NORWAYS POSITION AS HOLIDAY DESTINATION

Brand tracking results
June 2015
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4. THE IMPRESSION OF NORWAY AS A HOLIDAY DESTINATION

5. INTEREST IN TRAVELLING TO NORWAY AND DRIVERS

6. MARKETING ACTIVITIES - SOV
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 June 2014-May 2015 to get insight into Norway's position as a holiday destination in the 8 markets.

- The analysis includes descriptive and more advanced statistical analysis of the data. It also includes qualitative analysis of one open question about the association to Norway.
MAIN FINDINGS
# Main findings – UK, Denmark, Netherlands and France

<table>
<thead>
<tr>
<th></th>
<th>UK</th>
<th>Denmark</th>
<th>Netherlands</th>
<th>France</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Target group</strong></td>
<td>Overrepresentation of <strong>females</strong> and the <strong>middle age group (35-55)</strong>. Motivated mainly by the cities, local art and culture, and nature experiences.</td>
<td>Overrepresentation of the <strong>older age group (56+)</strong> and those with <strong>no kids</strong>. Travels a lot. <strong>Not that interested in outdoor activities</strong> – mainly big cities, local art and culture.</td>
<td>Overrepresentation of the <strong>middle age group (35-55)</strong>. 2 out of 3 travels <strong>without kids</strong>. Mainly motivated by big cities, local art and culture, and clean and unspoiled nature</td>
<td>Strong overrepresentation of <strong>females</strong> and <strong>35-55 year olds</strong>. Does not travel as often as tourists from other countries. The target group is very interested in experiencing dramatic nature and outdoor activities.</td>
</tr>
<tr>
<td><strong>Top of Mind</strong></td>
<td>Cold, fjords, snow, skiing, <strong>Northern Lights</strong>, mountains, <strong>expensive</strong></td>
<td>Beautiful nature, <strong>skiing</strong>, snow, mountains, <strong>expensive</strong>, <strong>Oslo</strong>, fjords</td>
<td>Beautiful and <strong>unspoiled nature</strong>, fjords, cold, snow, <strong>Northern Lights</strong>, mountains</td>
<td>Fjords, cold, snow, nature, landscapes, salmon</td>
</tr>
<tr>
<td><strong>Norways brand</strong></td>
<td>+ <strong>Spectacular nature</strong> + <strong>Spectacular fjords</strong> + <strong>Spectacular mountains</strong> + <strong>Natural phenomena</strong> + <strong>Accessibility</strong> + <strong>Good hiking</strong> + <strong>Good angling</strong> + <strong>Good cycling</strong></td>
<td>+ <strong>Spectacular nature</strong> + <strong>Spectacular fjords</strong> + <strong>Spectacular mountains</strong> + <strong>Good hiking</strong> + <strong>Great cuisine</strong> + <strong>Good cycling</strong> + <strong>Sustainable alternatives</strong> + <strong>Crowded skiing destinations</strong> + <strong>Attractive offers</strong></td>
<td>+ <strong>Spectacular nature</strong> + <strong>Spectacular fjords</strong> + <strong>Hiking</strong> + <strong>Easy to book</strong> + <strong>Easy to plan</strong> + <strong>Skiing</strong></td>
<td>+ <strong>Spectacular nature</strong> + <strong>Natural phenomena</strong> + <strong>New and interesting places</strong> + <strong>Good cycling</strong></td>
</tr>
<tr>
<td><strong>Drivers for going to Norway</strong></td>
<td>There is potential in telling and convincing the Brits that it is <strong>easy to travel</strong> to Norway, and that Norway offers a lot of <strong>cultural experiences</strong></td>
<td>The Danes are well aware that Norway has <strong>impressive nature</strong> and this is a significant driver. There is also great potential in communicating that it is <strong>easy to travel</strong> to and that there are <strong>cultural experiences</strong> in Norway</td>
<td>Telling the Dutch that Norway has a lot of <strong>exciting culture</strong> and that it is <strong>easy to travel</strong> to Norway could get more interested in going to Norway</td>
<td>There is a lot of potential in convincing the French that Norway is <strong>easy to get to</strong> and that it has <strong>opportunities to do outdoor activities</strong></td>
</tr>
<tr>
<td><strong>SOV</strong></td>
<td>UK is the country where Norway has the smallest SOV. The destinations with the most voice are Scotland, New Zealand and Canada</td>
<td>The largest SOV outside of Norway. The biggest competitors are Sweden, Germany and Denmark.</td>
<td>Norways SOV in the Netherlands is among the greatest a long side Germany, France, Italy and Austria.</td>
<td>The SOV is just about average. The biggest competitors to Norway on the French market are France and Canada.</td>
</tr>
</tbody>
</table>
## Main findings – Germany, Norway, Russia and Sweden

