or the Northern Lights	48%	25%	47%	43%	60%	64%	54%	38%
It offers experiences that you cannot find anywhere else in the world	67%	88%	84%	79%	87%	97%	73%	90%
It offers excellent skiing, snowboarding, etc.	48%	65%	69%	63%	71%	82%	73%	76%
It offers good cycling	60%	26%	55%	74%	64%	46%	77%	36%
It offers good hiking	75%	74%	66%	76%	67%	57%	70%	86%
It offers good angling	66%	59%	67%	69%	67%	68%	70%	60%
It offers a wide range of sustainable alternatives	63%	50%	71%	68%	72%	48%	69%	42%
It is the best place to experience the Northern Lights	58%	56%	43%	63%	51%	65%	72%	48%
It offers many kinds of beautiful light	61%	47%	48%	75%	64%	41%	70%	38%
Norway is easy to get to	64%	47%	48%	67%	58%	59%	75%	42%
It is easy to plan a trip to Norway	71%	44%	65%	87%	74%	79%	68%	28%
It is easy to book all the elements of a holiday to Norway	80%	62%	76%	84%	81%	80%	78%	52%
There are attractive offers for a holiday in Norway	58%	31%	46%	64%	67%	25%	66%	36%
It offers family friendly skiing	49%	22%	46%	55%	49%	18%	53%	14%
A lot of snow is guaranteed on a skiing holiday in Norway	81%	88%	83%	86%	89%	97%	90%	94%
There are many exciting experiences on offer in addition to skiing/snowboarding	84%	90%	80%	81%	81%	94%	90%	91%
It is less crowded in Norwegian skiing destinations	64%	51%	59%	71%	76%	49%	60%	66%
It offers a wide variety of ski in ski out products	52%	30%	43%	65%	43%	29%	56%	28%
It offers a wide selection of slopes with different levels of difficulty	56%	51%	48%	60%	52%	60%	73%	49%

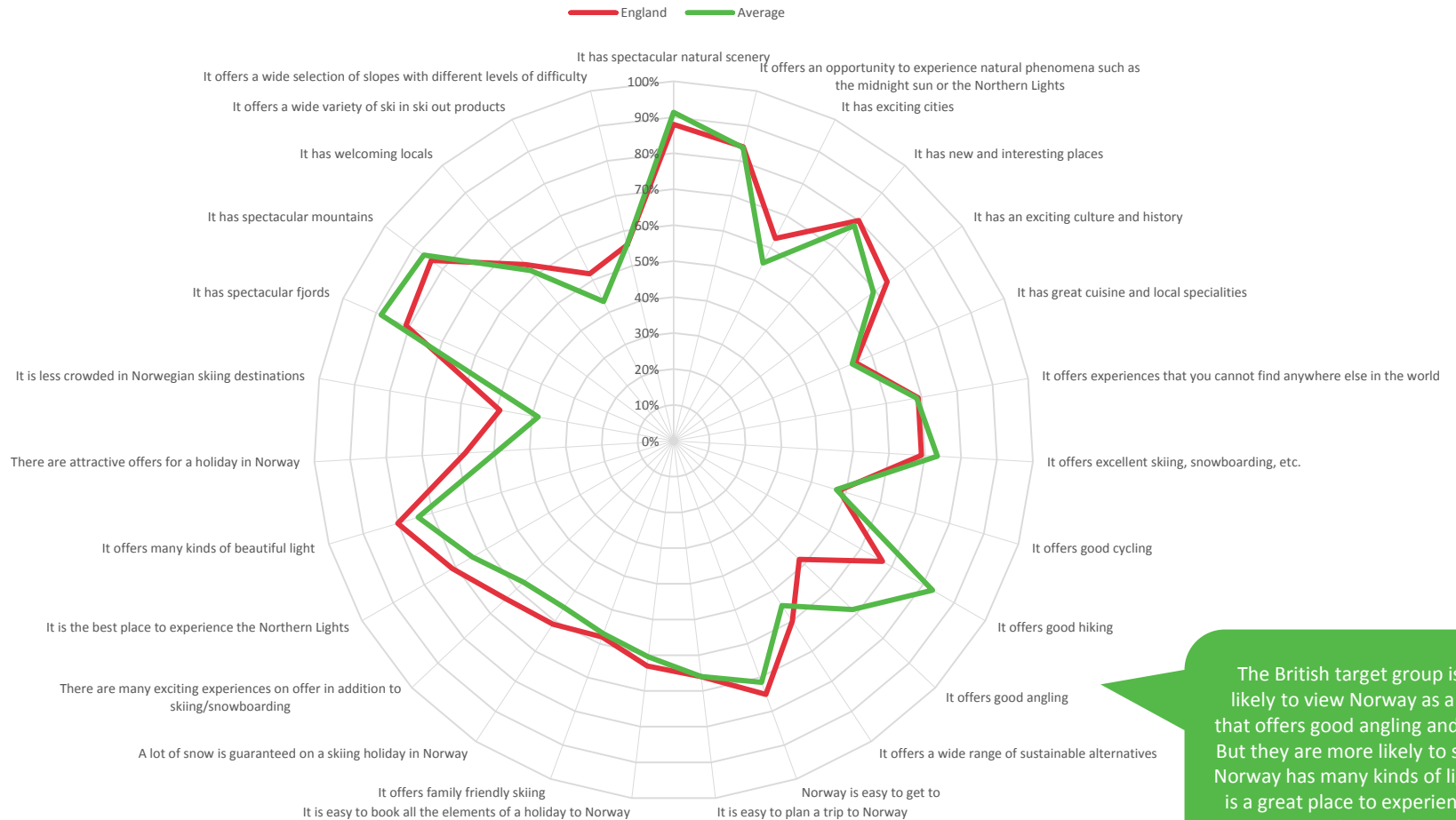
# Attitude to Norway – Norway's brand in the different markets

Based on question "Please state whether you agree or disagree with each statement" about Norway



# Attitude to Norway – Norways brand in the UK

Based on question "Please state whether you agree or disagree with each statement" about Norway

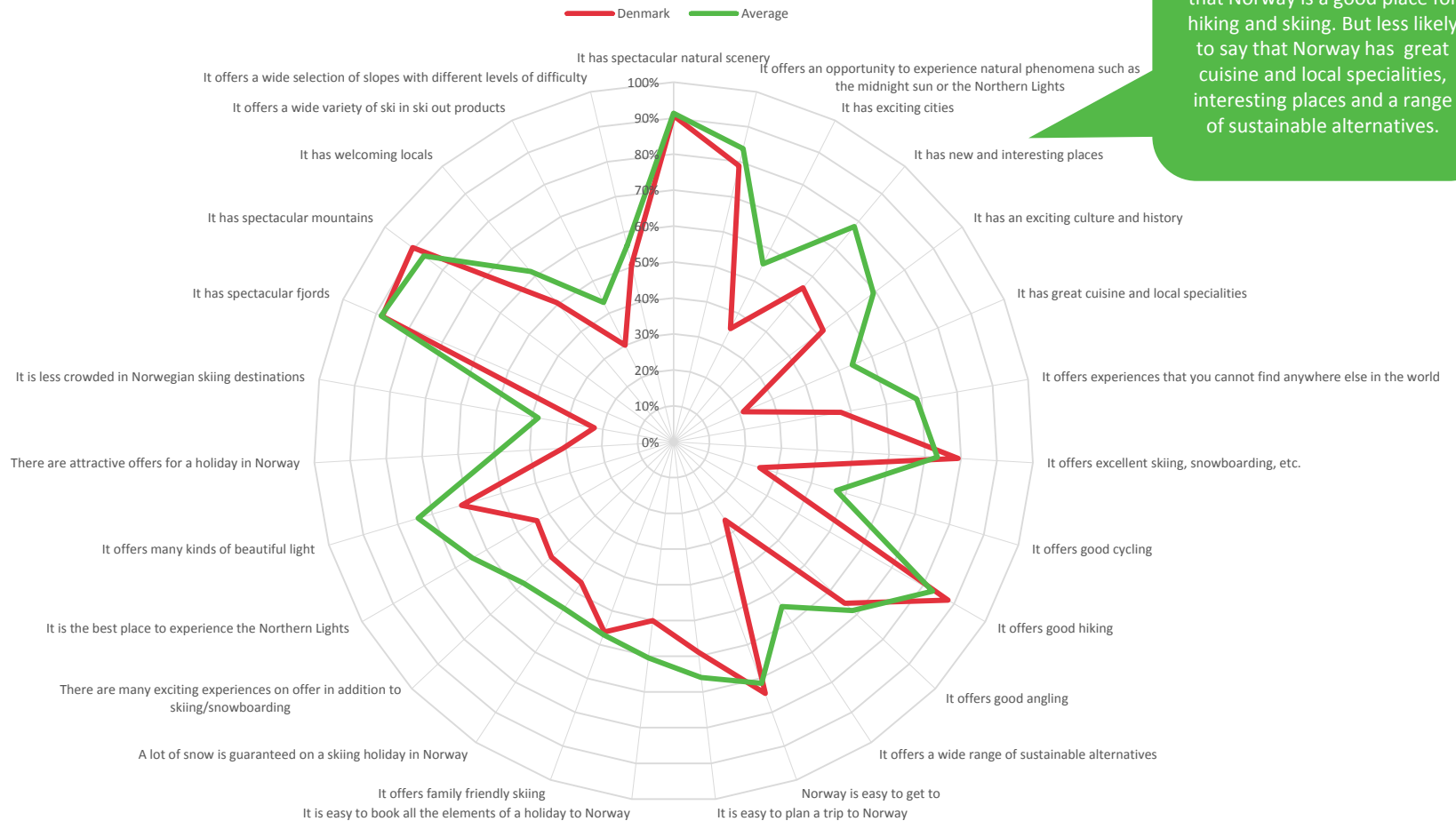


The British target group is less likely to view Norway as a place that offers good angling and hiking. But they are more likely to say that Norway has many kinds of light and is a great place to experience the Northern Lights.

