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Epinion

Norways branding

Tracking Norways brand in European markets – 2012-2019

Visit Norway

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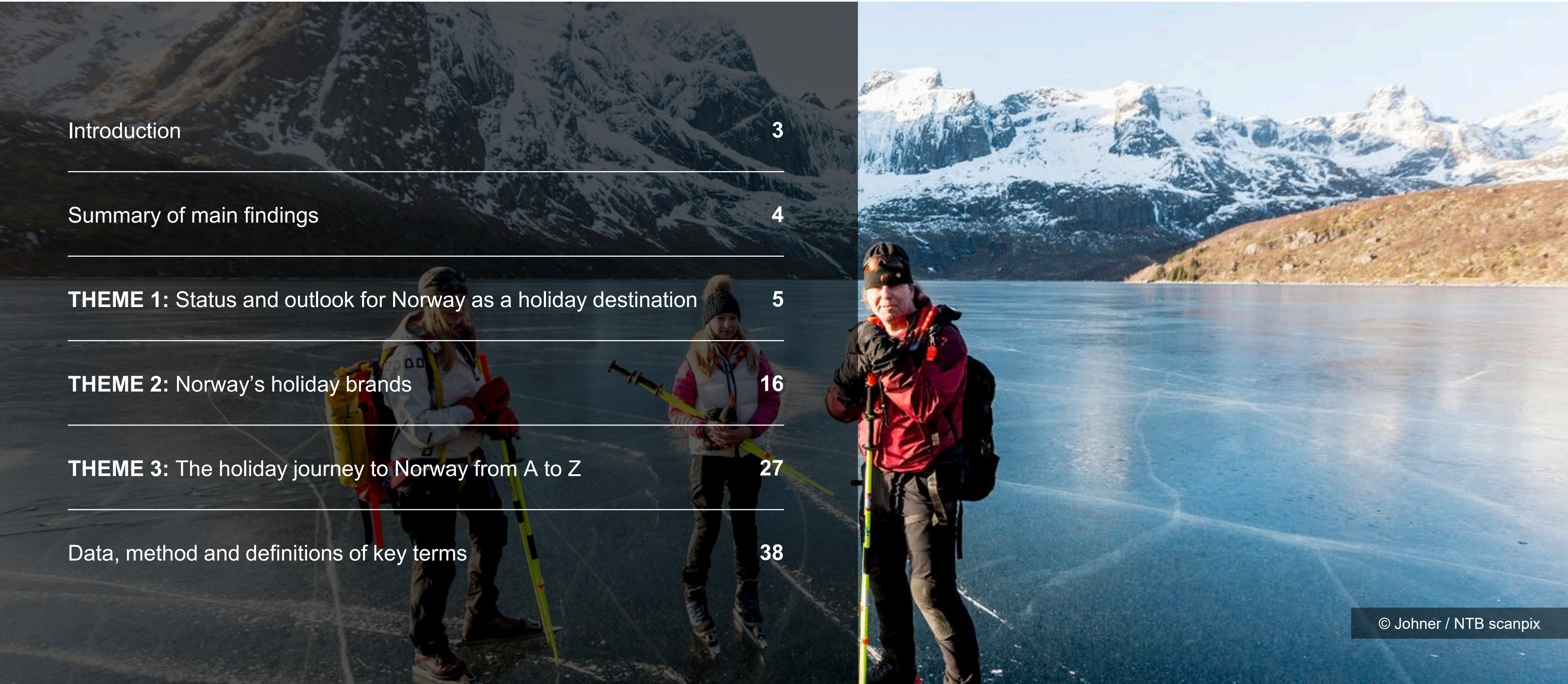

Tracking Norway's brand in European markets

This report aim to give some insights about Norway's perception and branding amongst potential tourists, and actual tourists that have visited Norway, from European markets

Visit Norway has been carrying out a brand tracker for Norway since 2012. The tracker has been carried out in the same six markets since its very start (with the exception of France which was added in 2013). The main goal is to provide insights about people's perception of Norway within these six markets, and to try to figure out if, and why, they would consider visiting Norway in the near future. We also take a look at where they've heard about Norway by measuring various media outlets and try to measure the effectiveness of each one. Norway's brand consists of five dimensions and we have a look at how these align with people associations to Norway, and which one is the most attractive for tourists within these six markets. Towards the end we look at the journey to Norway from A to Z, by looking at tourist's perception of Norway before, during and after their visit. Has their perception of Norway changed after visiting?

The report is built upon 149.872 respondents in 6 European countries: Denmark, England, Germany, Netherland, Sweden and France (you can read more about the data and method used in the last chapter). This report is written by Epinion on behalf of Visit Norway. It is built up in three different themes, with each theme addressing different angles of Norway's brand. Each theme begins with a brief description of the content before it presents the findings of a selection of the brand tracker depending on what the theme is about.

1. **Theme 1: Status and outlook for Norway as a holiday destination.**
   The first section looks at Norway's attractiveness and exposure from 2012 up until 2019. The exposure is also shown through various media outlets. The last part of theme 1 outlines an outlook for the next three years.
2. **Theme 2: Norway's holiday brands.**
   Section two presents the five dimensions of Norway as holiday destination and looks on how these align with the tourists' associations to Norway. We also look closer on how these dimensions compare to the various media outlets.
3. **Theme 3: The holiday journey to Norway from A to Z.**
   The last theme looks at the entire journey to Norway; from before visiting Norway, till after visiting Norway. What were their expectations before visiting Norway and to what degree were these expectations met? Have their perception of Norway changed after visiting? Theme 3 also look at the level of satisfaction and whether they would recommend Norway as a holiday destination to others.

In the last chapter you can read more about the data and method used for the report, as well as a definition of some key terms used throughout the report.

Summary of findings

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Norway's attractiveness is lower in Scandinavia

Overall there is a positive trend in Norway's attractiveness in the six measured markets. However, Norway's attractiveness in Scandinavia is different. We see a stabilizing/decline in Norway's attractiveness in Denmark, while Norway's attractiveness in Sweden is rising at a slower rate than in the other measured European markets. At the same time we see a strong increasing attractiveness amongst specific groups of tourists.

Digital channels is the most effective media outlet

Out of the five measured media outlets, digital channels is the one where most tourists have seen coverage of Norway, as well as being the most effective channel. Tourists whom have seen coverage for Norway through digital channels are the most likely to visit Norway. However, one should still not underestimate the more traditional channels like newspapers & magazines.

The environment is important for tourists

Many do consider the environment when travelling, especially within certain markets. At the same time, Norway is seen as a sustainable choice for many tourists, with a spectacular nature and beautiful lights. Many therefore come to Norway to do outdoor activities and experience the nature.

The trip to Norway exceeds the tourists' expectations in some areas, but disappoint in others

When looking at the trip to Norway before and after visiting, we can see that even though the expectations of Norway's nature are high, it is considered even more spectacular after the visit. However, the opposite is true for some of the other measured areas.

Theme 1:
Status and outlook for Norway as a holiday destination

This section looks at the trends for Norway’s attractiveness and exposure in the years 2012-2019. In large part the trends are positive with a substantial increase in certain types of tourists e.g. families with children. However, at the same time, Norway’s exposure compared to competing holiday destinations has fallen in recent years.

In addition to trends of previous years’, a general outlook for the next three years is outlined.

An increasing number of tourists’ see Norway as an attractive holiday destination

A slightly increasing trend of attractiveness amongst tourists

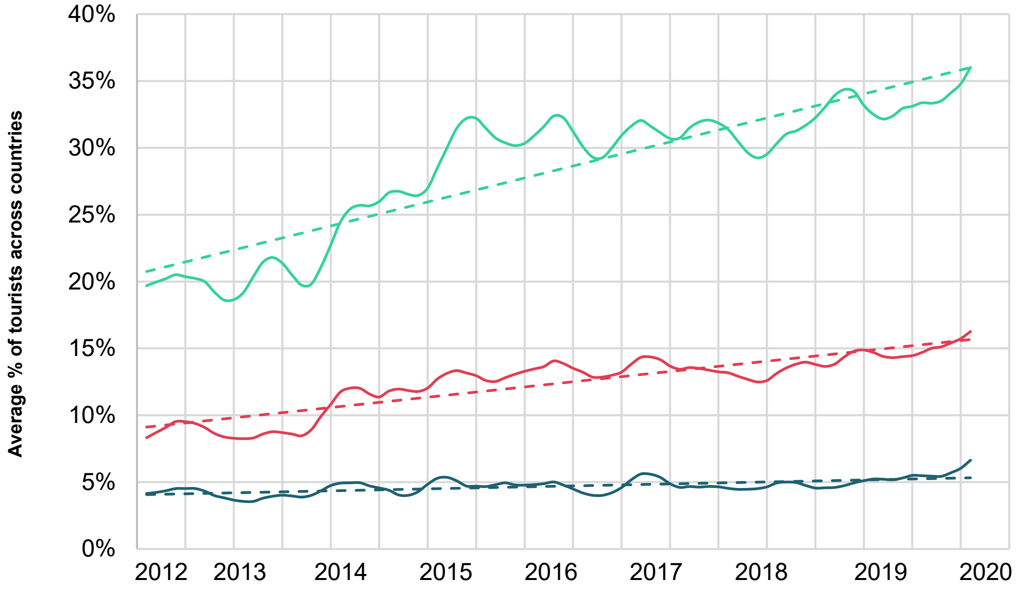
There is a slight increase in the likeliness of holiday visits amongst all three groups of tourists. The trend with the highest increase since last year lies within the group with a positive attitude towards visiting Norway within the next 12 months (by rating the question with a likeliness of visit with anything in-between 6 and 10). Although they are generally more stable, there is also a slight increase of about <1 percentage point in the two other groups of tourists; those that are likely to visit Norway and those that “definitely will” visit Norway within the next 12 months.

How likely is it that you will go on holiday to Norway in the next 12 months?
Scale from 0 to 10 where 0 is that you will definitely not, - and 10 is that you definitely will, be going on holiday to Norway.

Tourists with a positive attitude towards visiting Norway within the next 12 months (6-10)

Tourists that are likely to visit Norway within 12 months (8-10)

Tourists that definitely will visit Norway within 12 months (10)



Note: France was added to the tracking study in 2013.

Norway's attractiveness is increasing in some European markets, while declining or stabilizing amongst others

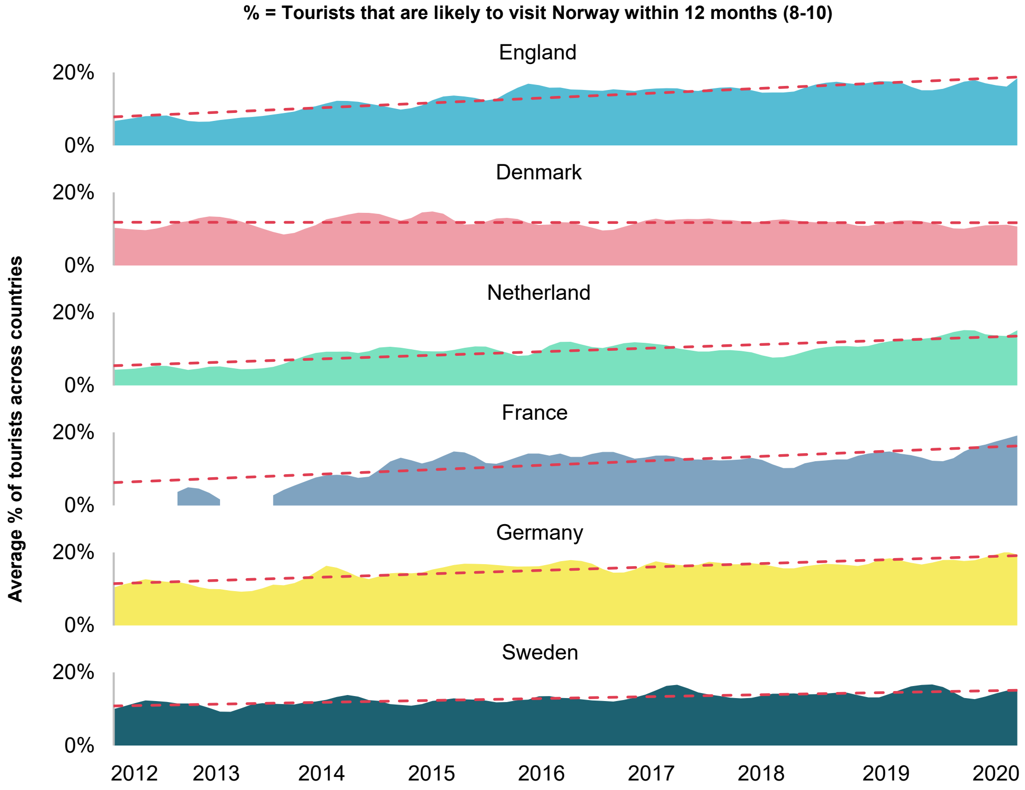
A clear positive trend from certain European countries

There is a clear positive trend of attractiveness for visits to Norway amongst English, German, French and Dutch tourists. Although not as significant, there is also a slightly positive trend in tourists from Sweden. This means that there is an increased likeliness of tourists coming from these countries to Norway for a holiday within the next 12 months, then there was in the past 12 months. This is especially true for French tourists, where we see the highest increase since last year amongst these six markets.

