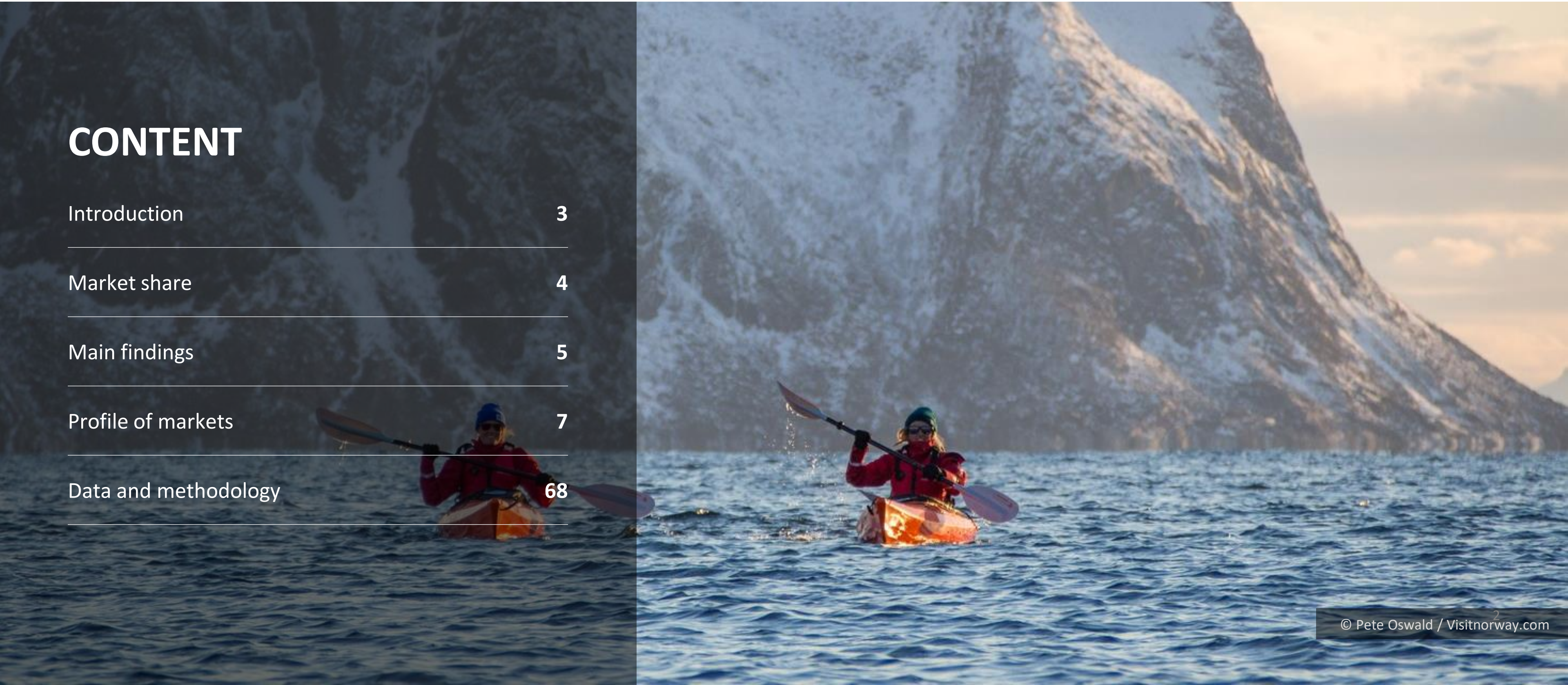
Innovasjon Norge

EPINION

NORWAY'S POSITION AS A HOLIDAY DESTINATION - 2018

INNNOVASJON NORGE

CONTENT



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INTRODUCTION

BACKGROUND

This publication looks into Norway's brand as a holiday destination in the seven European markets that are included in the ongoing Innovasjon Norge tracking. The purpose is to provide an overview of Innovasjon Norge's target groups in the different countries. Who are they? What are their travel habits? How do they perceive Norway as a holiday destination? What can be done in order to convince them that Norway is worth visiting?

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

DATA AND READING GUIDELINES

The results are based on data from the year 2018, collected from the ongoing Innovasjon Norge tracking in seven European countries: Norway, Sweden, Denmark, England, Germany, France and Netherlands. In some charts, the development is displayed, in which case there is drawn upon earlier year's data – earliest being from October 2012.

On some pages, the countries are compared to an average. This is the average for all foreign markets except the country in question. For example, the results of 'England' are compared to the average of the result from Sweden, Denmark, Germany, France and the Netherlands. This also means that Norway is compared to an average for the six foreign markets.

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MARKET SHARE

This map provides an overview of the size of the four main target groups across the seven countries that Innovasjon Norge is tracking. Generally the Nature target group is the largest in all foreign markets, however, as can be seen, this is very much due to the size of the culturally motivated group, which itself hovers around a share of 50-60% of active holiday travelers. Northern light and Alpine are the two smallest target groups with market shares ranging from 25-50%.

DEFINITION OF TARGET GROUPS

The target groups are defined as active travelers who would travel abroad in order to have certain experiences. For the select experiences associated with each target group, see the table below.

Nature	*Dramatic and wild nature, and beautiful scenery, Hiking, Fishing, Cycling, Local art, culture and lifestyles, Clean and unspoiled nature*
Northern Light	*Outdoor activities such as going dog sledding, staying in an ice hotel or seeing the northern lights, Alpine skiing, Snowboarding, Cross-country skiing*
Alpine	*Alpine skiing, Snowboarding, Cross-country skiing*
Culture	*Local art, culture and lifestyles*

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NORWAY

Nature: 82%
Northern light : 46%
Alpine: 32%
Culture: 63%

SWEDEN

Nature: 69%
Northern light : 32%
Alpine: 21%
Culture: 56%

DENMARK

Nature: 65%
Northern light : 25%
Alpine: 16%
Culture: 54%

ENGLAND

Nature: 74%
Northern light: 56%
Alpine: 31%
Culture: 60%

NETHERLAND

Nature: 68%
Northern light : 33%
Alpine: 19%
Culture: 57%

FRANCE

Nature: 63%
Northern light : 48%
Alpine: 30%
Culture: 51%

GERMANY

Nature: 68%
Northern light : 36%
Alpine: 23%
Culture: 57%

MAIN FINDINGS

ENGLAND, DENMARK, NETHERLANDS AND FRANCE

		ENGLAND	DENMARK	NETHERLANDS	FRANCE
TARGET GROUP		About four out of ten are **between 36 and 55 years old**. More than half has **no children**. They are primarily motivated by **wild unspoiled nature, big cities** and **local art, culture and lifestyles**. Seven out of ten says they are interested in **outdoor activities**.	More than four in ten Danes are **over 56 years old** and three in four have **no children**. They are motivated by **local art, culture and lifestyles** and **big cities**, but overall Less interested in **outdoor activities** compared to average across other foreign markets.	The characteristics of the Dutch is on par with the average across other foreign markets. About a third is **between 18 and 35 years old** and a quarter are **above 56 years old**. They are interested in **big cities, local art, culture and lifestyle and unspoiled nature** They are also more interested in **cycling** than average, but less so in other outdoor activities.	The French group is **travels less often**, is a **little younger** and more often **have no children**. They are motivated by **wild and beautiful scenery, and clean and unspoiled nature** as well as **local art, culture and lifestyle.**. They are motivated by all **Outdoor activities** compared to the average of other markets – including **skiing**, **hiking** and **cycling**.
NORWAYS BRAND	**TOP OF MIND**	Fjords, the northern lights, beautiful scenery, cold, snow,	Nature, skiing, mountains, fjords, expensive, cold	Nature, fjords, mountains, northern lights, snow, cold	Fjords, nature, open wide landscapes, northern lights and beautiful scenery
	BRAND VALUES	+ Spectacular natural scenery + Natural phenomena + Spectacular mountains + New and interesting experiences ÷ Wide variety of ski in ski out ÷ Less crowded skiing destinations ÷ Good cycling ÷ Good angling	+ Spectacular natural scenery + Spectacular mountains + Spectacular fjords + Hiking ÷ Good cycling ÷ Sustainable alternatives ÷ 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 ÷ Attractive offers for a holiday ÷ Wide selection of slopes ÷ 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 5% - 9% over 2018, 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 14% in 2018. It is especially high in the winter and months and in the it falls below that of more traditional summer holiday destinations.	Norway's SoV is fairly steady throughout the year being 7% - 10% in most months of 2018. Norway is thus well ahead of the other Nordic countries.	Norway's SoV ranges between 7% and 11% in 2018. The SoV is very stable across the whole year and barely changes.

MAIN FINDINGS

GERMANY, NORWAY AND SWEDEN

		GERMANY	NORWAY	SWEDEN
TARGET GROUP		Almost half of the German group is **between 36-55 years old**. They **travel slightly less often** than other foreign markets, but are **more likely to visit Norway**. Their motivation is primarily in **wild, clean and unspoiled nature** and **local art, culture and lifestyle**. They are more motivated by **hiking**, **cycling** and **nature** than the other markets.	Nine of out ten Norwegians have had a holiday in Norway or abroad **more than 3 times** in the past 3 years. They are motivated by experiencing **big cities, local art, culture and lifestyle** and **wild, unspoiled nature.** Compared to foreign markets, they are more motivated by **hiking** and **cross country skiing.**	The Swedish target group **travels more often** than other foreign markets. They are also older with half **being over 56 years old**. They are **less likely to visit Norway**, but **has seen more adds** for Norway than other foreign markets.They are primarily motivated by **big cities, local art, culture and lifestyles and wild and beautiful scenery.**
NORWAYS BRAND	TOP OF MIND	Fjords, beautiful scenery,untouched nature, the northern lights and landscapes	Nature, mountains, northern lights, fjords, but also locations such as Lofoten, Nord-Norge, Vestlandet, Sørlandet and Oslo	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 - Wide range of sustainable alternatives - Wide variety of ski in ski out - Attractive offers for a holiday - Less crowded skiing destinations	+ Spectacular natural scenery + Spectacular fjords + 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		Visitors and non-visitors especially disagree that it is easy to plan a trip to Norway and that Norway is easy to get to. Surprisingly, the visitors also evaluate skiing statements a lot higher that non-visitors.	Basically all Norwegians has vacationed in Norway. One could look at the locations in the associations to obtain a picture of where.	Most Swedish vacationers has visited Norway in the past. The ones that hasn't, mainly disagree on whether it is easy to plan a trip to Norway, if the locals are welcoming and if there is interesting culture and history.
SOV		Norway's SoV is at a stable level - between 7%-10% in 2018, outranking both Nordic neighbors of Denmark and Sweden.	Norway's SoV is the second highest in Norway. Denmark's SoV is higher throughout most of 2016. While Norway's SoV is 16%-19% throughout the year. This in part due to the measure of SoV domestically, so in reality Norway's share might be higher.	Norway's SoV in Sweden is very stable at 9% to 10%. Norway's SoV is ranking in the top half of all countries, but still outranked by Denmark, Sweden, Italy and on par with Germany, France and Iceland.

ENGLAND

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CHARACTERISTICS OF THE ENGLISH TARGET GROUP

The infographic below describes the characteristics of the English target group compared to the average of the remaining five foreign markets. The English target group is generally younger, more often children families and more likely to visit Norway. However, fewer has seen adds for Norway. They mainly associate Norway with the fjords, the northern lights, a beautiful scenery but being cold and snowy place to visit.

DEMOGRAPHIC CHARACTERISTICS

England target group / Average (foreign markets)

52% / 52%
Women

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

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

56% / 67%
No children

21% / 16%
1 child

22% / 17%
2 or more children

35% / 29%
18-35 years old

44% / 39%
36-55 years

21% / 33%
56 years or older

15,2 / 14,3
Average years of education

46 000 – 57 000 EUR
Median income

ASSOCIATIONS TO NORWAY

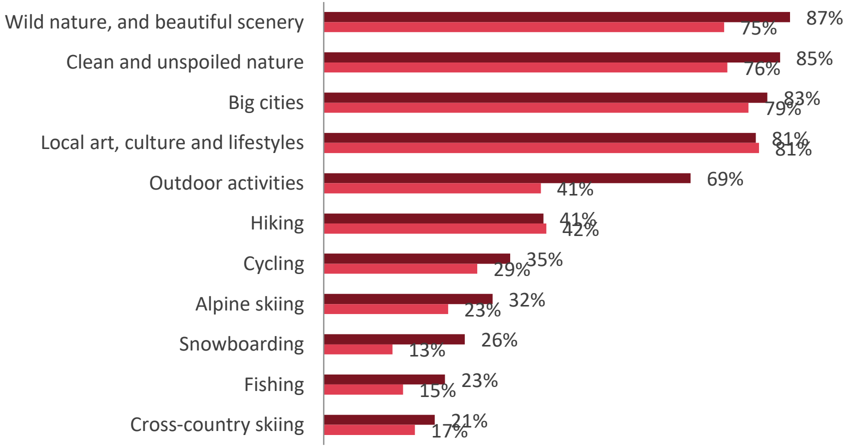
(N=5257)

PROBABILITY FOR VISIT AND RECALL

5,7 / 4,8
Likely to visit Norway within 12 months

14% / 23%
Remember seeing an add for Norway

MOTIVATION FOR TRAVEL ON HOLIDAY ABROAD

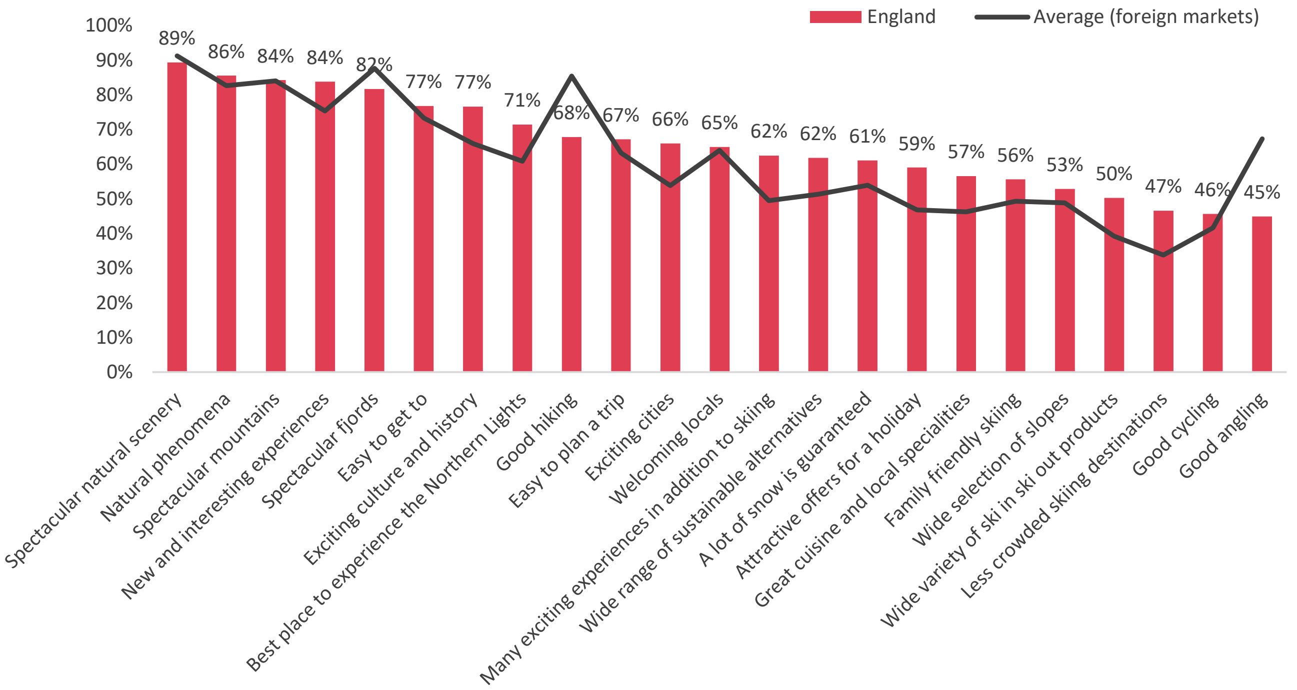


HOW THE ENGLISH TARGET GROUP SEES NORWAY

BRAND TARGETS

The chart on the right shows the percentage that agrees or strongly agrees that the brand characterize Norway. The bars display the percentage in England that agrees and the red line show the average across the remaining foreign markets (Norway excluded).

The English market tends to agree that the brands characterize Norway, to a higher degree than the foreign markets. This is especially true for the brands of ‘Exciting culture and History’, ’Best place to experience Northern lights’, ‘Exciting cities’ among others. The only two significant outliers are the brands of ‘Good hiking’ and ‘Good angling’.

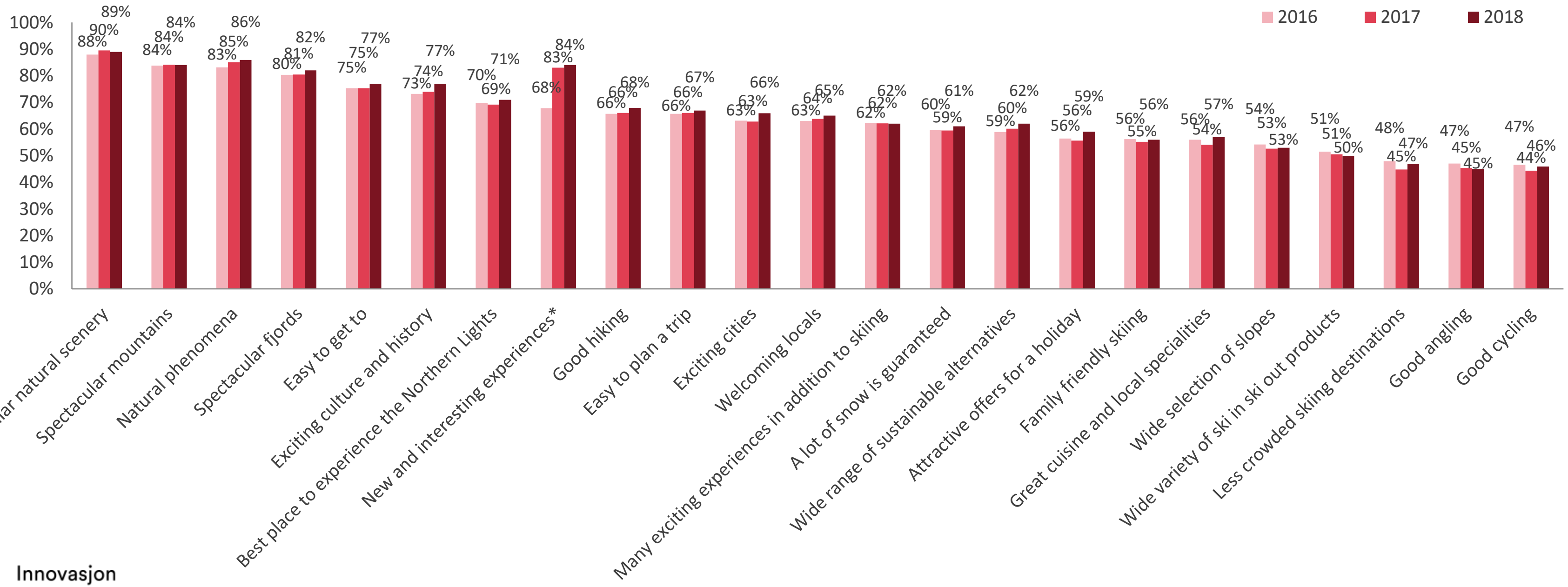


(N=5257)

DEVELOPMENT IN BRAND TARGETS 2016 TO 2018

The chart shows the share that agrees or strongly agrees with the brand statements about Norway and their development from 2016 to 2018. As can be seen there is very little change from 2016 to 2018, but there is however a small trend that most brand statements are on the rise. This indicates a lot of consistency and potential positive trend in the English target group's view of holidaying Norway.

DEVELOPMENT I BRAND TARGETS FROM 2016 TO 2018



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

VISITORS AND NON-VISITORS

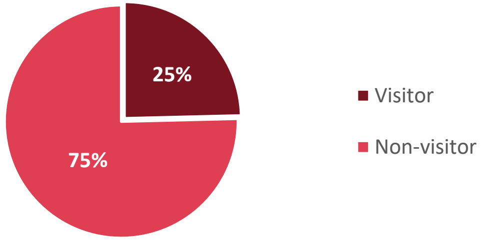
The circle diagram illustrates that a quarter of the active tourists in the English target group have visited Norway before.

The bar chart shows the difference in perception of Norway, between the people in the target group that have visited Norway before and the people in the target group who have not visited Norway before. In other words, these are brands on which Norway outperforms the non-visitor's expectations or fail to live up to expectations.

All brands are more positive for the group that have visited Norway the group that have not. This is an indication of great performance for Norway, but also reveals a discrepancy in perception of Norway and actual holiday in Norway.

It is especially 'Welcoming locals' and 'Easy to plan a trip' that are evaluated more highly.