# Attitude to Norway – Norways brand in Denmark

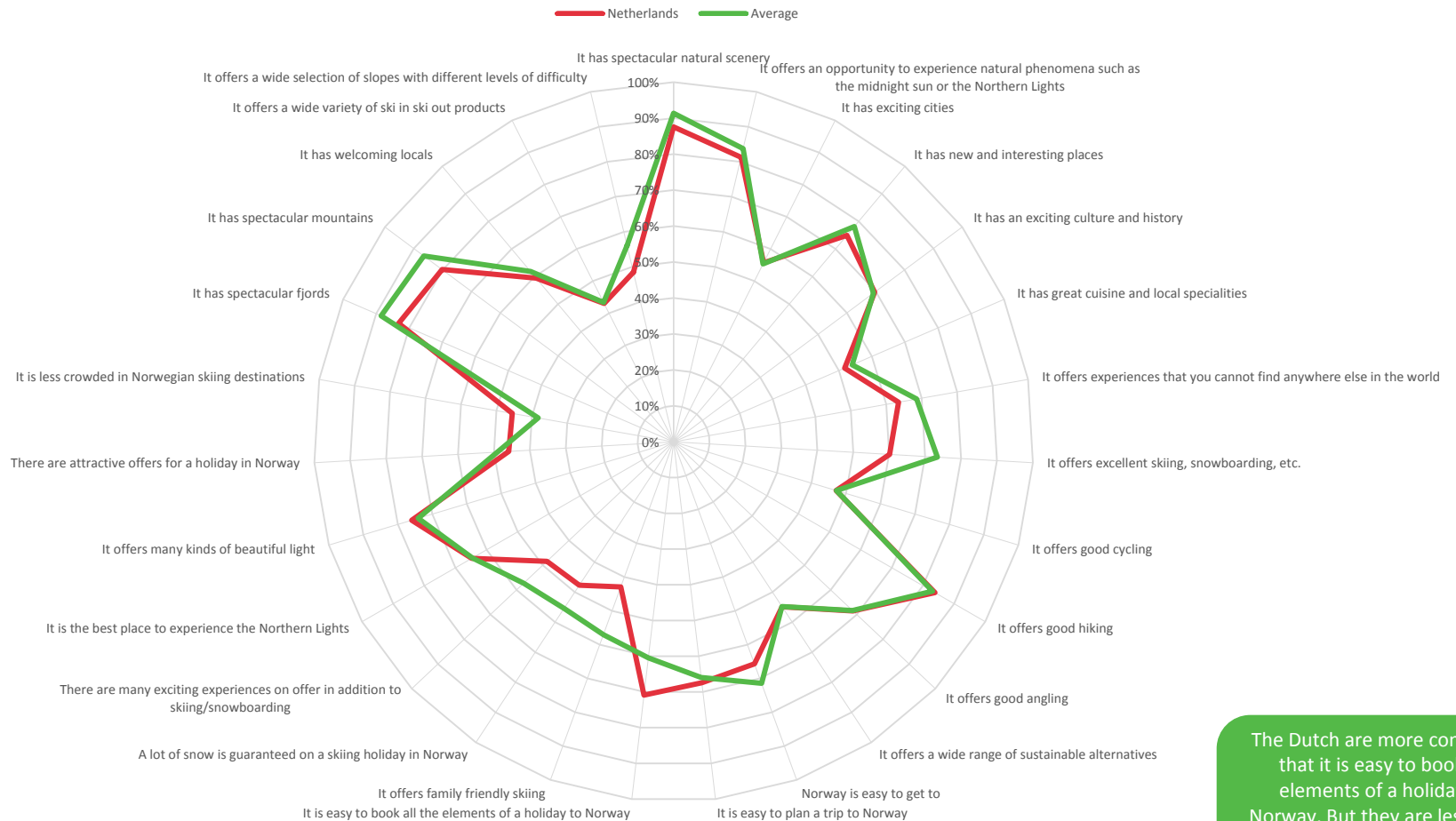
Based on question “Please state whether you agree or disagree with each statement” about Norway

Danes are more likely to say that Norway is a good place for hiking and skiing. But less likely to say that Norway has great cuisine and local specialities, interesting places and a range of sustainable alternatives.



# Attitude to Norway – Norway's brand in the Netherlands

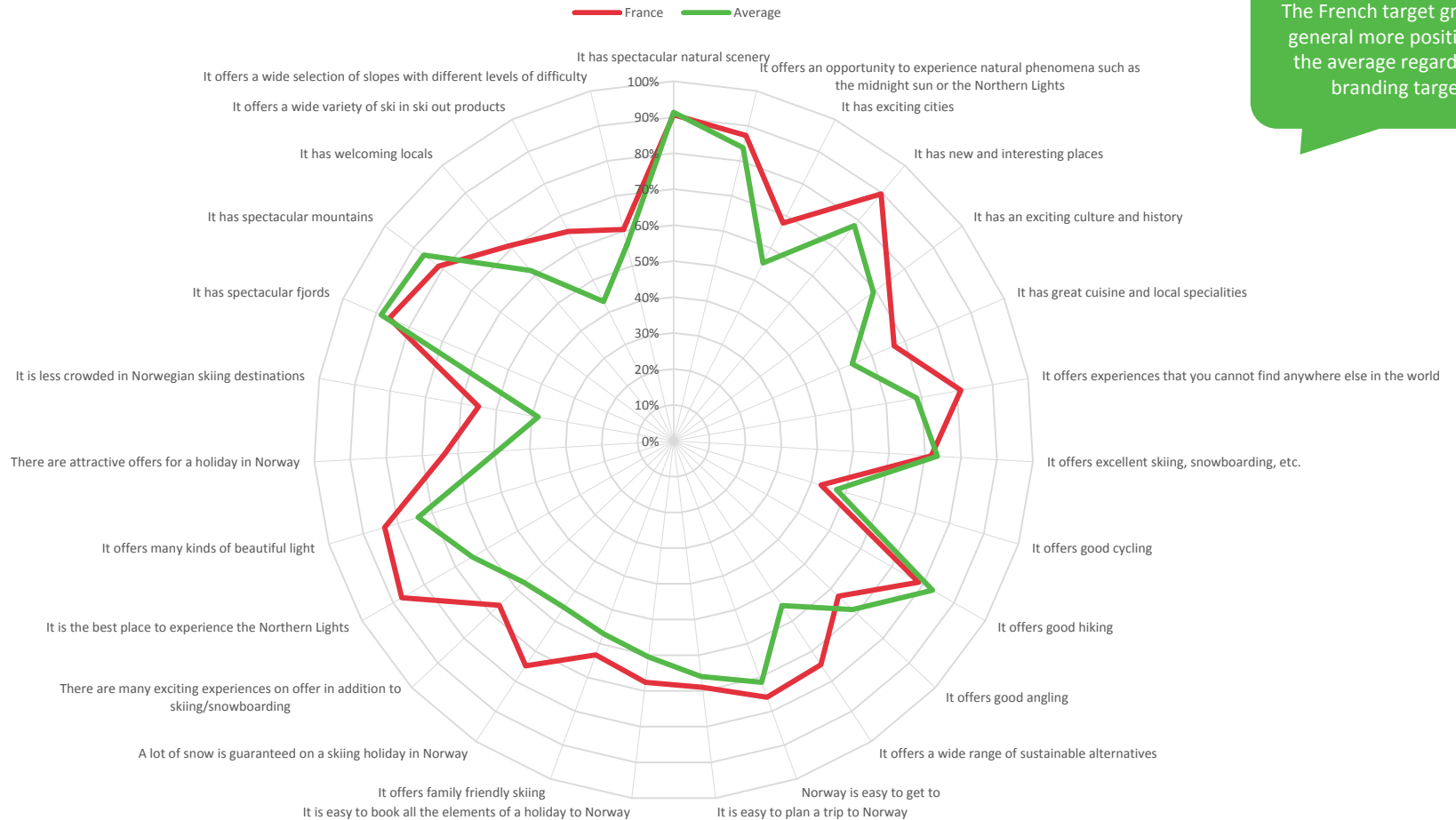
Based on question "Please state whether you agree or disagree with each statement" about Norway



The Dutch are more convinced that it is easy to book all elements of a holiday to Norway. But they are less likely to agree with Norway being good place to ski and a place that offers family friendly skiing.

# Attitude to Norway – Norways brand in France

Based on question “Please state whether you agree or disagree with each statement” about Norway

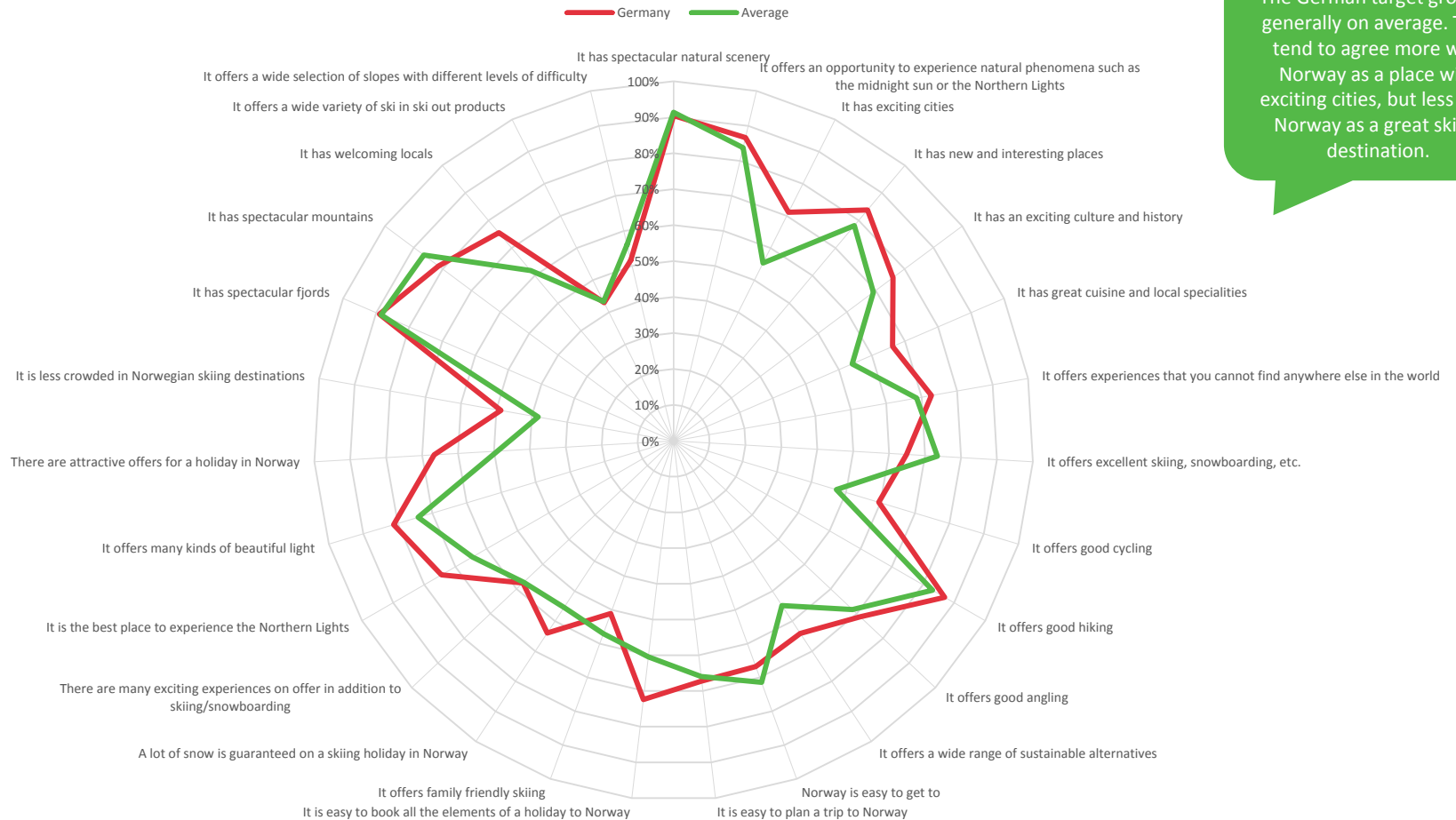


The French target group is in general more positive than the average regarding the branding targets.