<table>
<thead>
<tr>
<th></th>
<th>Germany</th>
<th>Norway</th>
<th>Russia</th>
<th>Sweden</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Target group</strong></td>
<td>Overrepresentation of the <strong>middle age group (35-55)</strong>. Travels less than in the other markets and rarely with kids. Very interested in <strong>clean and unspoiled nature</strong>.</td>
<td>**Overrepresentation of <strong>females</strong> and the 35-55 year olds. Less motivated by local art and culture, but more motivated by cross country skiing than the target groups in the other markets. Travels a lot.</td>
<td>Strong <strong>female overrepresentation</strong>. Very few in the oldest age group (55+). Large share with 1-2 children. Highly educated and wealthy. Very interested in <strong>local art and culture, big cities and dramatic nature</strong>.</td>
<td>Dominated by <strong>females</strong> and the 35-55 year olds. Not very interested in nature experiences. Mostly motivated by the big cities.</td>
</tr>
<tr>
<td><strong>Top of Mind</strong></td>
<td>Fjords, <strong>unspoiled</strong> and beautiful nature, snow, landscapes, <strong>Oslo</strong>, cold, mountains, fishing</td>
<td><strong>(Beautiful) nature, mountains, fjords, expensive, Lofoten, Hurtigruten, Northern Lights</strong></td>
<td>Fishing, fjords, skiing, nature, mountains</td>
<td>Fjords, beautiful nature, Hurtigruten, expensive, mountains, fishing</td>
</tr>
</tbody>
</table>
| **Norways brand** | **Brand values**  
+ Spectacular nature  
+ Spectacular fjords  
+ Natural phenomena  
+ Hiking  
+ Angling  
+ New and interesting places | **+ Spectacular nature  
+ Spectacular fjords  
+ Spectacular mountains  
+ Hiking  
+ Natural phenomena  
+ Cycling, angling, hiking  
+ Attractive offers  
+ Other activities in addition to skiing and snowboarding  
+ Easy to book** | **+ Spectacular nature  
+ New and interesting places  
+ Spectacular fjords** | **+ Spectacular nature  
+ Spectacular fjords  
+ Hiking  
+ Great cuisine  
+ Northern lights  
+ Exciting cities  
+ Cycling  
+ Attractive offers  
+ Crowded skiing destinations** |
| **Drivers for going to Norway** | The perception of Norway offering a lot of **cultural experiences** and easy to get to has great effect on the Germans | In **Norway** the fact that it is easy to plan and travel in Norway is the driver with most potential. There is potential in convincing people that there are exciting cultural experiences. | **Being able to travel to Norway easily** is the most important thing to the Russians | Branding Norway as a place with a lot of **cultural experiences** is the only significant factor for Swedish tourists |
| **SOV**           | On third place in the German market. Germany and Austria are on top.     | The biggest SOV among the 8 markets. On second place in the Norwegian market behind Denmark.                                              | The SOV is about average. Italy, Finland and France are the three biggest destinations in Russia.                               | The greatest SOV a long side Italy in the Swedish market |
TARGET GROUP
The size of the target group in each market
Based on questions regarding no. of holidays within last three years and holiday interests

<table>
<thead>
<tr>
<th>TARGET GROUP AREAS</th>
<th>UK</th>
<th>DENMARK</th>
<th>NETHERLANDS</th>
<th>FRANCE</th>
<th>GERMANY</th>
<th>NORWAY</th>
<th>RUSSIA</th>
<th>SWEDEN</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nature-based target group (Tracking)</td>
<td>72 %</td>
<td>76 %</td>
<td>67 %</td>
<td>60 %</td>
<td>68 %</td>
<td>83 %</td>
<td>68 %</td>
<td>67 %</td>
</tr>
<tr>
<td>Summer 2014</td>
<td>74 %</td>
<td>77 %</td>
<td>68 %</td>
<td>57 %</td>
<td>71 %</td>
<td>85 %</td>
<td>69 %</td>
<td>69 %</td>
</tr>
</tbody>
</table>

The size of target groups are based on more than 75.000 interview collected since september 2012

TARGET GROUP AREAS
ENGLAND London, Essex, Hertfordshire, Berkshire, Buckinghamshire, West Sussex, East Sussex and Kent
DENMARK National
NETHERLANDS National
FRANCE Paris and Rhone Alpes
GERMANY Hamburg, Bremen, Schleswig-Holstein, Niedersachsen, Nordrhein-Westfalen, Hessen, Rheinland-Pfalz and Saarland
NORWAY National
SWEDEN National
## Target group comparison

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

<table>
<thead>
<tr>
<th>Gender</th>
<th>UK</th>
<th>Denmark</th>
<th>Netherlands</th>
<th>France</th>
<th>Germany</th>
<th>Norway</th>
<th>Russia</th>
<th>Sweden</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>43 %</td>
<td>47 %</td>
<td>50 %</td>
<td>41 %</td>
<td>49 %</td>
<td>44 %</td>
<td>41 %</td>
<td>46 %</td>
</tr>
<tr>
<td>Female</td>
<td>57 %</td>
<td>53 %</td>
<td>50 %</td>
<td>59 %</td>
<td>51 %</td>
<td>56 %</td>
<td>59 %</td>
<td>54 %</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Age</th>
<th>UK</th>
<th>Denmark</th>
<th>Netherlands</th>
<th>France</th>
<th>Germany</th>
<th>Norway</th>
<th>Russia</th>
<th>Sweden</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-34</td>
<td>30 %</td>
<td>25 %</td>
<td>27 %</td>
<td>30 %</td>
<td>26 %</td>
<td>32 %</td>
<td>45 %</td>
<td>25 %</td>
</tr>
<tr>
<td>35-55</td>
<td>42 %</td>
<td>34 %</td>
<td>47 %</td>
<td>47 %</td>
<td>47 %</td>
<td>40 %</td>
<td>45 %</td>
<td>41 %</td>
</tr>
<tr>
<td>56+</td>
<td>28 %</td>
<td>41 %</td>
<td>26 %</td>
<td>23 %</td>
<td>27 %</td>
<td>28 %</td>
<td>10 %</td>
<td>34 %</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>No. of children</th>
<th>UK</th>
<th>Denmark</th>
<th>Netherlands</th>
<th>France</th>
<th>Germany</th>
<th>Norway</th>
<th>Russia</th>
<th>Sweden</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>63 %</td>
<td>77 %</td>
<td>67 %</td>
<td>59 %</td>
<td>70 %</td>
<td>69 %</td>
<td>46 %</td>
<td>67 %</td>
</tr>
<tr>
<td>1+2</td>
<td>32 %</td>
<td>20 %</td>
<td>28 %</td>
<td>36 %</td>
<td>27 %</td>
<td>26 %</td>
<td>50 %</td>
<td>28 %</td>
</tr>
<tr>
<td>3+</td>
<td>4 %</td>
<td>3 %</td>
<td>6 %</td>
<td>5 %</td>
<td>3 %</td>
<td>4 %</td>
<td>4 %</td>
<td>5 %</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Holidays in last 3 years</th>
<th>UK</th>
<th>Denmark</th>
<th>Netherlands</th>
<th>France</th>
<th>Germany</th>
<th>Norway</th>
<th>Russia</th>
<th>Sweden</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-2</td>
<td>39 %</td>
<td>27 %</td>
<td>35 %</td>
<td>47 %</td>
<td>47 %</td>
<td>9 %</td>
<td>42 %</td>
<td>33 %</td>
</tr>
<tr>
<td>3-4</td>
<td>30 %</td>
<td>28 %</td>
<td>33 %</td>
<td>26 %</td>
<td>29 %</td>
<td>18 %</td>
<td>27 %</td>
<td>29 %</td>
</tr>
<tr>
<td>More than 4</td>
<td>31 %</td>
<td>45 %</td>
<td>31 %</td>
<td>26 %</td>
<td>24 %</td>
<td>73 %</td>
<td>30 %</td>
<td>38 %</td>
</tr>
</tbody>
</table>