Stabilizing/declining likeliness of visits from Denmark

The only country, out of the six measured, that shows a stabilizing/declining likeliness of visits to Norway within the next 12 months are tourists that come from Denmark. Danish tourists show a stable or even a marginal decline in the likeliness of visits to Norway.

How likely is it that you will go on holiday to Norway in the next 12 months?
Scale from 0 to 10 where 0 is that you will definitely not, - and 10 is that you definitely will, be going on holiday to Norway.



Note: France was added to the tracking study in 2013.

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Norway is especially appealing to tourists with children – a difference that is increasing

Norway is becoming more and more attractive as a holiday destination for tourists with children

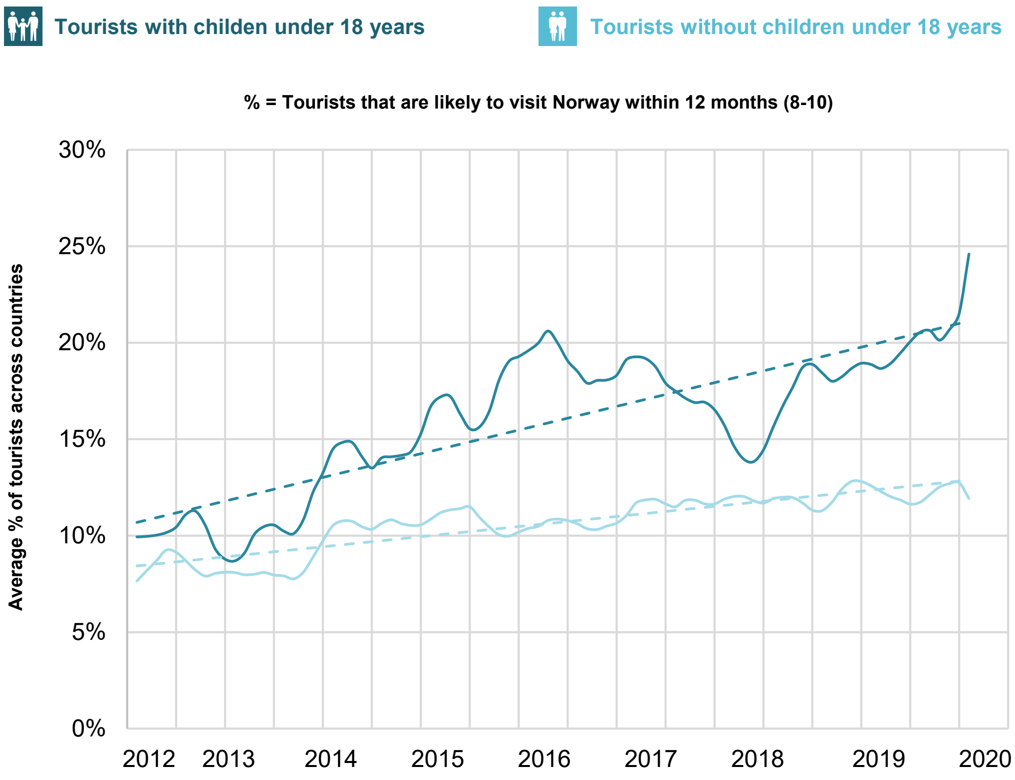
There is a positive trend within the likeliness of visits to Norway from tourists with children under the age of 18. This is especially true for the past year, where we see a vast increase in Norway’s attractiveness for tourists with children.

Meanwhile there is a slight decrease in Norway’s attractiveness amongst those without children

On the other hand, there is a slightly decreasing likeliness of visits from the other groups of tourists, which consists of those that don’t have children under the age of 18.

This is also means that the gap between the two groups of tourist is increasing, where Norway is becoming more and more a destination for tourists with children under the age of 18.

How likely is it that you will go on holiday to Norway in the next 12 months?
Scale from 0 to 10 where 0 is that you will definitely not, - and 10 is that you definitely will, be going on holiday to Norway.



Note: France was added to the tracking study in 2013.

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The increase in Norway’s attractiveness as a holiday destination, is especially true for tourists with higher incomes

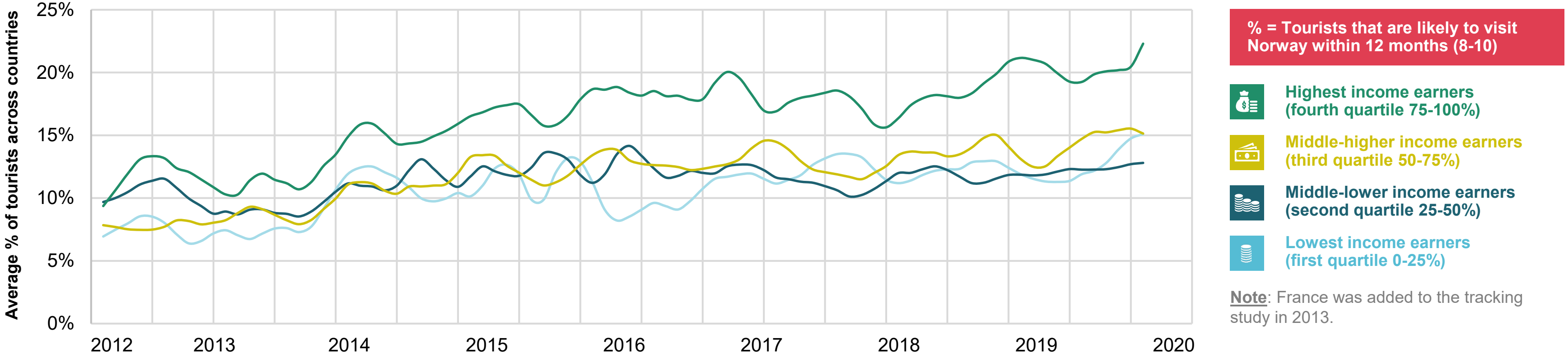
High income earners are more likely to visit Norway

The likeliness of visits to Norway from tourists with a high income has been higher than those with a lower income for many years. However, the difference is increasing. While middle income earners remain stable, the higher income earners are more likely to visit Norway now than last year.

… but at the same time Norway is becoming increasingly attractive for those with lower incomes

It is not only amongst those with high incomes we see an increasing likeliness of visits to Norway. Norway’s attractiveness is also increasing amongst those with lower incomes. This could be currency-related, where the Norwegian Kroner has been weak recently, so low-income earners might grab the chance while this is still the case.

How likely is it that you will go on holiday to Norway in the next 12 months?
Scale from 0 to 10 where 0 is that you will definitely not - and 10 is that you definitely will be going on holiday to Norway.



Note: France was added to the tracking study in 2013.

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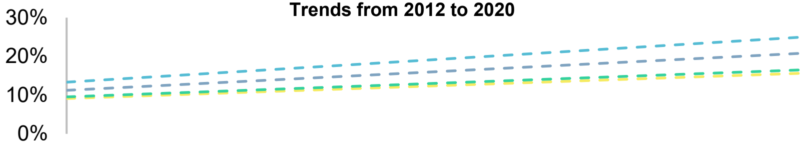
Norway is seen as a more likely holiday destination for those that want to go skiing and/or do other outdoor activities

Generally a slightly positive trend amongst all four interest groups

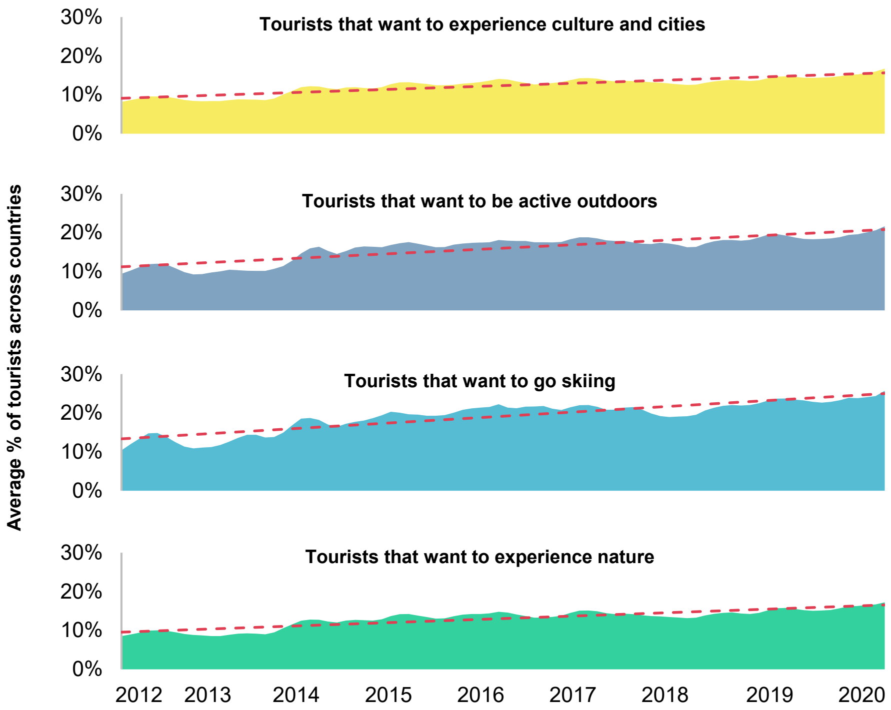
There is a small increase in the likeliness of visits to Norway from all four interest groups shown in the figure to the right. However, we see that three that involves outdoor activities have a higher increase than the interest group for experiencing culture and cities.

The tourist that want to go skiing and/or be active in other outdoor activities are more likely to visit Norway

Out of the four interest groups shown, those that want to go skiing and/or be active in other outdoor activities show an even more positive trend and a higher likeliness of visiting Norway within the next 12 months.



How likely is it that you will go on holiday to Norway in the next 12 months?
Scale from 0 to 10 where 0 is that you will definitely not - and 10 is that you definitely will be going on holiday to Norway.



Note: France was added to the tracking study in 2013.

Although the attractiveness of Norway as a holiday destination generally has risen, the Share of Voice has been steadily falling

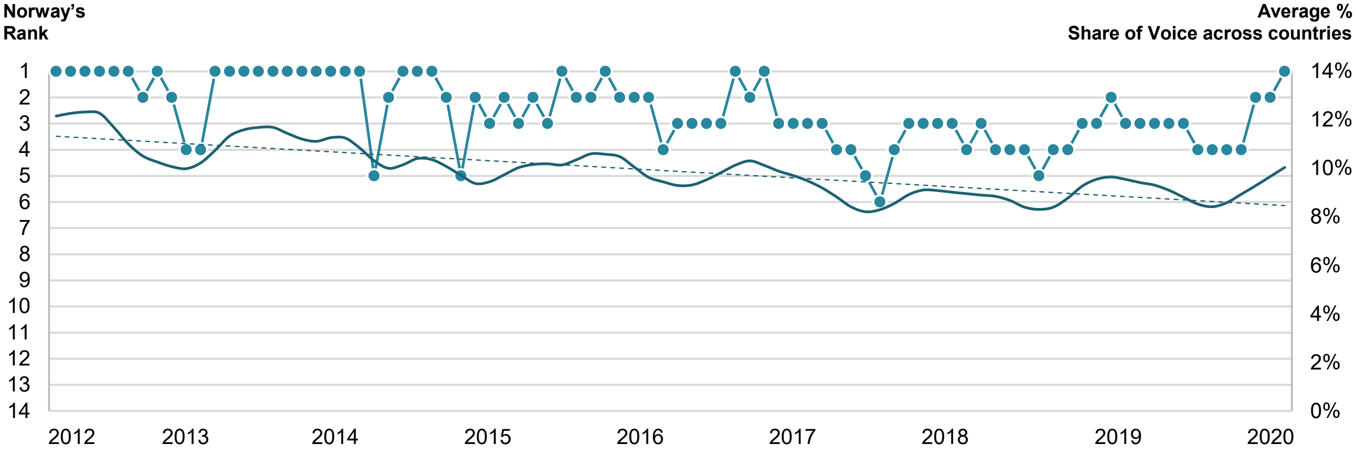
Norway’s Share of Voice has been steadily falling for the past years

Norway’s proportion of exposure through what is known as “Share of Voice” does not seem to be linked to the increasing attractiveness of Norway as a holiday destination. While the attractiveness is steadily increasing, the Share of Voice is steadily falling.

A positive trend in recent months

Although the Share of Voice of Norway has been steadily falling for several years, there seems to be signs of a positive trend in recent months. Since mid-2019, Norway’s Share of Voice has increased by approximately 4 percentage points. Maybe the trend is about to make a turn for the positive?

Can you remember having seen any advertisements for countries as holiday destinations in the past month?
Norway’s proportion of exposure and ranking amongst benchmarking countries



Norway’s rank:
1 being the most exposed country and 14 being the least exposed country.