# Attitude to Norway – Norways brand in Germany

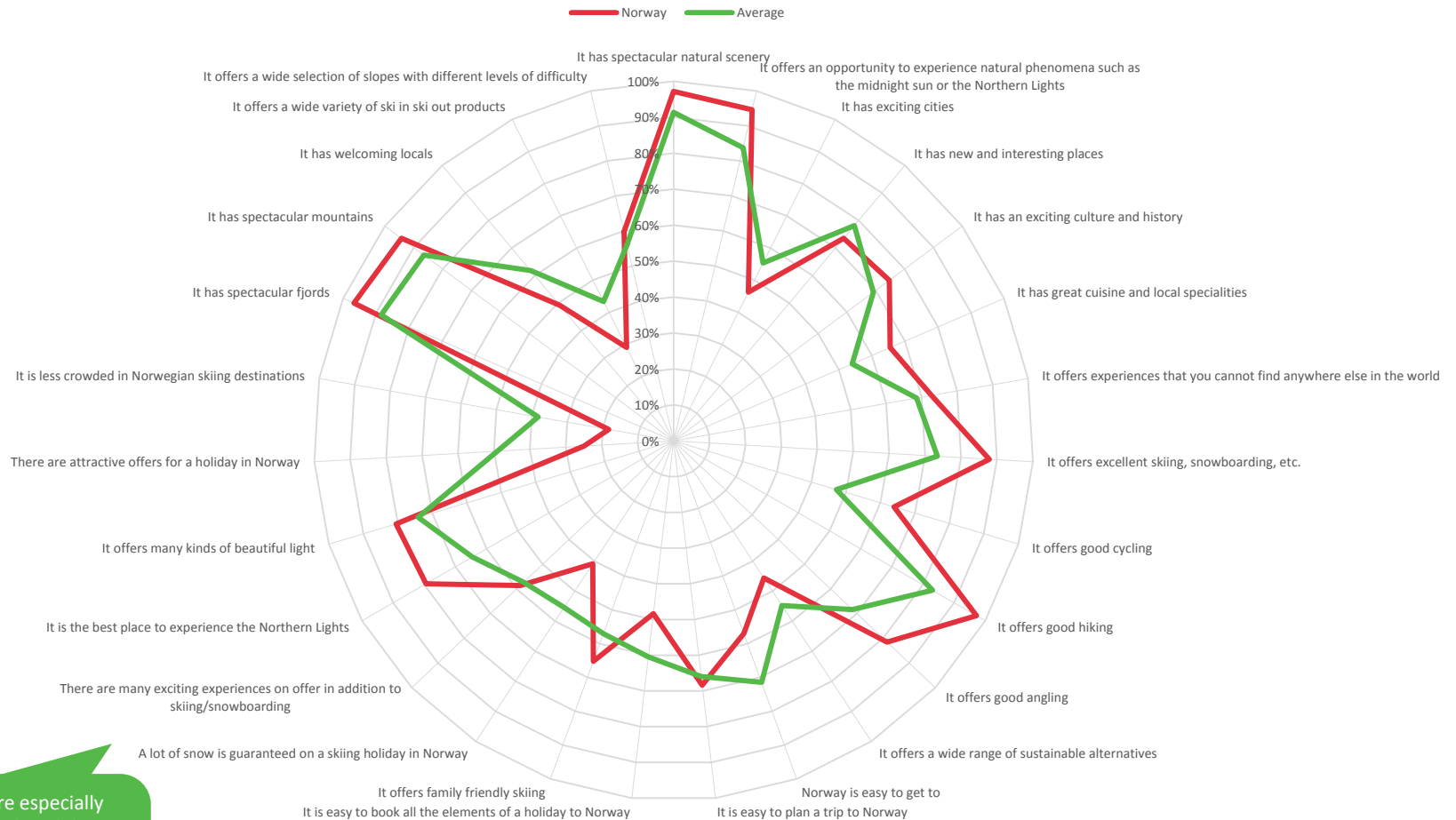
Based on question “Please state whether you agree or disagree with each statement” about Norway



The German target group is generally on average. They tend to agree more with Norway as a place with exciting cities, but less with Norway as a great skiing destination.

# Attitude to Norway – Norways brand in Norway

Based on question “Please state whether you agree or disagree with each statement” about Norway

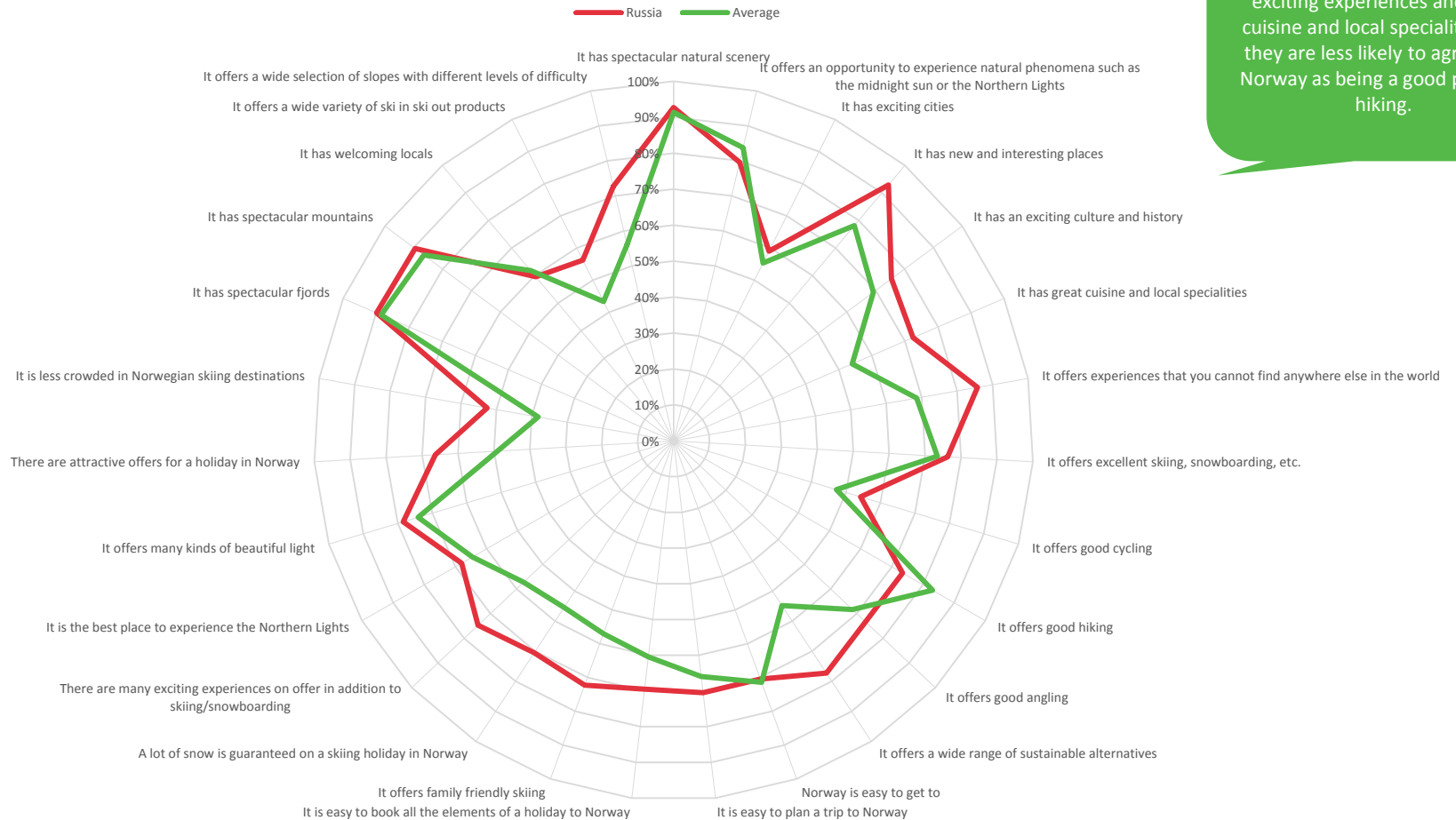


The Norwegians are especially positive towards cycling, hiking and angling opportunities. But they are less likely to say, that there are great offers for holidays in Norway.

# Attitude to Norway – Norways brand in Russia

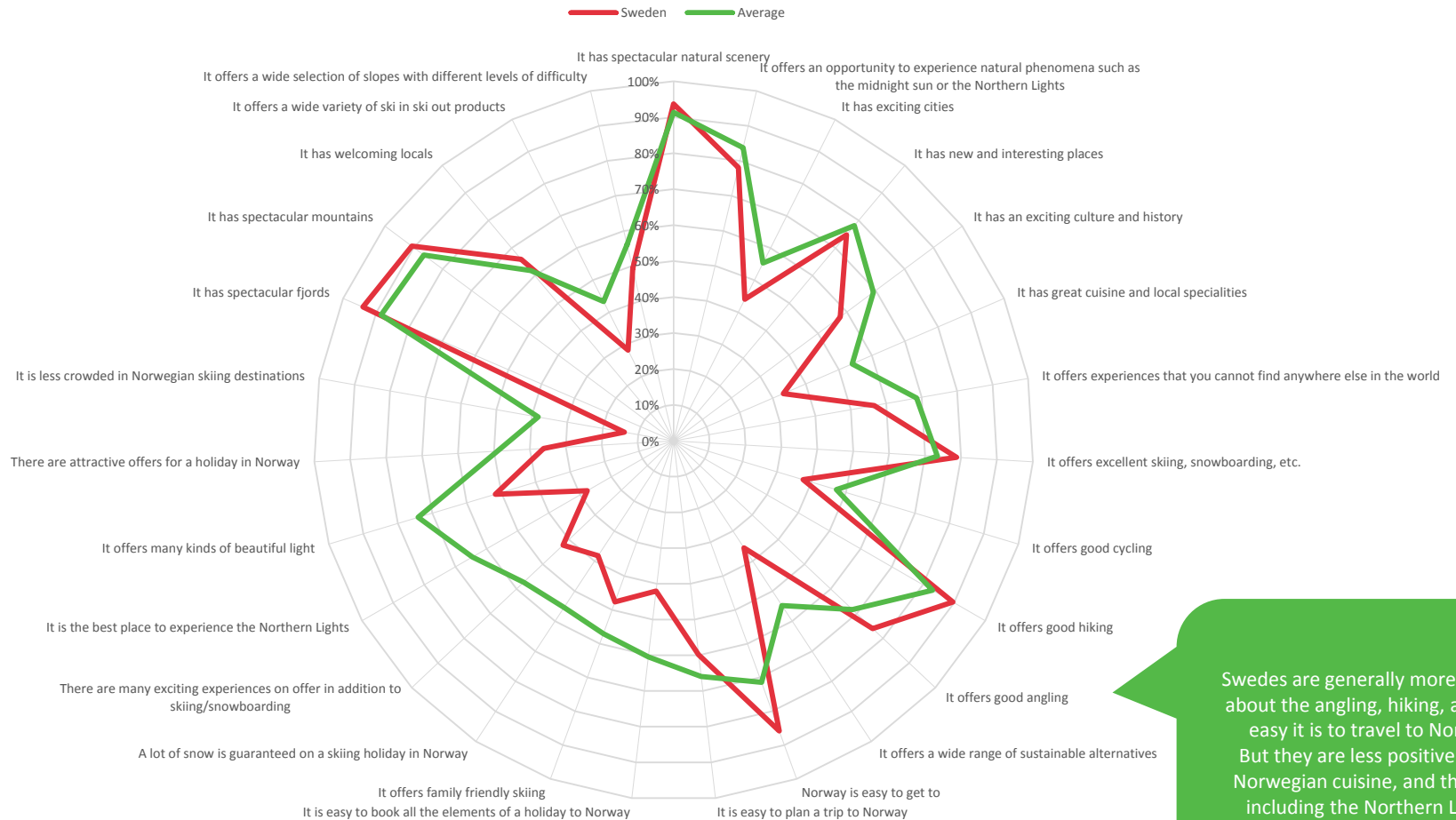
Based on question “Please state whether you agree or disagree with each statement” about Norway

The Russians perceive Norway as offering sustainable alternatives, exciting experiences and great cuisine and local specialities. But they are less likely to agree with Norway as being a good place for hiking.