### Motives

- **Dramatic and wild nature, and beautiful scenery**
  - 82 % | 62 % | 62 % | 86 % | 71 % | 65 % | 78 % | 61 %
- **Alpine skiing**
  - 28 % | 18 % | 18 % | 33 % | 18 % | 20 % | 23 % | 22 %
- **Snowboarding**
  - 21 % | 4 % | 14 % | 18 % | 12 % | 6 % | 23 % | 5 %
- **Cross-country skiing**
  - 18 % | 10 % | 11 % | 27 % | 17 % | 29 % | 15 % | 12 %
- **Outdoor activities such as going dog sledding, staying in an ice hotel or seeing the northern lights**
  - 60 % | 21 % | 32 % | 60 % | 34 % | 29 % | 25 % | 27 %
- **Clean and unspoiled nature**
  - 82 % | 61 % | 73 % | 80 % | 81 % | 61 % | 77 % | 54 %
- **Local art, culture and lifestyles**
  - 78 % | 76 % | 74 % | 78 % | 79 % | 69 % | 85 % | 68 %
- **Big cities**
  - 81 % | 82 % | 81 % | 79 % | 68 % | 88 % | 85 % | 82 %
- **Outdoor activities such as hiking, fishing or cycling**
  - 35 % | 25 % | 50 % | 50 % | 47 % | 48 % | 61 % | 37 %
- **Hiking**
  - 33 % | 32 % | 16 % | 50 % | 48 % | 52 % | 33 % | 33 %
- **Fishing**
  - 16 % | 6 % | 13 % | 16 % | 14 % | 12 % | 30 % | 9 %
- **Cycling**
  - 28 % | 13 % | 35 % | 18 % | 43 % | 23 % | 32 % | 13 %

<table>
<thead>
<tr>
<th>Income</th>
<th>Median (EUR)</th>
<th>56.000-70.000</th>
<th>67.000-80.000</th>
<th>40.000-50.00</th>
<th>40 000-52 999</th>
<th>40.000-52.999</th>
<th>91.000-102.000</th>
<th>N/A</th>
<th>55.000-65.000</th>
</tr>
</thead>
</table>

| Education | Average years | 15 | 14 | 15 | 15 | 14 | 14 | 16 | 14 |
THE IMPRESSION OF NORWAY AS A HOLIDAY DESTINATION
The top of mind association to Norway

In the tracking we ask the question “What is the first thing you think of when you think of holiday destinations and experiences in Norway?”. An analysis of the results in all the 8 markets shows the following

- There is high consistency between the eight markets Agreement on the fact that Norway has spectacular and beautiful nature – fjords and mountains – and that it offers the possibility of skiing.
- In France, UK and the Netherlands and to some degree also Germany Norway is associated with snow and cold
- In UK, the Netherlands and Norway the association to Northern Lights is prevalent.
- In Russia and to some degree Germany they think of fishing
- Unspoiled nature is a strong association in Germany and the Netherlands
- Lofoten is mentioned quite often by Norwegians.
- In Germany, Sweden and Denmark they think of Oslo
- In France they think of salmon
- Hurtigruten is a part of the Norwegian brand in Sweden and Norway

On the following slides the results for each market is shown
Based on question What is the first thing you think of when you think of holiday destinations and experiences in Norway?

The Brits have associations to:
- Cold
- Fjords
- Snow
- Northern Lights
- Beautiful Scenery
- Mountains
- Skiing
- Expensive
- Nature

(n=3005)
Denmark

Based on question What is the first thing you think of when you think of holiday destinations and experiences in Norway?

The Danes have associations to:
- Nature
- Skiing (ski + skiferie)
- Snow (sne)
- Mountains (bjerne + fjele)
- Beautiful (smuk + flot)
- Expensive (dyrt)
- Oslo
- Fjords (fjorde)

(n=2273)
Based on question What is the first thing you think of when you think of holiday destinations and experiences in Norway?

The Dutch have associations to:
- Nature
- Fjords
- Cold (koud)
- Beautiful (mooie)
- Snow (sneeuw)
- Northern Lights (norderlicht)
- Mountains (bergen)
- Unspoiled nature (ongerepte natuur)
- Landscape (Landschap)

(n=2451)
The French have associations to
Fjords
Cold (froid)
Snow (neige)
Nature
Landscapes (paysages)
Salmon (saumon)
Based on question What is the first thing you think of when you think of holiday destinations and experiences in Norway?

The Germans have associations to:

- Fjords
- Unspoiled nature (unberührte natur)
- Beautiful nature (schöne natur)
- Snow (schnee)
- Oslo
- Landscapes (landschaften+landschaft)
- Cold (kalt + kälte)
- Mountains (berge)
- Fishing (angeln)

(n=2905)
Based on question: What is the first thing you think of when you think of holiday destinations and experiences in Norway?

The Norwegians have associations to:
- Nature
- Mountains (fjell)
- Fjords
- Expensive (dyrt)
- Lofoten
- Hurtigruten
- Northen Lights (Nordlys)
- Beautiful (Vakker)

(n=3459)
The Russians have associations to
Fishing (Рыбалка)
Fjords (фьорды)
Skiing (Лыжи + лыжах)
Nature (природа)
Mountians (горы)

(n=1484)
Based on question What is the first thing you think of when you think of holiday destinations and experiences in Norway?

The Swedes have associations to:
- Fjords (fjordar)
- Nature
- Hurtigruten
- Beautiful (Vacker)
- Expensive (dyrt)
- Mountains (fjäll + berg)
- Fishing (Fiske)
- Oslo
- Skiing (skidor + skidåkning)

(n=2667)
Attitude to Norway – Norways brand in the different markets

Based on question Please state whether you agree or disagree with each statement.