ENGLISH TARGET GROUP WHO HAVE VISITED NORWAY



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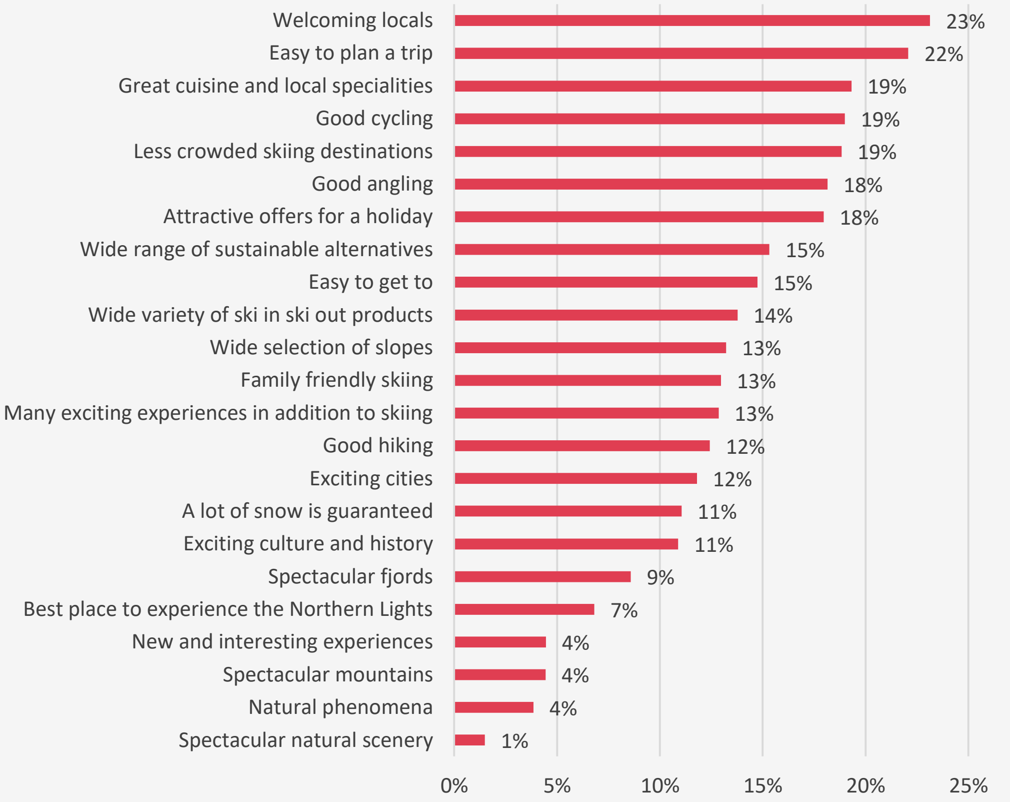
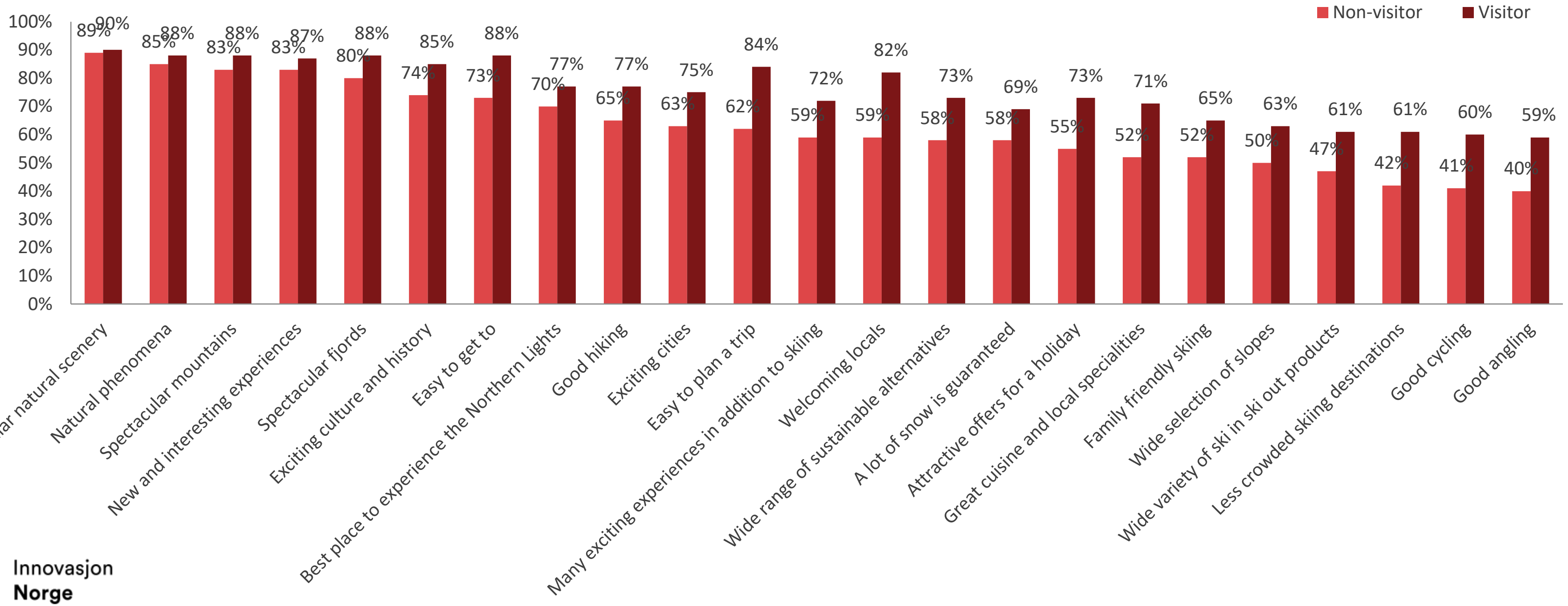
DIFFERENCE BETWEEN PERCENTAGE VISITORS THAT AGREE AND PERCENTAGE NON-VISITORS THAT AGREE



SHARE OF VISITORS AGREEING WITH BRAND STATEMENTS

This figure shows the percentage that agrees or strongly agrees with the brand statements by visitors and non-visitors. The previous page showed what set the groups apart, while this page shows the absolute percentage of agreement for both groups.

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



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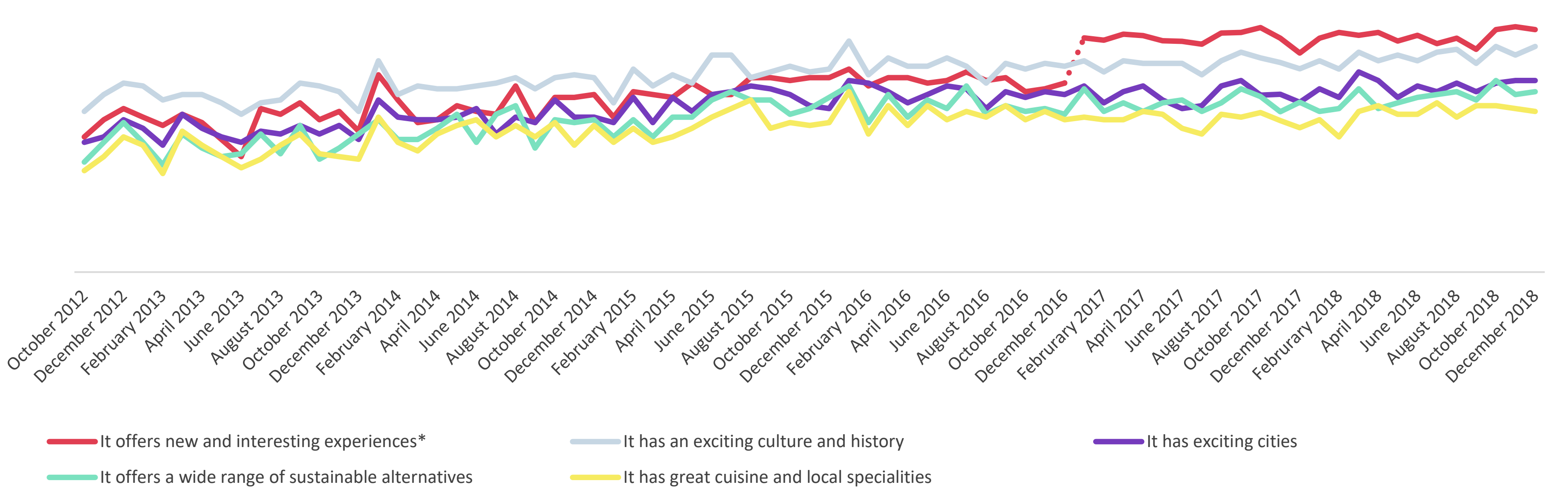
DEVELOPMENT IN KEY BRAND TARGETS SINCE 2012

The development since the beginning of the tracking is displayed the line chart across key performance brand indicators. For all five brand targets 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



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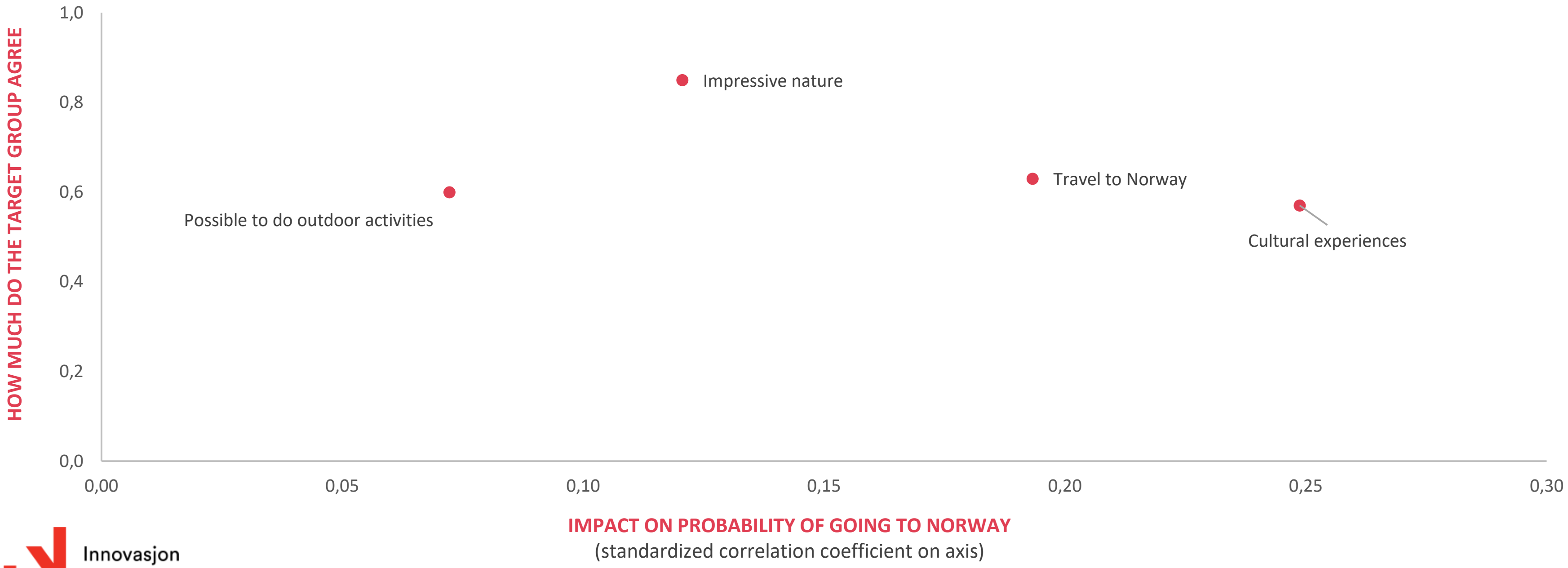
*Question wording until the end of 2016 was :"It offers experiences that you cannot find anywhere else in the world"

DRIVERS FOR THE PROBABILITY TO VISIT NORWAY

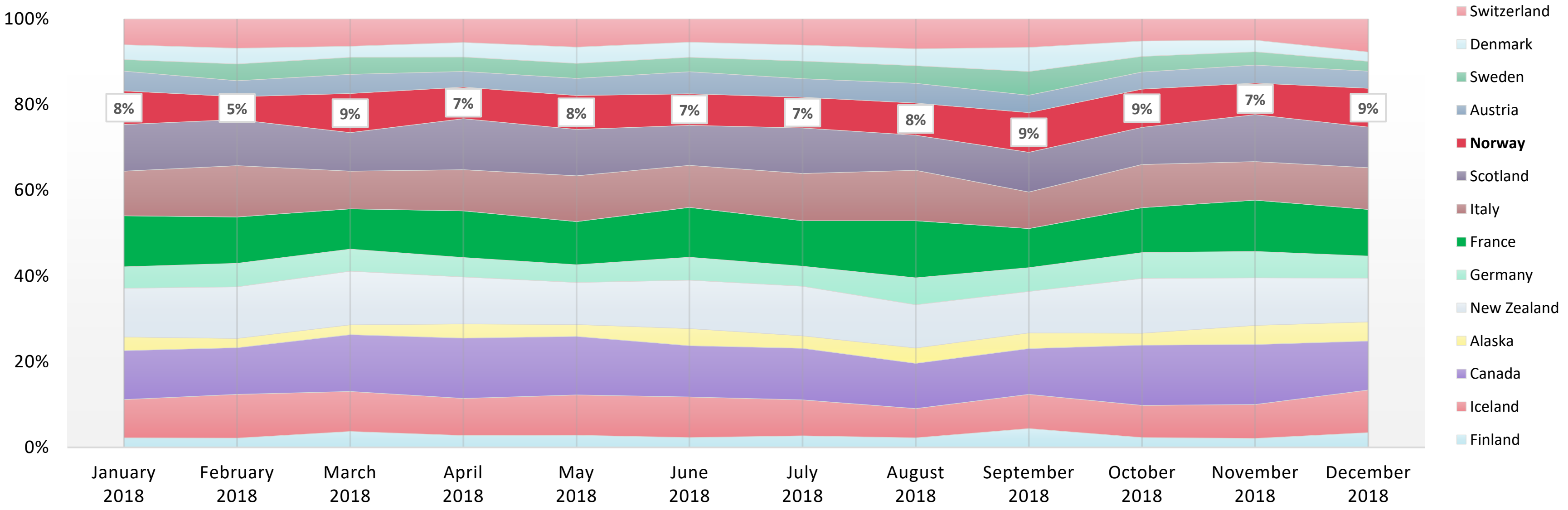
Grouping the branding targets into five dimensions (see explanation on page 56) reveals an interesting pattern. In the chart the dimensions that appear, are the ones that have a statistically significant impact on the probability of visiting Norway. The vertical axis plots how many on average agree or strongly agree with the branding dimension, while the horizontal axis showed the standardized impact on the probability of visiting Norway. The results show 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. Since this also has the lowest share of agreement, it should be prioritized as a area of improvement for the English market.



SHARE OF VOICE IN ENGLAND

Below is an illustration of the development of Norway's Share of Voice in months of 2018 in England compared with the Share of Voice for other markets. On average Norway has a decent share of the total voice, ranking in the top half of all countries. Across the months Norway's share is basically constant, which is an indication of a strong and stable holiday brand.

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



DENMARK

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CHARACTERISTICS OF THE DANISH TARGET GROUP

The infographic below describes the characteristics of the Danish target group compared to the average of the remaining five foreign markets. The Danish target group is generally older, more often has no children and are generally less likely to visit Norway than other foreign markets. However, more has seen adds for Norway. They mainly associate Norway with Nature, Skiing, Mountains and fjords, but also expensive and cold.

DEMOGRAPHIC CHARACTERISTICS

England target group / Average (foreign markets)

51% / 52%
Women

35% / 40%
1-2 travels abroad in the past 3 years

65% / 60%
3 or more travels abroad in the past 3 years

76% / 63%
No children

11% / 18%
1 child

12% / 19%
2 or more children

35% / 29%
18-35 years old

24% / 43%
36-55 years

42% / 29%
56 years or older

13,8 / 14,6
Average years of education

67 000 – 80 000 EUR
Median income

ASSOCIATIONS TO NORWAY

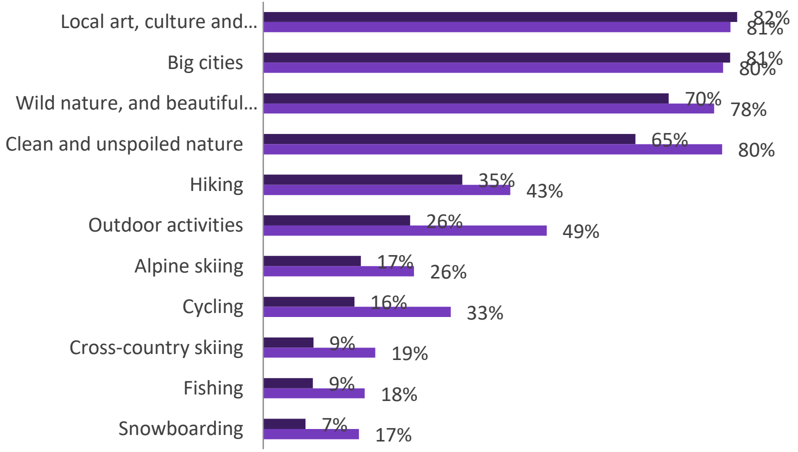
(N=5368)

PROBABILITY FOR VISIT AND RECALL

4,1 / 5,1
Likely to visit Norway within 12 months

25% / 20%
Remember seeing an add for Norway

MOTIVATION FOR TRAVEL ON HOLIDAY ABROAD

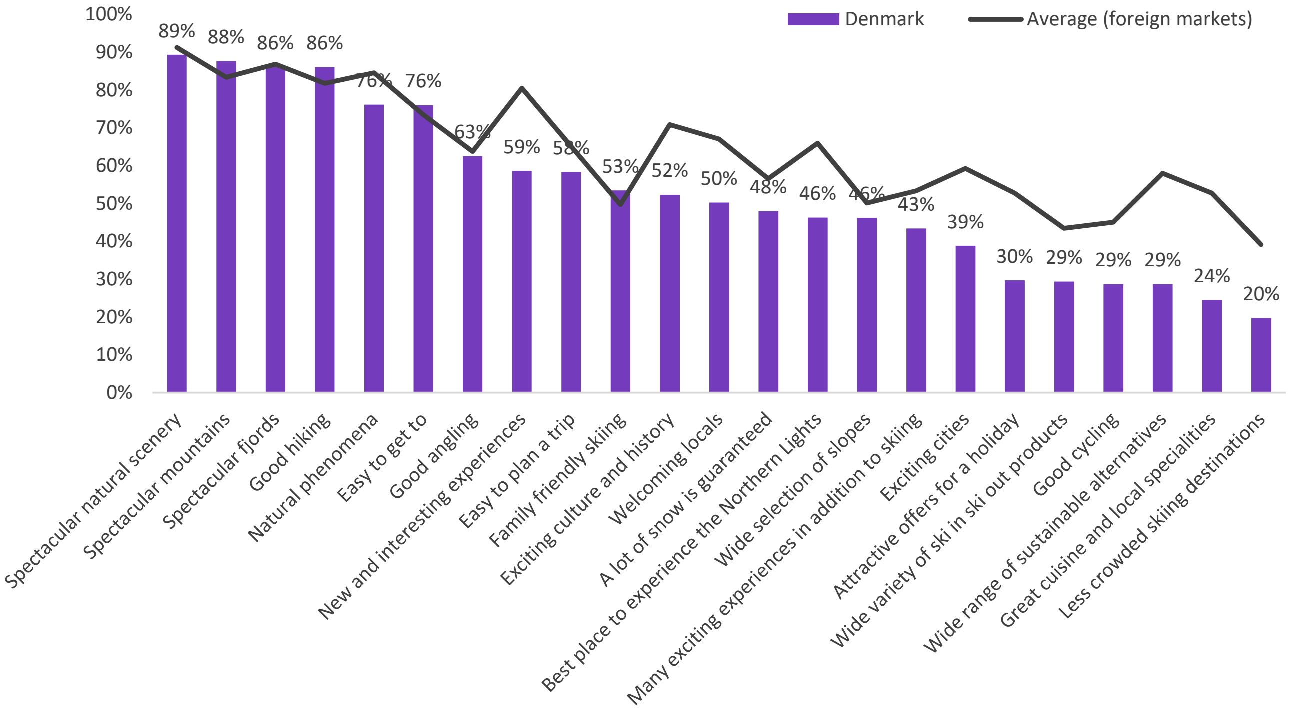


HOW THE DANISH TARGET GROUP SEES NORWAY

BRAND TARGETS

The chart on the right shows the percentage that agrees or strongly agrees that the brand characterize Norway. The bars display the percentage in Denmark that agrees and the red line show the average across the remaining foreign markets (Norway excluded).

The Danish market tends to agree less than other foreign markets, that the brands characterize Norway. Among the top four brands there is no difference, however it is clear that anything below is generally rated lower than foreign markets – maximum difference being ‘Great cuisine’ and ‘Sustainable alternatives’.



N=5368

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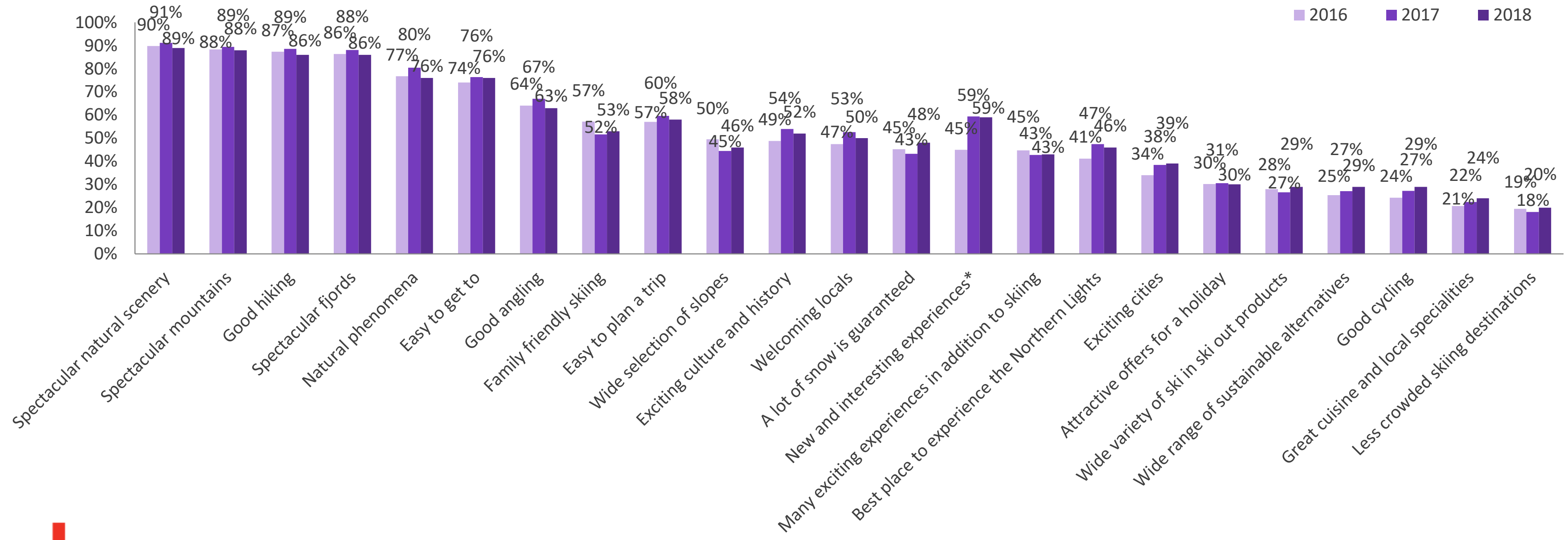

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**Question wording until the end of 2016 was :"It offers experiences that you cannot find anywhere else in the world"*

VISITORS AND NON-VISITORS

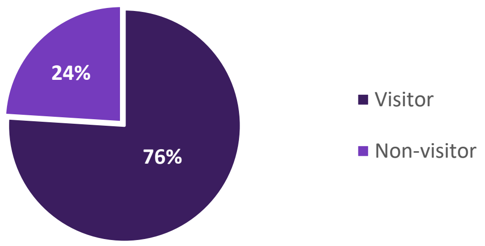
The circle diagram illustrates that three quarters of the active tourists in the Danish target group have visited Norway before.

The bar chart shows the difference in perception of Norway, between the people in the target group that have visited Norway before and the people in the target group who have not visited Norway before. In other words, these are brands on which Norway outperforms the non-visitor's expectations or fail to live up to expectations.

All brands are more positive for the group that have visited Norway the group that have not. This is an indication of great performance for Norway, but also reveals a discrepancy in perception of Norway and actual holiday in Norway.

It is especially 'Welcoming locals', 'Spectacular fjords' and 'Easy to plan a trip' that are evaluated more highly amongst visitors.