# Attitude to Norway – Norways brand in Sweden

Based on question “Please state whether you agree or disagree with each statement” about Norway



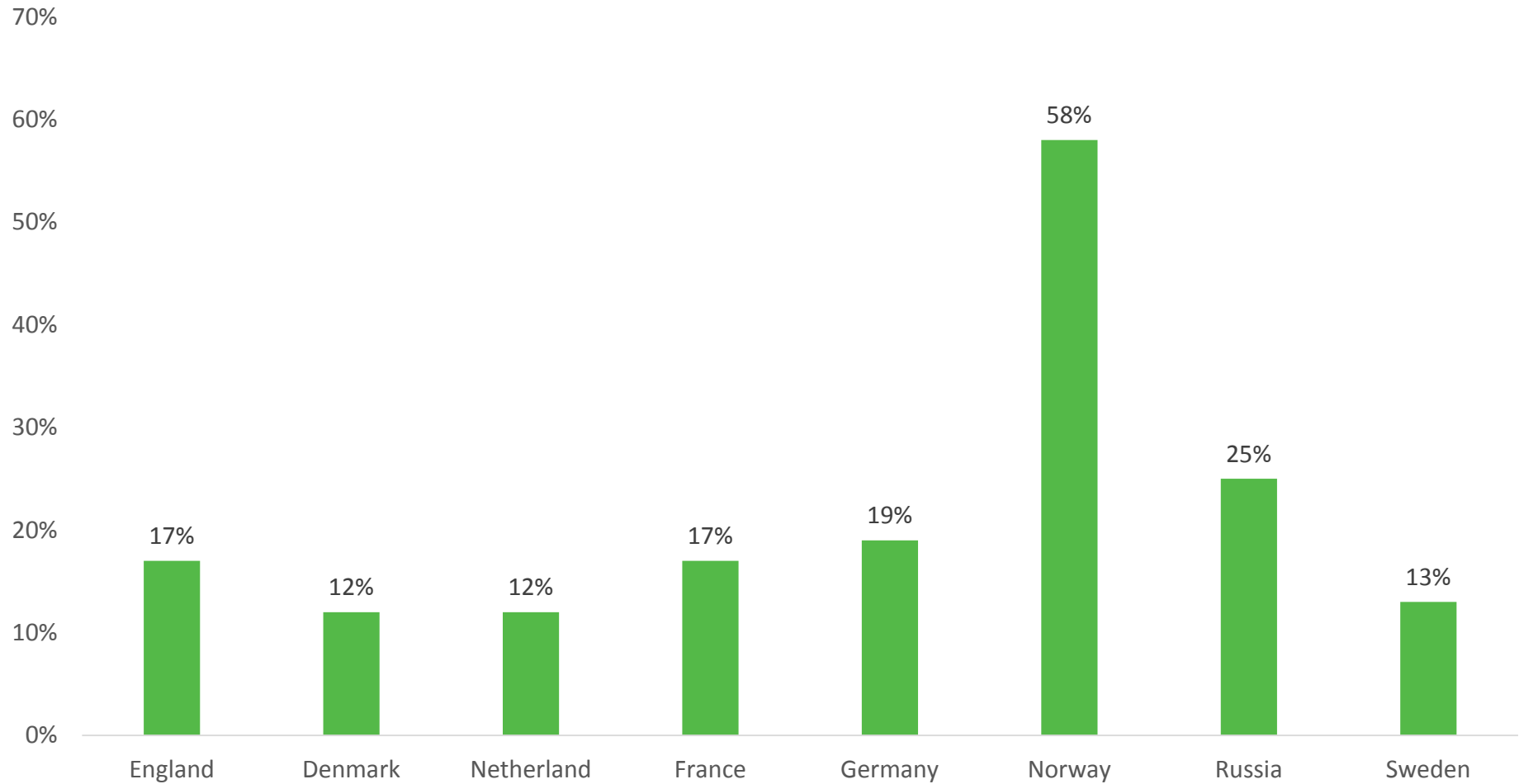
Swedes are generally more positive about the angling, hiking, and how easy it is to travel to Norway. But they are less positive about Norwegian cuisine, and the light, including the Northern Lights.



# INTEREST IN TRAVELLING TO NORWAY AND DRIVERS

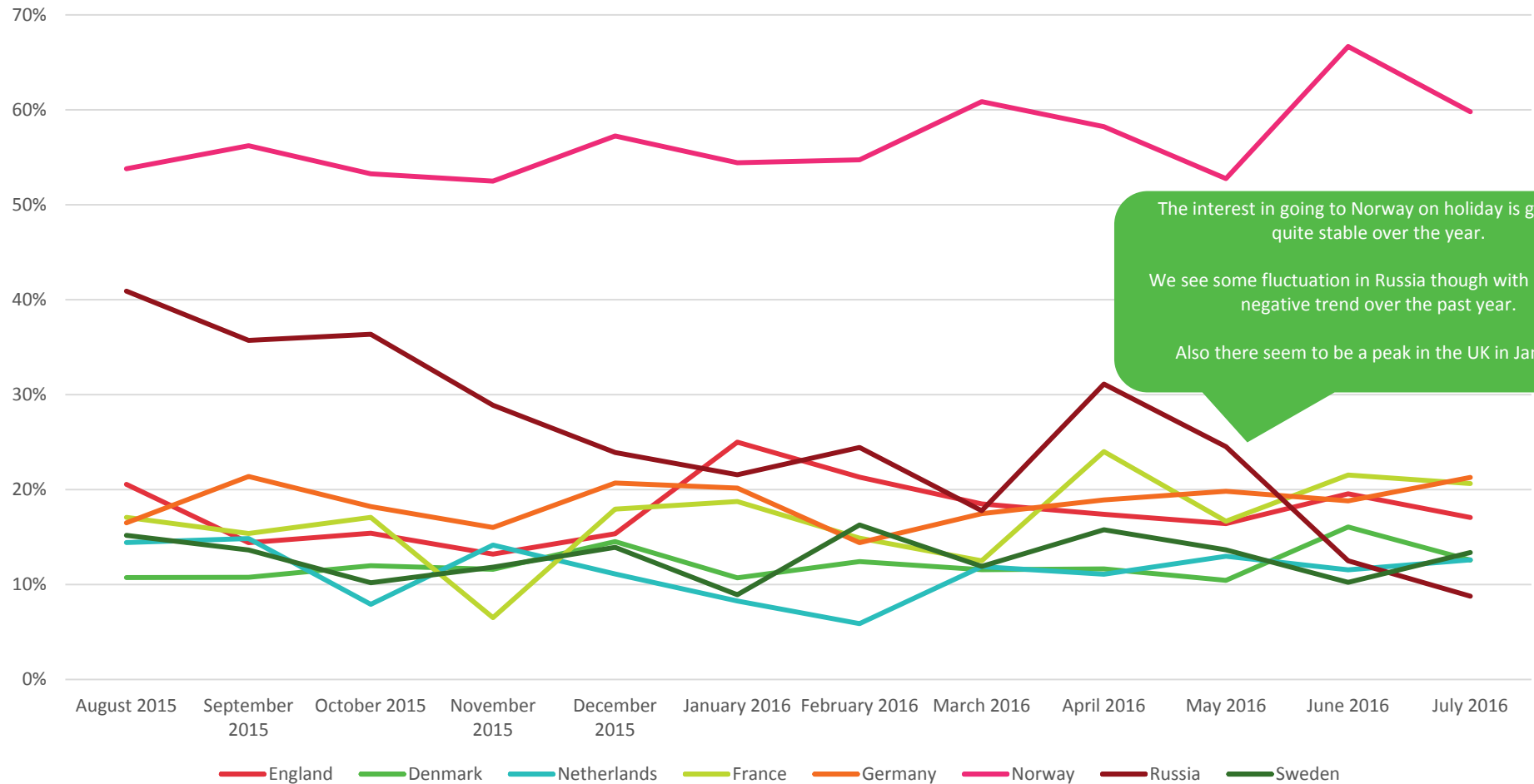
## Norwegians, Russians and Germans are most likely to go on holiday in Norway

“How likely is it that you will go on holiday to Norway in the next 12 months?” (Proportion interested)



# The likelihood of going to Norway changes over time

“How likely is it that you will go on holiday to Norway in the next 12 months?” (Proportion interested)



The interest in going to Norway on holiday is generally quite stable over the year.

We see some fluctuation in Russia though with a general negative trend over the past year.

Also there seem to be a peak in the UK in January.

# Characteristics of the group that is interested in going to Norway

These data are only presented for respondents interested in going to Norway on holiday

The index is calculated by comparing the value for people that are interested in travelling to Norway with the value for the target group as a whole

		England		Denmark		Netherlands		France		Germany		Norway		Russia		Sweden	
		%	Index	%	Index	%	Index	%	Index	%	Index	%	Index	%	Index	%	Index
Gender	Male	49%	102	53%	103	62%	124	62%	124	56%	112	45%	96	54%	112	49%	109
	Female	51%	98	47%	97	38%	76	38%	76	44%	88	55%	104	46%	89	51%	93
Age	18 - 35	53%	139	29%	99	37%	110	50%	127	33%	103	26%	93	55%	108	20%	104
	36 - 55	39%	95	22%	91	46%	103	41%	98	46%	101	44%	101	38%	91	42%	101
	56 +	8%	38	49%	105	17%	78	9%	48	21%	95	30%	104	7%	99	38%	97
No. of children	None	34%	59	75%	94	52%	82	23%	44	53%	80	67%	98	26%	66	69%	100
	1+2	53%	150	22%	125	33%	115	61%	151	39%	132	28%	106	66%	116	28%	106
	3+	13%	200	3%	99	14%	209	16%	222	8%	186	5%	96	9%	189	3%	74
Holidays in last 3 years	1 - 2	25%	65	23%	75	26%	68	34%	67	33%	72	8%	83	30%	68	23%	74
	3 - 4	38%	121	26%	92	39%	115	30%	111	33%	108	16%	91	29%	95	26%	92
	More than 4	37%	123	51%	124	35%	126	36%	163	34%	143	76%	105	41%	162	51%	125
Income	Median (EUR)	48.000-60.000	▶	81.000-94.000	▶	50.000-60.000	▲	40.000-52.999	▶	40.000-52.999	▶	85.000-96.000	▶	N/A		53.000-63.000	▼
Education	Average years	15,8	(+0,5)	13,9	(-0,1)	16,1	(+0,8)	14,8	(-0,8)	14	(-0,3)	14,3	(+0,1)	15,3	(-0,2)	14,0	(+0,1)



# Characteristics of the group that is interested in going to Norway

These data are only presented for respondents interested in going to Norway on holiday

The index is calculated by comparing the value for people that are interested in travelling to Norway with the value for the target group as a whole

	England		Denmark		Netherlands		France		Germany		Norway		Russia		Sweden	
	%	Index	%	Index	%	Index	%	Index	%	Index	%	Index	%	Index	%	Index
Dramatic and wild nature, and beautiful scenery	89%	103	76%	111	81%	116	94%	107	82%	107	76%	107	92%	113	72%	106
Alpine skiing	52%	158	31%	172	38%	188	62%	152	37%	163	24%	108	56%	174	30%	127
Snowboarding	51%	182	11%	203	33%	185	41%	190	32%	195	7%	103	48%	174	7%	162
Cross-country skiing	50%	213	24%	247	33%	224	64%	170	40%	185	37%	121	34%	196	22%	165
Outdoor activities such as going dog sledding, staying in an ice hotel or seeing the Northern Lights	75%	116	36%	167	61%	152	77%	116	55%	138	39%	113	51%	180	38%	132
Clean and unspoiled nature	82%	97	71%	106	85%	102	85%	102	91%	105	77%	110	94%	113	69%	116
Local art, culture and lifestyles	81%	100	78%	95	86%	102	80%	99	89%	106	78%	101	95%	103	73%	94
Big cities	86%	103	84%	99	83%	97	81%	101	76%	106	88%	99	92%	105	79%	95
Hiking	58%	143	39%	118	37%	180	76%	122	71%	129	64%	114	54%	143	51%	139
Fishing	49%	202	15%	185	38%	230	52%	196	30%	193	17%	120	56%	165	22%	201
Cycling	60%	174	18%	116	60%	145	57%	198	61%	134	29%	116	50%	147	21%	140

# Characteristics of the group that is interested in going to Norway

These data are only presented for respondents interested in going to Norway on holiday

The index is calculated by comparing the value for people that are interested in travelling to Norway with the value for the target group as a whole