Norway’s Share of Voice:
The proportion of exposure to holiday destination advertisements accounted for by Norway.

Notes:
Benchmarking countries: Finland, Iceland, Canada, Alaska, New Zealand, Germany, France, Italy, Scotland, Norway, Austria, Sweden, Denmark and Switzerland.

France was added to the tracking study in 2013.

Norway's exposure through media outlets has been stable since digital channels overtook the traditional newspapers & magazines in 2015

Continuously fluctuating but overall stable exposure through media outlets since 2015

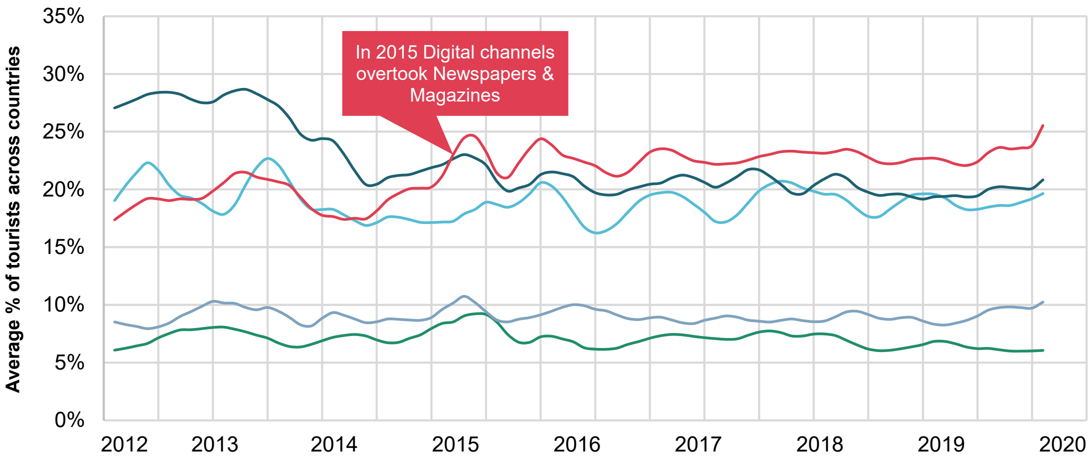
Since digital channels overtook the traditional newspapers & magazines in 2015, the exposure through media outlets have been fluctuating, yet still remaining overall stable across all measured types of media outlets.

Most tourists still hear about Norway through digital channels

Digital channels is still the media outlet where most tourists hear about Norway, which has been the case since 2015. However, newspapers & magazines, and radio & TV also remain important channels for reaching the tourists.

Have you heard or seen coverage about Norway as a holiday destination in the past month?

More answers are possible. Percentage shown is the proportion of tourists who remembers seeing coverage about Norway through any of the specific outlets.



Type of media outlet	Specific outlets
Radio & TV	Feature on radio or television Advertisement on television
Newspapers & Magazines	Article in newspaper, magazine etc. Advertisement in newspaper, magazine etc. Special supplement in a newspaper, magazine etc.
Digital channels	Coverage on the internet Talked about on Facebook etc. In an online newsletter
Trade fairs & Distributors	Trade fair Travel agency or tour operator
Other sources	In books etc. Advertisement in the cinema Outdoor advertisement, e.g. a large billboard Other sources

Tourists whom have seen coverage for Norway through digital channels are also the most likely to visit Norway

Digital channels is the most effective channel for reaching those that most likely will visit Norway

Out of the measured media outlets, digital channels is by far the most effective one. A tourist whom has seen coverage for Norway through digital channels is 162 percent more likely to visit Norway, than a tourist that hasn't seen coverage for Norway through digital channels.

Newspapers & magazines and radio & TV are still important channels

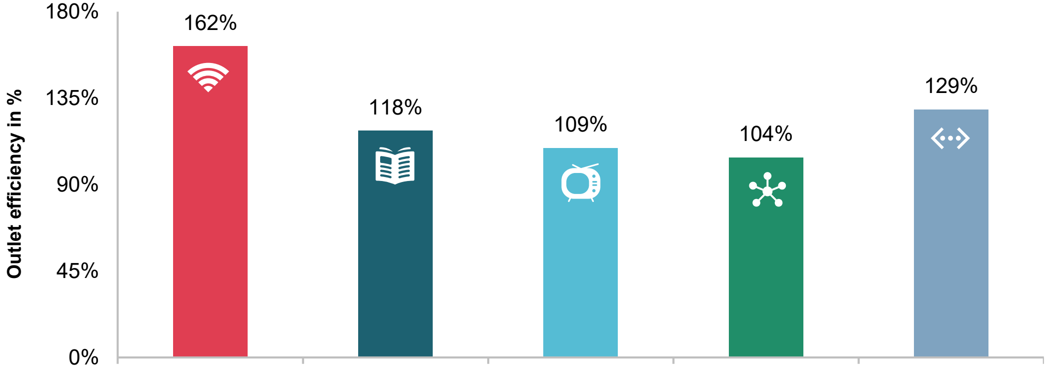
Although they are not as effective as digital channels, newspapers & magazines and radio & TV also contribute to a higher likeliness of tourists visiting Norway.

Thus, digital channels should be considered the main channel for exposure of Norway, but at the same time keeping some coverage through other channels. It is also likely that not all kinds of tourists will be reached through digital channels, e.g. the older generation.

Have you heard or seen coverage about Norway as a holiday destination in the past month?
More answers are possible.

% = How much more likely a tourist is to visit Norway on a holiday, if they have seen coverage for Norway through the given media outlet.

Example interpretation:
A tourist who has seen coverage for Norway through Radio & TV is 109% more likely to visit Norway, than a tourist not having seen coverage through Radio & TV.



Digital channels
- Coverage on the internet
- Talked about on Facebook etc.
- In an online newsletter

Newspapers & Magazines
- Article in newspaper, magazine etc.
- Advertisement in newspaper, magazine etc.
- Special supplement in a newspaper, magazine etc.

Radio & TV
- Feature on radio or television
- Advertisement on television

Trade fairs & Distributors
- Trade fair
- Travel agency or tour operator

Other sources
- In books etc.
- Advertisement in the cinema
- Outdoor advertisement, e.g. a large billboard
- Other sources

Note: Data covers 2018-2019. France was added to the tracking study in 2013.

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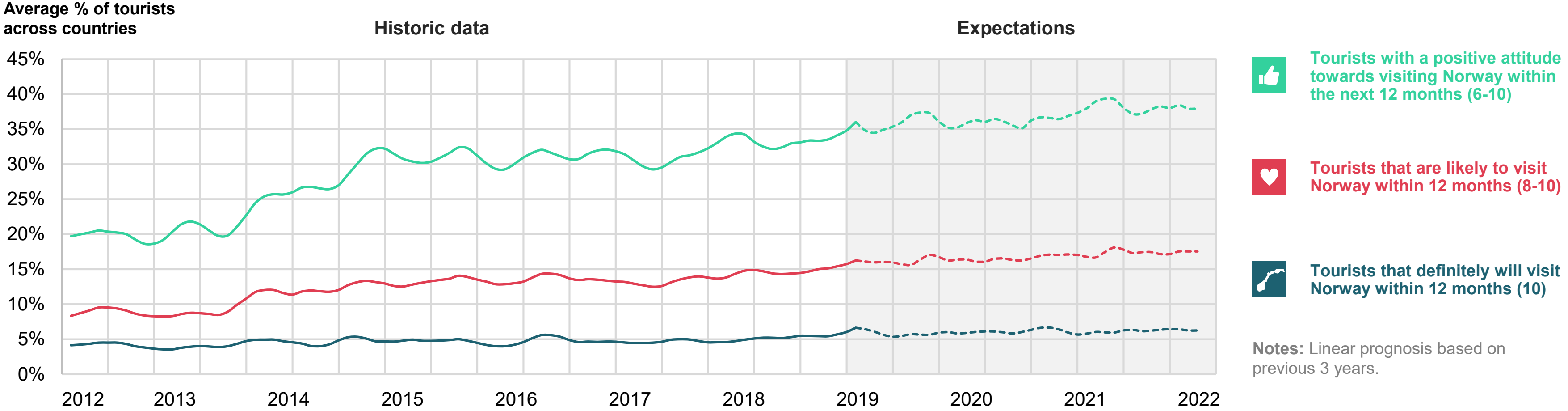
Outlook: Norway's attractiveness is expected to increase in the following three years, although the number of tourists that «definitely» will visit Norway remains constant

Increasing attractiveness

Norway's attractiveness har been slowly increasing and based on historic data this trend is also expected to continue for the following three years. Tourists with a positive attitude towards visiting Norway within the next 12 months, as well as those that are likely to visit Norway within this period, is expected to follow the same positive trend. However, the tourists that "definitely" will visit Norway within the next 12 months is expected to remain at the same level as it is today.

The prognosis is based on historical numbers and derived from the trend and periodicity in the previous 3 years. It is therefore an expectation given by historical data.

How likely is it that you will go on holiday to Norway in the next 12 months?
Scale from 0 to 10 where 0 is that you will definitely not - and 10 is that you definitely will be going on holiday to Norway.



Notes: Linear prognosis based on previous 3 years.

Outlook: Most of the measured European markets are expected to increase in the next three years, while the Danish market is expected to continue declining

Norway’s attractiveness amongst most of the measured European countries is expected to continue increasing

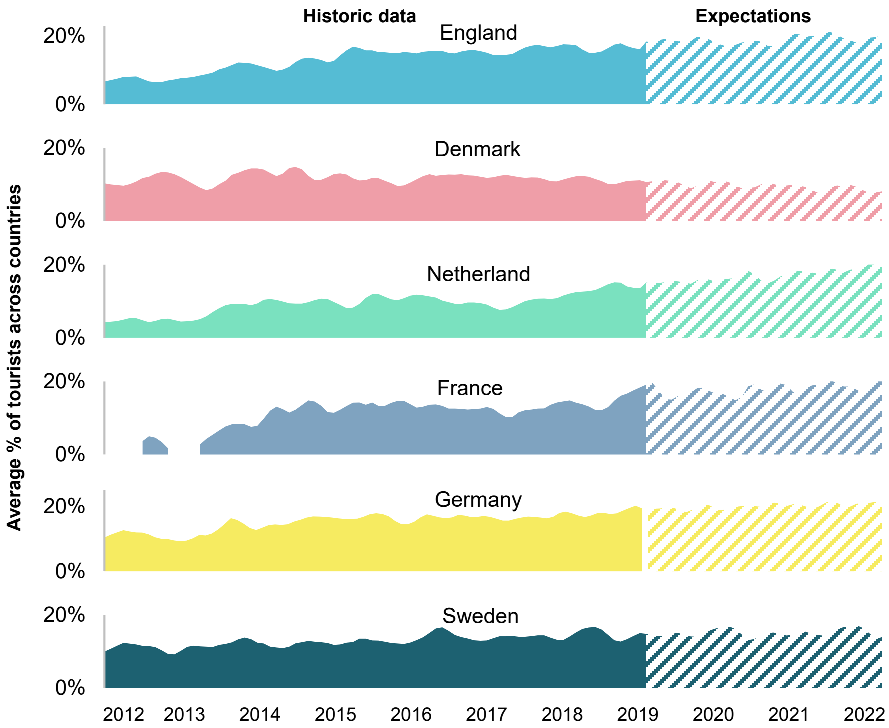
The positive trend of Norway’s attractiveness amongst countries like England, Netherlands, France and Germany is expected to continue in the next three years, where the likeliness of visits of tourists from these countries within the next 12 months is expected to be higher for each of the three years. The overall trend for the next three years is also slightly positive for Sweden; however it is expected to continue fluctuating from year to year.

Falling attractiveness in Denmark

On the other hand, Norway’s attractiveness in Denmark is expected to go in the complete opposite direction as to the other measured European countries, with a declining attractiveness within the next three years. If this ends up being the case, we can expect there to be less Danish tourists visiting Norway in the next three years.

How likely is it that you will go on holiday to Norway in the next 12 months?
Scale from 0 to 10 where 0 is that you will definitely not - and 10 is that you definitely will be going on holiday to Norway.

% = Tourists that are likely to visit Norway within 12 months (8-10)



Note: France was added to the tracking study in 2013.
Prognosis based on linear trend from previous 3 years trends in attractiveness per country. Prognosis is therefore based on historical data and the actual course can of course be actively affected.

Theme 2:
Norway's holiday brands

Section two presents the five dimensions of Norway as holiday destination and looks on how these align with the tourists’ associations to Norway. Norway’s brand as a destination for spectacular nature still stands strong, however we see an increasing demand of also wanting to experience other offerings in addition to nature when visiting Norway on a holiday.

We also look closer on how these dimensions compare to the various media outlets. Digital media is important, but other more traditional channels are also important, especially within certain markets.

Norway's holiday destination brand

The five dimensions of the Norwegian holiday brand and the overarching sustainability theme

How we measure the Norwegian brand as a holiday destination

To measure and track the development of the Norwegian holiday destination brand, the Tracking Survey asks all active tourists to which extent they believe 23 different statements characterize their perception of Norway. Each of the 23 statements are evaluated from 'Completely agree' to 'Completely disagree' on a five-point scale.