DANISH TARGET GROUP WHO HAVE VISITED NORWAY



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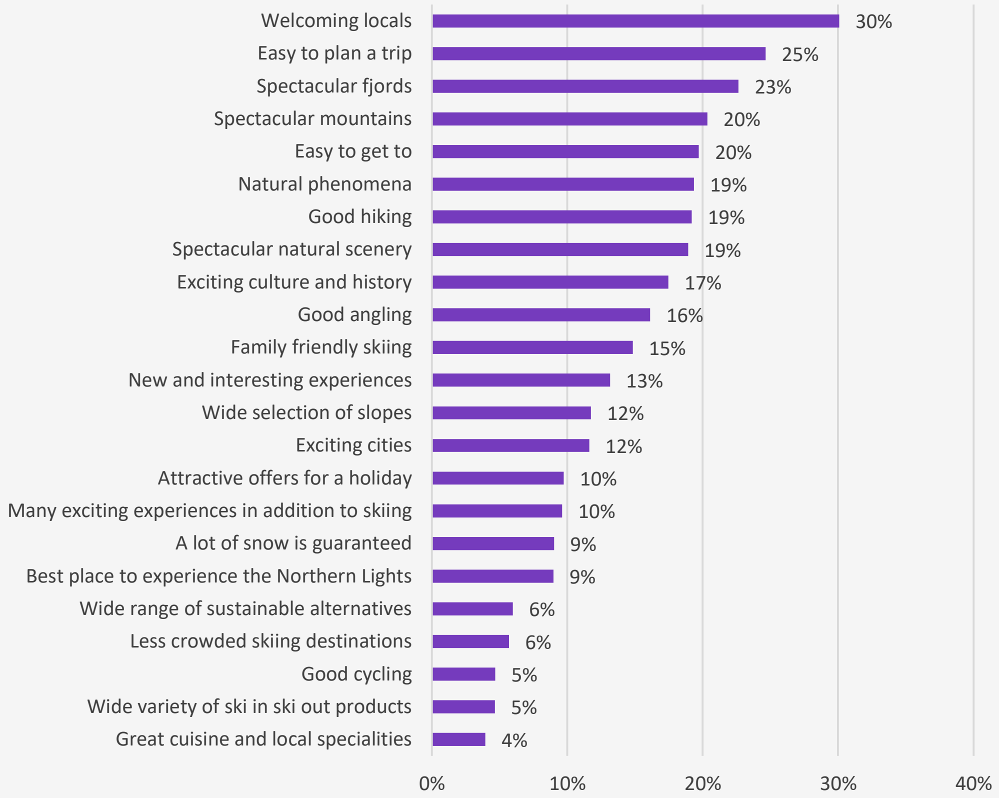
DIFFERENCE BETWEEN PERCENTAGE VISITORS THAT AGREE AND PERCENTAGE NON-VISITORS THAT AGREE



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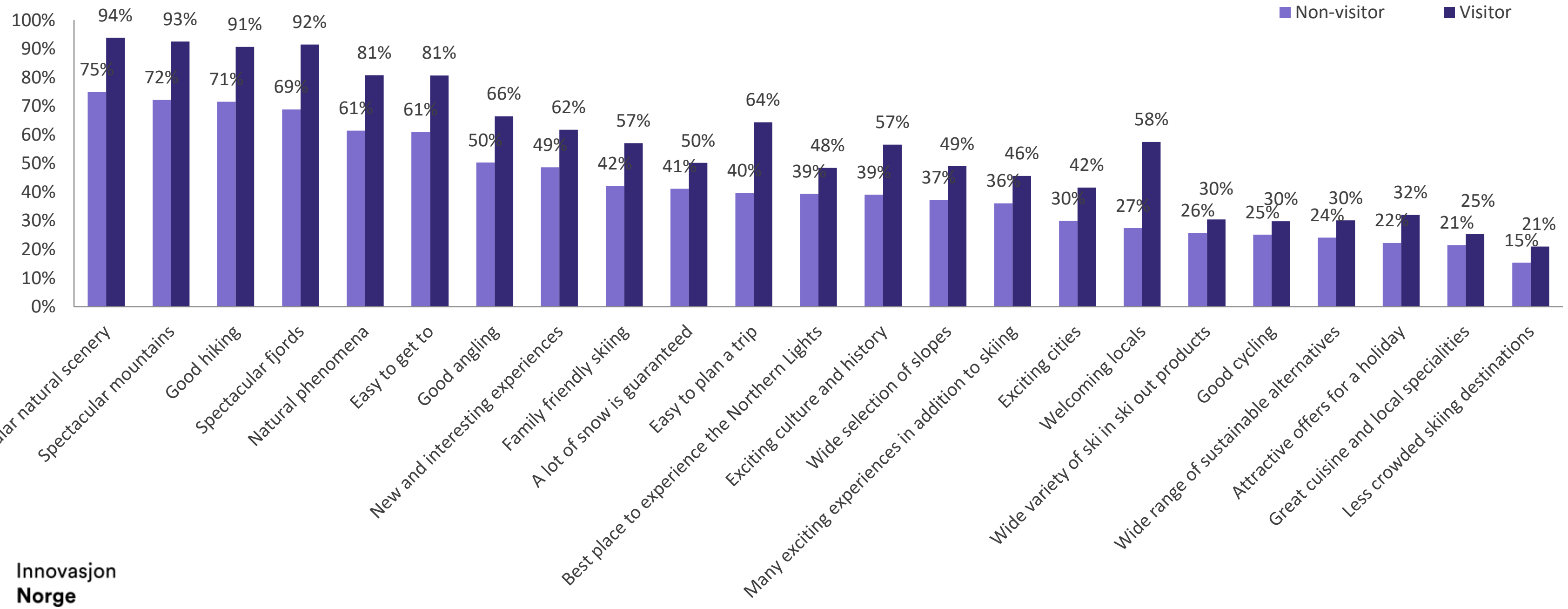

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DEVELOPMENT IN KEY BRAND TARGETS SINCE 2012

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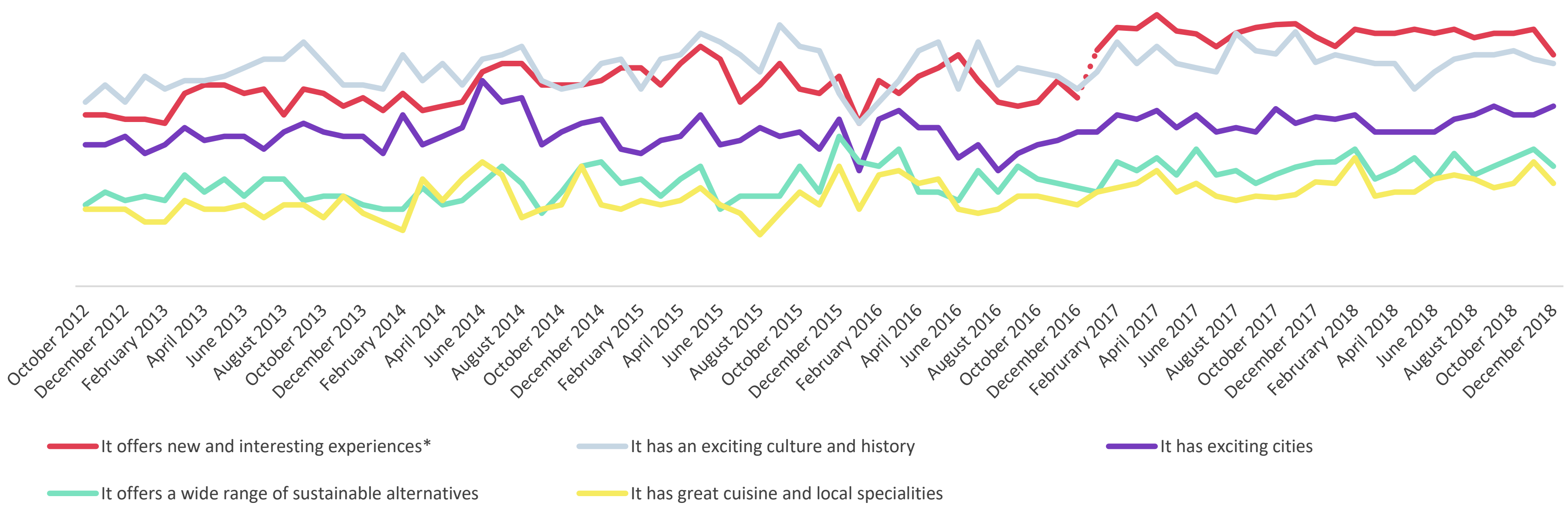
DEVELOPMENT IN KEY INDICATORS



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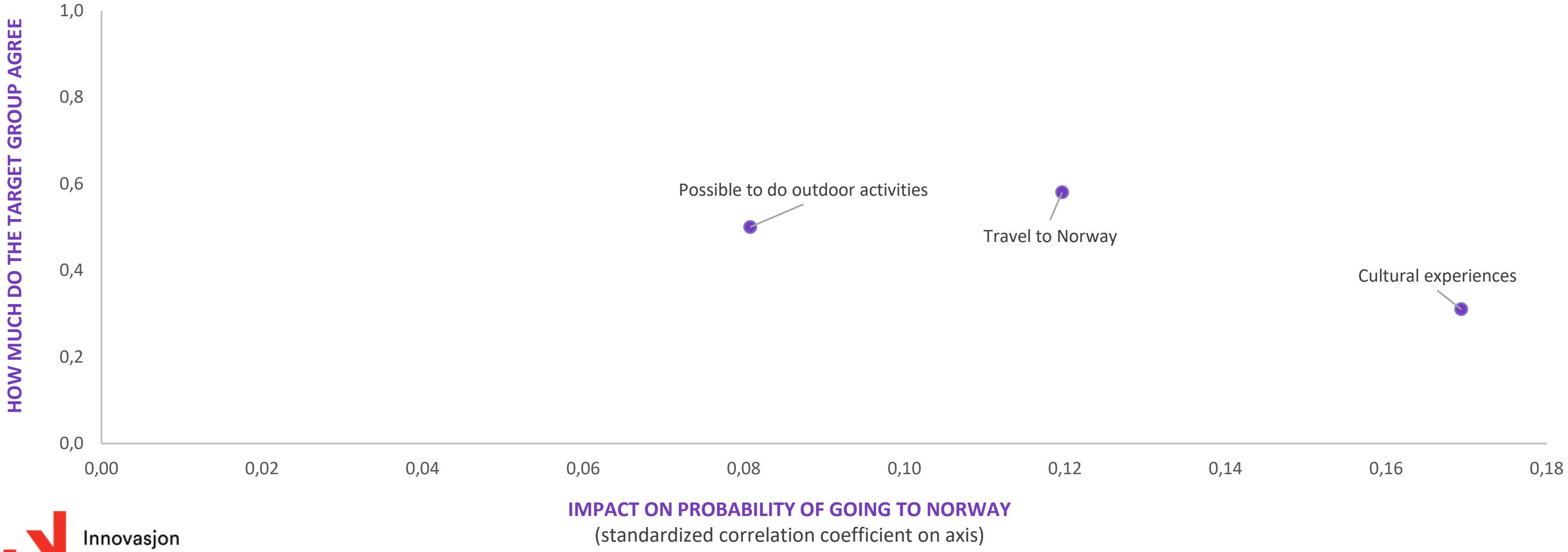
**Question wording until the end of 2016 was :"It offers experiences that you cannot find anywhere else in the world"*

DRIVERS FOR THE PROBABILITY TO VISIT NORWAY

Grouping the branding targets into five dimensions (see explanation on page 56) reveals an interesting pattern. In the chart the dimensions that appear, are the ones that have a statistically significant impact on the probability of visiting Norway. The vertical axis plots how many on average agree or strongly agree with the branding dimension, while the horizontal axis showed the standardized impact on the probability of visiting Norway. The results show that a large share of the target group agrees that it is easy to travel to Norway and it is possible to do outdoor activities. However, the lowest share is Norway as a destination for cultural experiences , but it has the highest impact on the probability of going to Norway. It should be prioritized as a area of improvement for the Danish market.



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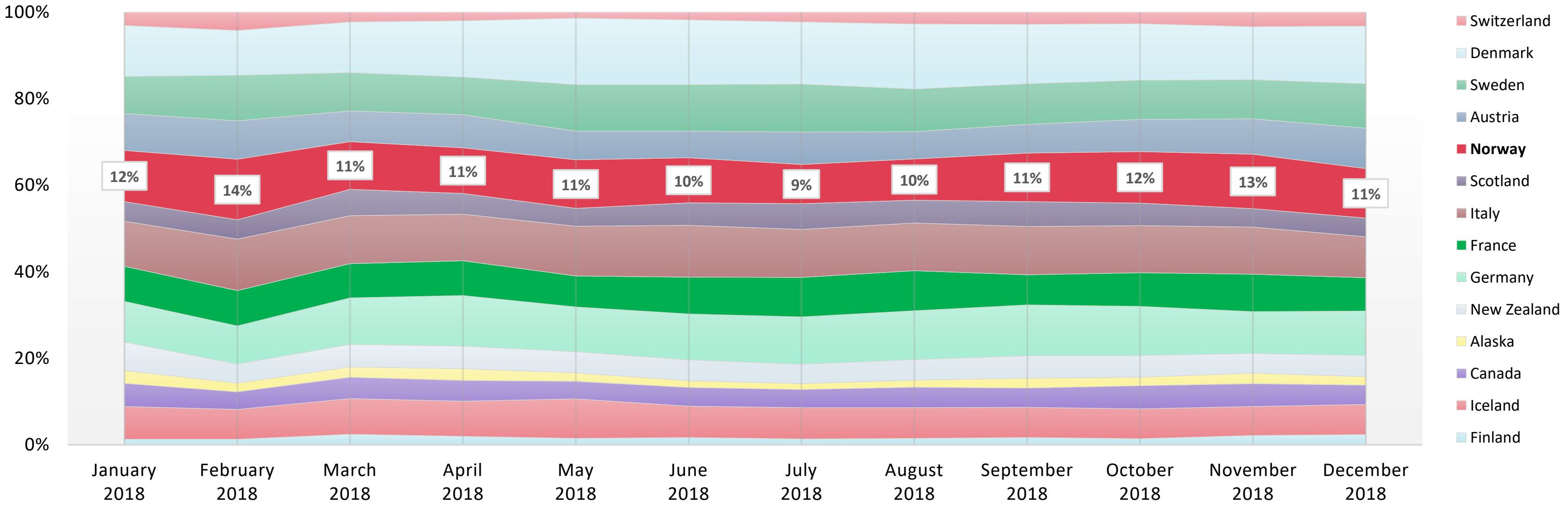
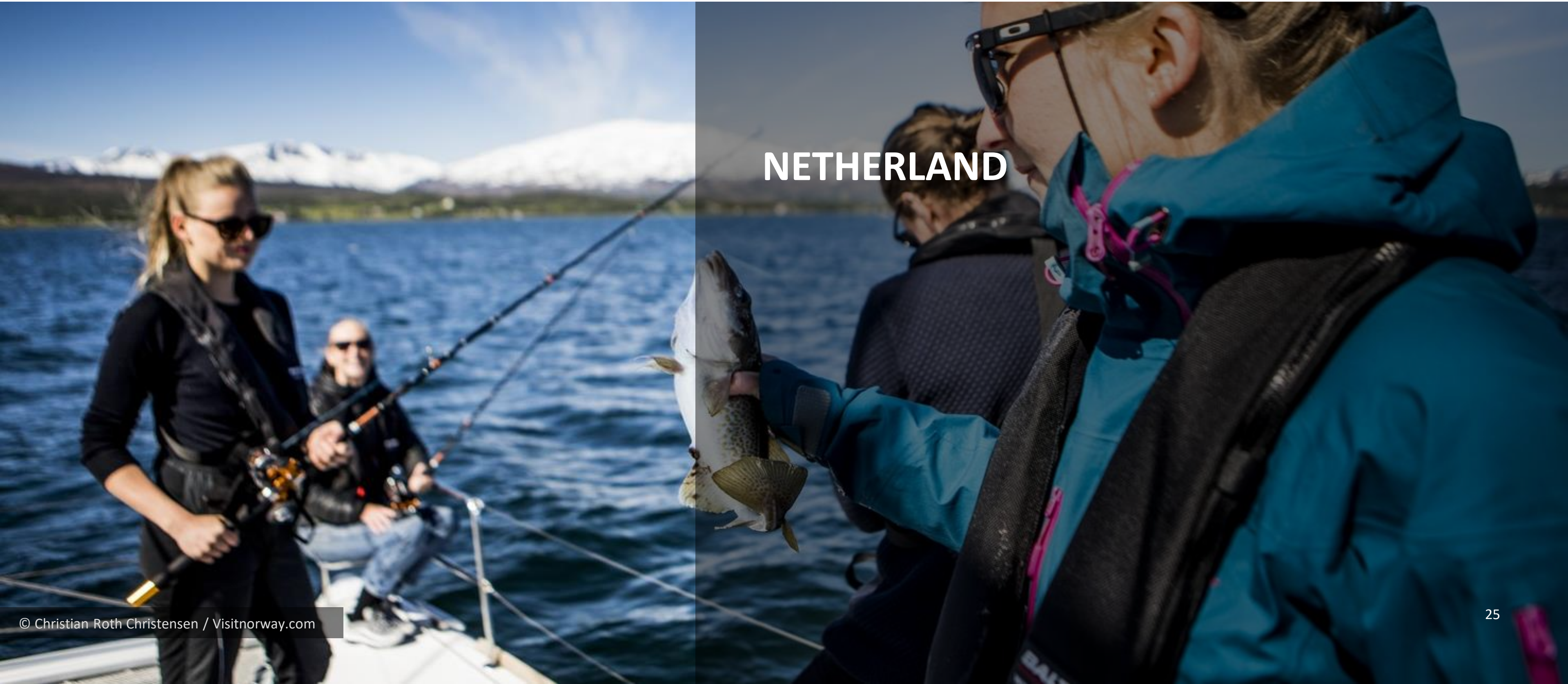
SHARE OF VOICE IN DENMARK

Below is an illustration of the development of Norway's Share of Voice in months of 2018 in Denmark compared with the Share of Voice for other markets. On average Norway has a decent share of the total voice, ranking in the top five amongst of all countries. Across the months Norway's share is largely constant, but with a small but notable increase in February 2018. Generally this is an indication of a strong and stable holiday brand.

DEVELOPMENT IN SHARE OF VOICE IN DENMARK COMPARED TO OTHER COUNTRIES



NETHERLAND



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CHARACTERISTICS OF THE DUTCH TARGET GROUP

The infographic below describes the characteristics of the Dutch target group compared to the average of the remaining five foreign markets. The Dutch target group is generally younger, but has similar trends in relation to having children. They are less likely to visit Norway, but actually sees more adds from Norway than other foreign Markets. They mainly associate Norway with the nature, fjords, northern lights, beautiful landscapes and mountains, but some also mention it being cold and snowy.

DEMOGRAPHIC CHARACTERISTICS

England target group / Average (foreign markets)

51% / 52%
Women

40% / 39%
1-2 travels abroad in the past 3 years

60% / 61%
3 or more travels abroad in the past 3 years

64% / 66%
No children

17% / 16%
1 child

18% / 17%
2 or more children

32% / 29%
18-35 years old

43% / 39%
36-55 years

24% / 32%
56 years or older

15,1 / 14,3
Average years of education

40 000 – 50 000 EUR
Median income

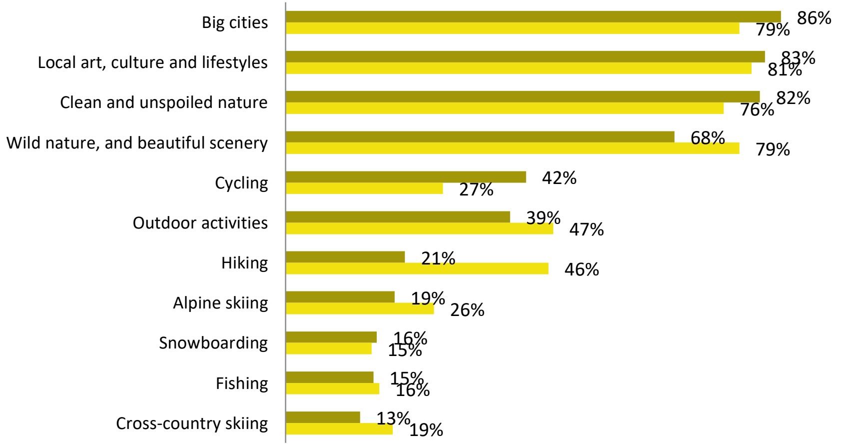
ASSOCIATIONS TO NORWAY

PROBABILITY FOR VISIT AND RECALL

4,7 / 5,1
Likely to visit Norway within 12 months

25% / 20%
Remember seeing an add for Norway

MOTIVATION FOR TRAVEL ON HOLIDAY ABROAD



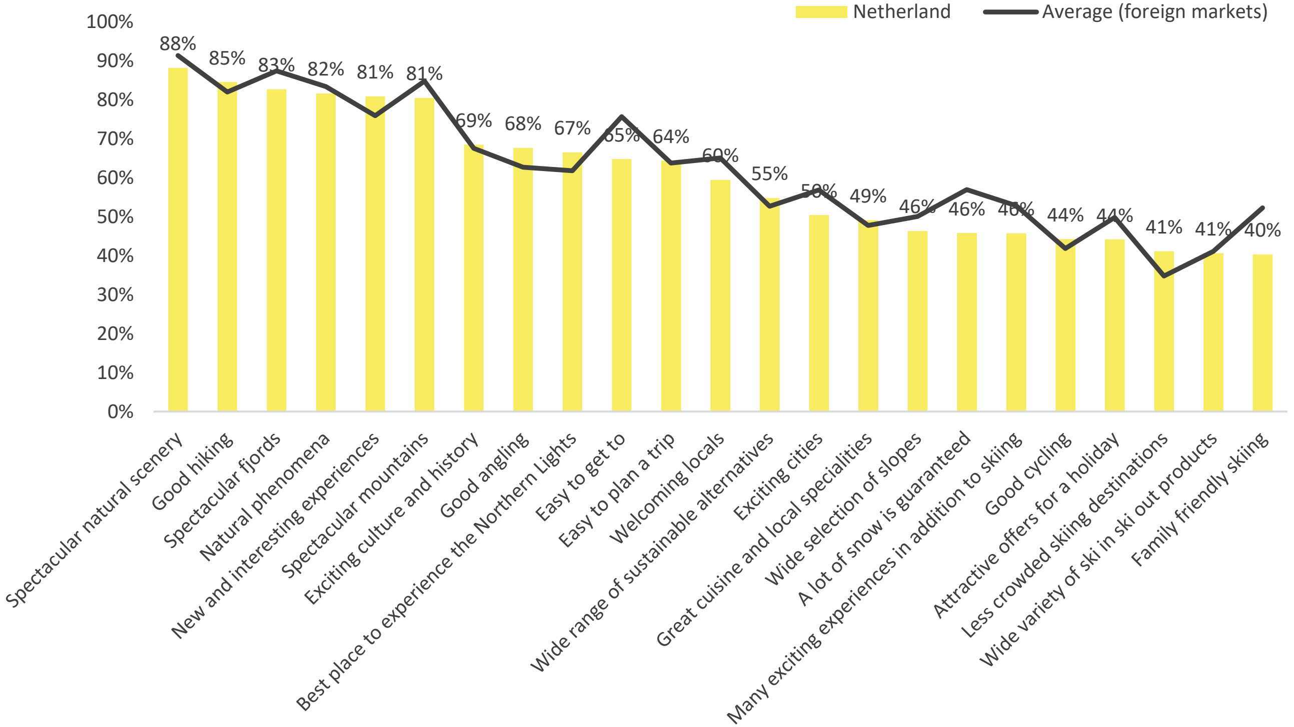
(N=5297)

HOW THE DUTCH TARGET GROUP SEES NORWAY

BRAND TARGETS

The chart on the right shows the precentage that agrees or strongly agrees that the brand characterize Norway. The bars display the percentage in the Netherlands that agrees and the red line show the average across the remaining foreign markets (Norway excluded).

The Dutch market tends to stay around the average rate of agreement amongst foreign markets across most brand values. This only outliers where the average foreign markets agree more than the Dutch, is in relation to the skiing attributes, such as 'Family friendly skiing', 'A lot of snow is guaranteed' and 'Wide selection of slopes'. In contrast though, agreement with 'Angling' and 'Northern lights'seem to be sligtly more prevalent in the Netherlands.