	England		Denmark		Netherlands		France		Germany		Norway		Russia		Sweden	
	%	Index	%	Index	%	Index	%	Index	%	Index	%	Index	%	Index	%	Index
It has spectacular natural scenery	93%	106	96%	106	91%	104	95%	105	94%	104	98%	101	96%	104	97%	104
It offers an opportunity to experience natural phenomena such as the midnight sun or the northern lights	91%	109	86%	109	90%	111	96%	110	94%	109	96%	102	93%	117	82%	105
It has exciting cities	84%	133	49%	140	73%	131	97%	143	85%	120	52%	112	77%	130	54%	122
It has new and interesting places	90%	113	70%	126	84%	112	98%	109	91%	109	80%	109	95%	102	89%	119
It has an exciting culture and history	89%	121	71%	136	84%	120	97%	130	87%	115	80%	107	90%	119	67%	116
It has great cuisine and local specialities	82%	148	32%	151	75%	145	90%	135	81%	122	71%	109	89%	123	43%	128
It offers experiences that you cannot find anywhere else in the world	86%	125	59%	125	82%	129	97%	120	89%	122	78%	107	95%	111	69%	122
It offers excellent skiing, snowboarding, etc.	85%	124	84%	106	74%	123	90%	125	77%	119	88%	100	91%	119	81%	103
It offers good cycling	78%	164	36%	144	70%	148	75%	175	77%	129	67%	105	72%	134	46%	123
It offers good hiking	85%	128	93%	106	91%	108	94%	120	93%	107	99%	101	86%	117	93%	104
It offers good angling	76%	159	70%	107	80%	117	83%	132	83%	116	84%	103	83%	113	79%	103
It offers a wide range of sustainable alternatives	85%	141	40%	154	72%	131	97%	130	84%	131	50%	111	90%	116	52%	145
Norway is easy to get to	89%	119	87%	117	84%	128	94%	124	82%	123	63%	111	89%	127	95%	111
It is easy to plan a trip to Norway	88%	132	85%	145	85%	126	91%	132	85%	127	77%	112	94%	133	83%	139
It is easy to book all the elements of a holiday to Norway	87%	139	74%	148	86%	121	93%	138	88%	122	54%	111	92%	132	58%	138
It offers family friendly skiing	82%	143	67%	120	68%	158	91%	143	71%	139	69%	105	89%	123	58%	122
A lot of snow is guaranteed on a skiing holiday in Norway	84%	139	62%	132	70%	147	87%	116	80%	125	44%	107	87%	124	50%	130
There are many exciting experiences on offer in addition to skiing/snowboarding	84%	132	65%	139	75%	156	91%	136	75%	131	63%	108	90%	120	53%	126
It is the best place to experience the Northern Lights	87%	122	55%	124	84%	130	97%	111	88%	118	81%	102	85%	125	38%	136
It offers many kinds of beautiful light	93%	117	67%	108	89%	117	95%	113	90%	111	84%	104	92%	117	64%	125
There are attractive offers for a holiday in Norway	86%	149	53%	171	77%	168	90%	141	86%	129	30%	122	89%	134	53%	146
It is less crowded in Norwegian skiing destinations	75%	152	33%	150	70%	153	87%	158	70%	144	21%	113	71%	135	22%	160
It has spectacular fjords	91%	112	96%	109	88%	106	94%	109	95%	106	98%	101	97%	108	96%	103
It has spectacular mountains	93%	110	96%	106	88%	110	97%	119	90%	111	96%	102	96%	107	95%	105
It has welcoming locals	85%	133	75%	147	76%	127	93%	131	89%	118	56%	113	84%	141	82%	124
It offers a wide variety of ski in ski out products	80%	153	40%	134	70%	162	94%	144	68%	157	31%	107	80%	142	39%	139
It offers a wide selection of slopes with different levels of difficulty	80%	143	61%	121	72%	149	91%	150	72%	140	62%	104	92%	126	57%	117

Branding targets

# 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 specialities
- 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

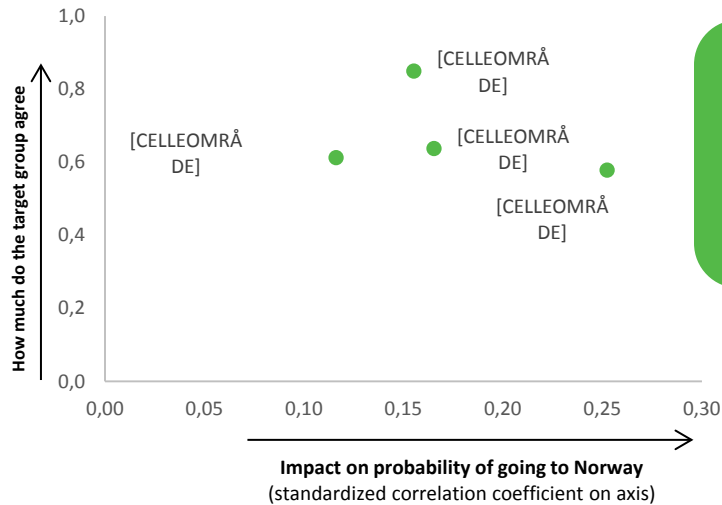
### Impressive nature:

- 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

# What has impact on the probability of going to Norway? Brand factors

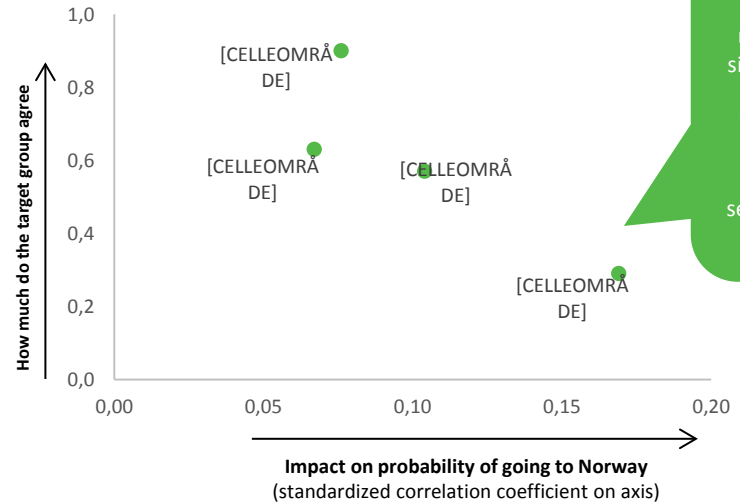
The maps only show the effect of significant brand factors from multiple regression analysis

## UNITED KINGDOM



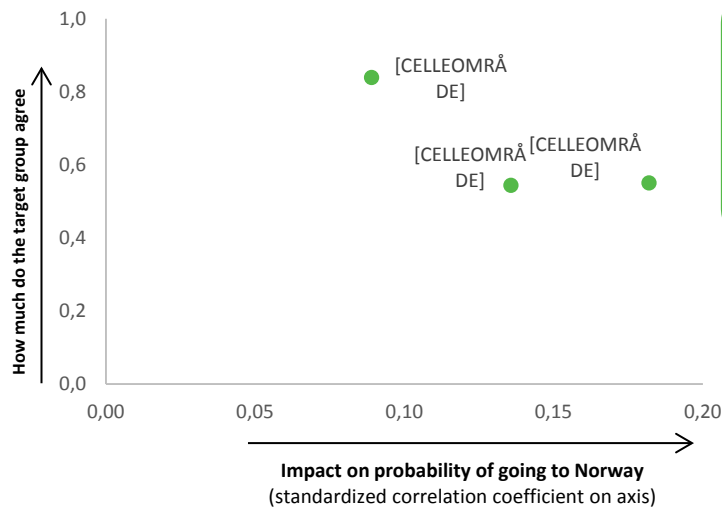
There is potential in telling and convincing the Brits that Norway offers a lot of **cultural experiences** and that it is **easy to travel to Norway**.

## DENMARK



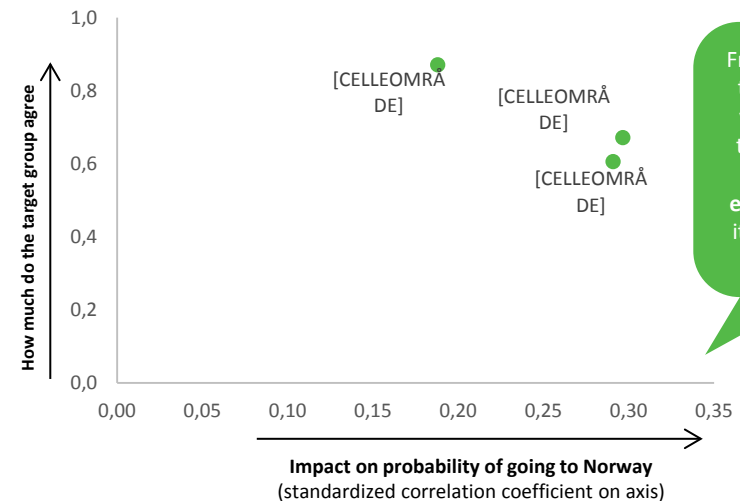
The Danes are well aware that Norway has **impressive nature** and this is a significant driver. But Danes don't think that Norway offers any **cultural experiences** which seems to be the most important factor.

## NETHERLANDS



The view of Norway as a country with a lot of **cultural experiences** seems to be the most important driver among the Dutch tourists.

## FRANCE

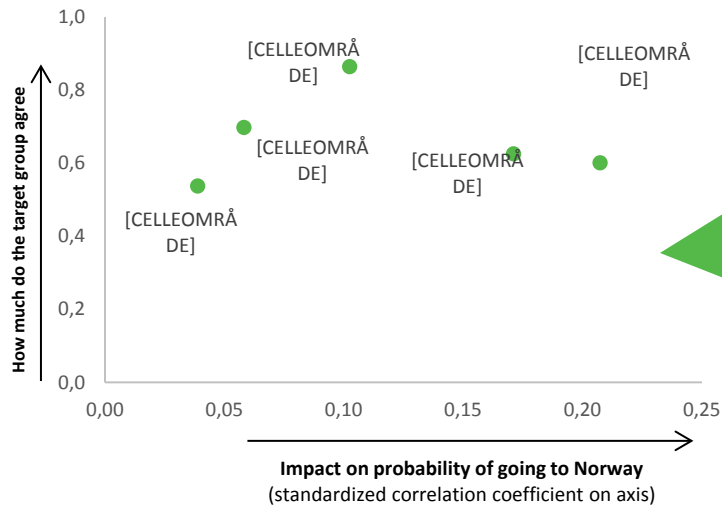


French tourists seem to be more likely to visit Norway if they think there are a lot of **cultural experiences** and that it is **easy to travel to Norway**.

# What has impact on the probability of going to Norway? Brand factors

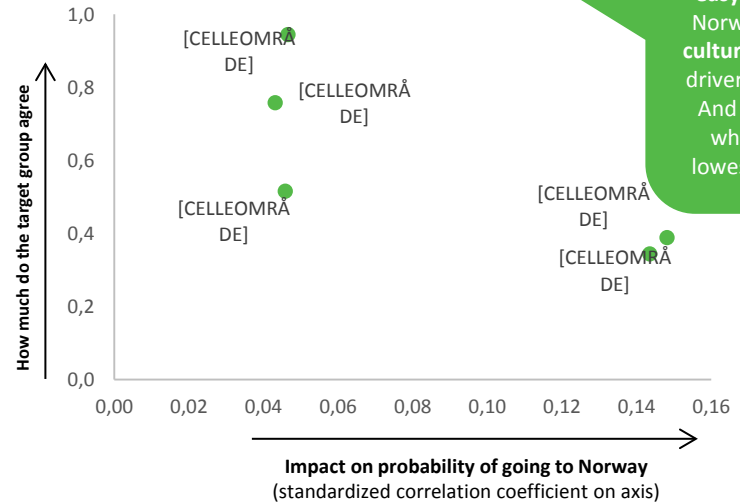
The maps only show the effect of significant brand factors from multiple regression analysis

## GERMANY



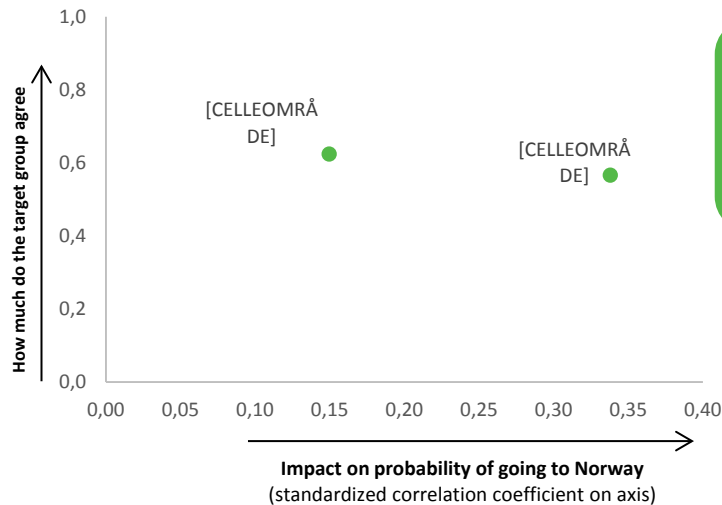
It seems that the perception of how easy it is to travel to Norway and the cultural experiences that Norway offers are the most important factors for German tourists.