Identifying the brand dimensions

Utilizing all the observations made since 2012, we can identify inter-correlating statements. That is, we can see agreements within certain statements aligned together. For example, if a tourist agrees with the statement 'Norway has spectacular natural scenery', it is also very likely that the same tourist agrees with 'Norway has spectacular mountains'.

Using this approach with grouping statements reveals five overall brands for Norway as a holiday destination. The five brands are shown and defined in the figure to the right.

It has exciting cities
It has an exciting culture and history
It has great cuisine and local specialties
It has welcoming locals

It offers good hiking

It offers good angling

It offers good cycling

It offers a wide range of sustainable alternatives

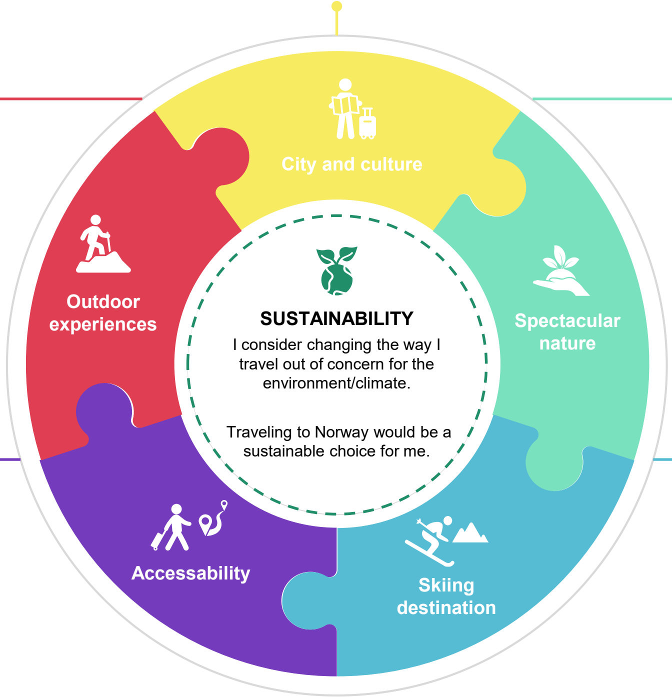
It has spectacular natural scenery

It has spectacular fjords

It has spectacular mountains

It offers an opportunity to experience natural phenomena such as the midnight sun or the northern lights

It is the best place to experience the Northern Lights



Norway is easy to get to

It is easy to plan a trip to Norway

There are attractive offers for a holiday in Norway

Family friendly skiing

A lot of snow is guaranteed

Exciting experiences in addition to skiing/snowboarding

Less crowded skiing destinations

A wide variety of ski in/ski out products

A wide selection of slopes with different levels of difficulty

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Many do consider the environment when travelling

Almost half of the tourists do consider changing the way they travel for the sake of the environment

47 percent of the tourists asked do say that they agree with the fact that they should consider changing the way they travel out of concern for the environment/climate. However, the level of agreement does seem to vary across nationalities. Out of the nationalities measured, French tourists are the ones that agree with this statement the most, while Danish tourists are the ones that least agree that they should consider changing the way they travel for the sake of the environment.

Highest level of disagreement from other Scandinavian countries

If we look at those that actually disagree that they should consider changing the way they travel out of concern for the environment/climate, the highest level of disagreement out of the nationalities measured come from our neighbours in Scandinavia. 26 percent in both Denmark and Sweden disagree with the statement. This is also the case for the Netherlands.
Overall, there is still many that don't know or neither agree nor disagree that they should consider changing the way they travel for the environment across all countries.

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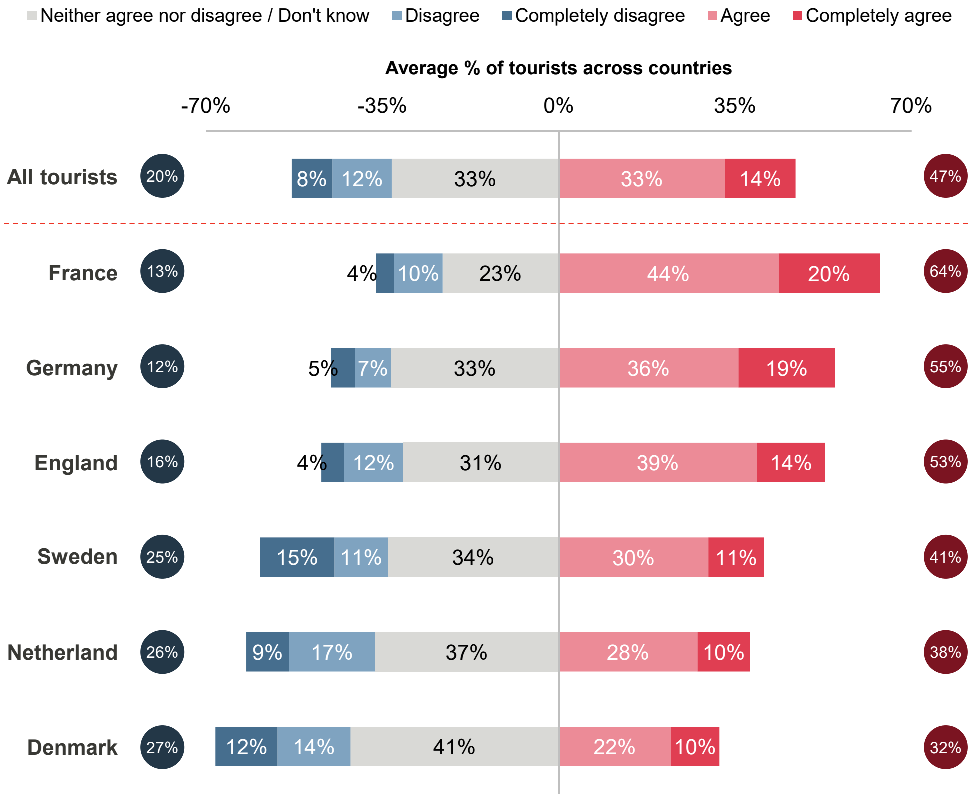
To what extent do you agree or disagree with the following statement:
I consider changing the way I travel out of concern for the environment/climate



Note: Question was added to the tracking survey in June 2019.

Norway is generally seen as a sustainable destination, but there are variations across countries

Almost half of the tourists consider Norway as a sustainable destination

46 percent of the tourists asked do say that they agree that travelling to Norway would be a sustainable choice for them. However, the level of agreement does seem to vary across nationalities. Out of the nationalities measured, French tourists are the ones that agree with this statement the most, while Danish tourists are the ones that least agree that travelling to Norway would be a sustainable choice for them.

Highest level of disagreement from the Dutch and Danish tourists

If we look at those that actually disagree with the statement that travelling to Norway would be a sustainable choice for them, the highest level of disagreement out of the nationalities measured come from Dutch and Danish tourists. 15 percent in both the Netherlands and Denmark disagree with the statement.

Overall, there is also a vary high level of those that don’t know or neither agree nor disagree that travelling to Norway would be a sustainable choice for them. Questions about sustainability still seem difficult to answer for some respondents.

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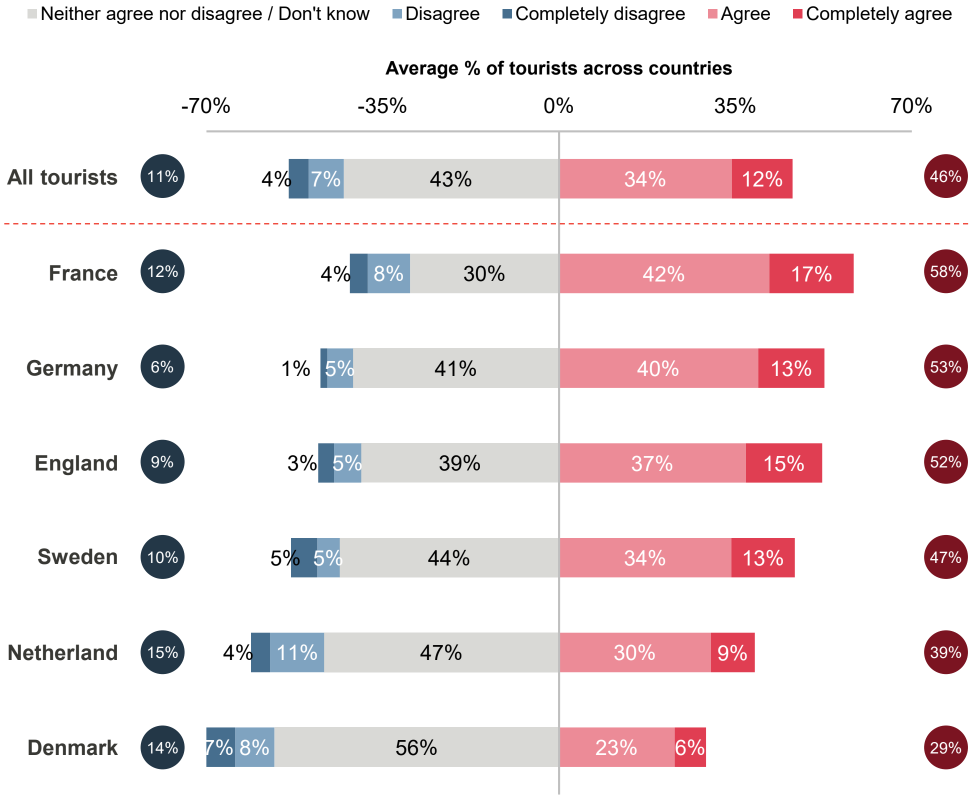
To what extent do you agree or disagree with the following statement:
Travelling to Norway would be a sustainable choice for me



Note: Question was added to the tracking survey in June 2019.

Norway is mainly considered to be a destination with spectacular nature, but the brands of outdoor experiences and city & culture are becoming more prevalent

Spectacular nature is by far the branding dimension with highest level of agreement from tourists

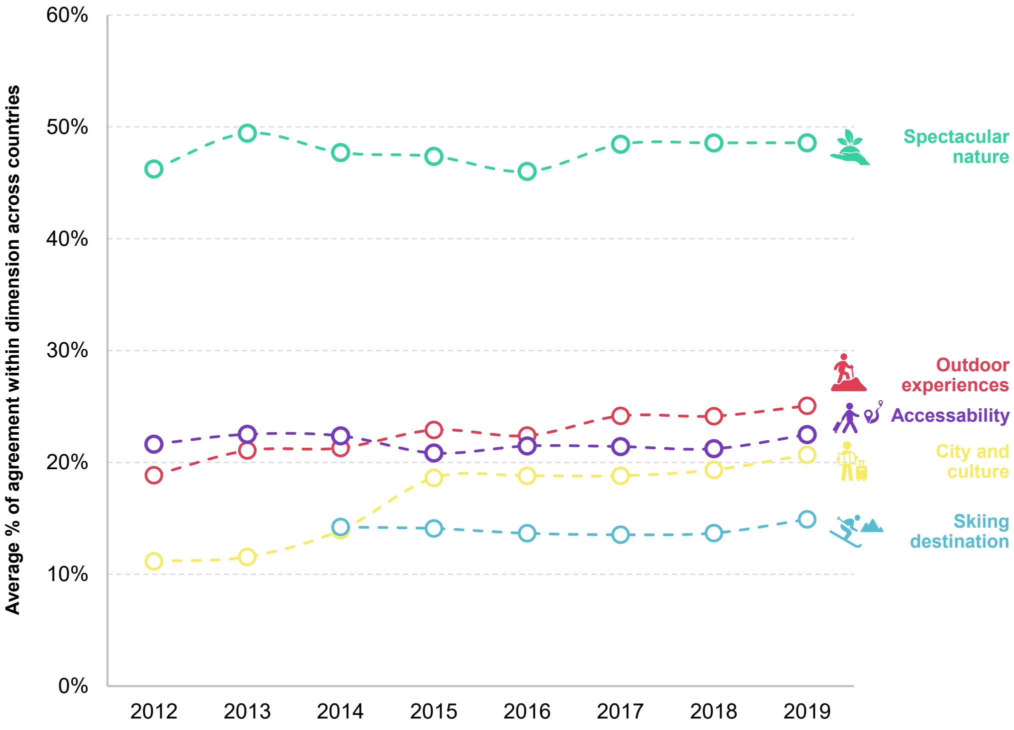
Out of the five branding dimensions measured, spectacular nature is, and has been, the one with the by far highest level of agreement from tourists. However, it is also the only branding dimension which has stagnated over the past two years.

A positive development in the other four dimensions

Although the remaining four branding dimensions have a lower level of agreement from tourists, the level of agreement for all four dimensions have had a positive development since 2018. This is especially true for the brand dimension concerning city and culture, which has increased the most out of the four.

The Norwegian holiday destination brand from 2012-2019

The average proportion of 'completely agreeing' tourists within each branding dimension.