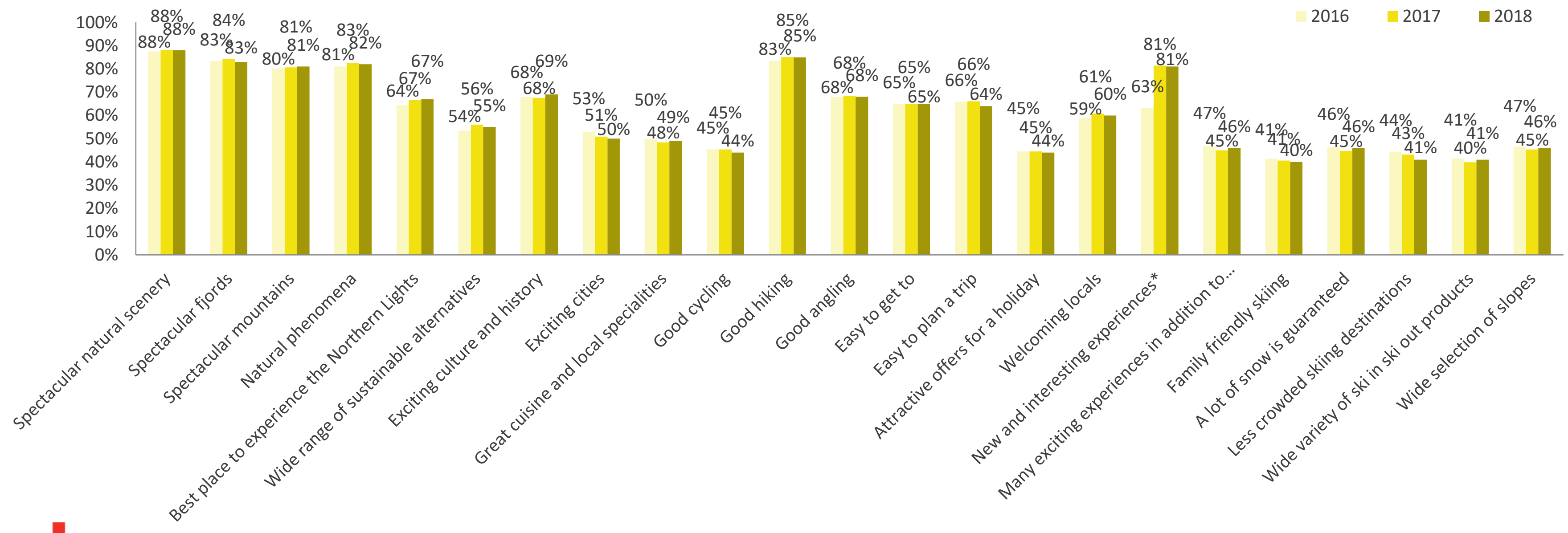


N=5297

DEVELOPMENT IN BRAND TARGETS 2016 TO 2018

The chart shows the share that agrees or strongly agrees with the brand statements about Norway and their development from 2016 to 2018. As can be seen there is very little change from 2016 to 2018, and there’s generally a constant and stable rate of change. This indicates a lot of consistency and stable brand position in the Dutch target group.

DEVELOPMENT I BRAND TARGETS FROM 2016 TO 2018



Innovasjon Norge

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

VISITORS AND NON-VISITORS

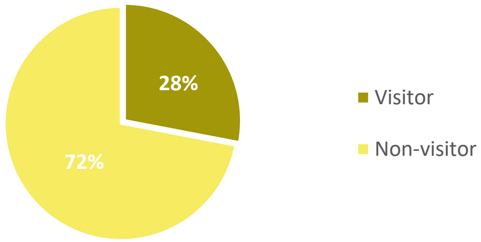
The circle diagram illustrates that more than a quarter of the active tourists in the Dutch target group have visited Norway before.

The bar chart shows the difference in perception of Norway, between the people in the target group that have visited Norway before and the people in the target group who have not visited Norway before. In other words, these are brands on which Norway outperforms the non-visitor's expectations or fail to live up to expectations.

All brands are more positive for the group that have visited Norway the group that have not. This is an indication of great performance for Norway, but also reveals a discrepancy in perception of Norway and actual holiday in Norway.

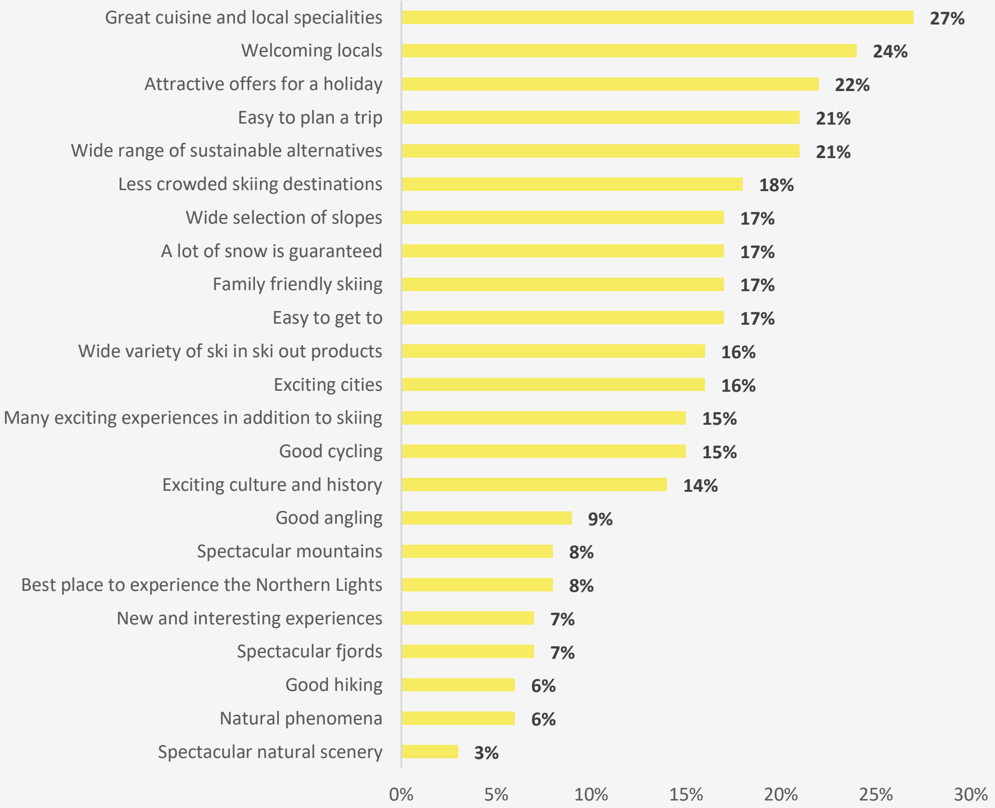
It is especially 'Great cuisine and local specialties', 'Attractive offers for a holiday', 'Welcoming locals' and 'Easy to plan a trip' that are evaluated more highly.

DUTCH TARGET GROUP WHO HAVE VISITED NORWAY



N=5297

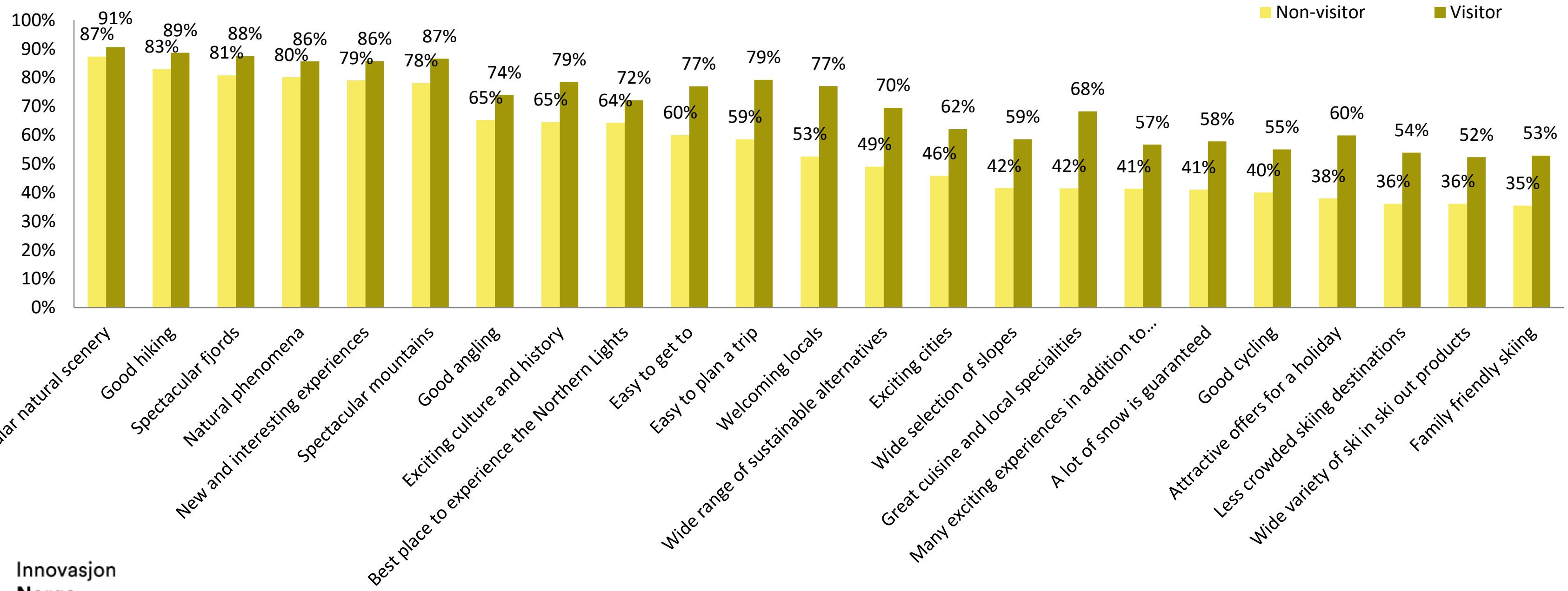
DIFFERENCE BETWEEN PERCENTAGE VISITORS THAT AGREE AND PERCENTAGE NON-VISITORS THAT AGREE



SHARE OF VISITORS AGREEING WITH BRAND STATEMENTS

This figure shows the percentage that agrees or strongly agrees with the brand statements by visitors and non-visitors. The previous page showed what set the groups apart, while this page shows the absolute percentage of agreement for both groups.

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

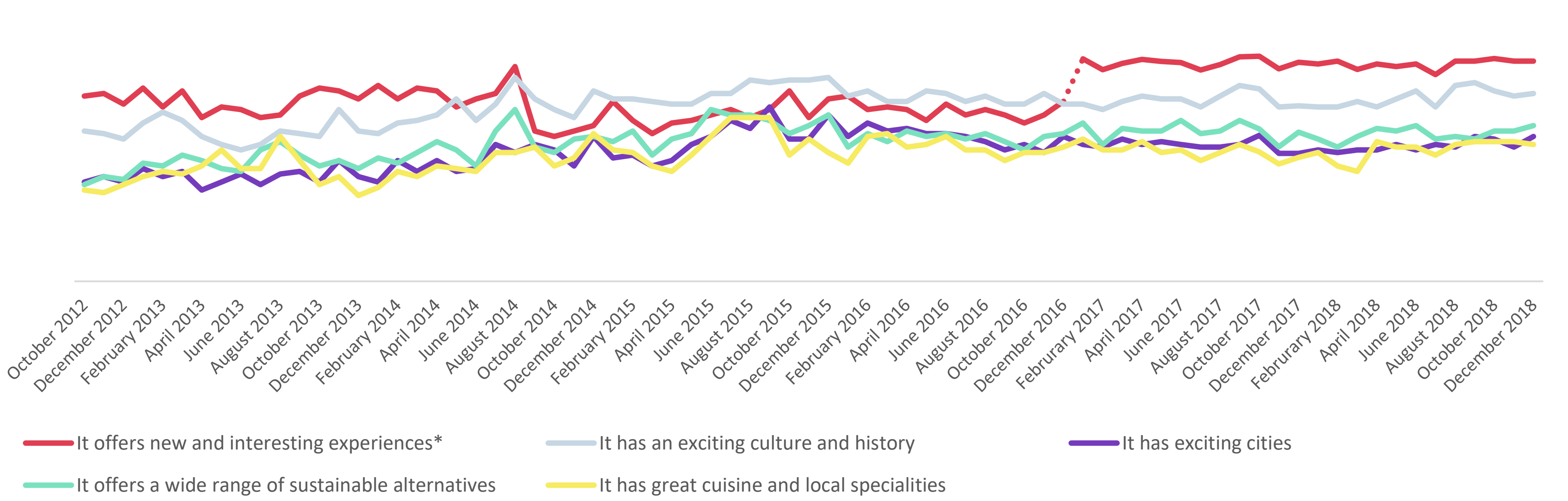


Innovasjon Norge

DEVELOPMENT IN KEY BRAND TARGETS SINCE 2012

The development since the beginning of the tracking is displayed the line chart across key performance brand indicators. For all five brand targets there is a lot of fluctuation early on, but recent years has seen a more stable and consistent constant trend. The performance doesn't fluctuated across the different months.

DEVELOPMENT IN KEY INDICATORS



Innovasjon Norge

*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

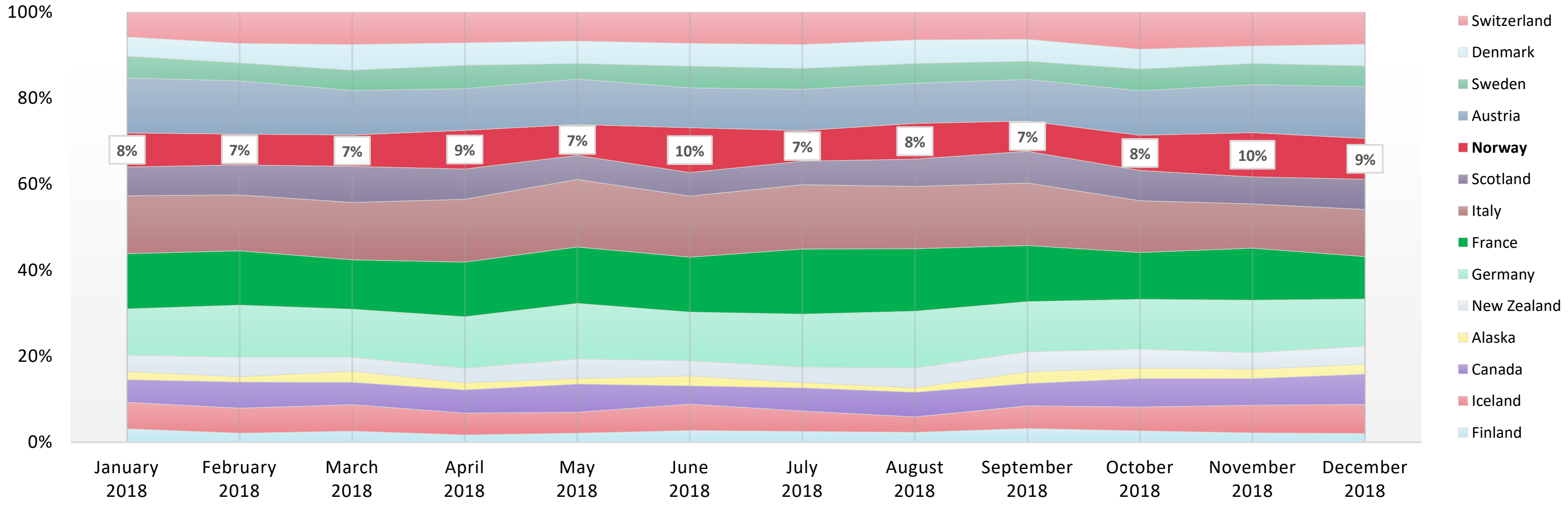
Grouping the branding targets into five dimensions (see explanation on page 56) reveals an interesting pattern. In the chart the dimensions that appear, are the ones that have a statistically significant impact on the probability of visiting Norway. The vertical axis plots how many on average agree or strongly agree with the branding dimension, while the horizontal axis showed the standardized impact on the probability of visiting Norway. The results show 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 and being easy to travel to, have the highest impact on the probability of going to Norway. Since these also rank the lowest on agreement, it should be prioritized as a area of improvement for the Dutch market.

Innovasjon Norge

SHARE OF VOICE IN NETHERLANDS

Below is an illustration of the development of Norway's Share of Voice in months of 2018 in the Netherlands compared with the Share of Voice for other markets. On average Norway has a decent share of the total voice, ranking in the top five countries. Across the months Norway's share is basically constant, though with slight increases in June and November, although the differences are so small it might be noise. Generally, though, Norway seems to be a strong and stable holiday brand in the Netherlands.

DEVELOPMENT IN SHARE OF VOICE IN NETHERLANDS COMPARED TO OTHER COUNTRIES



FRANCE

CHARACTERISTICS OF THE FRENCH TARGET GROUP

The infographic below describes the characteristics of the French target group compared to the average of the remaining five foreign markets. The French target group is generally younger, more often children families and more likely to visit Norway. However, fewer has seen adds for Norway than in other markets. They mainly associate Norway with the fjords, nature, open wide landscapes, the northern lights and being beautiful.

DEMOGRAPHIC CHARACTERISTICS

England target group | Average (foreign markets)

51% / 52%
Women

50% / 37%
1-2 travels abroad in the past 3 years

50% / 63%
3 or more travels abroad in the past 3 years

54% / 67%
No children

21% / 15%
1 child

24% / 16%
2 or more children

34% / 29%
18-35 years old

42% / 39%
36-55 years

24% / 32%
56 years or older

15,0 / 14,3
Average years of education

26 000 – 39 999 EUR
Median income

ASSOCIATIONS TO NORWAY

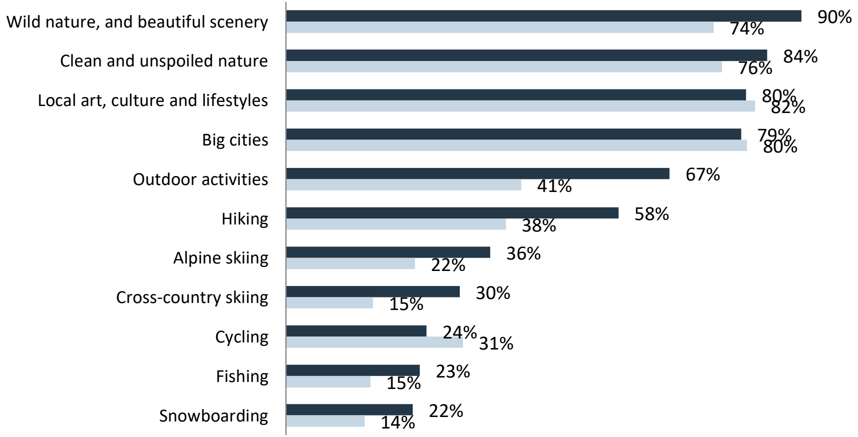
(N=2666)

PROBABILITY FOR VISIT AND RECALL

5,2 / 4,9
Likely to visit Norway within 12 months

19% / 22%
Remember seeing an add for Norway

MOTIVATION FOR TRAVEL ON HOLIDAY ABROAD

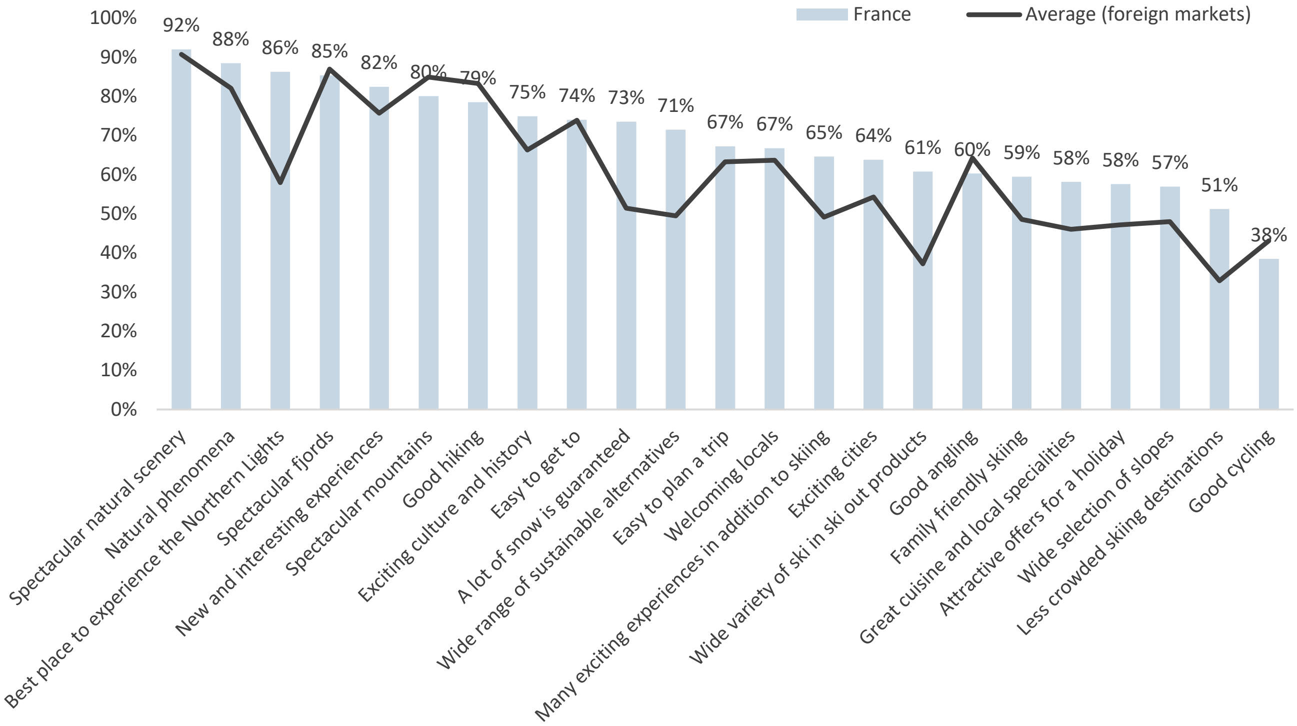


HOW THE FRENCH TARGET GROUP SEES NORWAY

BRAND TARGETS

The chart on the right shows the percentage that agrees or strongly agrees that the brand characterize Norway. The bars display the percentage in France that agrees and the red line show the average across the remaining foreign markets (Norway excluded).

The French market tends to agree that the brands characterize Norway, to a higher degree than the foreign markets. This is especially true for the brands of ’Best place to experience Northern lights’, ‘Natural phenomena’, ‘Guaranteed snow’, ‘Sustainable alternatives’, ‘Exciting cities’, and even brand values related to skiing.