## NORWAY



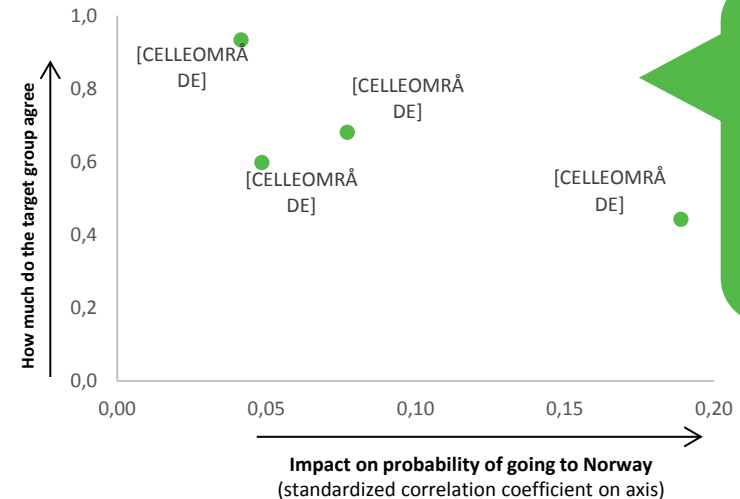
In Norway the fact that it is easy to plan and travel in Norway and that there are cultural experiences are the drivers with most potential. And these are the factors where Norway is rated lowest by the Norwegians.

## RUSSIA



Russian tourists are estimated to put especially high emphasis on how easy it is to travel to Norway.

## SWEDEN



Swedish tourists are expected to be more likely to visit Norway if they perceive the country as a place that offers cultural experiences. Less than half has that impression of Norway currently.



# MARKETING ACTIVITIES – SHARE OF VOICE

# The share of voice of Norway and competitors

“Can you remember having seen any advertisements for countries as holiday destinations in the past month?”

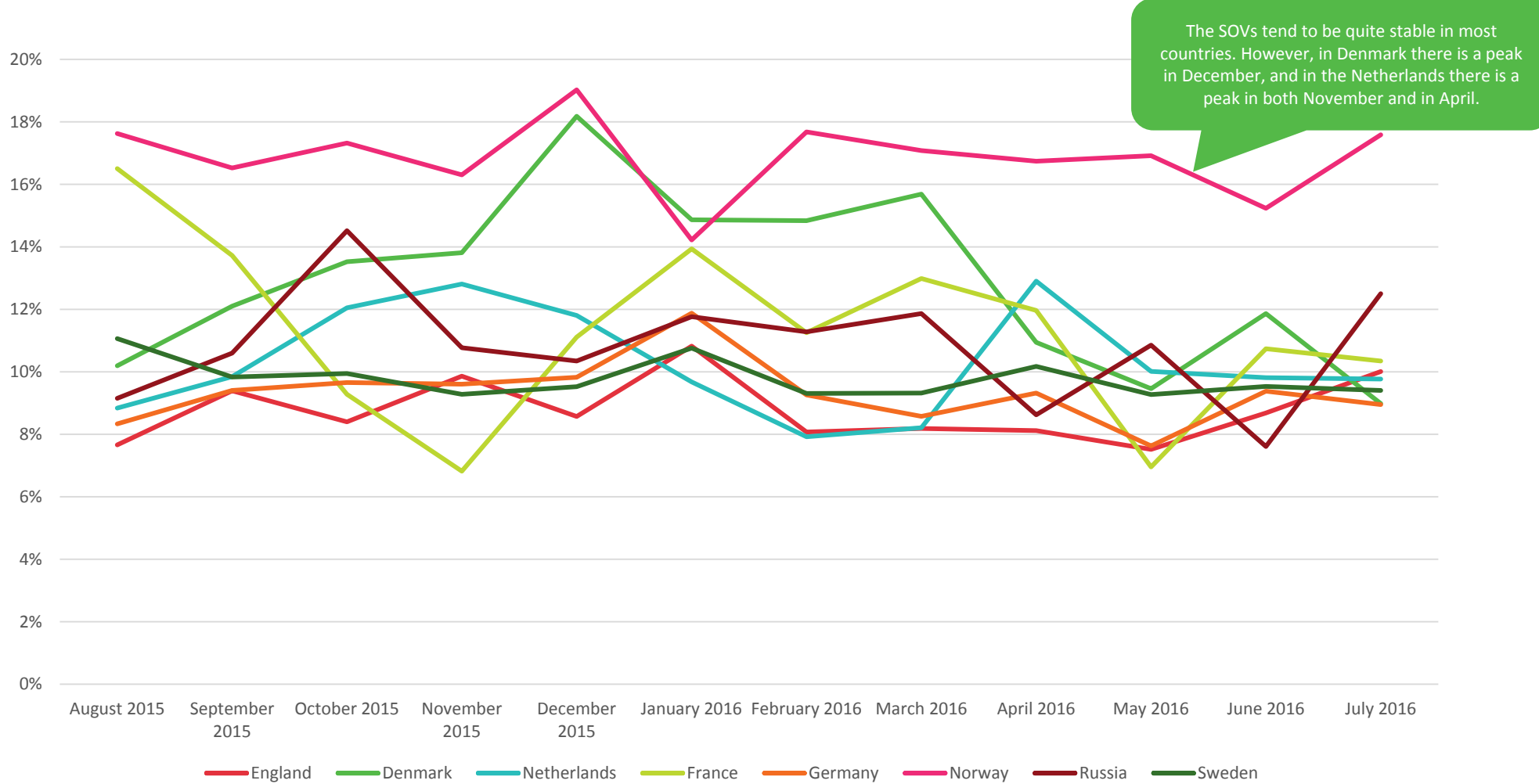
	England	Denmark	Netherlands	France	Germany	Norway	Russia	Sweden
Finland	3%	1%	3%	5%	3%	2%	14%	5%
Iceland	7%	8%	6%	7%	5%	10%	5%	8%
Canada	11%	4%	6%	14%	7%	2%	4%	2%
Alaska	3%	2%	2%	2%	2%	1%	2%	2%
New Zealand	11%	5%	4%	5%	6%	3%	3%	3%
Germany	5%	10%	11%	4%	14%	5%	9%	9%
France	11%	7%	12%	16%	7%	8%	11%	8%
Italy	10%	10%	11%	10%	9%	11%	13%	11%
Scotland	12%	5%	7%	9%	7%	4%	3%	7%
<b>Norway</b>	<b>9%</b>	<b>13%</b>	<b>10%</b>	<b>11%</b>	<b>9%</b>	<b>17%</b>	<b>11%</b>	<b>10%</b>
Austria	5%	8%	11%	4%	11%	4%	7%	7%
Sweden	4%	11%	6%	4%	5%	10%	7%	14%
Denmark	4%	13%	5%	3%	6%	21%	4%	13%
Switzerland	7%	2%	7%	7%	7%	3%	7%	3%

↑  
The competing holiday destinations

Norways SOV is largest in Norway and Denmark, while lowest in the UK and Germany.

# Norway's SOV and the variation over time

“Can you remember having seen any advertisements for countries as holiday destinations in the past month?”