<table>
<thead>
<tr>
<th>Statement</th>
<th>UK</th>
<th>Denmark</th>
<th>Netherlands</th>
<th>France</th>
<th>Germany</th>
<th>Norway</th>
<th>Russia</th>
<th>Sweden</th>
</tr>
</thead>
<tbody>
<tr>
<td>It has spectacular natural scenery</td>
<td>87 %</td>
<td>93 %</td>
<td>87 %</td>
<td>90 %</td>
<td>90 %</td>
<td>97 %</td>
<td>94 %</td>
<td>92 %</td>
</tr>
<tr>
<td>It has exciting cities</td>
<td>57 %</td>
<td>36 %</td>
<td>47 %</td>
<td>59 %</td>
<td>68 %</td>
<td>47 %</td>
<td>54 %</td>
<td>44 %</td>
</tr>
<tr>
<td>It has new and interesting places</td>
<td>74 %</td>
<td>53 %</td>
<td>72 %</td>
<td>87 %</td>
<td>78 %</td>
<td>72 %</td>
<td>93 %</td>
<td>72 %</td>
</tr>
<tr>
<td>It has an exciting culture and history</td>
<td>68 %</td>
<td>50 %</td>
<td>66 %</td>
<td>68 %</td>
<td>72 %</td>
<td>73 %</td>
<td>78 %</td>
<td>54 %</td>
</tr>
<tr>
<td>It has great cuisine and local specialities</td>
<td>49 %</td>
<td>21 %</td>
<td>46 %</td>
<td>54 %</td>
<td>61 %</td>
<td>65 %</td>
<td>73 %</td>
<td>32 %</td>
</tr>
<tr>
<td>It has spectacular fjords</td>
<td>82 %</td>
<td>91 %</td>
<td>84 %</td>
<td>86 %</td>
<td>89 %</td>
<td>97 %</td>
<td>90 %</td>
<td>93 %</td>
</tr>
<tr>
<td>It has spectacular mountains</td>
<td>83 %</td>
<td>92 %</td>
<td>78 %</td>
<td>77 %</td>
<td>80 %</td>
<td>95 %</td>
<td>88 %</td>
<td>88 %</td>
</tr>
<tr>
<td>It has welcoming locals</td>
<td>54 %</td>
<td>53 %</td>
<td>63 %</td>
<td>71 %</td>
<td>46 %</td>
<td>54 %</td>
<td>63 %</td>
<td></td>
</tr>
<tr>
<td>It offers an opportunity to experience natural phenomena such as the midnight sun or the northern lights</td>
<td>83 %</td>
<td>80 %</td>
<td>79 %</td>
<td>88 %</td>
<td>89 %</td>
<td>94 %</td>
<td>75 %</td>
<td>74 %</td>
</tr>
<tr>
<td>It offers experiences that you cannot find anywhere else in the world</td>
<td>64 %</td>
<td>50 %</td>
<td>59 %</td>
<td>76 %</td>
<td>67 %</td>
<td>74 %</td>
<td>85 %</td>
<td>52 %</td>
</tr>
<tr>
<td>It offers excellent skiing, snowboarding, etc.</td>
<td>63 %</td>
<td>79 %</td>
<td>57 %</td>
<td>64 %</td>
<td>64 %</td>
<td>87 %</td>
<td>74 %</td>
<td>75 %</td>
</tr>
<tr>
<td>It offers good cycling</td>
<td>41 %</td>
<td>25 %</td>
<td>46 %</td>
<td>35 %</td>
<td>55 %</td>
<td>66 %</td>
<td>51 %</td>
<td>32 %</td>
</tr>
<tr>
<td>It offers good hiking</td>
<td>61 %</td>
<td>91 %</td>
<td>84 %</td>
<td>75 %</td>
<td>87 %</td>
<td>97 %</td>
<td>72 %</td>
<td>87 %</td>
</tr>
<tr>
<td>It offers good angling</td>
<td>43 %</td>
<td>67 %</td>
<td>66 %</td>
<td>58 %</td>
<td>71 %</td>
<td>80 %</td>
<td>73 %</td>
<td>73 %</td>
</tr>
<tr>
<td>It offers a wide range of sustainable alternatives</td>
<td>53 %</td>
<td>24 %</td>
<td>52 %</td>
<td>67 %</td>
<td>60 %</td>
<td>45 %</td>
<td>76 %</td>
<td>34 %</td>
</tr>
<tr>
<td>It is the best place to experience the Northern Lights</td>
<td>66 %</td>
<td>45 %</td>
<td>60 %</td>
<td>83 %</td>
<td>72 %</td>
<td>80 %</td>
<td>59 %</td>
<td>24 %</td>
</tr>
<tr>
<td>It offers many kinds of beautiful light</td>
<td>74 %</td>
<td>64 %</td>
<td>73 %</td>
<td>81 %</td>
<td>55 %</td>
<td>81 %</td>
<td>73 %</td>
<td>46 %</td>
</tr>
<tr>
<td>Norway is easy to get to</td>
<td>72 %</td>
<td>77 %</td>
<td>62 %</td>
<td>72 %</td>
<td>68 %</td>
<td>58 %</td>
<td>67 %</td>
<td>84 %</td>
</tr>
<tr>
<td>It is easy to plan a trip to Norway</td>
<td>60 %</td>
<td>60 %</td>
<td>66 %</td>
<td>62 %</td>
<td>64 %</td>
<td>68 %</td>
<td>67 %</td>
<td>56 %</td>
</tr>
<tr>
<td>It is easy to book all the elements of a holiday to Norway</td>
<td>55 %</td>
<td>50 %</td>
<td>69 %</td>
<td>61 %</td>
<td>71 %</td>
<td>47 %</td>
<td>61 %</td>
<td>38 %</td>
</tr>
<tr>
<td>There are attractive offers for a holiday in Norway</td>
<td>39 %</td>
<td>17 %</td>
<td>32 %</td>
<td>42 %</td>
<td>45 %</td>
<td>20 %</td>
<td>48 %</td>
<td>18 %</td>
</tr>
<tr>
<td>It offers family friendly skiing</td>
<td>47 %</td>
<td>53 %</td>
<td>39 %</td>
<td>58 %</td>
<td>48 %</td>
<td>64 %</td>
<td>70 %</td>
<td>47 %</td>
</tr>
<tr>
<td>A lot of snow is guaranteed on a skiing holiday in Norway</td>
<td>54 %</td>
<td>42 %</td>
<td>43 %</td>
<td>67 %</td>
<td>64 %</td>
<td>43 %</td>
<td>69 %</td>
<td>36 %</td>
</tr>
<tr>
<td>There are many exciting experiences on offer in addition to skiing/snowboarding</td>
<td>52 %</td>
<td>42 %</td>
<td>42 %</td>
<td>59 %</td>
<td>54 %</td>
<td>57 %</td>
<td>73 %</td>
<td>28 %</td>
</tr>
<tr>
<td>It is less crowded in Norwegian skiing destinations</td>
<td>42 %</td>
<td>16 %</td>
<td>43 %</td>
<td>45 %</td>
<td>42 %</td>
<td>23 %</td>
<td>48 %</td>
<td>14 %</td>
</tr>
<tr>
<td>It offers a wide variety of ski in ski out products</td>
<td>41 %</td>
<td>23 %</td>
<td>39 %</td>
<td>56 %</td>
<td>38 %</td>
<td>30 %</td>
<td>47 %</td>
<td>32 %</td>
</tr>
<tr>
<td>It offers a wide selection of slopes with different levels of difficulty</td>
<td>48 %</td>
<td>44 %</td>
<td>41 %</td>
<td>52 %</td>
<td>49 %</td>
<td>61 %</td>
<td>66 %</td>
<td>46 %</td>
</tr>
</tbody>
</table>
Attitude to Norway – Norway's brand in the different markets