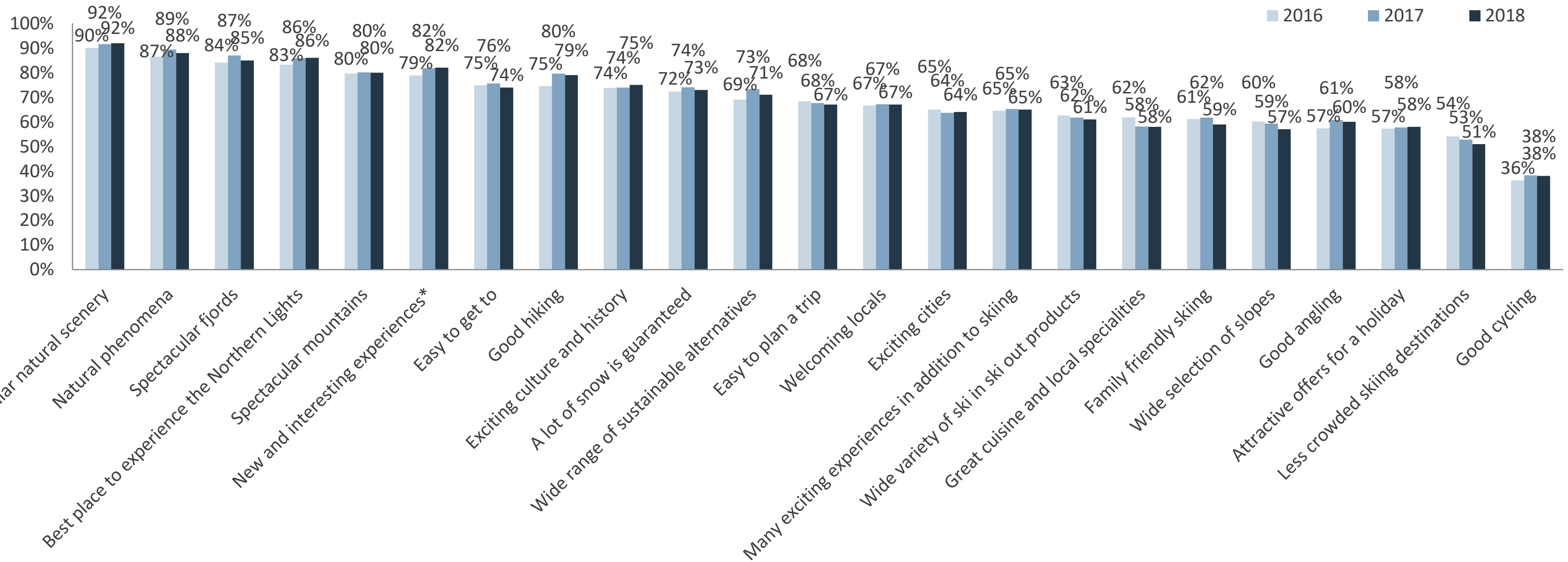


N=2666

DEVELOPMENT IN BRAND TARGETS 2016 TO 2018

The chart shows the share that agrees or strongly agrees with the brand statements about Norway and their development from 2016 to 2018. As can be seen there is very little change from 2016 to 2018, but there is however a small trend that most brand statements are on the rise. This indicates a lot of consistency and potential positive trend in the French target groups view of holidaying Norway.

DEVELOPMENT I BRAND TARGETS FROM 2016 TO 2018



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

Innovasjon Norge

VISITORS AND NON-VISITORS

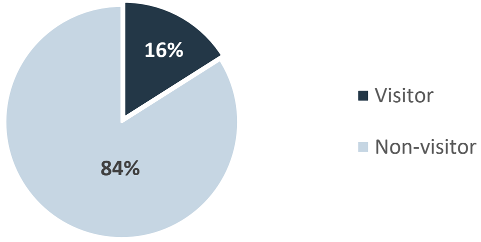
The circle diagram illustrates that only one in six of the active tourists in the French target group have visited Norway before.

The bar chart shows the difference in perception of Norway, between the people in the target group that have visited Norway before and the people in the target group who have not visited Norway before. In other words, these are brands on which Norway outperforms the non-visitor's expectations or fail to live up to expectations.

All brands are more positive for the group that have visited Norway the group that have not. This is an indication of great performance for Norway, but also reveals a discrepancy in perception of Norway and actual holiday in Norway.

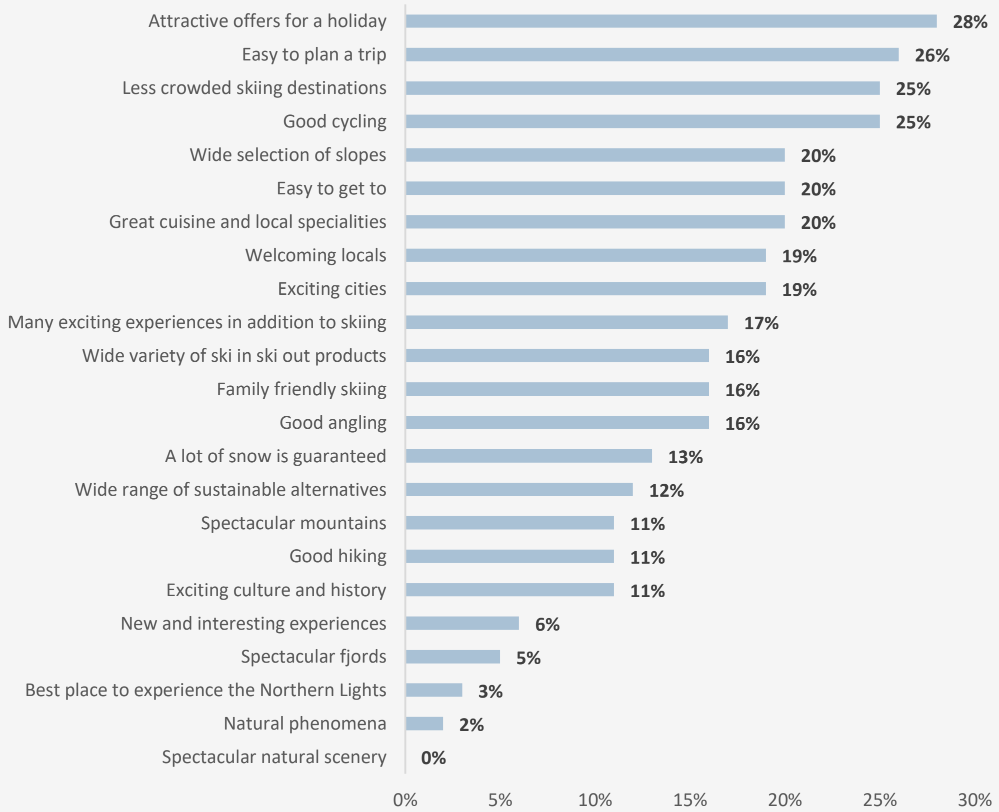
It is especially 'Attractive offers for a holiday', 'Easy to plan a trip' and 'Less crowded skiing destinations' that are evaluated more highly.

DUTCH TARGET GROUP WHO HAVE VISITED NORWAY



N=2666

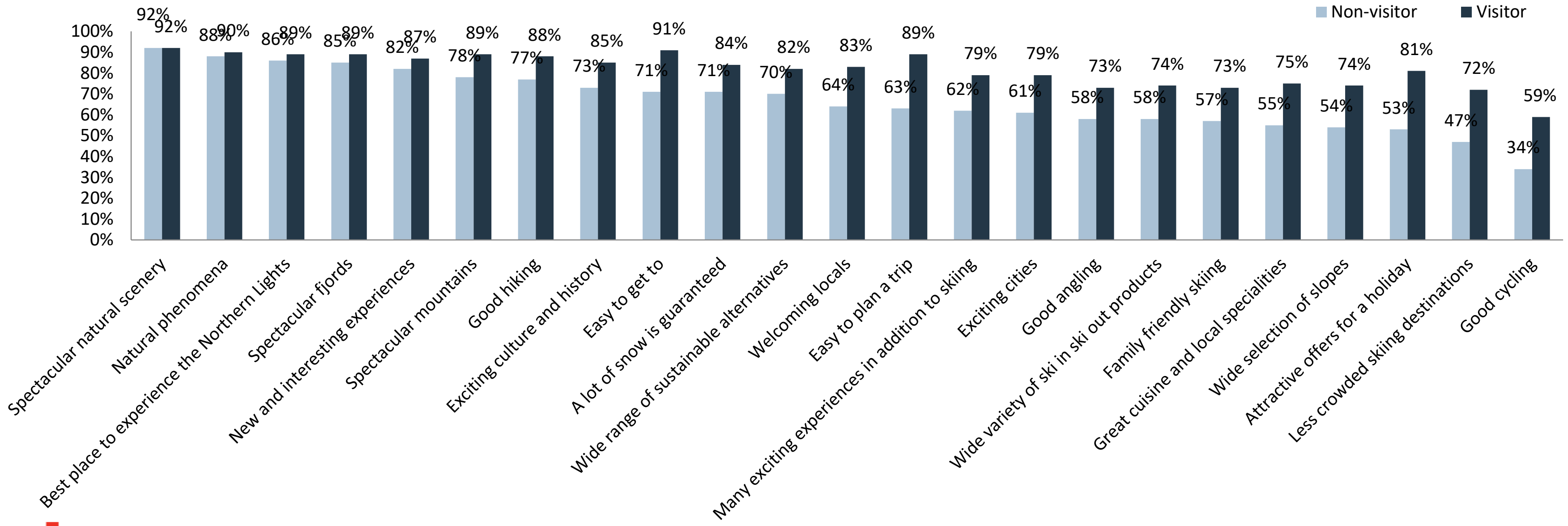
DIFFERENCE BETWEEN PERCENTAGE VISITORS THAT AGREE AND PERCENTAGE NON-VISITORS THAT AGREE



SHARE OF VISITORS AGREEING WITH BRAND STATEMENTS

This figure shows the percentage that agrees or strongly agrees with the brand statements by visitors and non-visitors. The previous page showed what set the groups apart, while this page shows the absolute percentage of agreement for both groups.

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

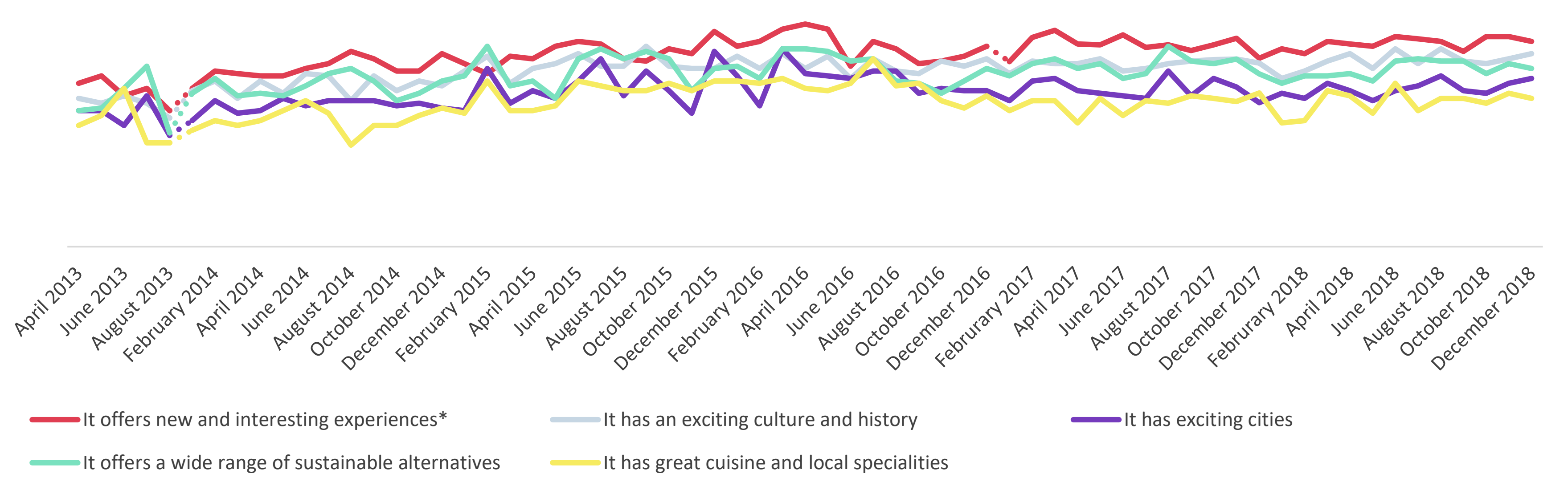


Innovasjon Norge

DEVELOPMENT IN KEY BRAND TARGETS SINCE 2012

The development since the beginning of the tracking is displayed the line chart across key performance brand indicators. For all five brand targets there is a stable and constant trend, which indicates a strong and consistent holiday brand for Norway.

DEVELOPMENT IN KEY INDICATORS

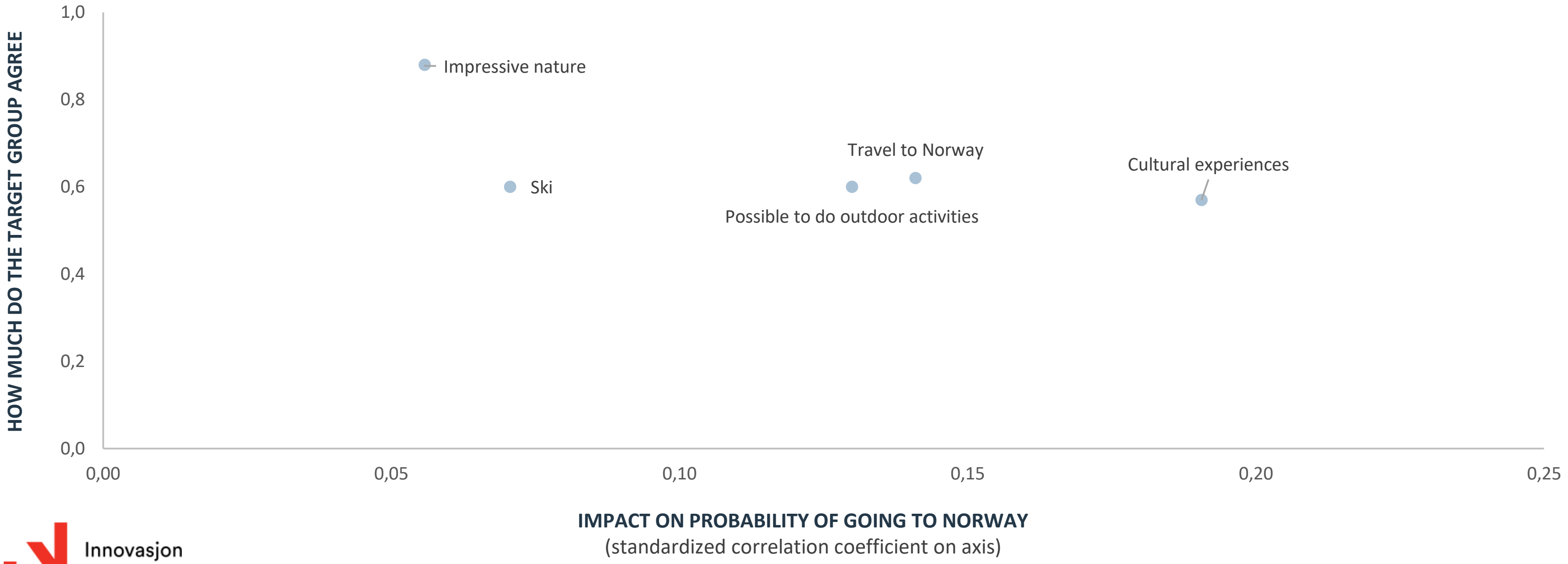


Innovasjon Norge

*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

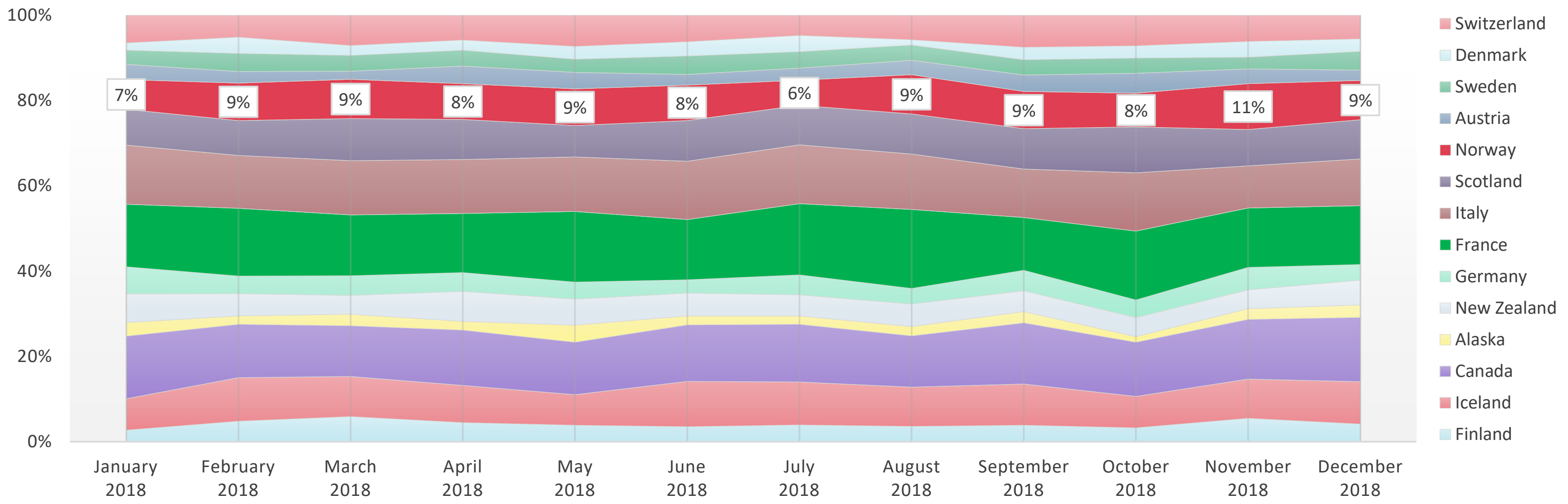
Grouping the branding targets into five dimensions (see explanation on page 56) reveals an interesting pattern. In the chart the dimensions that appear, are the ones that have a statistically significant impact on the probability of visiting Norway. The vertical axis plots how many on average agree or strongly agree with the branding dimension, while the horizontal axis showed the standardized impact on the probability of visiting Norway. The results show 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. Since this also has the lowest share of agreement, it should be prioritized as a area of improvement for the French market.



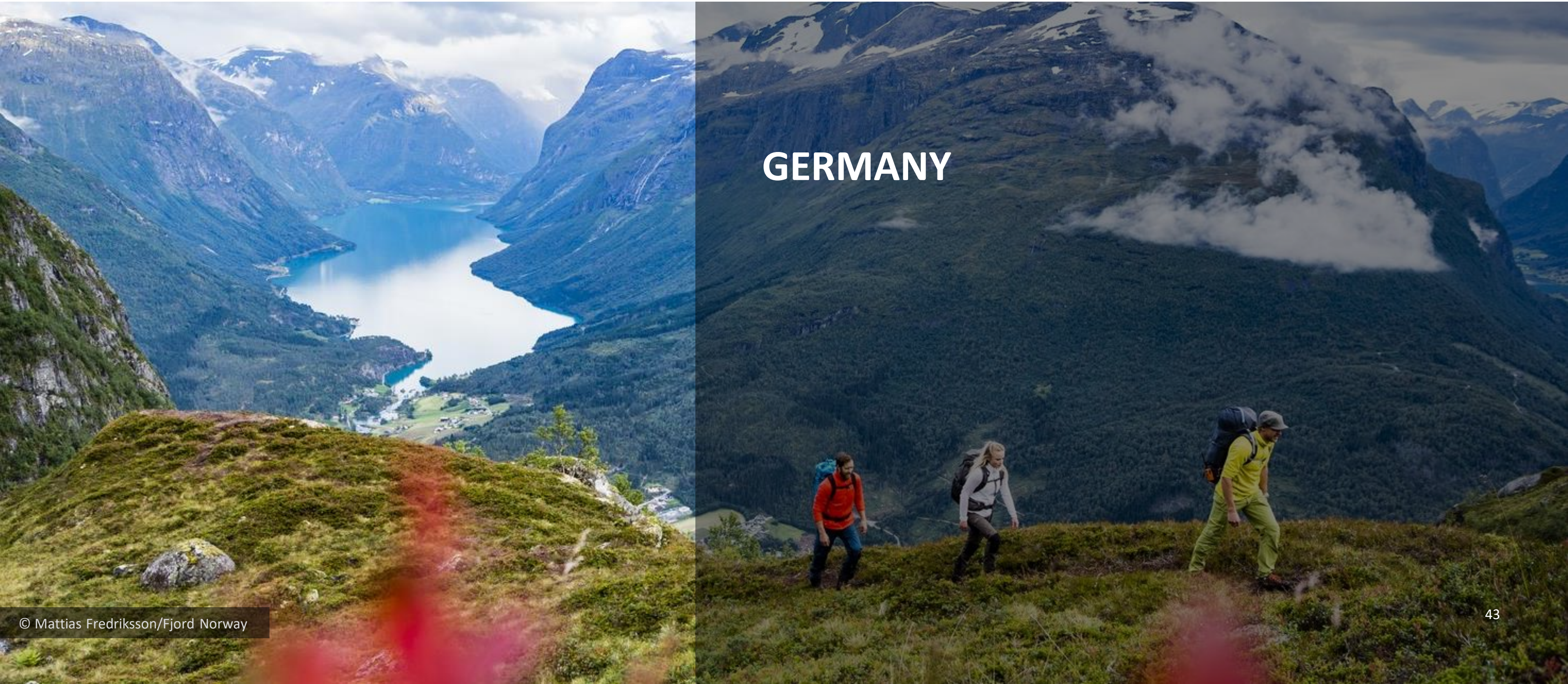
SHARE OF VOICE IN FRANCE

Below is an illustration of the development of Norway's Share of Voice in months of 2018 in France compared with the Share of Voice for other markets. On average Norway has a decent share of the total voice, ranking in the top half of all countries. Across the months Norway's share is basically constant, which is an indication of a strong and stable holiday brand.

DEVELOPMENT IN SHARE OF VOICE IN FRANCE COMPARED TO OTHER COUNTRIES



GERMANY



CHARACTERISTICS OF THE GERMAN TARGET GROUP

The infographic below describes the characteristics of the German target group compared to the average of the remaining five foreign markets. The German target group is generally younger, more often without children and more likely to visit Norway. About one in five has seen adds for Norway which on par with the other foreign markets. They mainly associate Norway with nature, fjords, the northern lights, landscapes and unspoiled nature.