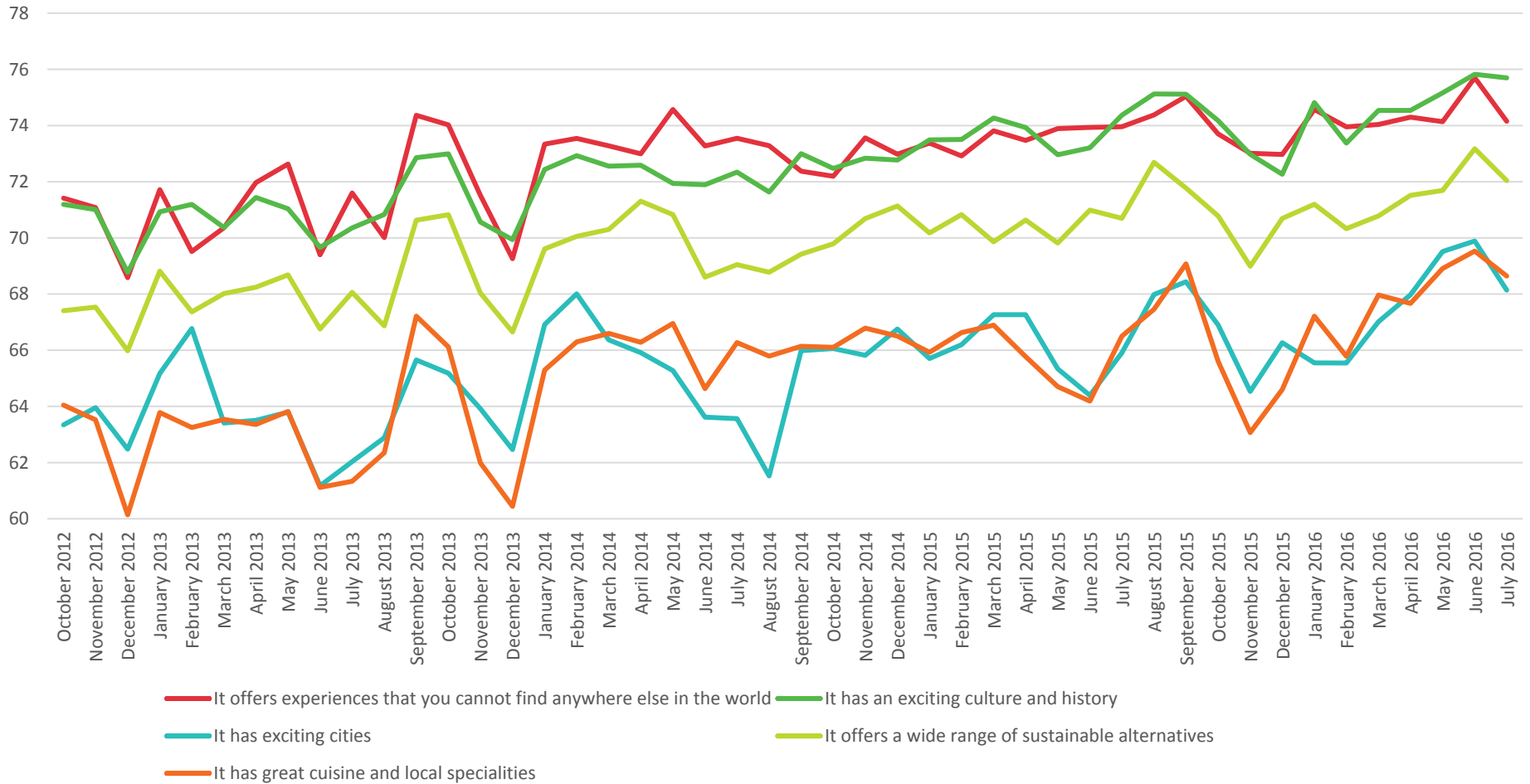




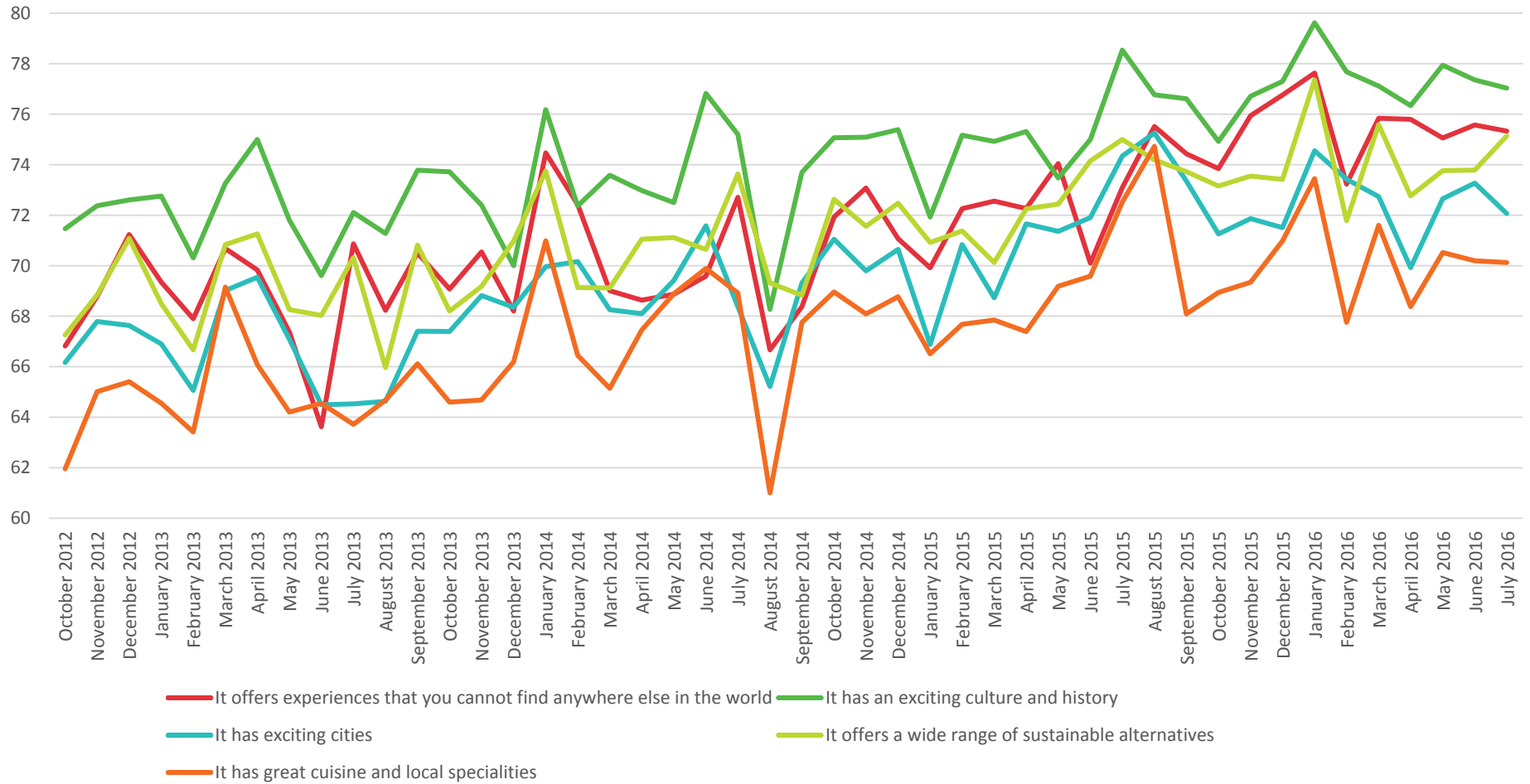


# TIME SERIES FOR SELECTED BRAND TARGETS

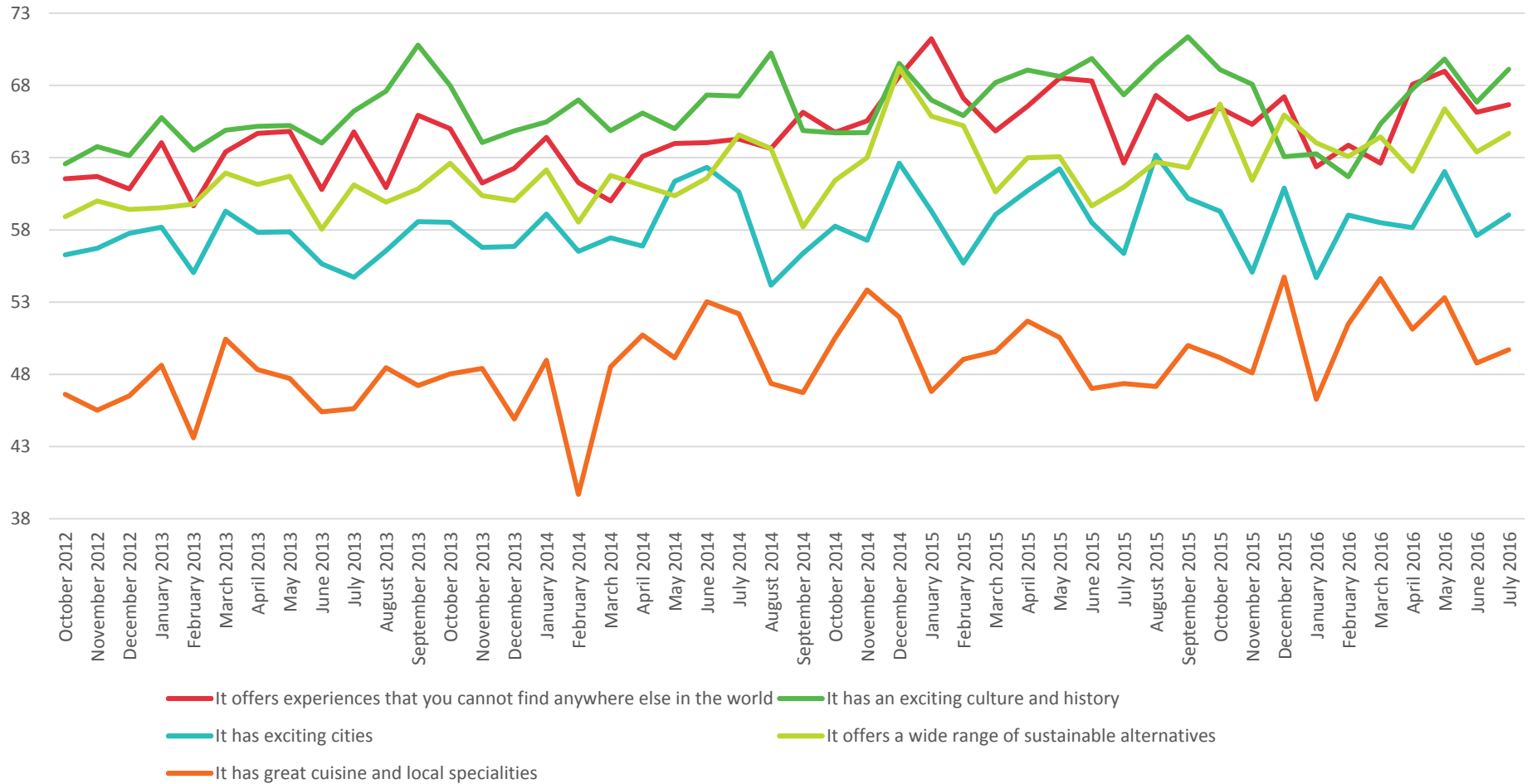
# All markets



UK



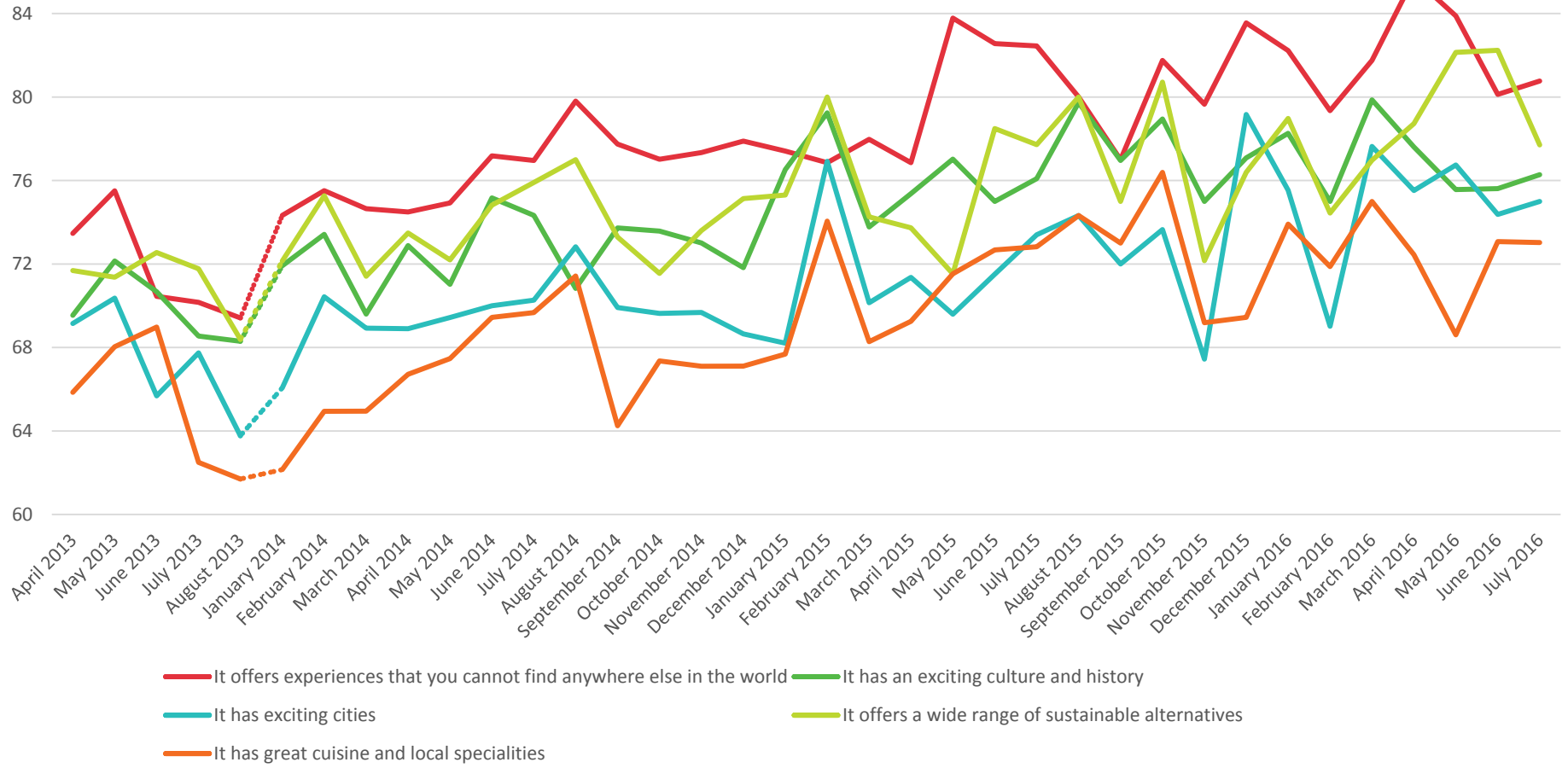
# Denmark



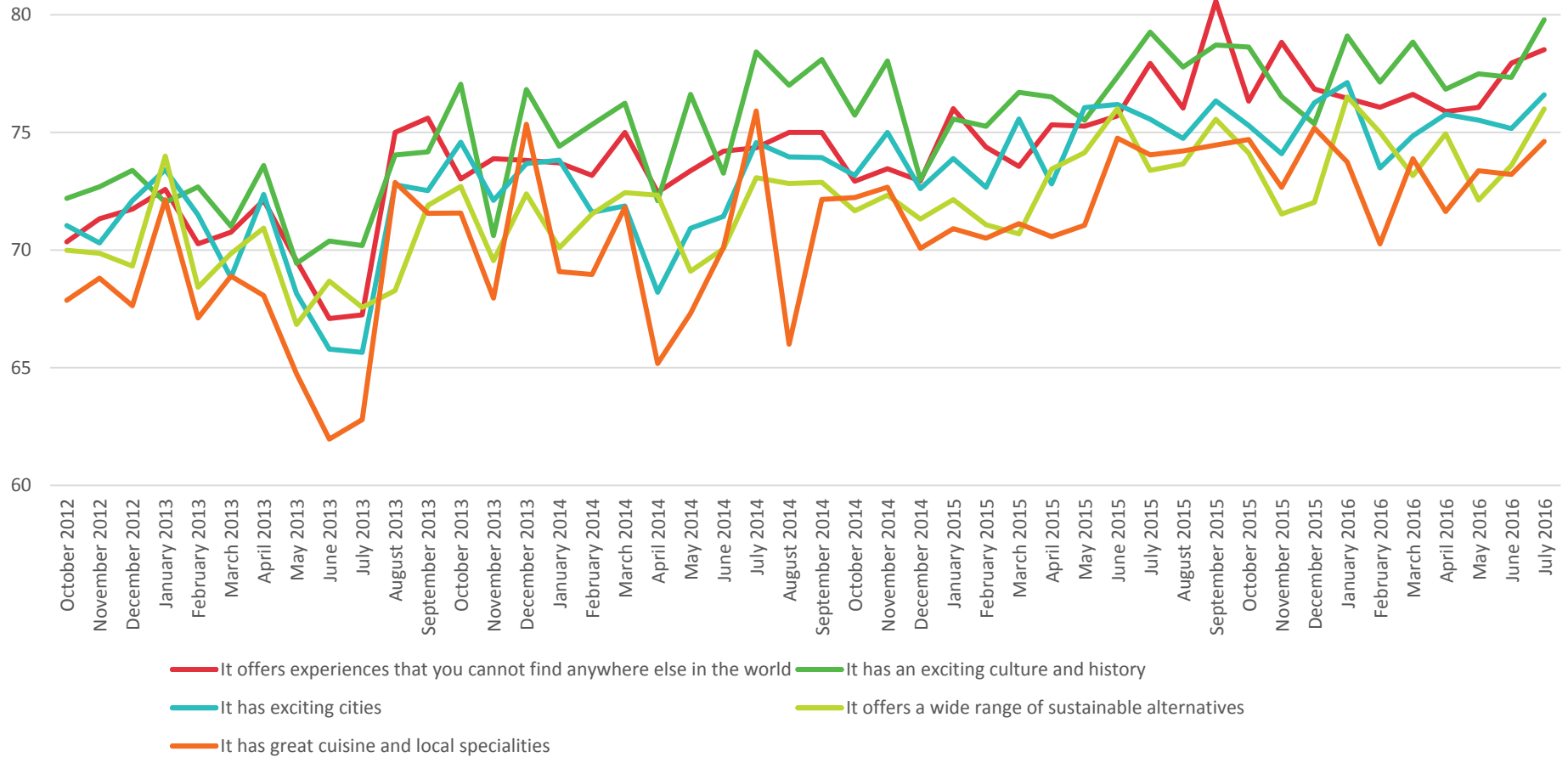
# Netherlands



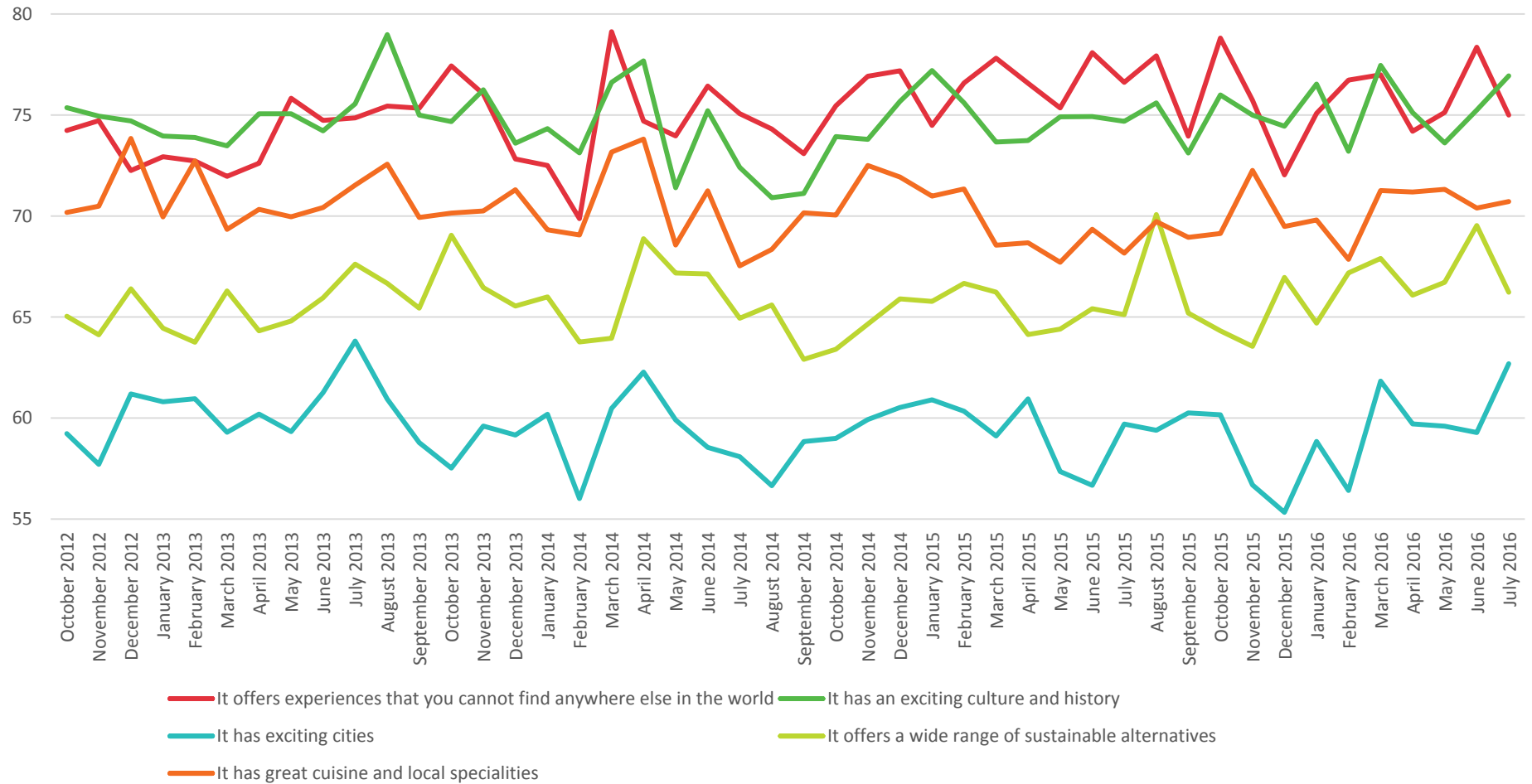