Based on the question: Please state whether you agree or disagree with each statement.

- It has spectacular natural scenery
- It has exciting cities
- It has new and interesting places
- It has an exciting culture and history
- It has great cuisine and local specialities
- It has spectacular fjords
- It has spectacular mountains
- It has welcoming locals
- Natural phenomena such as the midnight sun or the northern lights
- It offers experiences that you cannot find anywhere else in the world
- It offers excellent skiing, snowboarding, etc.
- It offers a wide range of sustainable alternatives
- It is the best place to experience the Northern Lights
- 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
- A lot of snow is guaranteed on a skiing holiday in Norway
- It is easy to book all the elements of a holiday to Norway
- There are attractive offers for a holiday in Norway
- It offers many kinds of beautiful light
Attitude to Norway – Norways brand in the UK
Based on question Please state whether you agree or disagree with each statement

- It has spectacular natural scenery
- It has exciting cities
- It has new and interesting places
- It has an exciting culture and history
- It has great cuisine and local specialities
- It has spectacular fjords
- It has spectacular mountains
- It has welcoming locals
- Natural phenomena such as the midnight sun or the northern lights
- It offers experiences that you cannot find anywhere else in the world
- It offers excellent skiing, snowboarding, etc.

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

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

- It offers many kinds of beautiful light
- It is the best place to experience the Northern Lights
- It offers a wide range of sustainable alternatives

- It offers good cycling
- It offers good hiking
- It offers good angling

The British are not as convinced that Norway has new offers good hiking an angling
Attitude to Norway – Norway’s brand in Denmark

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

Danes are not as convinced that Norway has new interesting places, interesting culture and history and great cuisine. They are not convinced about cycling opportunities and sustainable alternatives either.
Attitude to Norway – Norway’s brand in the Netherlands

Based on question: Please state whether you agree or disagree with each statement.
Attitude to Norway – Norway’s brand in France

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

The French target group is in general more positive than the average regarding the branding targets.
The German target group is pretty much on average, but have a more positive view on Norwegian cities and that it is easy to book all elements of a holiday to Norway.
Attitude to Norway – Norway's brand in Norway

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

The Norwegians tend to be more positive than average in general and are very positive towards hiking opportunities.
Attitude to Norway – Norway’s brand in Russia

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

The Russians perceive Norway as having new and interesting places, exciting cities, exciting culture and history, great cuisine and also unique experiences. Also, they are convinced about winter activities.
Attitude to Norway – Norway’s brand in Sweden

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

Swedes are generally more positive about the angling, hiking, skiing and how easy it is to go to Norway. They are, however, not convinced about the Norwegian cuisine and other winter experiences in addition to skiing/snowboarding.
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)

- England: 12%
- Denmark: 14%
- Netherlands: 10%
- France: 9%
- Germany: 15%
- Norway: 57%
- Russia: 17%
- Sweden: 12%
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)

Especially in Russia, we see a lot of fluctuation in the interest in going to Norway on holiday.

In Denmark there is a significant increase in May 2015.

In Germany the likelihood was high in July/August 2014, with a lower likelihood the preceding months.
## 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.

### Share in left column. Index compared to the target group in the right column. On income and education the right column shows whether it is more or less than the target group.