DEMOGRAPHIC CHARACTERISTICS

England target group / Average (foreign markets)

50% / 52%
Women

43% / 38%
1-2 travels abroad in the past 3 years

57% / 62%
3 or more travels abroad in the past 3 years

69% / 64%
No children

17% / 16%
1 child

14% / 18%
2 or more children

30% / 30%
18-35 years old

46% / 38%
36-55 years

24% / 32%
56 years or older

14,0 / 14,6
Average years of education

40 000 – 52 999 EUR
Median income

ASSOCIATIONS TO NORWAY

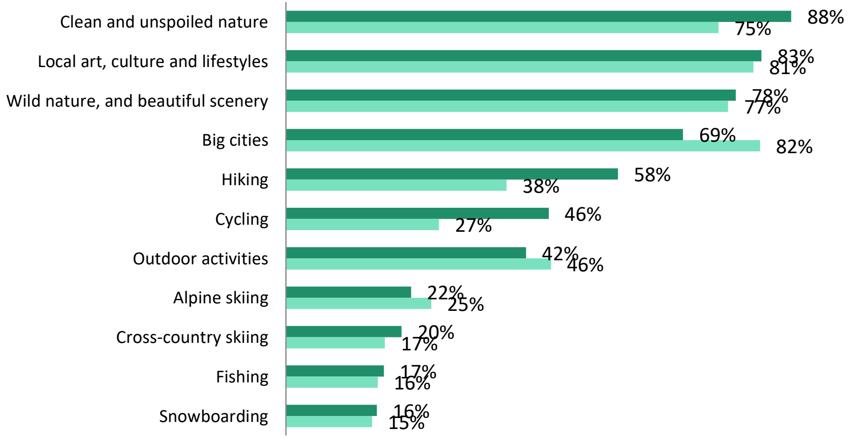
(N=5313)

PROBABILITY FOR VISIT AND RECALL

5,4 / 4,8
Likely to visit Norway within 12 months

20% / 21%
Remember seeing an add for Norway

MOTIVATION FOR TRAVEL ON HOLIDAY ABROAD

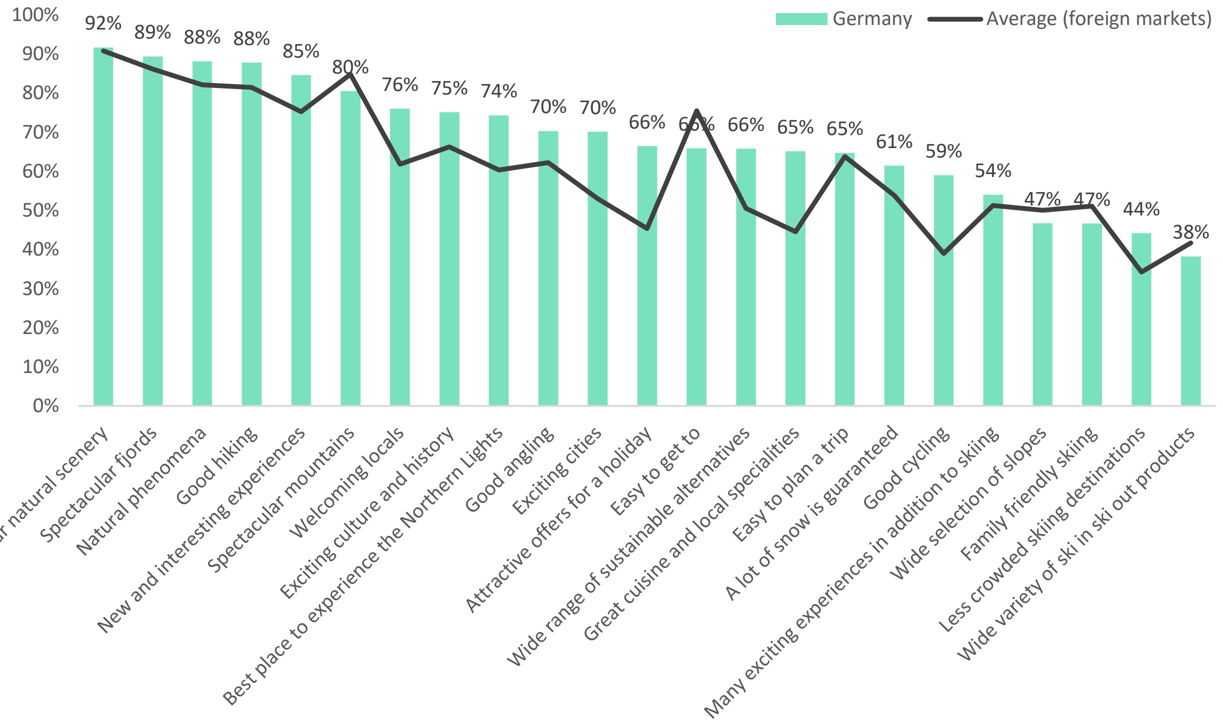


HOW THE GERMAN TARGET GROUP SEES NORWAY

BRAND TARGETS

The chart on the right shows the percentage that agrees or strongly agrees that the brand characterize Norway. The bars display the percentage in Germany that agrees and the red line show the average across the remaining foreign markets (Norway excluded).

The German market tends to agree that the brands characterize Norway, to a higher degree than the foreign markets. This is especially true for the brands of 'Exciting culture and History','Best place to experience Northern lights', 'Exciting cities' among otheres. The only small outliers are the brands of 'Easy to get to' and part of the skiing brands.

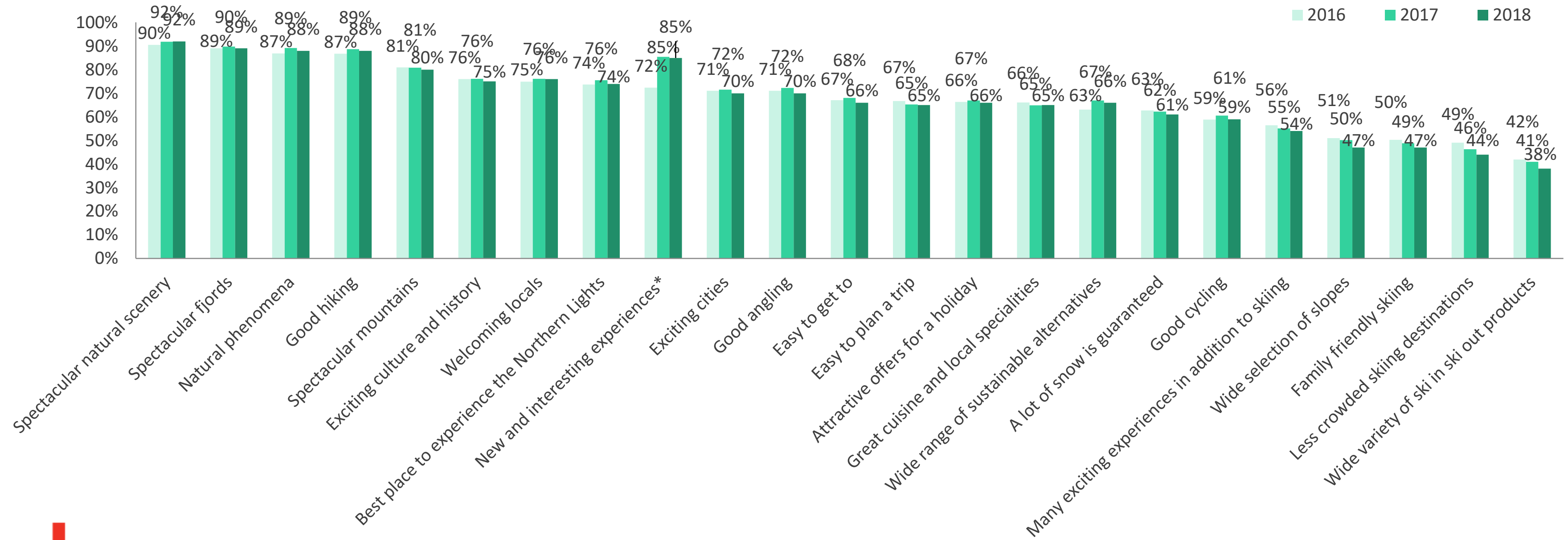


N=5313

DEVELOPMENT IN BRAND TARGETS 2016 TO 2018

The chart shows the share that agrees or strongly agrees with the brand statements about Norway and their development from 2016 to 2018. As can be seen there is very little change from 2016 to 2018 and there is a generally stable trend. This indicates a lot of consistency and strong brand in the German target group's view of holidaying Norway.

DEVELOPMENT I BRAND TARGETS FROM 2016 TO 2018



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

Innovasjon Norge

VISITORS AND NON-VISITORS

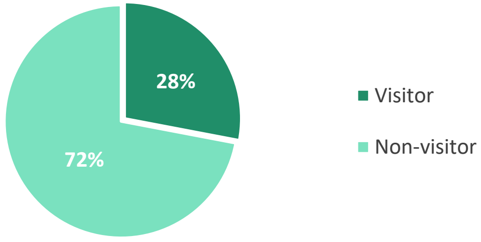
The circle diagram illustrates that more than a quarter of the active tourists in the German target group have visited Norway before.

The bar chart shows the difference in perception of Norway, between the people in the target group that have visited Norway before and the people in the target group who have not visited Norway before. In other words, these are brands on which Norway outperforms the non-visitor's expectations or fail to live up to expectations.

All brands are more positive for the group that have visited Norway the group that have not. This is an indication of great performance for Norway, but also reveals a discrepancy in perception of Norway and actual holiday in Norway.

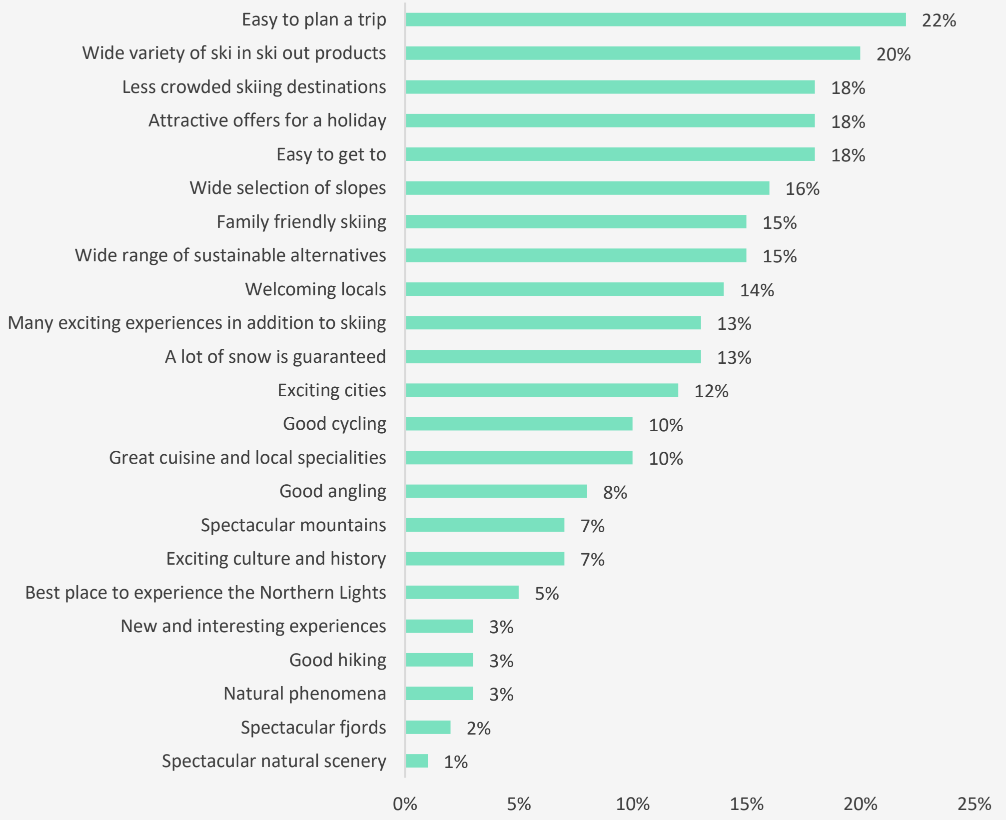
It is especially brands related to skiing, 'Attractive offers for a holiday' and 'Easy to plan a trip' that are evaluated more highly.

DUTCH TARGET GROUP WHO HAVE VISITED NORWAY



N=5313

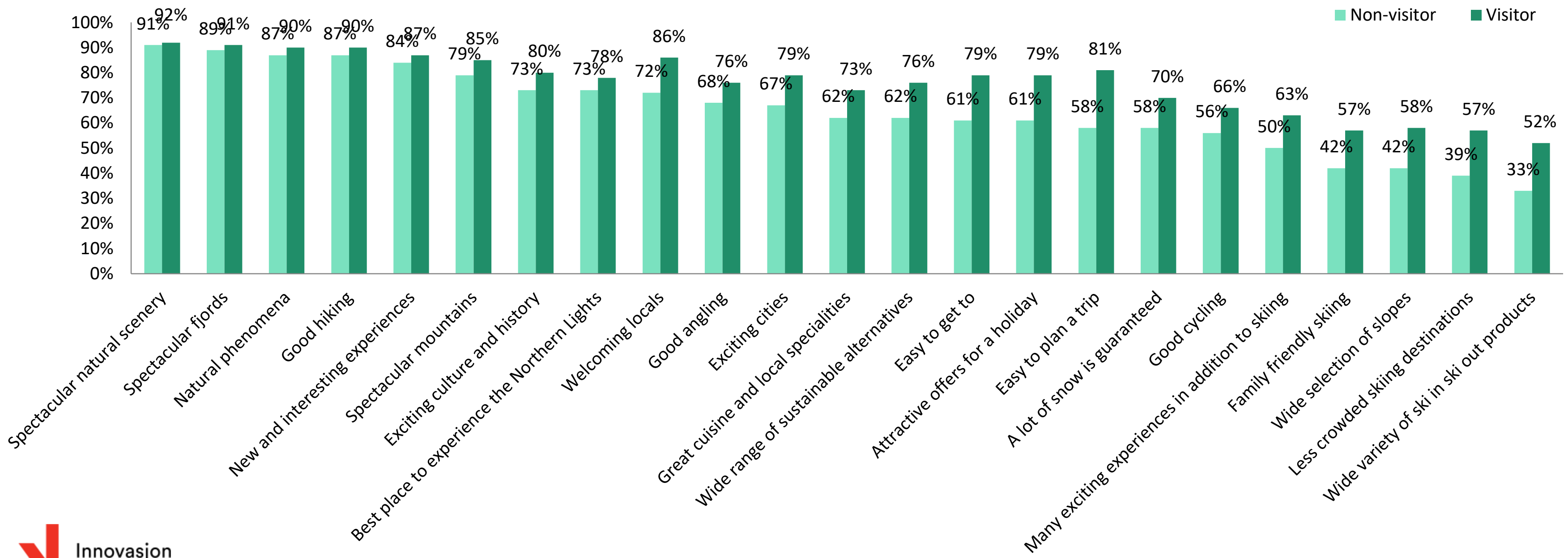
DIFFERENCE BETWEEN PERCENTAGE VISITORS THAT AGREE AND PERCENTAGE NON-VISITORS THAT AGREE



SHARE OF VISITORS AGREEING WITH BRAND STATEMENTS

This figure shows the percentage that agrees or strongly agrees with the brand statements by visitors and non-visitors. The previous page showed what set the groups apart, while this page shows the absolute percentage of agreement for both groups.

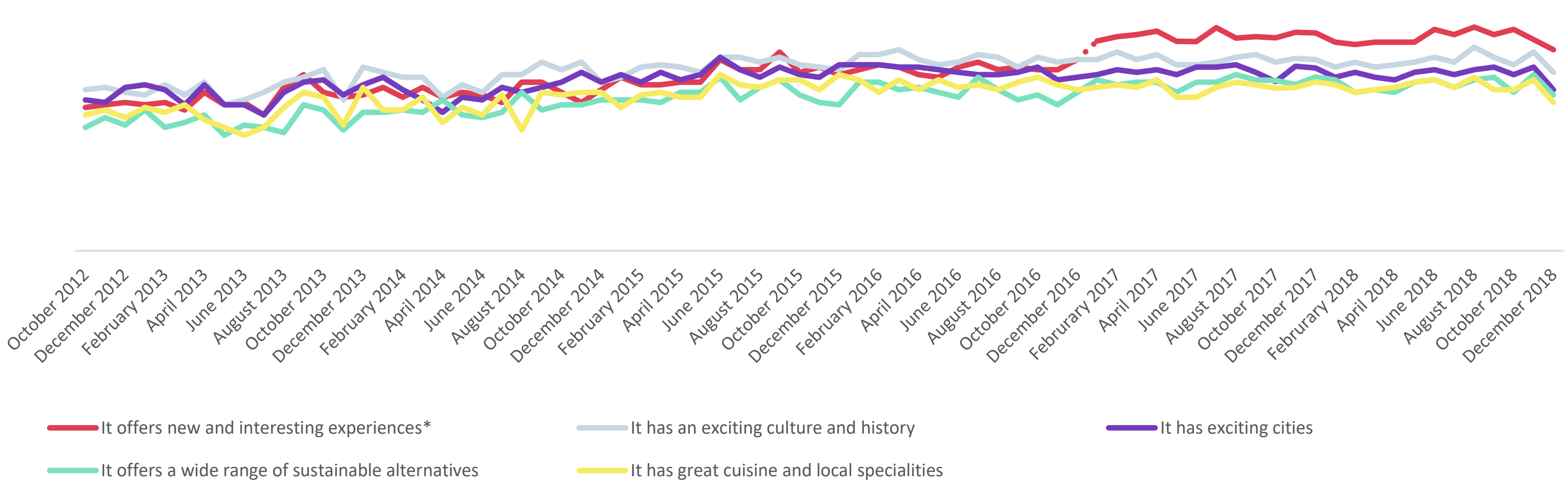
PERCENTAGE THAT AGREES WITH THE STATEMENT SPLIT BY VISITOR AND NON-VISITOR



DEVELOPMENT IN KEY BRAND TARGETS SINCE 2012

The development since the beginning of the tracking is displayed the line chart across key performance brand indicators. For all five brand targets there is a slowly but steady increase in the perception of Norway having good offers on all brand targets, but in recent years the trend has been more stable and constant. So even though the view of Norway is fluctuating there seems to have been a small positive trend in the view of Norway which has stabilized in recent years.

DEVELOPMENT IN KEY INDICATORS

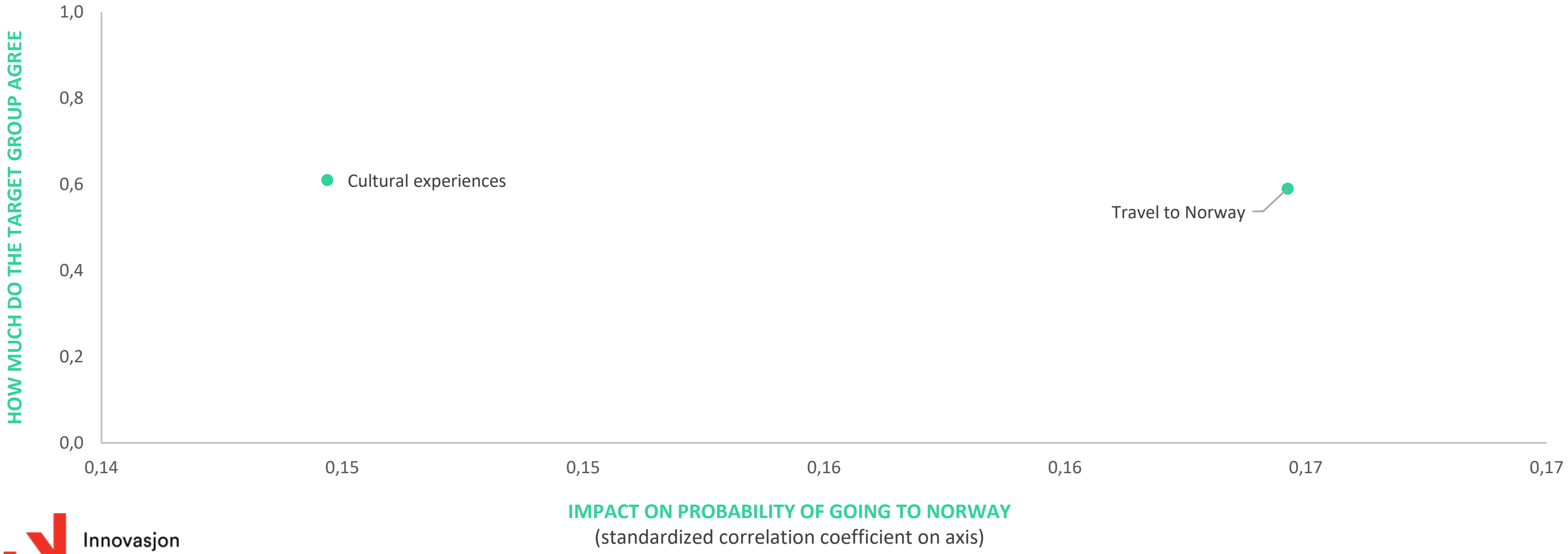


Innovasjon Norge

*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

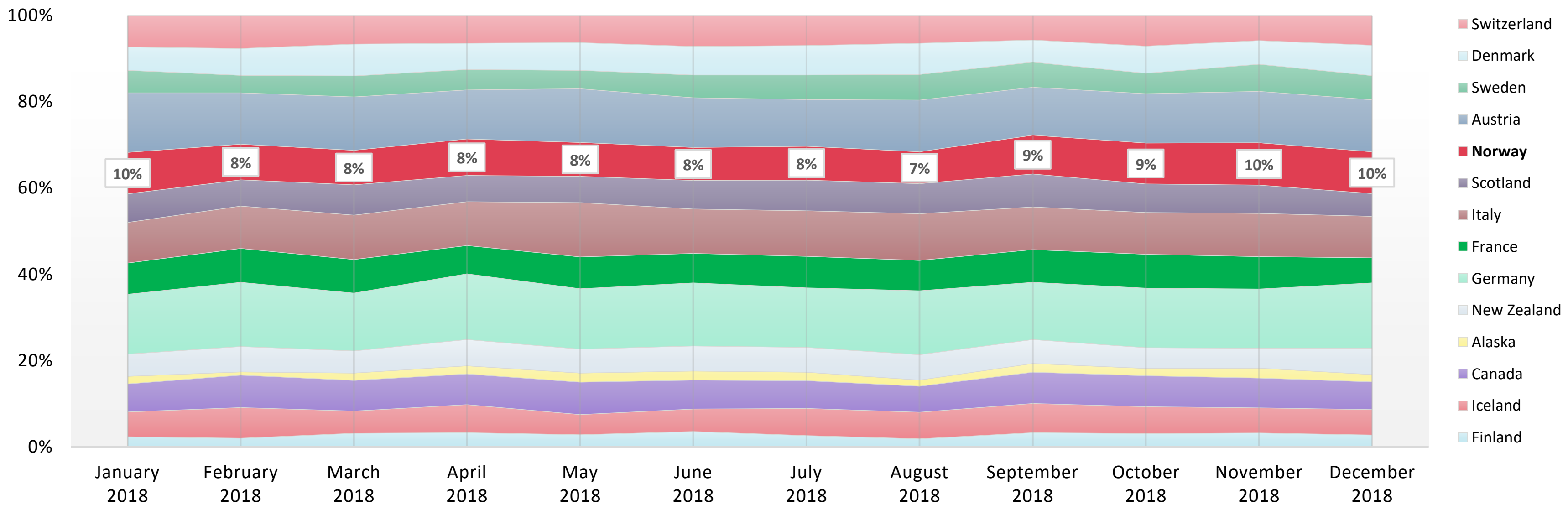
Grouping the branding targets into five dimensions (see explanation on page 69) reveals an interesting pattern. In the chart the dimensions that appear, are the ones that have a statistically significant impact on the probability of visiting Norway. The vertical axis plots how many on average agree or strongly agree with the branding dimension, while the horizontal axis showed the standardized impact on the probability of visiting Norway. The results show that only two dimensions are significant for the German target group: Cultural experiences and Travel to Norway. They are both at the level of agreement, but travel to Norway has a significantly higher impact on the probability of visiting. Both dimensions, though, should be prioritized as a area of improvement for the German market.