Note: From September 2014 to January 2015 five new items were added to the tracking survey. Three items for 'Spectacular Nature' in September, one item for 'City and Culture' and one item for 'Accessible Destination'. Note that these new items does not affect the overall trends. France was added to the tracking survey in 2013.

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Spectacular nature is the prevailing brand for Norway across all countries, however, the strength of the other branding dimensions does vary across countries

Spectacular nature is the branding dimension with highest agreement across all countries

As can be seen below, spectacular nature is the branding dimension with the highest level of agreement across all measured countries. Most of which have a +/- 50 percent proportion of tourists that agree with the brand.

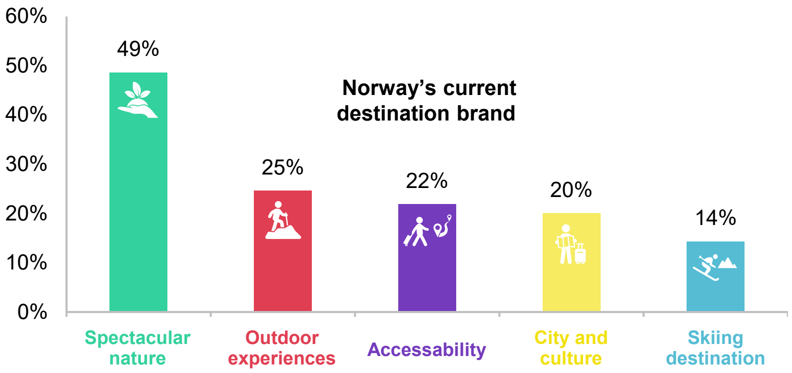
Tourists from Germany are the most positive tourists towards Norway's brands

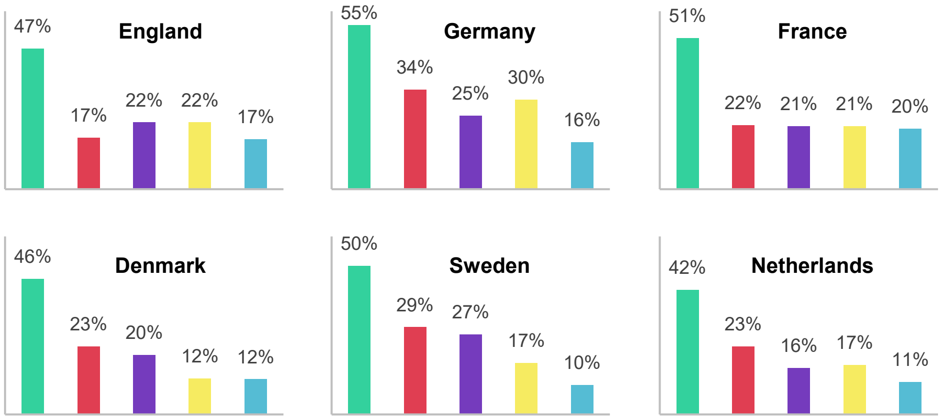
Out of the countries measured, tourists from Germany are the ones that have the highest overall agreement with all of Norway’s branding dimensions. In addition to 55 percent completely agreeing that Norway has spectacular nature, 34 percent agree that Norway has great outdoor experiences.

The Norwegian holiday destination overall and by tourist nationality

The average proportion of ‘completely agreeing’ tourists within each branding dimension for 2018-2019.

Average % of agreement within dimension across countries





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Norway must diversify and be associated with more than a destination with beautiful nature to attract more tourists

Easy access is the most important perception

While “completely agreeing” with the experiential brands of City and culture, Sustainability and Skiing destination all increases the likelihood being a potential visitor in Norway by more than 100%, the most important brand is Accessibility which increases the likelihood with 163%. Emphasizing that Norway is an easily accessible destination with attractive offers will have the largest direct impact on likelihood to visit Norway within the next 12 months.

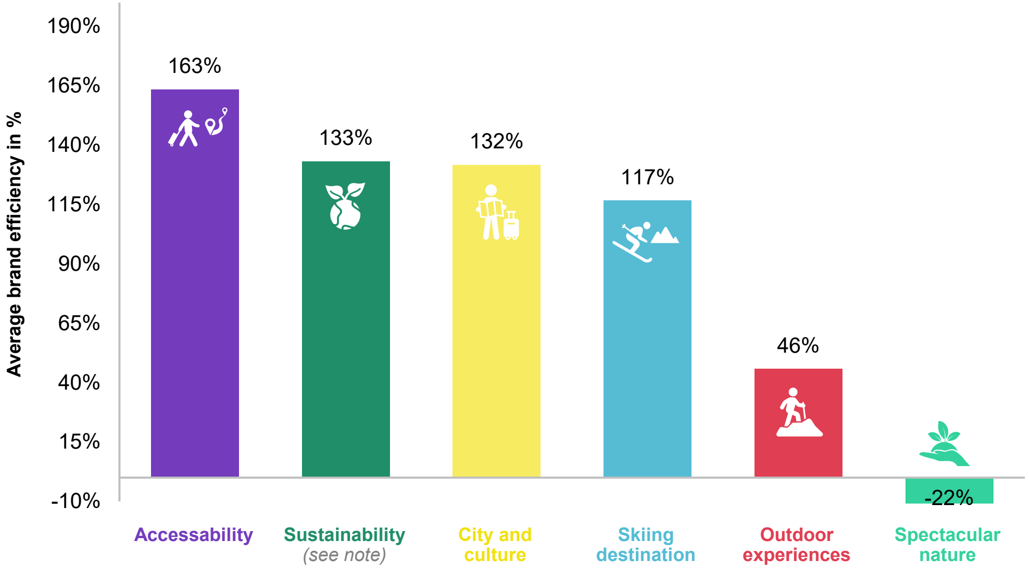
Nature is considered as a “given” for the tourists

The negative effect of “only” agreeing with nature characterizing Norway, is a clear indication that having ‘Spectacular nature’ is not enough; it needs to be combined with other types of branding e.g. “Outdoor experiences” or “City and culture”. To use the comparative advantage Norway has in its beautiful nature, it will have to be communicated as a part of something more; amazing outdoor experiences, exciting new culture, great food or simply very attractive offers.

How likely is it that you will go on holiday to Norway in the next 12 months?
Scale from 0 to 10 where 0 is that you will definitely not - and 10 is that you definitely will be going on holiday to Norway.

% = How much more likely a tourist is to visit Norway on a holiday, if they completely agree with only the one brand being associated with Norway as a holiday destination.

Example of interpretation:
A tourist who completely agrees with only “City and culture” characterizing Norway as a holiday destination is 132% more likely to visit Norway, than a tourist who does not agree with any brand characterizing Norway.



Note: Results are based on 2018-2019 except for Sustainability which only covers June 2019 to December 2019. Sustainability is based on one question on a 1 to 5 scale, which means the effect is from “neutral (3)” to “completely agree (5)”.

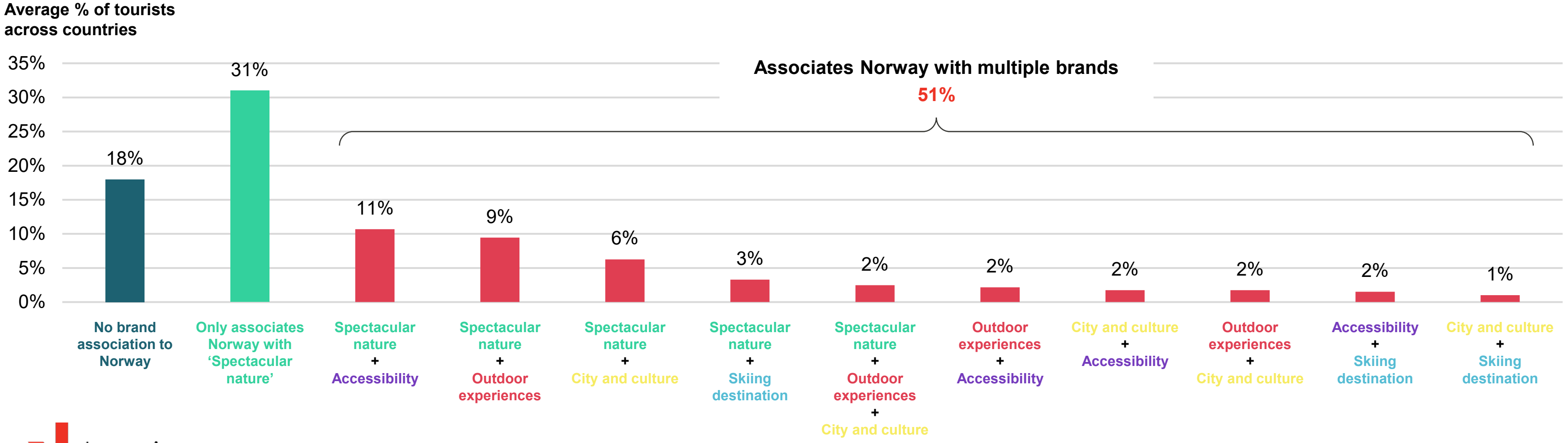
Many have multiple associations to Norway, even though a fair amount still only associate Norway as a destination with spectacular nature

Half of the tourists associate Norway with multiple brands

51 percent of the tourists asked associate Norway with multiple brands, most of which are in combination with the brand of spectacular nature. Out of the ones that associate Norway with multiple brands, spectacular nature in combination with accessibility or outdoor experiences are the most common ones.

There is still a fair amount of 31 percent that only associate Norway with spectacular nature, while almost 1/5 don’t associate Norway with any brand. This means there is still room to build brand awareness for Norway.

Using the brand palette to characterize Norway’s holistic destination image – top 10 combinations
Percentages represent the proportion of tourists who evaluates the 2-3 branding values highest or second highest 2018-2019.



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Note: Combinations not in the top 10 make up 11%

All the measured channels seem to have a similar effect, but some brands are easier to influence

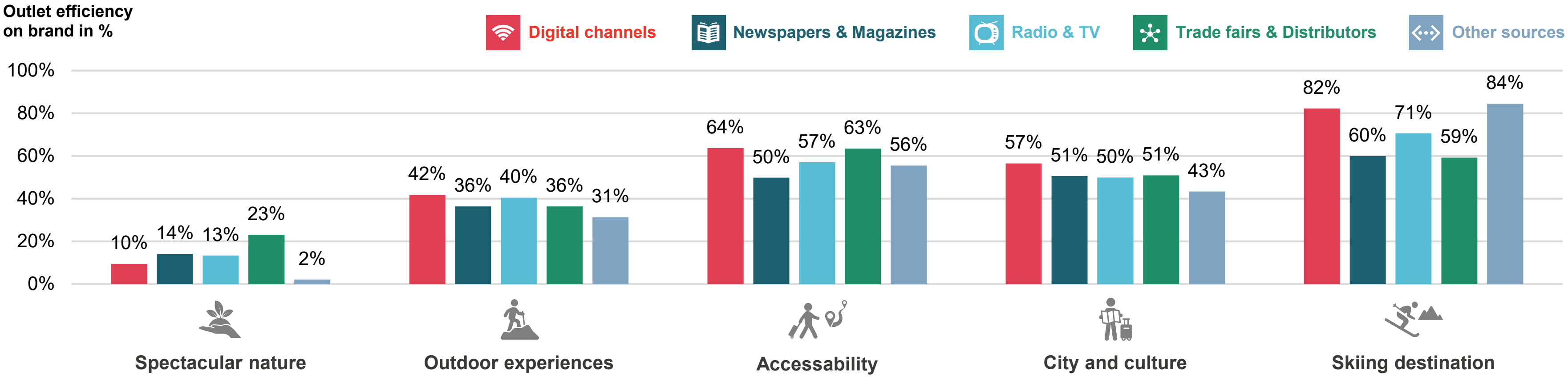
Norway as a destination for skiing, city & culture and accessibility are the easiest holiday brands to influence

Out of the six brands measured, Norway as a skiing destination seems to be the easiest one to influence across all five channels. This especially goes for digital channels where 82 percent that have seen coverage of Norway through digital channels associate Norway as a destination for skiing. This is also the case for Norway as a destination for city & culture and accessibility, although to somewhat lower extent. However, these latter to brands are the ones that have the greatest effect on attractiveness (ref. slide x). Nature is once again proven as a given for Norway.

Have you heard or seen coverage about Norway as a holiday destination in the past month?

% = How much more the brand is associated with Norway, if they have seen coverage for Norway through the given media outlet.