# France



# Germany

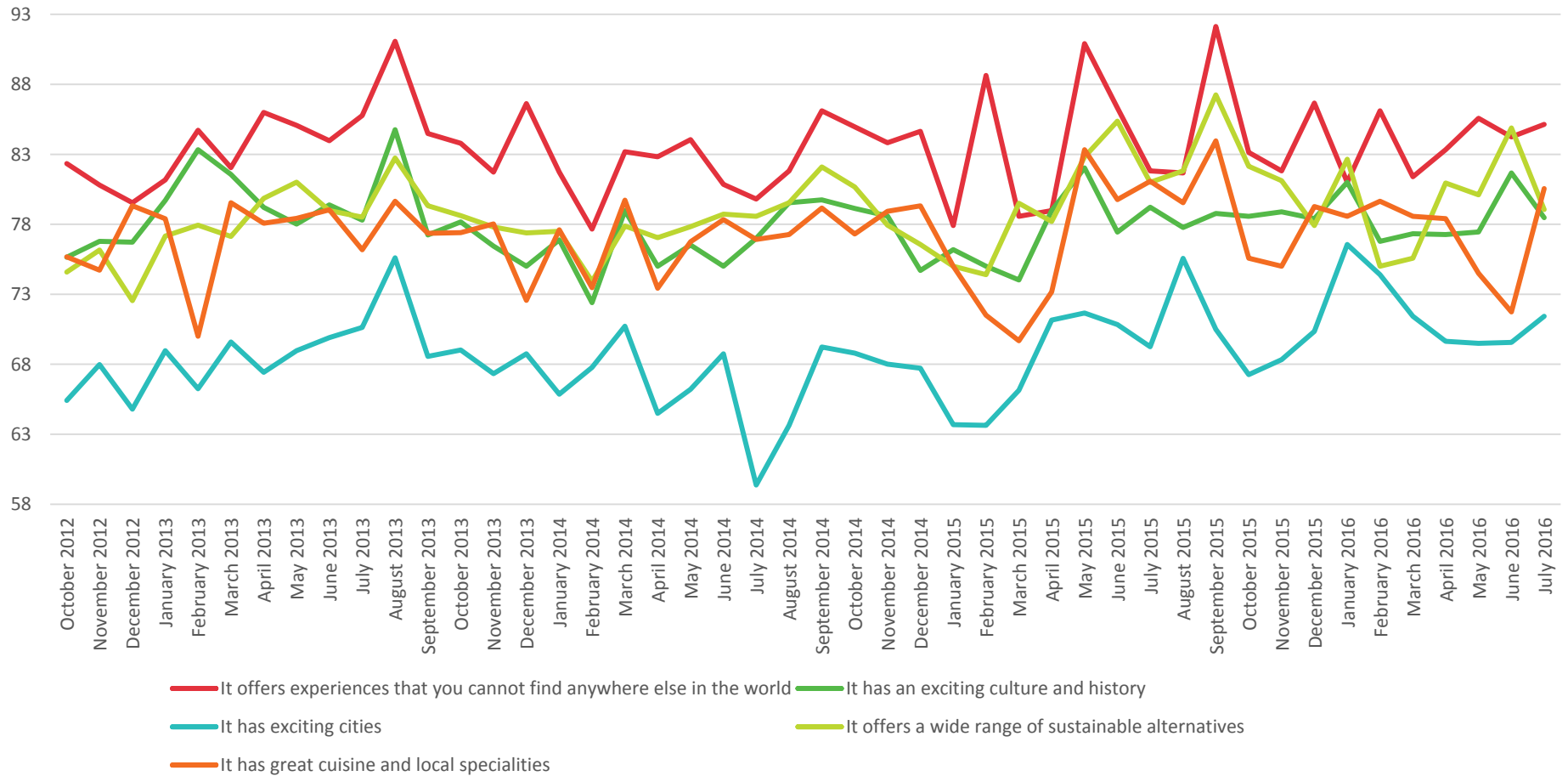


# Norway





# Russia



# Sweden





# METHOD

## Data

The analysis in the report is based on the following number of interviews:

Market	Number of interviews
UK	4.118
Denmark	2.093
Netherlands	3.324
France	580
Germany	4.220
Norway	3.702
Russia	603
Sweden	3.662





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