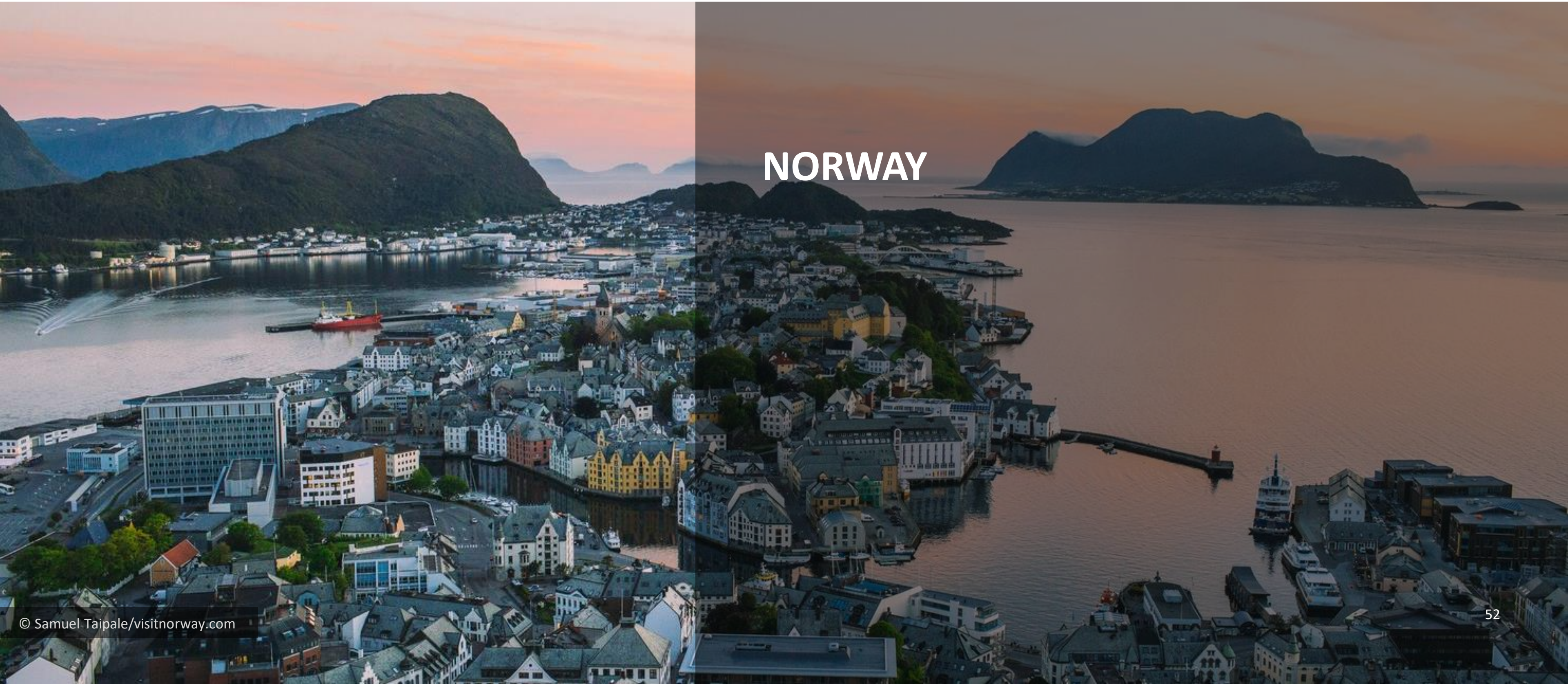
SHARE OF VOICE IN GERMANY

Below is an illustration of the development of Norway's Share of Voice in months of 2018 in Germany compared with the Share of Voice for other markets. On average Norway has a decent share of the total voice, ranking in the top half of all countries. Across the months Norway's share is basically constant, which is an indication of a strong and stable holiday brand.

DEVELOPMENT IN SHARE OF VOICE IN GERMANY COMPARED TO OTHER COUNTRIES



NORWAY



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CHARACTERISTICS OF THE NORWEGIAN TARGET GROUP

The infographic below describes the characteristics of the Norwegian target group compared to the average of the six foreign markets. The Norwegian target group is typically older than foreigners, they travel more often abroad than foreigners and they are naturally a lot more likely to visit Norway for a holiday within the next 12 months. Similarly, they have naturally seen a lot more adds for holidaying in Norway. They mainly associate a holiday in Norway with nature, mountains, northern lights and fjords. They also mention locations such as Lofoten, Nord-Norge, Vestlandet, Sørlandet, Oslo etc.

DEMOGRAPHIC CHARACTERISTICS

England target group / Average (foreign markets)

52% / 51%
Women

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

89% / 63%
3 or more travels 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

ASSOCIATIONS TO NORWAY

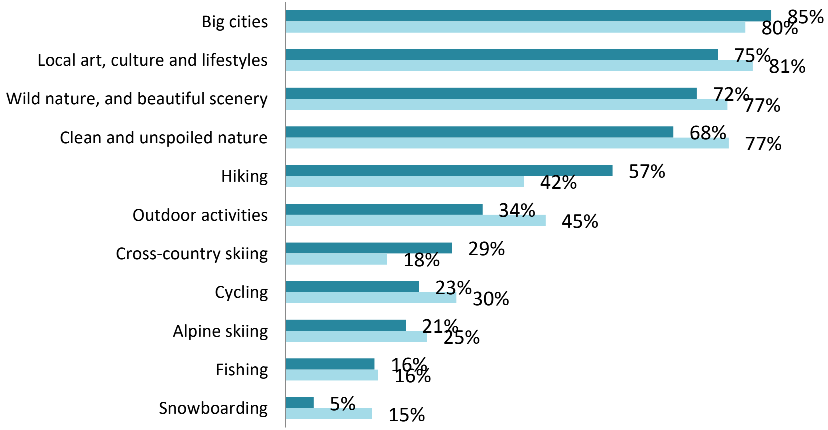
(N=5393)

PROBABILITY FOR VISIT AND RECALL

8,3 / 4,9
Likely to visit Norway within 12 months

42% / 21%
Remember seeing an add for Norway

MOTIVATION FOR TRAVEL ON HOLIDAY ABROAD

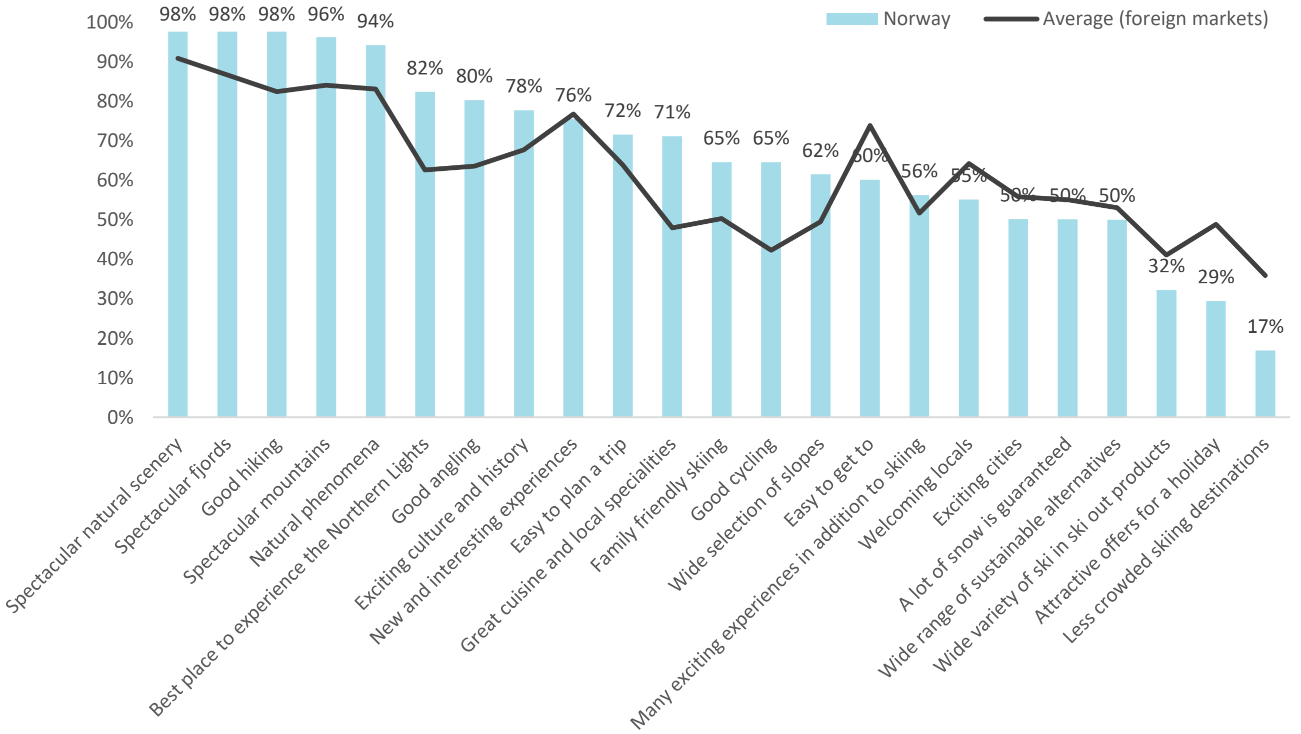


HOW THE NORWEGIAN TARGET GROUP SEES NORWAY

BRAND TARGETS

The chart on the right shows the percentage that agrees or strongly agrees that the brand characterize Norway. The bars display the percentage in Norway that agrees and the red line show the average across the six foreign markets.

The Norwegian target group tends to agree that the brands characterize Norway, to a higher degree than the foreign markets. This is especially true for the brands of concerning landscapes, nature and norten lights. Likewise Norwegians tende to agree that family friendly skiing is more available, although the remaining skiing brand are rated lower.

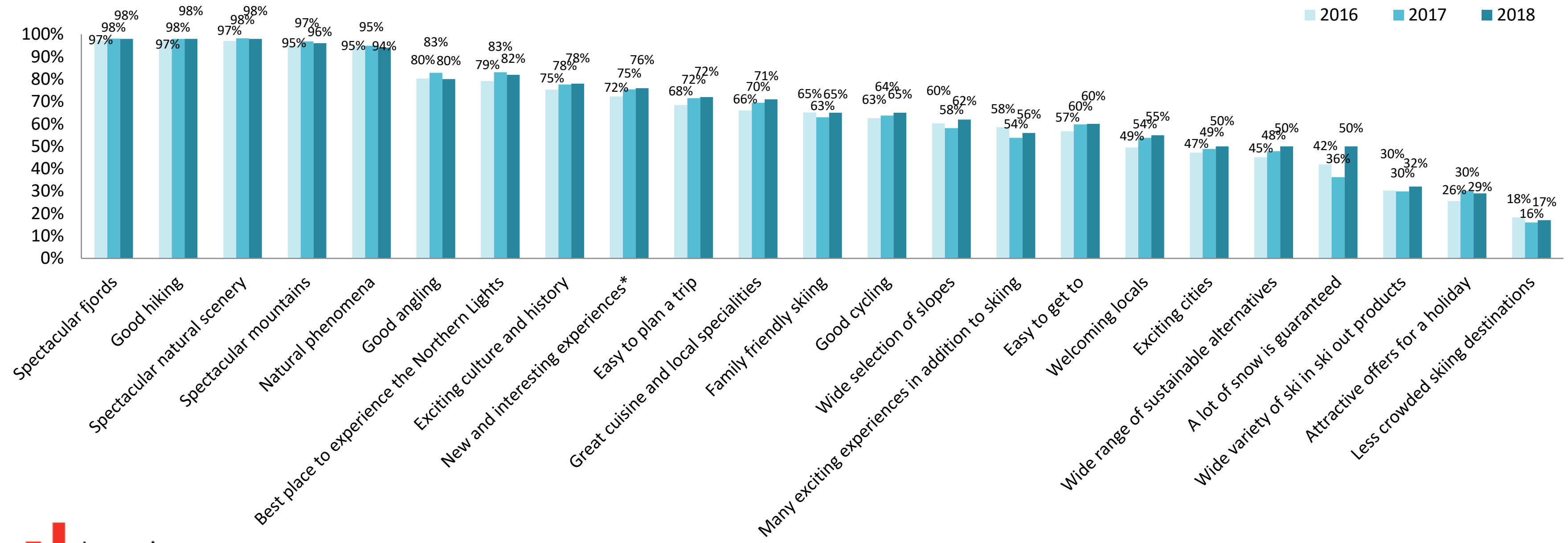


N=5393

DEVELOPMENT IN BRAND TARGETS 2016 TO 2018

The chart shows the share that agrees or strongly agrees with the brand statements about Norway and their development from 2016 to 2018. As can be seen there is slight positive trend 2016 to 2018 which indicates slow and steady brand awareness domestically for Norway. However, the growth is not present across all brand statements, which leaves room for improvement.

DEVELOPMENT I BRAND TARGETS FROM 2016 TO 2018



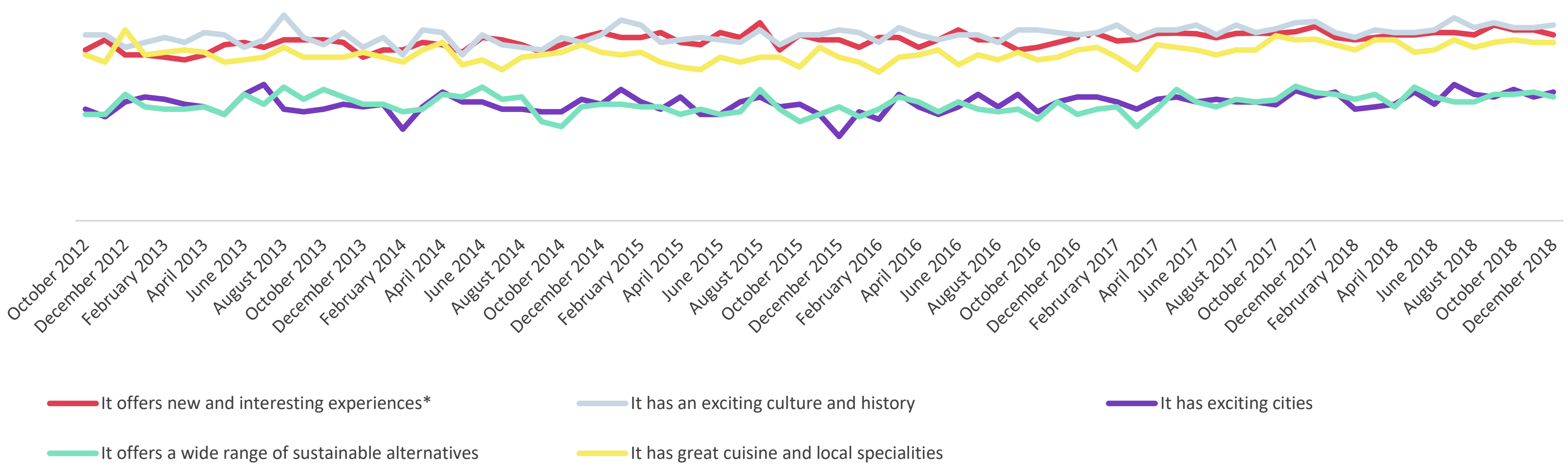
Innovasjon Norge

**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 development since the beginning of the tracking is displayed the line chart across key performance brand indicators. For all five brand targets there is a slow but steady increase in the perception of Norway having good offers on all brand targets. In recent years the trend has been more stable and consistent. There also seems to be less fluctuations in the brand target, than for the foreign markets.

DEVELOPMENT IN KEY INDICATORS

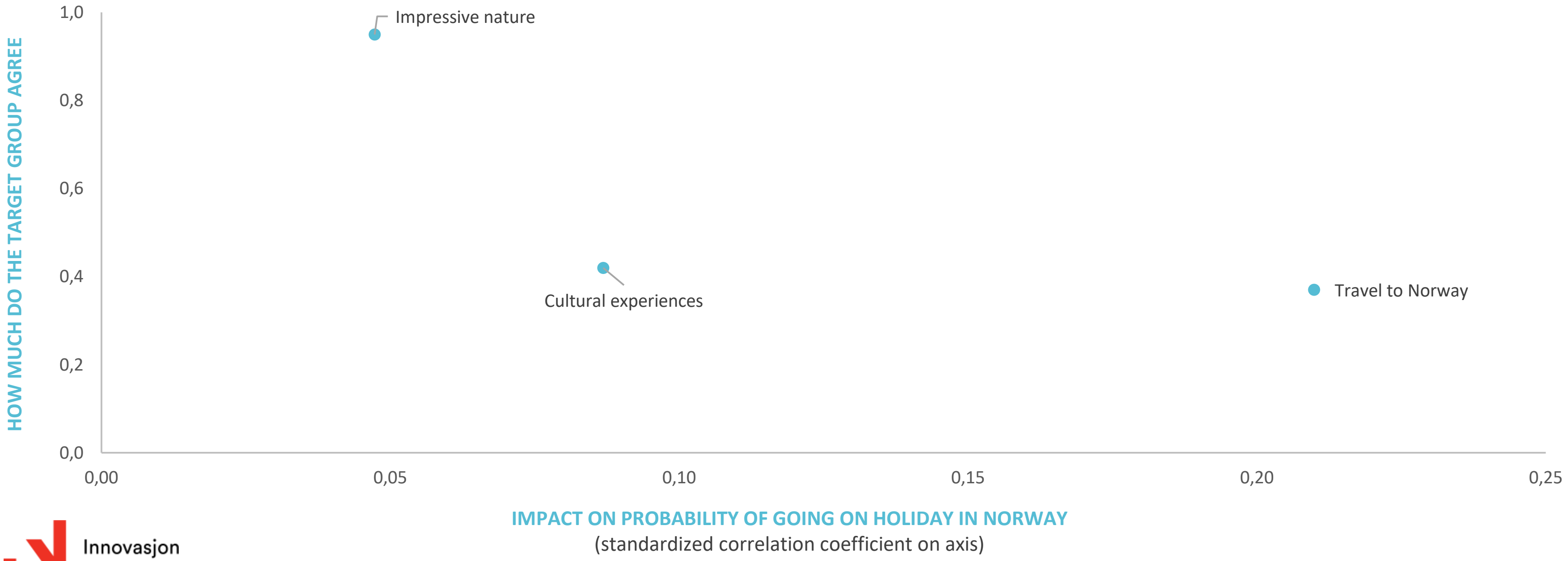


Innovasjon Norge

*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

Grouping the branding targets into five dimensions (see explanation on page 56) reveals an interesting pattern. In the chart the dimensions that appear, are the ones that have a statistically significant impact on the probability of visiting Norway. The vertical axis plots how many on average agree or strongly agree with the branding dimension, while the horizontal axis showed the standardized impact on the probability of visiting Norway. The results show 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 and being easy to travel to Norway have the highest impact on the probability of going to Norway. Since these also has the lowest share of agreement, it should be prioritized as a area of improvement for the domestic holiday market.

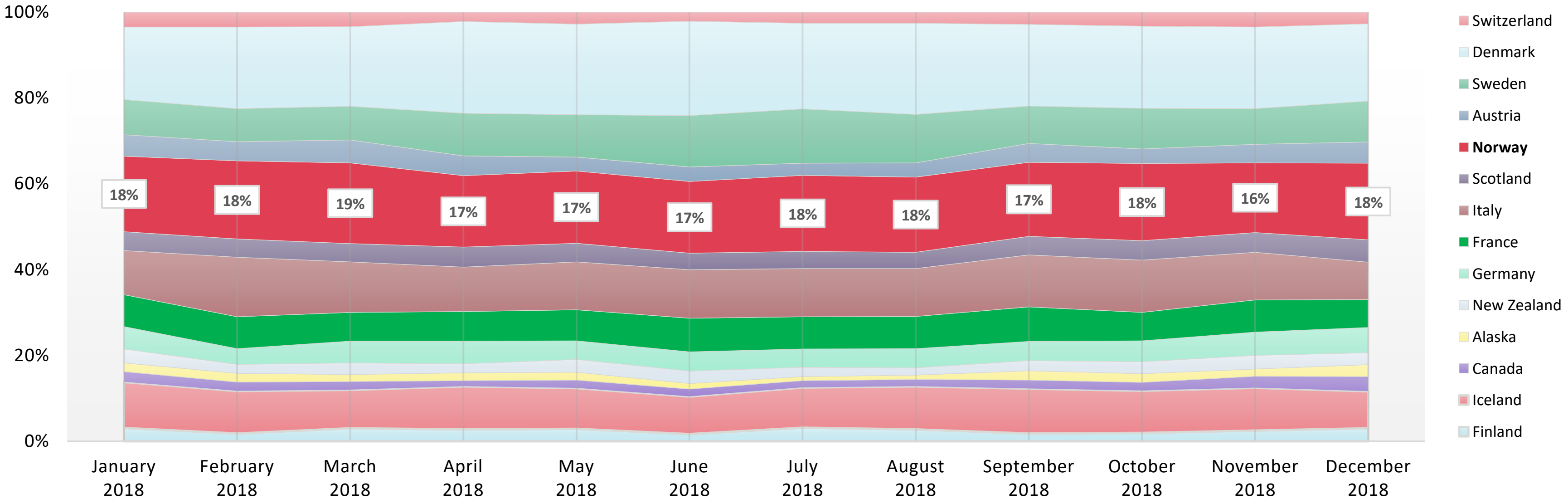


Innovasjon Norge

SHARE OF VOICE IN NORWAY

Below is an illustration of the development of Norway's Share of Voice in months of 2018 domestically compared with the Share of Voice for other markets. Naturally, Norway has one of the strongest SOV only outranked by Denmark's share. However, this is also where the measure of SOV can create a distorted picture, since it only measures if a person has seen an add or not, not how many adds a person has seen. As a consequence, Norway's share might be substantially higher in reality.

DEVELOPMENT IN SHARE OF VOICE IN NORWAY COMPARED TO OTHER COUNTRIES



SWEDEN

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CHARACTERISTICS OF THE SWEDISH TARGET GROUP

The infographic below describes the characteristics of the Swedish target group compared to the average of the remaining five foreign markets. The Swedish target group is a lot older, less often children families, and overall less likely to visit Norway. This is despite that a third of all the active tourists has seen adds for Norway. The Swedish mainly associate Norway with the fjords, nature and Hurtigruten.

DEMOGRAPHIC CHARACTERISTICS

England target group / Average (foreign markets)

58% / 51%
Women

28% / 41%
1-2 travels abroad in the past 3 years

72% / 59%
3 or more travels abroad in the past 3 years

73% / 64%
No children

12% / 17%
1 child

15% / 18%
2 or more children

11% / 33%
18-35 years old

39% / 40%
36-55 years

49% / 27%
56 years or older

13,7 / 14,6
Average years of education

57 000 – 67 000 EUR
Median income

ASSOCIATIONS TO NORWAY

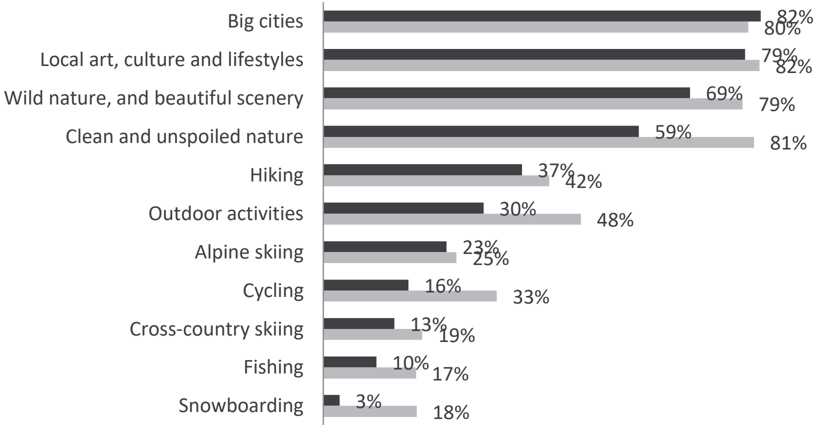
(N=5668)

PROBABILITY FOR VISIT AND RECALL

4,4 / 5,0
Likely to visit Norway within 12 months

33% / 19%
Remember seeing an add for Norway

MOTIVATION FOR TRAVEL ON HOLIDAY ABROAD

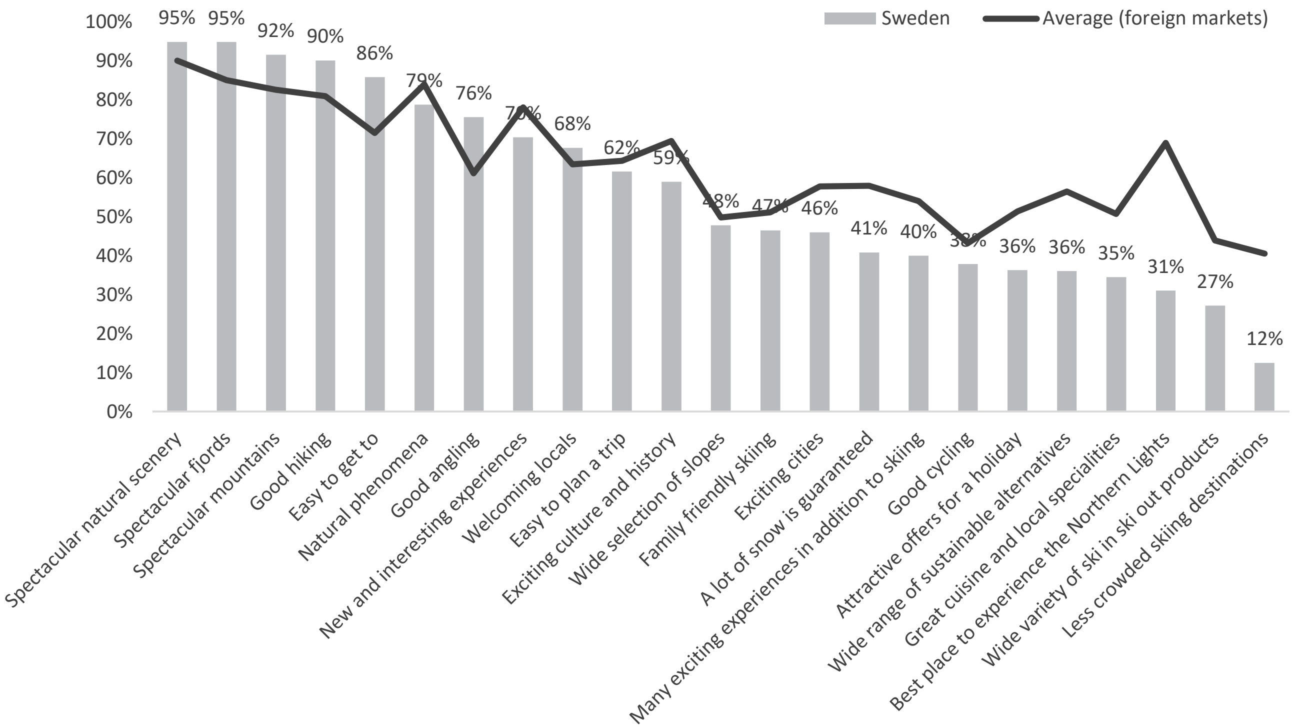


HOW THE SWEDISH TARGET GROUP SEES NORWAY

BRAND TARGETS

The chart on the right shows the percentage that agrees or strongly agrees that the brand characterize Norway. The bars display the percentage in Swedish that agrees and the red line show the average across the remaining foreign markets (Norway excluded).