Example interpretation: *A tourist who has seen coverage for Norway through Radio & TV finds the brand "Skiing destination" to be 71% higher, than a tourist who has not seen coverage through Radio & TV.*



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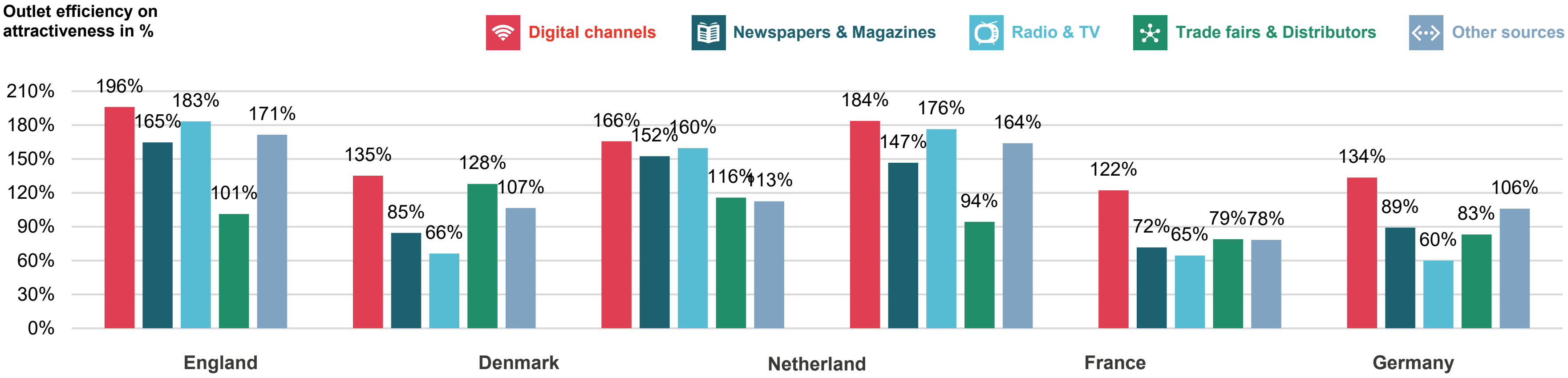
Different channels have different effects amongst the measured countries

Digital channels are effective, but some countries also require other channels

The various channels have different effects across the measured countries. While digital channels seems to be effective in all countries, it is still relatively more effective in Denmark, Sweden and Germany. In these countries most other channels are much less effective than the online ones. In England, France and the Netherlands traditional media still stands strong, with a high percentage having seen coverage of Norway in newspapers & magazines, and radio & TV. Additionally we can see that Germany seems to be the most difficult country to influence, due to Norway's already high level of attractiveness amongst potential tourists in Germany.

Have you heard or seen coverage about Norway as a holiday destination in the past month?
% = How much more likely a tourist is to visit Norway on a holiday, if they have seen coverage for Norway through the given media outlet.

Example interpretation: *A tourist who has seen coverage for Norway through Radio & TV in England is 183% more likely to visit Norway, than an English tourist not having seen coverage through Radio & TV.*



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<u>Note</u>: Data covers 2018-2019.

Spectacular nature has two nuances as a brand: Beautiful lights and landscape & nature

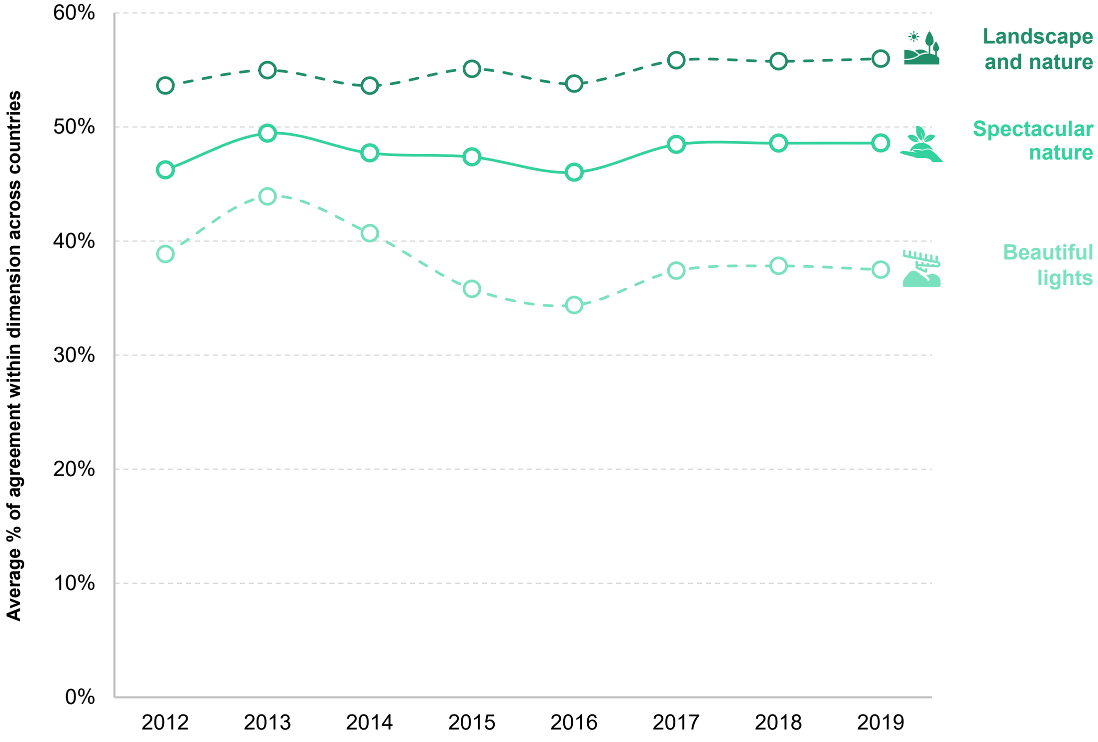
The level of agreement for both sub-dimensions have stabilized over the past few years

While the level of agreement of both Norway as a destination for landscape & nature and beautiful lights have been fluctuating in the past up until 2016/2017, both have been stabilized since. In 2019 there was even a marginal decline in the level of agreement for Norway as a destination with beautiful lights.

This also means that Norway's brand as a destination with spectacular nature has remained stabile over the past years. It seems as if Norway's beautiful nature is almost becoming expected by tourists, where other branding values are now becoming increasingly important to attract tourists, in addition to the spectacular nature.

The Norwegian holiday nature brands from 2012-2019

The average proportion of 'completely agreeing' tourists within each branding dimension.



Note: From September 2014 three items for 'Spectacular Nature'. Note that these new items does not affect the overall trends. France was added to the tracking survey in 2013.

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Theme 3:
The holiday journey to Norway from A to Z

Theme 3 looks at the entire journey to Norway from the beginning till the end. By this we mean even before travelling to Norway and even after leaving Norway. Tourists that come to Norway seek to experience both nature and culture on their holiday trip. The more coverage of Norway they see, the higher the chances are of them actually coming to Norway. Many consider travelling to Norway for a while before they end up going, but many still end up booking their trip quite close to departing to Norway. The elements of satisfaction are very similar regardless of the purpose of the holiday trip.

The various stages of a holiday journey to Norway from A to Z

A view on each stage of a holiday journey

In this chapter we look at each stage of a holiday journey to Norway. We start off with looking at pre-journey elements of their visit, by looking at their motivation, knowledge of, and booking habits. We then continue to elements during their visit by look at experiences and satisfaction. The last part is post-journey, where we first have a look at the tourists' evaluation of their holiday in Norway, what they've learnt and how if their attitude towards Norway has changed after their visit. Towards the end we also look at the potential for future visits to Norway.

Stages of a holiday journey to Norway

Before visiting Norway

- Motivators and determinants
- Exposure, knowledge and booking

During the visit in Norway

- Experiences and activities
- Satisfaction with Norway's offerings

After visiting Norway

- Evaluation of the visit
- Learnings from the visit
- Attitudes before and after

Future visits in Norway

- Repeated visits to Norway
- Destination loyalty

Tourists seek out nature and culture, both of which Norway offers

Over 90 percent seek nature and culture out of the tourists that are likely to visit Norway within the next 12 months

Nature and culture are by far the experiences that most tourists that are likely to visit Norway within the next 12 months seek on a holiday abroad. Although to a lower extent, this is also somewhat aligned with Norway holiday destination brand, where spectacular nature and city & culture are two of the brands that are most associated with Norway. There are also quite a few of those that are likely to visit Norway within the next 12 months that seek to go skiing and/or other outdoor activities, which also are two of Norway's holiday destination brands.

One in five state that the purpose of their holiday trip to Norway were city holiday and/or cultural holiday

City & culture is an important purpose for many tourists. Besides relaxation, going on a city holiday, cultural holiday, active holiday and/or round trip are the main purposes of those that came to Norway on a holiday trip.

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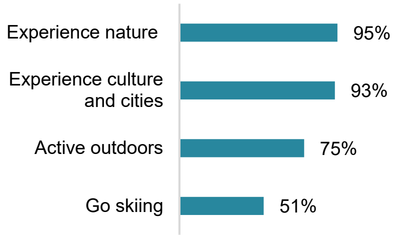
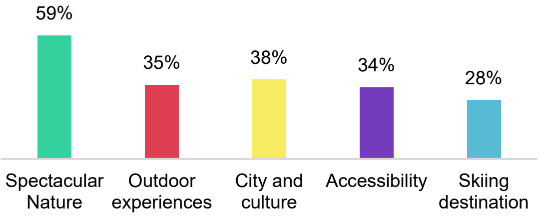
What motivates a first-time visitor to visit Norway?
Proportion amongst tourists who has never been to Norway are likely to visit Norway within the next 12 months.

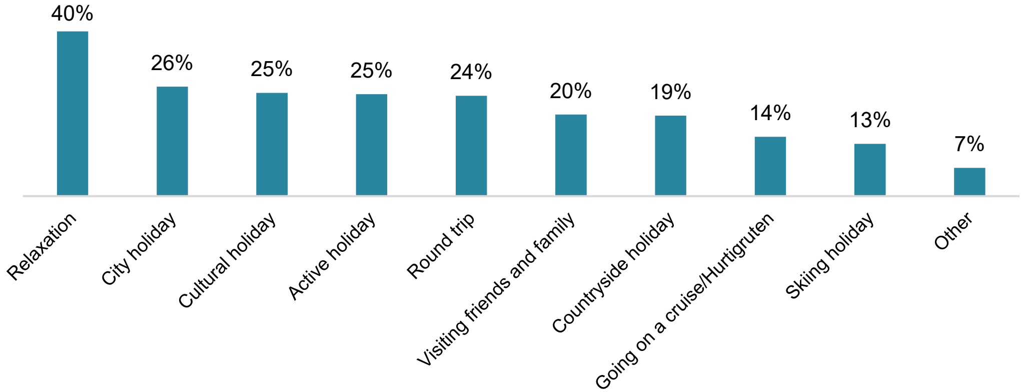
What types of experiences are you seeking on a holiday abroad?



Norway's holiday destination brand



What is the purpose of this holiday trip to Norway? If the trip has several purposes, please select the most important ones. Proportion of foreign holiday travelers in Norway.



Those that have seen coverage of Norway are more likely to visit

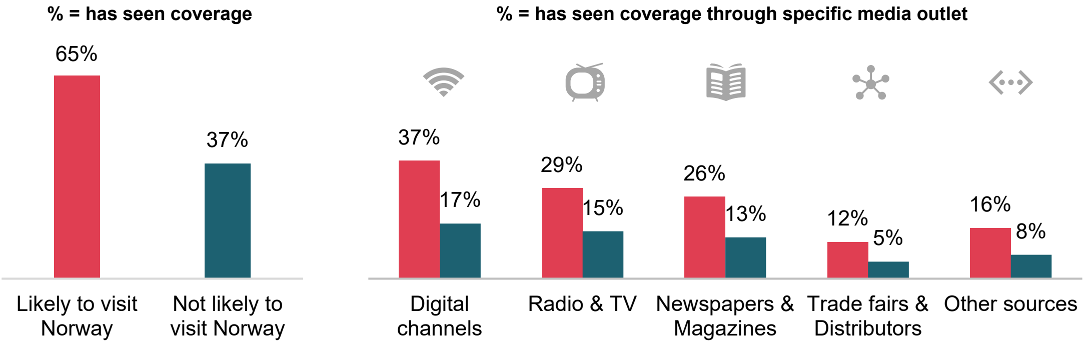
Regardless of channel, all of those that have seen coverage of Norway are more likely to visit Norway

The more coverage, the more likely it is that more tourists will visit Norway. Digital channels is the media outlet with the highest percentage of coverage that leads to likeliness of visit, thus also the channel with the highest return. All media outlets have a higher percentage of those that are likely to visit than those whom are not likely to visit, but the difference is smaller amongst the other media outlets.

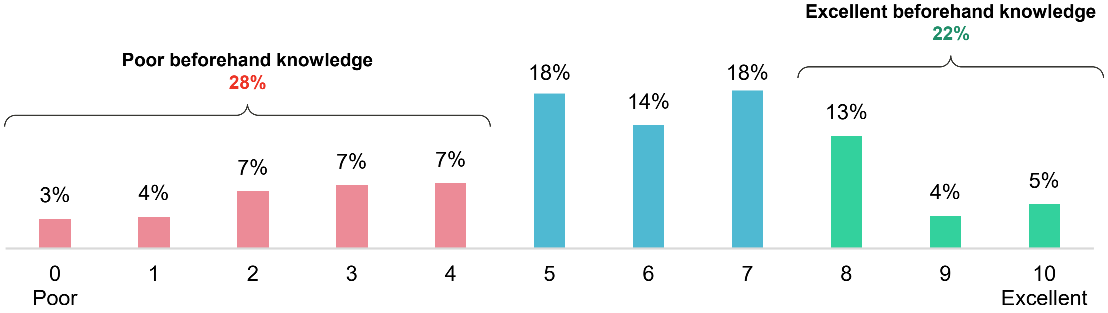
Most tourists have an average knowledge of Norway when they decided to book their trip

The average knowledge level of Norway when booking a trip is medium to good. Less than one third had poor knowledge of Norway before booking their trip. Thus, reaching out to potential tourists to increase awareness of Norway is important for tourists to end up booking a trip to Norway.