<table>
<thead>
<tr>
<th>Gender</th>
<th>UK</th>
<th>Denmark</th>
<th>Netherlands</th>
<th>France</th>
<th>Germany</th>
<th>Norway</th>
<th>Russia</th>
<th>Sweden</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>53 %</td>
<td>123</td>
<td>43 %</td>
<td>91</td>
<td>59 %</td>
<td>118</td>
<td>55 %</td>
<td>134</td>
</tr>
<tr>
<td>Female</td>
<td>47 %</td>
<td>82</td>
<td>57 %</td>
<td>108</td>
<td>41 %</td>
<td>82</td>
<td>45 %</td>
<td>76</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Age</th>
<th>UK</th>
<th>Denmark</th>
<th>Netherlands</th>
<th>France</th>
<th>Germany</th>
<th>Norway</th>
<th>Russia</th>
<th>Sweden</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-34</td>
<td>42 %</td>
<td>140</td>
<td>24 %</td>
<td>96</td>
<td>29 %</td>
<td>107</td>
<td>37 %</td>
<td>123</td>
</tr>
<tr>
<td>35-55</td>
<td>43 %</td>
<td>102</td>
<td>31 %</td>
<td>91</td>
<td>55 %</td>
<td>117</td>
<td>48 %</td>
<td>102</td>
</tr>
<tr>
<td>56+</td>
<td>14 %</td>
<td>50</td>
<td>45 %</td>
<td>110</td>
<td>15 %</td>
<td>58</td>
<td>15 %</td>
<td>65</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>No. of children</th>
<th>UK</th>
<th>Denmark</th>
<th>Netherlands</th>
<th>France</th>
<th>Germany</th>
<th>Norway</th>
<th>Russia</th>
<th>Sweden</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>47 %</td>
<td>75</td>
<td>77 %</td>
<td>100</td>
<td>56 %</td>
<td>84</td>
<td>41 %</td>
<td>69</td>
</tr>
<tr>
<td>1+2</td>
<td>44 %</td>
<td>138</td>
<td>19 %</td>
<td>95</td>
<td>37 %</td>
<td>132</td>
<td>50 %</td>
<td>139</td>
</tr>
<tr>
<td>3+</td>
<td>8 %</td>
<td>200</td>
<td>4 %</td>
<td>133</td>
<td>7 %</td>
<td>117</td>
<td>10 %</td>
<td>200</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Holidays in last 3 years</th>
<th>UK</th>
<th>Denmark</th>
<th>Netherlands</th>
<th>France</th>
<th>Germany</th>
<th>Norway</th>
<th>Russia</th>
<th>Sweden</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-2</td>
<td>28 %</td>
<td>72</td>
<td>18 %</td>
<td>67</td>
<td>23 %</td>
<td>66</td>
<td>29 %</td>
<td>62</td>
</tr>
<tr>
<td>3-4</td>
<td>34 %</td>
<td>113</td>
<td>25 %</td>
<td>89</td>
<td>35 %</td>
<td>106</td>
<td>29 %</td>
<td>112</td>
</tr>
<tr>
<td>More than 4</td>
<td>38 %</td>
<td>123</td>
<td>58 %</td>
<td>129</td>
<td>41 %</td>
<td>132</td>
<td>41 %</td>
<td>158</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Income</th>
<th>UK</th>
<th>Denmark</th>
<th>Netherlands</th>
<th>France</th>
<th>Germany</th>
<th>Norway</th>
<th>Russia</th>
<th>Sweden</th>
</tr>
</thead>
<tbody>
<tr>
<td>Median (EUR)</td>
<td>56.000-70.000</td>
<td>100</td>
<td>67.000-80.000</td>
<td>100</td>
<td>40.000-50.000</td>
<td>100</td>
<td>40 000-52 999</td>
<td>100</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Education</th>
<th>UK</th>
<th>Denmark</th>
<th>Netherlands</th>
<th>France</th>
<th>Germany</th>
<th>Norway</th>
<th>Russia</th>
<th>Sweden</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average years</td>
<td>16 (+1)</td>
<td>15 (+1)</td>
<td>16 (+1)</td>
<td>16 (+1)</td>
<td>15 (+1)</td>
<td>14</td>
<td>-</td>
<td>15 (-1)</td>
</tr>
</tbody>
</table>
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

<table>
<thead>
<tr>
<th>Motives</th>
<th>UK %</th>
<th>Index</th>
<th>Denmark %</th>
<th>Index</th>
<th>Netherlands %</th>
<th>Index</th>
<th>France %</th>
<th>Index</th>
<th>Germany %</th>
<th>Index</th>
<th>Norway %</th>
<th>Index</th>
<th>Russia %</th>
<th>Index</th>
<th>Sweden %</th>
<th>Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dramatic and wild nature, and beautiful scenery</td>
<td>89 %</td>
<td>108</td>
<td>81 %</td>
<td>131</td>
<td>78 %</td>
<td>127</td>
<td>91 %</td>
<td>106</td>
<td>84 %</td>
<td>119</td>
<td>77 %</td>
<td>119</td>
<td>90 %</td>
<td>116</td>
<td>81 %</td>
<td>133</td>
</tr>
<tr>
<td>Alpine skiing</td>
<td>50 %</td>
<td>178</td>
<td>34 %</td>
<td>191</td>
<td>36 %</td>
<td>199</td>
<td>55 %</td>
<td>166</td>
<td>30 %</td>
<td>164</td>
<td>23 %</td>
<td>116</td>
<td>45 %</td>
<td>196</td>
<td>35 %</td>
<td>159</td>
</tr>
<tr>
<td>Snowboarding</td>
<td>48 %</td>
<td>230</td>
<td>7 %</td>
<td>184</td>
<td>32 %</td>
<td>232</td>
<td>43 %</td>
<td>238</td>
<td>25 %</td>
<td>206</td>
<td>6 %</td>
<td>101</td>
<td>43 %</td>
<td>186</td>
<td>9 %</td>
<td>179</td>
</tr>
<tr>
<td>Cross-country skiing</td>
<td>44 %</td>
<td>245</td>
<td>26 %</td>
<td>260</td>
<td>32 %</td>
<td>288</td>
<td>48 %</td>
<td>177</td>
<td>34 %</td>
<td>202</td>
<td>39 %</td>
<td>133</td>
<td>35 %</td>
<td>236</td>
<td>23 %</td>
<td>194</td>
</tr>
<tr>
<td>Outdoor activities such as going dog sledding, staying in an ice hotel</td>
<td>71 %</td>
<td>119</td>
<td>33 %</td>
<td>159</td>
<td>64 %</td>
<td>199</td>
<td>75 %</td>
<td>124</td>
<td>52 %</td>
<td>152</td>
<td>34 %</td>
<td>116</td>
<td>56 %</td>
<td>223</td>
<td>38 %</td>
<td>140</td>
</tr>
<tr>
<td>Clean and unspoiled nature</td>
<td>88 %</td>
<td>107</td>
<td>79 %</td>
<td>129</td>
<td>90 %</td>
<td>124</td>
<td>89 %</td>
<td>111</td>
<td>90 %</td>
<td>111</td>
<td>74 %</td>
<td>122</td>
<td>93 %</td>
<td>121</td>
<td>74 %</td>
<td>137</td>
</tr>
<tr>
<td>Local art, culture and lifestyles</td>
<td>83 %</td>
<td>106</td>
<td>80 %</td>
<td>105</td>
<td>88 %</td>
<td>119</td>
<td>88 %</td>
<td>113</td>
<td>88 %</td>
<td>112</td>
<td>77 %</td>
<td>112</td>
<td>92 %</td>
<td>109</td>
<td>76 %</td>
<td>112</td>
</tr>
<tr>
<td>Big cities</td>
<td>90 %</td>
<td>111</td>
<td>84 %</td>
<td>102</td>
<td>89 %</td>
<td>110</td>
<td>88 %</td>
<td>111</td>
<td>75 %</td>
<td>110</td>
<td>89 %</td>
<td>102</td>
<td>90 %</td>
<td>106</td>
<td>84 %</td>
<td>103</td>
</tr>
<tr>
<td>Outdoor activities such as hiking, fishing or cycling</td>
<td>57 %</td>
<td>163</td>
<td>41 %</td>
<td>166</td>
<td>74 %</td>
<td>148</td>
<td>81 %</td>
<td>161</td>
<td>62 %</td>
<td>132</td>
<td>64 %</td>
<td>133</td>
<td>89 %</td>
<td>147</td>
<td>57 %</td>
<td>153</td>
</tr>
<tr>
<td>Hiking</td>
<td>55 %</td>
<td>165</td>
<td>47 %</td>
<td>146</td>
<td>29 %</td>
<td>184</td>
<td>72 %</td>
<td>144</td>
<td>67 %</td>
<td>141</td>
<td>65 %</td>
<td>124</td>
<td>48 %</td>
<td>146</td>
<td>53 %</td>
<td>162</td>
</tr>
<tr>
<td>Fishing</td>
<td>44 %</td>
<td>273</td>
<td>14 %</td>
<td>234</td>
<td>32 %</td>
<td>248</td>
<td>42 %</td>
<td>261</td>
<td>28 %</td>
<td>203</td>
<td>16 %</td>
<td>134</td>
<td>46 %</td>
<td>155</td>
<td>23 %</td>
<td>257</td>
</tr>
<tr>
<td>Cycling</td>
<td>52 %</td>
<td>186</td>
<td>17 %</td>
<td>132</td>
<td>62 %</td>
<td>178</td>
<td>44 %</td>
<td>245</td>
<td>57 %</td>
<td>132</td>
<td>29 %</td>
<td>128</td>
<td>44 %</td>
<td>137</td>
<td>23 %</td>
<td>174</td>
</tr>
</tbody>
</table>