The Swedish market tends tobe on par with the foreign markets, although nature and hiking ranks a bit higher than the foreign markets, and the cultural and skiing brand statements rank a bit lower than the foreign markets.

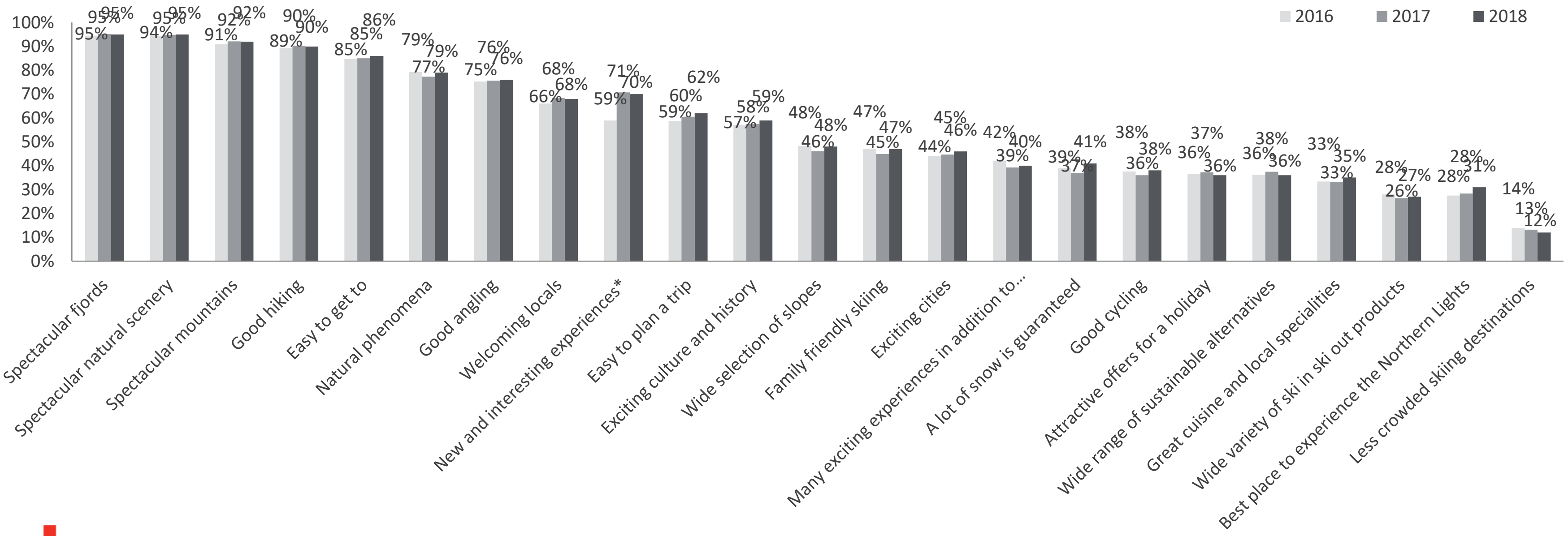


N=5668

DEVELOPMENT IN BRAND TARGETS 2016 TO 2018

The chart shows the share that agrees or strongly agrees with the brand statements about Norway and their development from 2016 to 2018. As can be seen there is very little change from 2016 to 2018, but there is however a small trend that most brand statements are on the rise. This indicates a lot of consistency and potential positive trend in the Swedish target groups view of holidaying Norway.

DEVELOPMENT I BRAND TARGETS FROM 2016 TO 2018



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

VISITORS AND NON-VISITORS

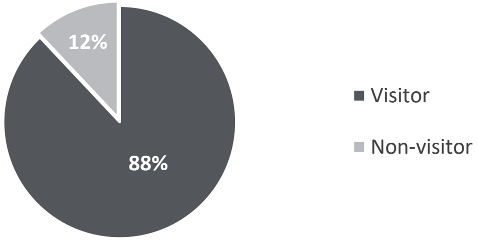
The circle diagram illustrates that nine in ten of the active tourists in the Swedish target group have visited Norway before.

The bar chart shows the difference in perception of Norway, between the people in the target group that have visited Norway before and the people in the target group who have not visited Norway before. In other words, these are brands on which Norway outperforms the non-visitor's expectations or fail to live up to expectations.

All brands are more positive for the group that have visited Norway the group that have not (the two negative values are due to uncertainty). This is an indication of great performance for Norway, but also reveals a discrepancy in perception of Norway and actual holiday in Norway.

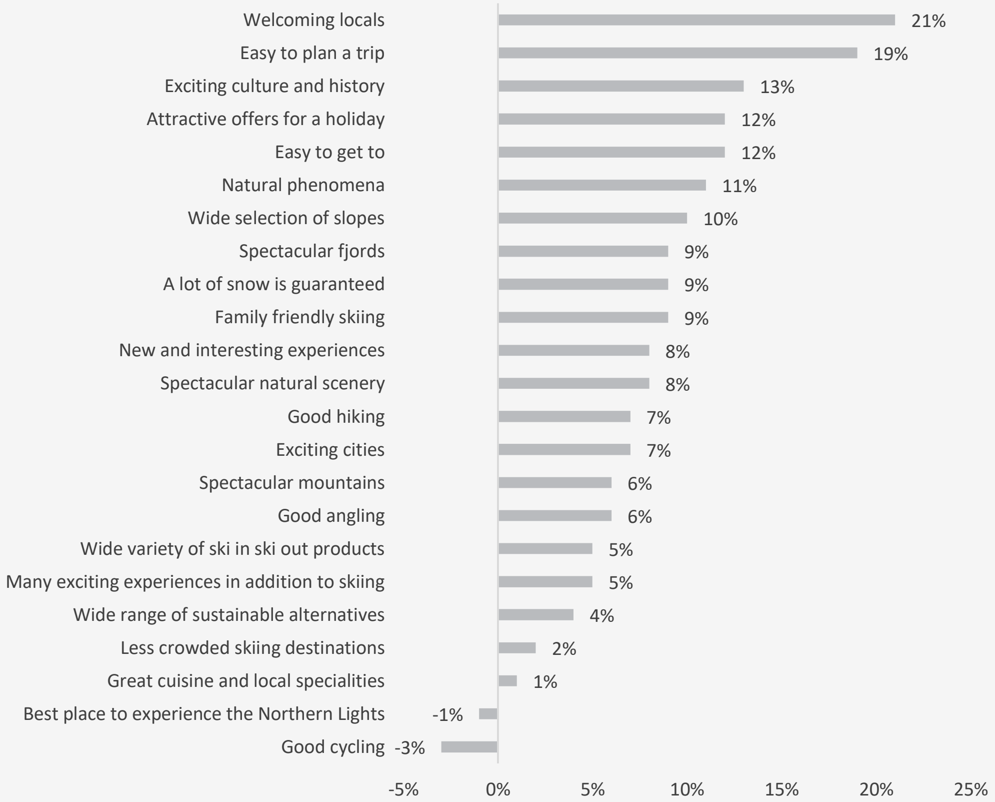
It is especially 'Welcoming locals', 'Easy to plan a trip' and 'Culture and history' that are evaluated more highly.

DUTCH TARGET GROUP WHO HAVE VISITED NORWAY



N=5668

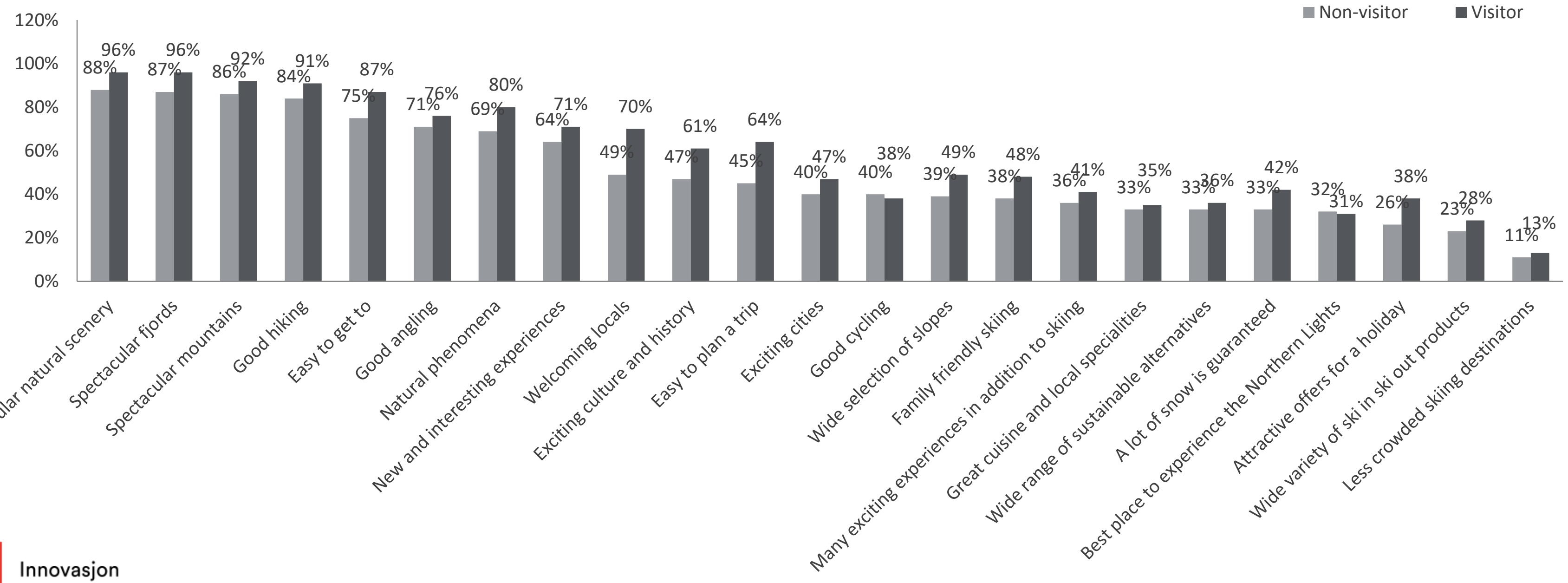
DIFFERENCE BETWEEN PERCENTAGE VISITORS THAT AGREE AND PERCENTAGE NON-VISITORS THAT AGREE



SHARE OF VISITORS AGREEING WITH BRAND STATEMENTS

This figure shows the percentage that agrees or strongly agrees with the brand statements by visitors and non-visitors. The previous page showed what set the groups apart, while this page shows the absolute percentage of agreement for both groups.

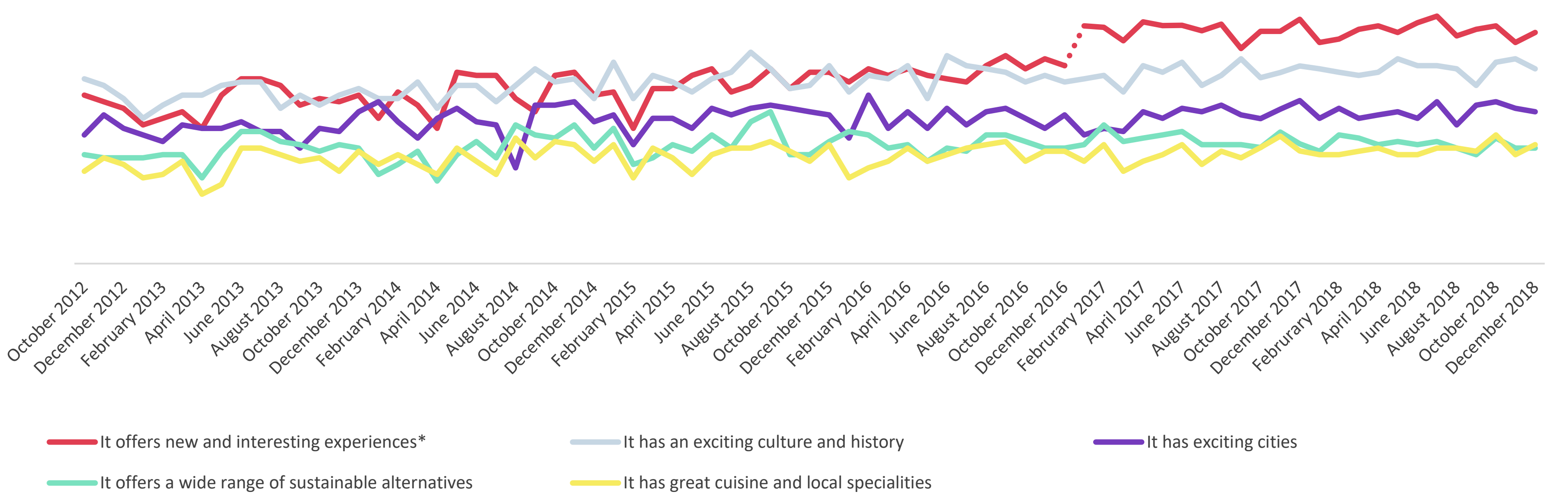
PERCENTAGE THAT AGREES WITH THE STATEMENT SPLIT BY VISITOR AND NON-VISITOR



DEVELOPMENT IN KEY BRAND TARGETS SINCE 2012

The development since the beginning of the tracking is displayed the line chart across key performance brand indicators. For all five brand targets 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



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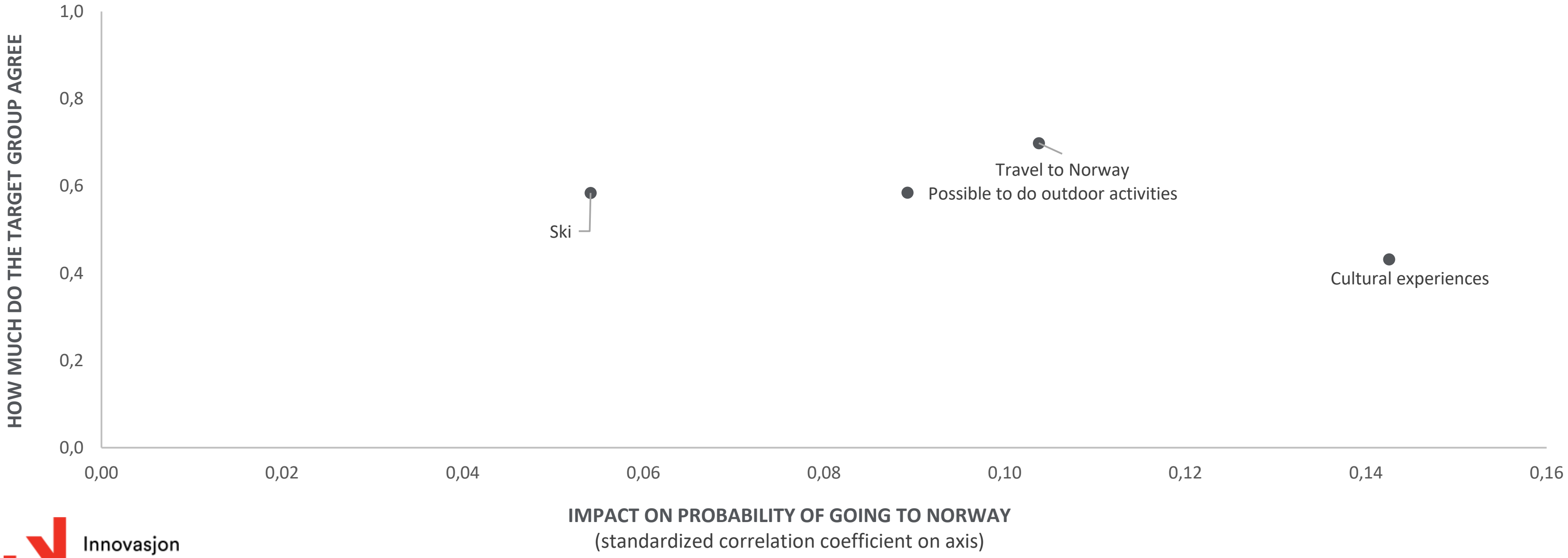
*Question wording until the end of 2016 was :"It offers experiences that you cannot find anywhere else in the world"

DRIVERS FOR THE PROBABILITY TO VISIT NORWAY

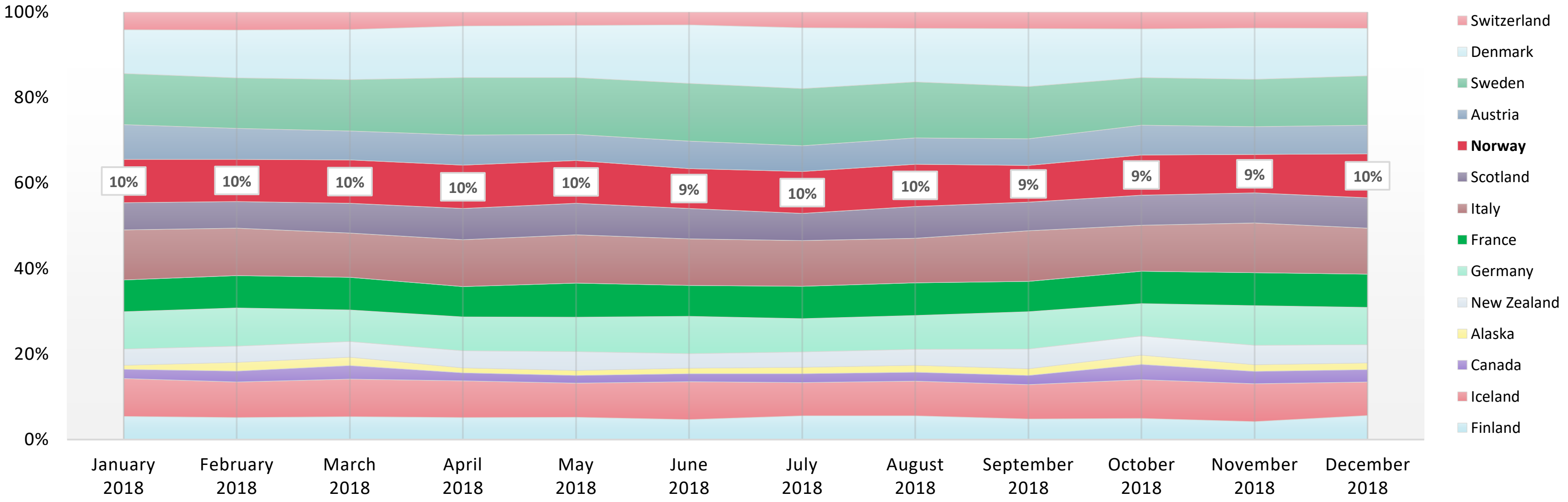
Grouping the branding targets into five dimensions (see explanation on page 56) reveals an interesting pattern. In the chart the dimensions that appear, are the ones that have a statistically significant impact on the probability of visiting Norway. The vertical axis plots how many on average agree or strongly agree with the branding dimension, while the horizontal axis showed the standardized impact on the probability of visiting Norway. The results show that a large share of the target group agrees that Ski, Travel to Norway and possibility to do outdoor activities describes Norway. However, the highest impact on the probability of visiting is interesting cultural experiences, which also has the lowest share of agreement. It should be prioritized as a area of improvement for the Swedish group.



SHARE OF VOICE IN SWEDEN

Below is an illustration of the development of Norway's Share of Voice in months of 2018 in Sweden compared with the Share of Voice for other markets. On average Norway has a decent share of the total voice, ranking in the top half of all countries, but still outranked by Denmark, Sweden, Italy and on par with Germany, France and Iceland. Across the months Norway's share is basically constant, which is an indication of a stable holiday brand.

DEVELOPMENT IN SHARE OF VOICE IN SWEDEN COMPARED TO OTHER COUNTRIES



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DATA AND METHODOLOGY

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 impact-slides is based on a factor analysis. A look at the brand values reveals that many of them share characteristics which results in brand values being inter-correlated. Therefore, to test the effect on the likelihood of visiting Norway, the branding values has been reduced in dimensionality, by merging similar brands together. This is done through a factor analysis, which indicated that the 23 brand values could be meaningfully reduced to five central dimensions: Skiing destinations, Cultural Experiences, Possible to do outdoor activities, Impressive nature and Travel to Norway.

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

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

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

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 USED

THIS PUBLICATION IS BASED ON THE FOLLOWING NUMBER OF INTERVIEWS

MARKET	NUMBER OF INTERVIEWS
ENGLAND	5 257
DENMARK	5 368
NETHERLANDS	5 297
FRANCE	2 666
GERMANY	5 313
NORWAY	5 393
SWEDEN	5 668

Approximately 100 interviews are conducted per week per country, except for France, which is approximately 50 interviews per week. Interviews are geographically limited to the focus areas listed below:

England: *Bedfordshire and Hertfordshire, Berkshire, Buckinghamshire and Oxford shore, Essex, Inner London, Outer London, Kent, Surrey, East and West Sussex*
France: *Ile de France, Rhone-Alpes*
Germany: Baden-Wüttemberg, Bayern, Berlin, Hamburg Hessen, Niedersachsen, Nordrhein-Westfalen, Rheinland-Pfalz, Schleswig-Holstein
Norway, Sweden, Denmark and The Netherlands*: National coverage.*

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