Have you heard or seen coverage about Norway as a holiday destination in the past month?
Proportion amongst tourists who has never been to Norway



How would rate your knowledge of Norway when you decided to book your trip to Norway?
Proportion amongst foreign tourists that went to Norway on a holiday



Source: The Norwegian Tourism Survey 2018-2019

Many consider visiting Norway for a while before booking their trip quite late

Half of the tourists considered a trip to Norway for more less than six months before travelling

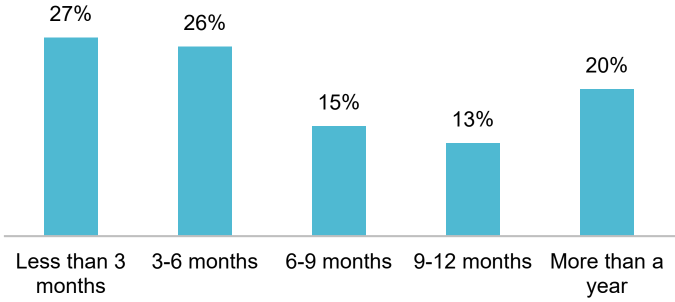
53 percent of the tourists considered a trip to Norway for less than half a year before they ended up going. However, at the same time 1/5 have been considering the trip to Norway for more than a year. Regardless, many still seem to book their trip to Norway quite late, with 63 percent of the tourists booking the trip within 3 months of departure.

Timing of marketing

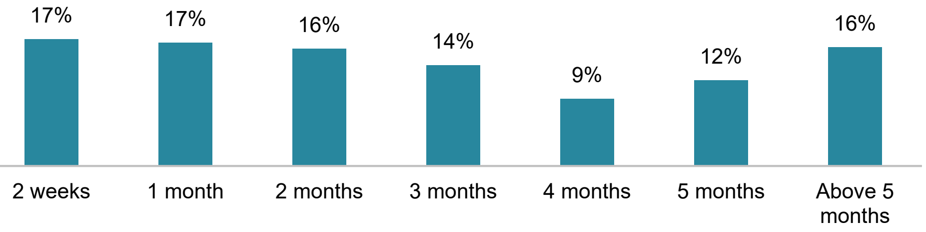
This means that awareness of Norway should be raised within six months of the tourists arriving, and then offers should be made within 2 weeks to 2 months of the arrival. As an example, for skiing tourism, the marketing could start around the months of autumn, with special offers around December-January to increase the potential for visits of skiing tourists.

Length of consideration and booking habits of a trip to Norway
Proportion amongst foreign tourists that went to Norway on a holiday

How long before visiting Norway did you first consider this trip to Norway?



How long before leaving did you book the first part of your trip to Norway?



Experiencing nature is important regardless of their main purpose

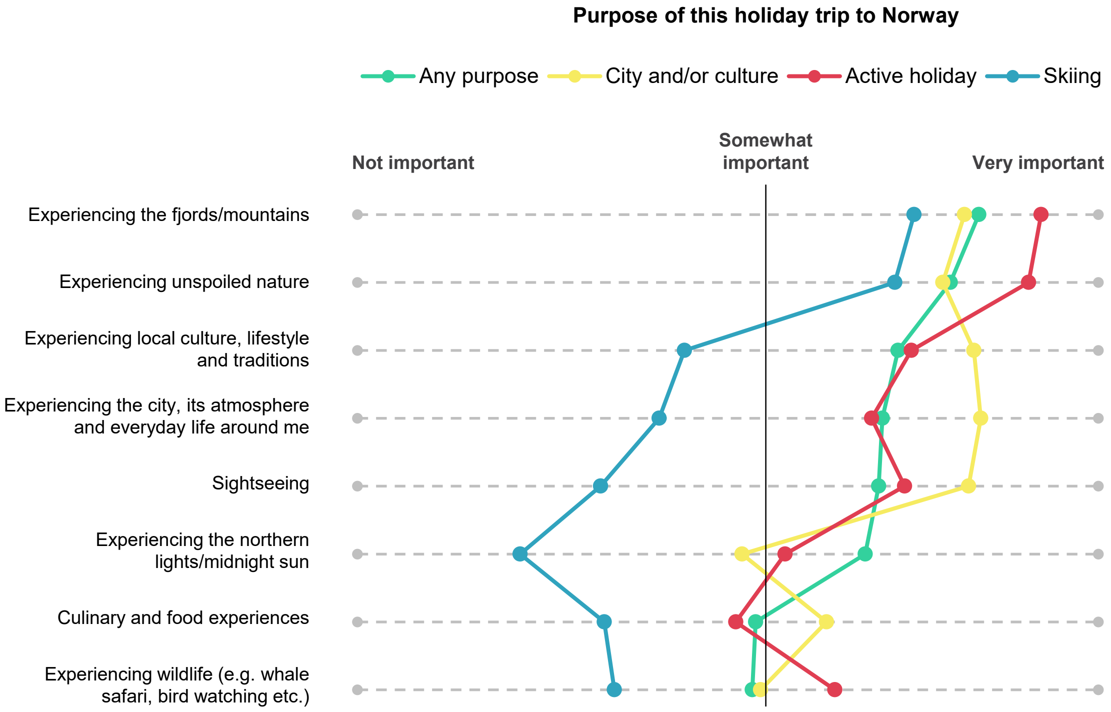
Experiencing the fjords/mountains and unspoiled nature are considered important by all tourists

There are big variations in what the tourists consider important experiences based on the purpose of their trip. However, they all agree upon the fact that experiencing fjords/mountains and unspoiled nature is important for their current holiday trip to Norway.

Tourists with skiing as their main purpose differ from the tourists with other purposes

Tourists that travel to Norway mainly to go skiing differ from tourists with other purposes as they are more specific in what they consider important experiences for their holiday trip. Along with other tourists they too see experiencing fjords/mountains and unspoiled nature as important, but all other activities are considered somewhat less important.

How important were the following experiences for your current holiday in Norway?
Average importance amongst foreign tourists that are on a holiday in Norway by purpose of the trip



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Source: The Norwegian Tourism Survey 2018-2019

High level of agreement on what the tourists are satisfied with on their holiday trip to Norway

Tourists are satisfied with the same elements of their trip regardless of purpose

Regardless of purpose, almost all tourists state that they are most satisfied with the hospitality of the locals on their holiday trip to Norway. The only exception lies within tourists with a main purpose of going on skiing trip, which are most satisfied with the accommodation facilities on their holiday trip to Norway.

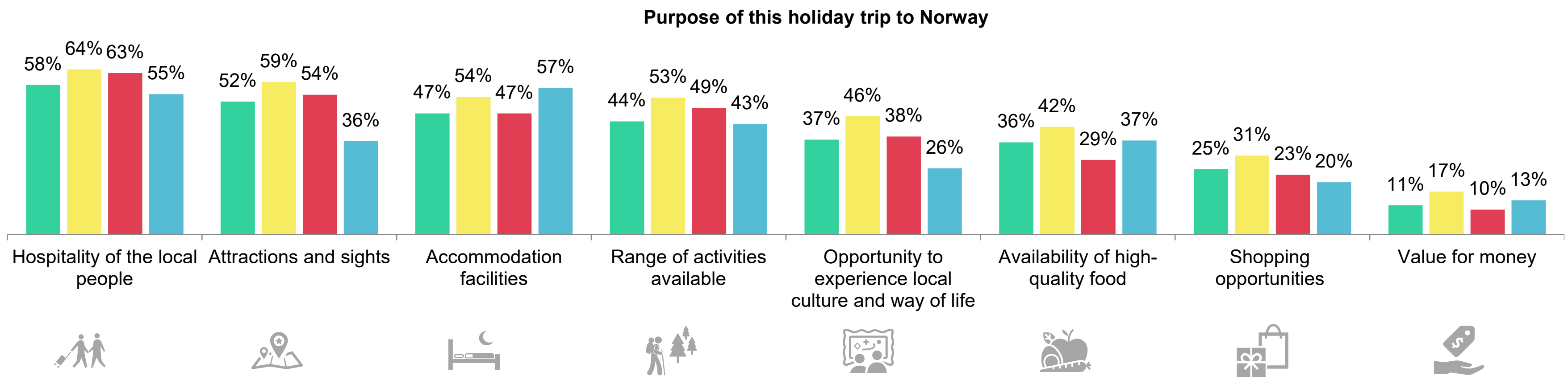
Low value for money

The element with the smallest proportion of very satisfied tourists is value for money. Very few tourists are very satisfied with the value for money on their holiday trip to Norway.

How satisfied or dissatisfied were you with…

Proportion of very satisfied foreign tourists that went on a holiday to Norway by purpose of the trip

Any purpose | City and/or culture | Active holiday | Skiing



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Source: The Norwegian Tourism Survey 2018-2019

Tourists are very satisfied with their stay in Norway and are also likely to recommend it as a destination to others

High levels of satisfaction regardless of purpose

Regardless of purpose, almost all tourists state that they very satisfied with their trip to Norway. More than 85 percent give a score of 8-10 on a scale from 0-10, with 10 being the most satisfied. Skiing tourists are slightly more satisfied than tourists with other purposes, however the differences are marginal.

Many would recommend Norway as a destination to others

As well as a high level of satisfaction, many state that they would recommend Norway as a destination to others. More than 86 percent give a score of 8-10 on a scale from 0-10, with 10 being the most likely to recommend Norway. Skiing tourists are slightly more likely to recommend Norway to others; however the differences are marginal.

Satisfaction and recommendation 2-4 weeks after the trip

Scales go from 0 to 10 with 0 being very dissatisfied/to a very limited extend and 10 being very satisfied/to a very great extend.

Norway's nature exceeds expectations, but some areas disappoint

Norway's nature is even more spectacular than expected

There is a higher level of agreement that Norway has a spectacular nature after visiting Norway than there is before the visit. In other words, Norway's nature exceeds the tourists' expectations, even though expectations were high before visiting.

There is some mismatch between tourists' expectations and what they experience when visiting

There are also some areas where the tourists had a higher expectation before visiting Norway than they experienced during their visit. This is especially with regards to the Northern Lights, the amount of snow and the amount of people at skiing destinations.

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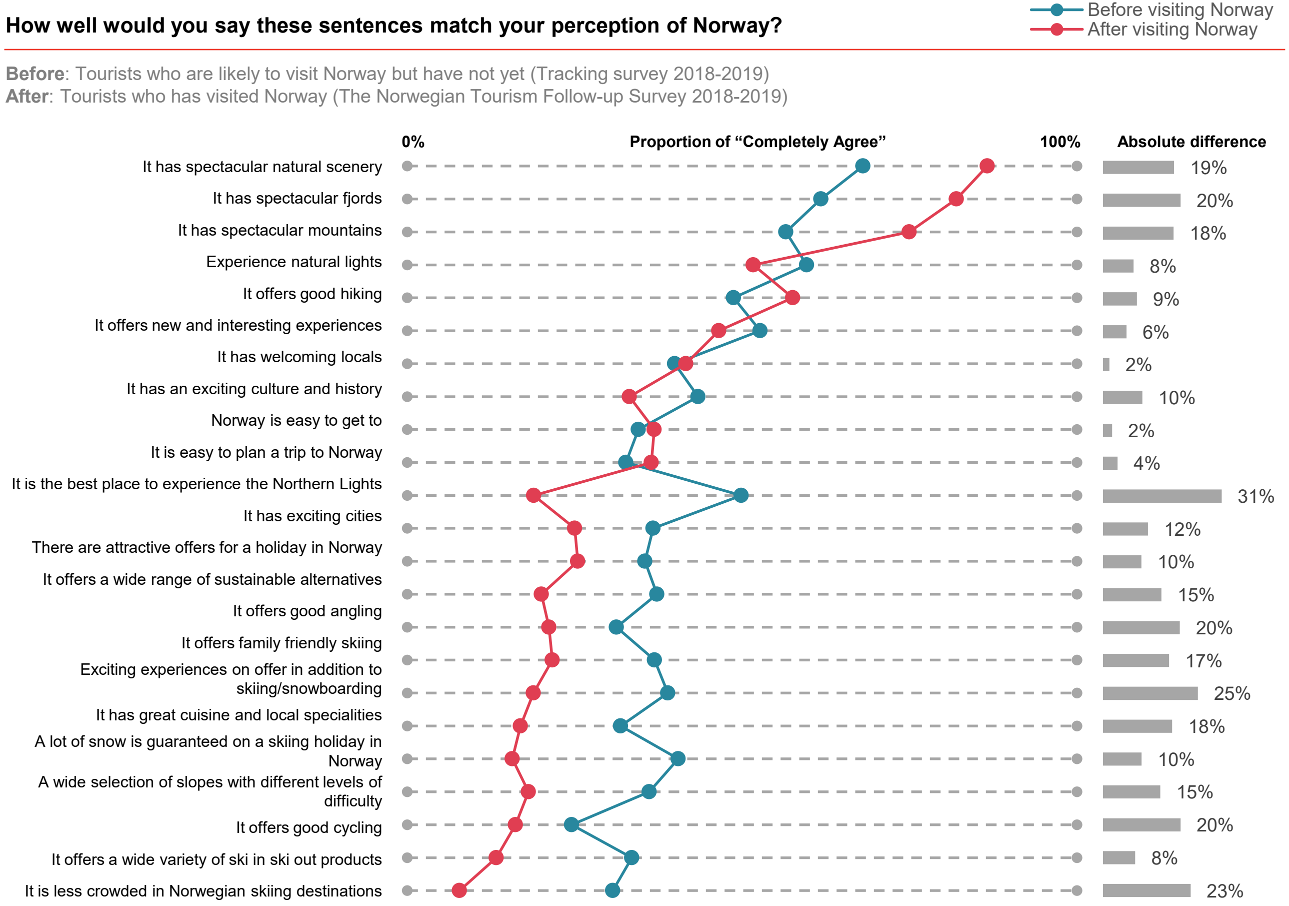
How well would you say these sentences match your perception of Norway?