Share in left column. Index compared to the target group in the right column.
### Characteristics of the group that is interested in going to Norway

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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.

<table>
<thead>
<tr>
<th>Branding targets</th>
<th>UK %</th>
<th>Denmark %</th>
<th>Netherlands %</th>
<th>France %</th>
<th>Germany %</th>
<th>Norway %</th>
<th>Russia %</th>
<th>Sweden %</th>
</tr>
</thead>
<tbody>
<tr>
<td>It has spectacular natural scenery</td>
<td>91%</td>
<td>99%</td>
<td>90%</td>
<td>88%</td>
<td>91%</td>
<td>98%</td>
<td>101%</td>
<td>103%</td>
</tr>
<tr>
<td>It has exciting cities</td>
<td>80%</td>
<td>141%</td>
<td>143%</td>
<td>144%</td>
<td>141%</td>
<td>120%</td>
<td>113%</td>
<td>141%</td>
</tr>
<tr>
<td>It has new and interesting places</td>
<td>88%</td>
<td>118%</td>
<td>138%</td>
<td>117%</td>
<td>109%</td>
<td>87%</td>
<td>111%</td>
<td>95%</td>
</tr>
<tr>
<td>It has an exciting culture and history</td>
<td>87%</td>
<td>128%</td>
<td>129%</td>
<td>122%</td>
<td>129%</td>
<td>83%</td>
<td>107%</td>
<td>90%</td>
</tr>
<tr>
<td>It has great cuisine and local specialities</td>
<td>75%</td>
<td>154%</td>
<td>178%</td>
<td>164%</td>
<td>148%</td>
<td>73%</td>
<td>109%</td>
<td>89%</td>
</tr>
<tr>
<td>It has spectacular fjords</td>
<td>90%</td>
<td>109%</td>
<td>106%</td>
<td>91%</td>
<td>105%</td>
<td>92%</td>
<td>102%</td>
<td>94%</td>
</tr>
<tr>
<td>It has spectacular mountains</td>
<td>94%</td>
<td>114%</td>
<td>107%</td>
<td>85%</td>
<td>116%</td>
<td>89%</td>
<td>101%</td>
<td>97%</td>
</tr>
<tr>
<td>It has welcoming locals</td>
<td>79%</td>
<td>146%</td>
<td>142%</td>
<td>78%</td>
<td>137%</td>
<td>83%</td>
<td>116%</td>
<td>69%</td>
</tr>
<tr>
<td>It offers an opportunity to experience natural phenomena such as the midnight sun or the northern lights</td>
<td>93%</td>
<td>112%</td>
<td>110%</td>
<td>86%</td>
<td>109%</td>
<td>95%</td>
<td>107%</td>
<td>92%</td>
</tr>
<tr>
<td>It offers experiences that you cannot find anywhere else in the world</td>
<td>84%</td>
<td>131%</td>
<td>116%</td>
<td>72%</td>
<td>121%</td>
<td>89%</td>
<td>117%</td>
<td>80%</td>
</tr>
<tr>
<td>It offers excellent skiing, snowboarding, etc.</td>
<td>81%</td>
<td>129%</td>
<td>110%</td>
<td>75%</td>
<td>131%</td>
<td>88%</td>
<td>137%</td>
<td>73%</td>
</tr>
<tr>
<td>It offers good cycling</td>
<td>79%</td>
<td>193%</td>
<td>132%</td>
<td>65%</td>
<td>142%</td>
<td>68%</td>
<td>193%</td>
<td>67%</td>
</tr>
<tr>
<td>It offers good hiking</td>
<td>85%</td>
<td>140%</td>
<td>108%</td>
<td>86%</td>
<td>103%</td>
<td>89%</td>
<td>119%</td>
<td>91%</td>
</tr>
<tr>
<td>It offers good angling</td>
<td>74%</td>
<td>172%</td>
<td>112%</td>
<td>76%</td>
<td>115%</td>
<td>84%</td>
<td>144%</td>
<td>75%</td>
</tr>
<tr>
<td>It offers a wide range of sustainable alternatives</td>
<td>78%</td>
<td>146%</td>
<td>164%</td>
<td>80%</td>
<td>154%</td>
<td>89%</td>
<td>133%</td>
<td>77%</td>
</tr>
<tr>
<td>It is the best place to experience the Northern Lights</td>
<td>88%</td>
<td>134%</td>
<td>117%</td>
<td>80%</td>
<td>133%</td>
<td>93%</td>
<td>112%</td>
<td>81%</td>
</tr>
<tr>
<td>It offers many kinds of beautiful light</td>
<td>87%</td>
<td>118%</td>
<td>123%</td>
<td>84%</td>
<td>115%</td>
<td>91%</td>
<td>112%</td>
<td>68%</td>
</tr>
<tr>
<td>Norway is easy to get to</td>
<td>92%</td>
<td>127%</td>
<td>121%</td>
<td>76%</td>
<td>122%</td>
<td>93%</td>
<td>130%</td>
<td>81%</td>
</tr>
<tr>
<td>It is easy to plan a trip to Norway</td>
<td>87%</td>
<td>145%</td>
<td>140%</td>
<td>83%</td>
<td>126%</td>
<td>93%</td>
<td>150%</td>
<td>79%</td>
</tr>
<tr>
<td>It is easy to book all the elements of a holiday to Norway</td>
<td>81%</td>
<td>147%</td>
<td>142%</td>
<td>83%</td>
<td>121%</td>
<td>84%</td>
<td>137%</td>
<td>84%</td>
</tr>
<tr>
<td>There are attractive offers for a holiday in Norway</td>
<td>69%</td>
<td>176%</td>
<td>168%</td>
<td>62%</td>
<td>195%</td>
<td>79%</td>
<td>189%</td>
<td>66%</td>
</tr>
<tr>
<td>It offers family friendly skiing</td>
<td>73%</td>
<td>154%</td>
<td>94%</td>
<td>69%</td>
<td>177%</td>
<td>92%</td>
<td>159%</td>
<td>61%</td>
</tr>
<tr>
<td>A lot of snow is guaranteed on a skiing holiday in Norway</td>
<td>68%</td>
<td>125%</td>
<td>134%</td>
<td>67%</td>
<td>155%</td>
<td>90%</td>
<td>134%</td>
<td>69%</td>
</tr>
<tr>
<td>There are many exciting experiences on offer in addition to skiing/snowboarding</td>
<td>75%</td>
<td>144%</td>
<td>119%</td>
<td>62%</td>
<td>148%</td>
<td>90%</td>
<td>152%</td>
<td>68%</td>
</tr>
<tr>
<td>It is less crowded in Norwegian skiing destinations</td>
<td>75%</td>
<td>179%</td>
<td>156%</td>
<td>53%</td>
<td>124%</td>
<td>82%</td>
<td>182%</td>
<td>59%</td>
</tr>
<tr>
<td>It offers a wide variety of ski in ski out products</td>
<td>75%</td>
<td>183%</td>
<td>136%</td>
<td>62%</td>
<td>160%</td>
<td>90%</td>
<td>160%</td>
<td>58%</td>
</tr>
<tr>
<td>It offers a wide selection of slopes with different levels of difficulty</td>
<td>78%</td>
<td>161%</td>
<td>107%</td>
<td>62%</td>
<td>152%</td>
<td>87%</td>
<td>168%</td>
<td>64%</td>
</tr>
</tbody>
</table>
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**
- Cultural experiences
- Travel to Norway

**DENMARK**
- Impressive nature
- Travel to Norway

**NETHERLANDS**
- Impressive nature
- Travel to Norway

**FRANCE**
- Possible to do outdoor activities
- Impressive nature
- Travel to Norway

The Danes are well aware that Norway has impressive nature and this is a significant driver. There is also great potential in communicating that it is easy to travel to and that there are cultural experiences in Norway.

Telling the Dutch that Norway has a lot of exciting culture and that it is easy to travel to Norway could get more interested in going to Norway.

There is a lot of potential in convincing the French that Norway is easy to get to and that it has opportunities to do outdoor activities.

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

The Brits that it is easy to travel to Norway, and that Norway offers a lot of cultural experiences.
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

Impact on probability of going to Norway (standardized correlation coefficient on axis)

The perception of Norway offering a lot of cultural experiences and easy to get to has great effect on the Germans

RUSSIA

Impact on probability of going to Norway (standardized correlation coefficient on axis)

Branding Norway as a place with a lot of cultural experiences is the only significant factor for Swedish tourists

SWEDEN

Impact on probability of going to Norway (standardized correlation coefficient on axis)

In Norway the fact that it is easy to plan and travel in Norway is the driver with most potential. There is potential in convincing people that there are exciting cultural experiences.

NORWAY

Impact on probability of going to Norway (standardized correlation coefficient on axis)

How much do the target group agree

Travel to Norway

Impressive nature

Possible to do outdoor activities

Cultural experiences
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?

<table>
<thead>
<tr>
<th>The competing holiday destinations</th>
<th>UK</th>
<th>Denmark</th>
<th>Netherlands</th>
<th>France</th>
<th>Germany</th>
<th>Norway</th>
<th>Russia</th>
<th>Sweden</th>
<th>Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Finland</td>
<td>2 %</td>
<td>1 %</td>
<td>3 %</td>
<td>4 %</td>
<td>3 %</td>
<td>2 %</td>
<td>13 %</td>
<td>5 %</td>
<td>4 %</td>
</tr>
<tr>
<td>Iceland</td>
<td>7 %</td>
<td>9 %</td>
<td>5 %</td>
<td>9 %</td>
<td>4 %</td>
<td>10 %</td>
<td>6 %</td>
<td>7 %</td>
<td>7 %</td>
</tr>
<tr>
<td>Canada</td>
<td>12 %</td>
<td>4 %</td>
<td>5 %</td>
<td>14 %</td>
<td>7 %</td>
<td>2 %</td>
<td>3 %</td>
<td>2 %</td>
<td>6 %</td>
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<tr>
<td>Alaska</td>
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<td>1 %</td>
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<tr>
<td>New Zealand</td>
<td>12 %</td>
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<td>Germany</td>
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<td>France</td>
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<td>Italy</td>
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<tr>
<td>Scotland</td>
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<td>11 %</td>
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<td>5 %</td>
<td>3 %</td>
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<tr>
<td>Norway</td>
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<td>19 %</td>
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<td>Austria</td>
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<td>Sweden</td>
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<tr>
<td>Denmark</td>
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<td>Switzerland</td>
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<td>7 %</td>
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<td>5 %</td>
</tr>
</tbody>
</table>

Norways SOV is largest in Norway and Denmark, while lowest in the UK
Can you remember having seen any advertisements for countries as holiday destinations in the past month?

The SOVs tend to be quite stable in most countries. However, in Sweden it is more volatile and peaks during winter campaigns.