Before: Tourists who are likely to visit Norway but have not yet (Tracking survey 2018-2019)
After: Tourists who has visited Norway (The Norwegian Tourism Follow-up Survey 2018-2019)



__Source__: Questions related to skiing are only asked to tourists who wants to experience skiing (before) and people who went skiing in Norway (after)

Norway's perception as a sustainable destination is maintained – if not even improved during the stay in Norway

7 out of 10 tourists who are likely to visit Norway, but have not done so yet, see Norway as a sustainable holiday destination

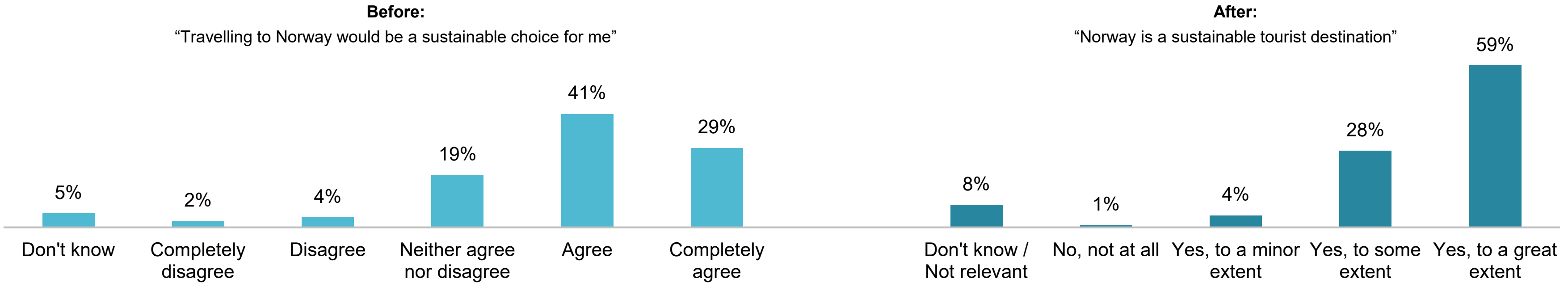
Amongst the tourists who are likely to visit Norway but have not done so yet, Norway is seen as a very sustainable holiday destination. There are basically no negative indications, a few neutral but with the rest being positive. The overall image is that Norway is a sustainable choice.

8 out of 10 agree to some or to a great extent that Norway is a sustainable tourist destination

When asking tourists after they have been on a holiday to Norway, whether they think Norway is a sustainable choice, they overwhelmingly agree. Despite the difference in scale between the "before" and "after" scenario, it is clear that Norway at the very least lives up to the sustainable expectation – if not even improves upon it.

Norway as a sustainable holiday destination *before* and *after* visiting
Question phrasing was "How much do you agree with the (following) statements about Norway".

Before: Tourists who are likely to visit Norway but have not done so yet (Tracking survey 2018-2019)
After: Tourists who have visited Norway (The Norwegian Tourism Follow-up Survey 2018-2019)



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About half the travelers in Norway are first-time visitors and almost half of the potential tourists say they have previously visited Norway

5 out of 10 tourists in Norway are first-time visitors

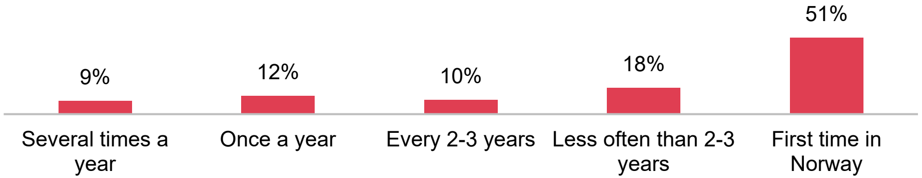
Amongst the foreign tourists in Norway, about half indicate that they are first-time visitors, while about 1 in 10 are frequent travelers with several trips to Norway every year. Even though the frequent travelers only make up a small proportion, they make up a large part of the trips to Norway, given that they travel to Norway 2 or more times a year. While European markets do visit Norway more often than overseas tourists such as USA and Australia (about 70-80 percent first-time visitors), tourists from Germany, France, Great Britain and The Netherlands still have a high proportion of first-time visitors – an average of 60 percent.

A large proportion of the tourist visits to Norway lies in the past

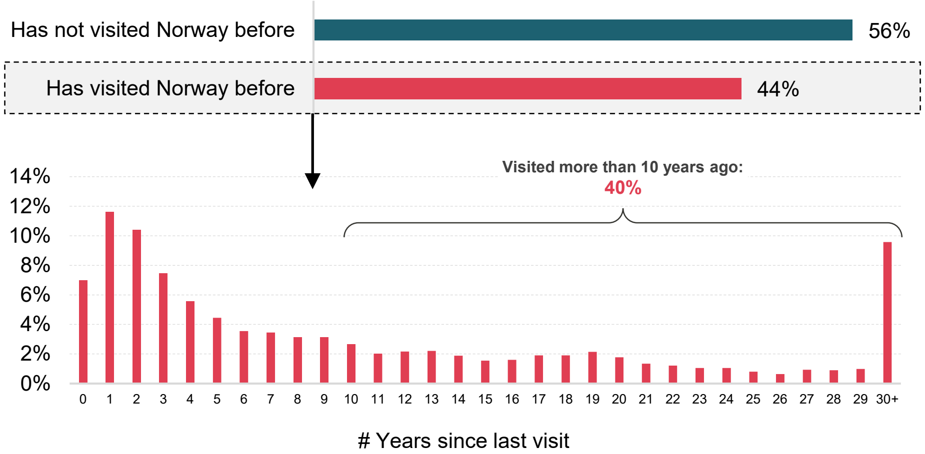
While 9 out of 20 potential tourists say they have visited Norway before, 40 percent of these visits happened more than 10 years ago, and only one third of the visits within the last three years. On the one hand, the large proportion of first-time visitors indicates that efforts could be focused on those whom has not yet visited Norway. On the other hand, the frequent visitors make up a large proportion of the trips to Norway, meaning that efforts could be focused on "re-activating" old tourists.

How often do you visit Norway on a holiday trip?
Proportion of foreign tourists in Norway

Source: The Norwegian Tourism Survey 2018-2019



Have you visited Norway before? If so, in what year were your last visit?
Proportion of tourists across countries



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Data, method and definitions of key terms

This final chapter explains some key terms used throughout the report, as well as describing the data in more detail with regards to procedures used for data processing and weighing.

The report presents results based on several different data sources; primarily from a market tracker amongst x European markets in 2012-2019, but there are also results from the Norwegian Tourism Survey in 2018 and 2019.

Data and methodology

This publication is primarely build upon the Tracking survey conducted by Epinion on behalf of Visit Norway.

The survey population is restricted to «potential tourists» defined as people who has been on a holiday not payed by their employer within the last three years, and falls within any of the below target groups.

Specific sampling areas and frequency are described below the table on the right.

Results are weighted such that every country and every month has an equal weight in the totals for years and across countries.

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*

Number of interviews completed 2012 to 2019

	2012	2013	2014	2015	2016	2017	2018	2019	Total
England	923	2356	2475	2568	4055	4751	4708	5033	26869
Denmark	1306	3481	1658	2161	2358	5039	5128	5742	26873
Netherland	924	2289	2297	1803	4062	4748	4730	5028	25881
France	-	534	2222	970	991	2415	2395	2583	12110
Germany	1413	2802	2338	2629	4132	4878	4782	5107	28081
Sweden	1149	3145	2383	2998	3994	5369	5508	5512	30058
Interviews in total	5715	14607	13373	13129	19592	27200	27251	29005	149872

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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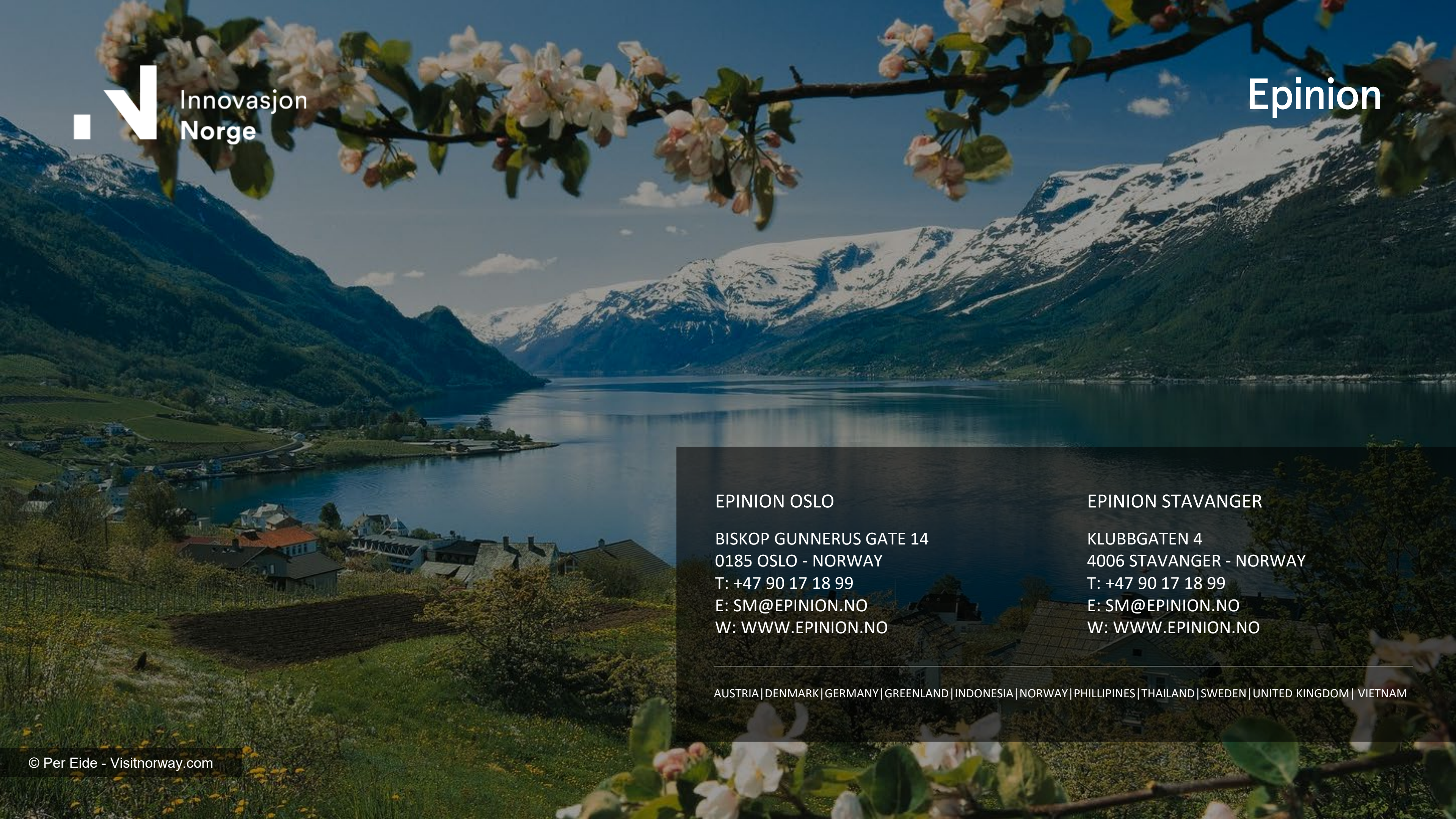

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